
Surdna Foundation 2020 Grantee Perception Report

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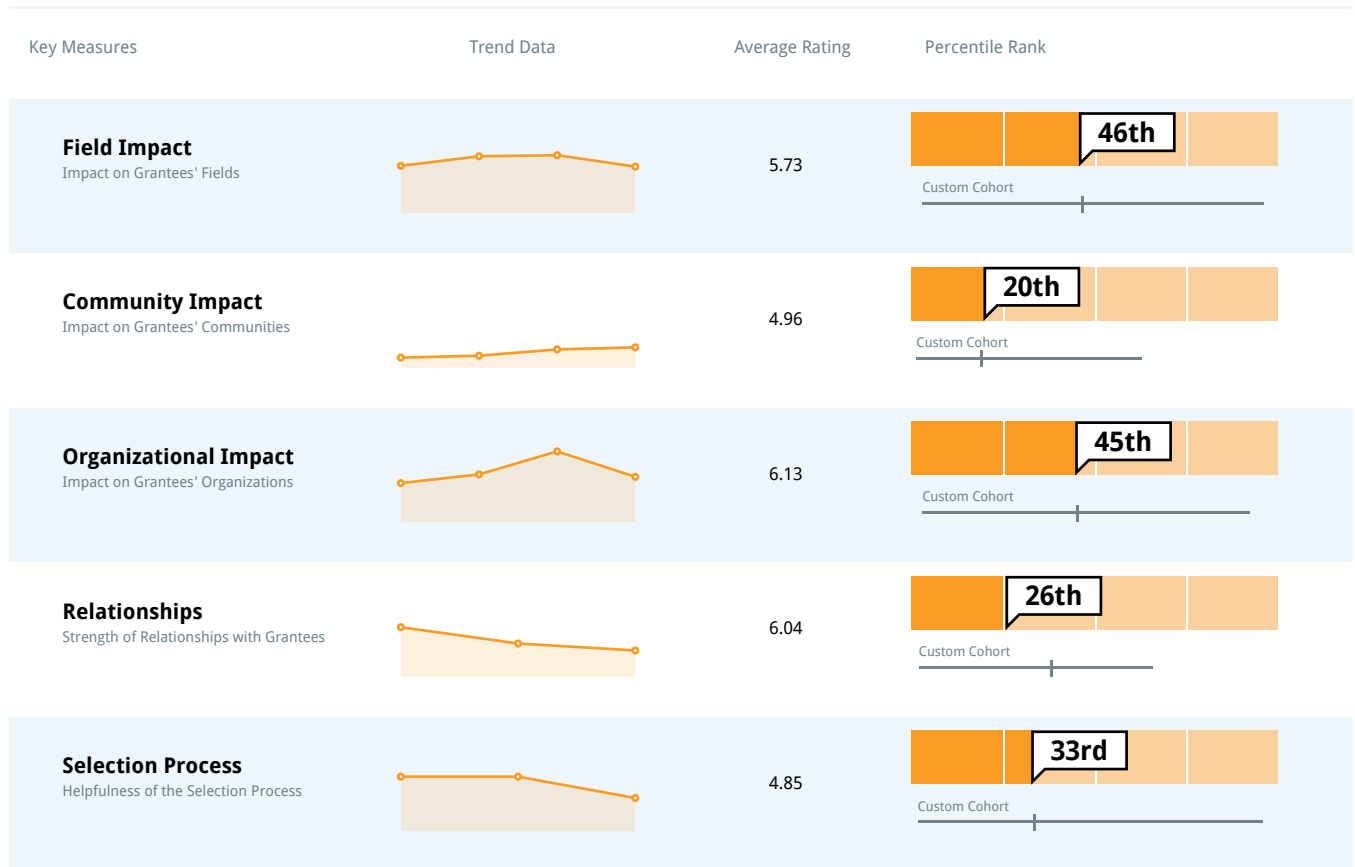
The online version of this report can be accessed at cep.surveymresults.org

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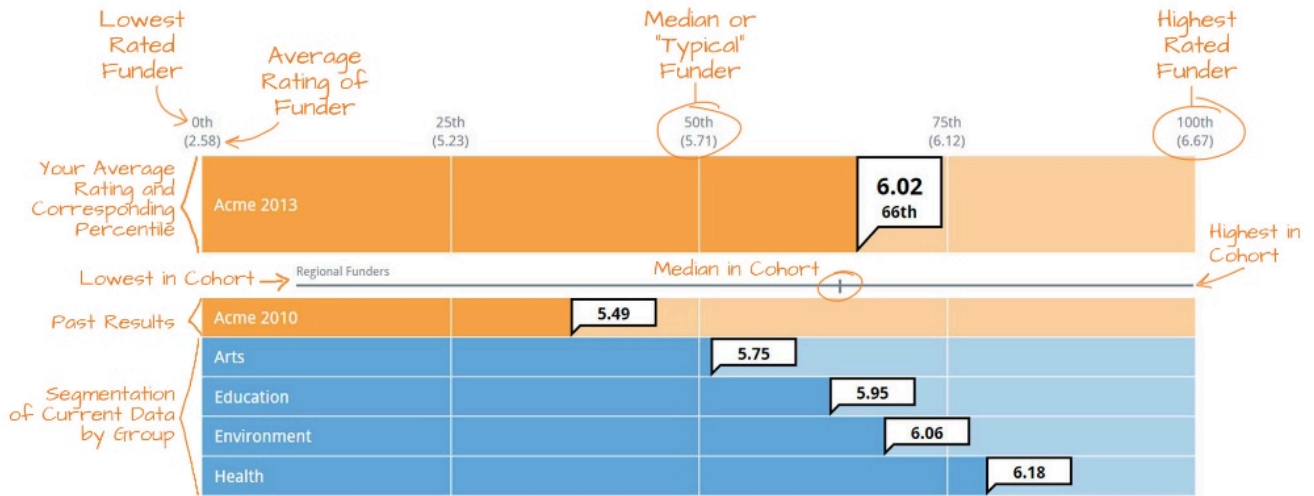
Key Ratings Summary

The following chart highlights a selection of your key results. Each of these data points corresponds to an individual survey measure that is displayed with additional detail in the subsequent pages of this report.



Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.



Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.



Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Surdna 2020	October and November 2020	339	177	52%
Surdna 2014	October and November 2014	323	187	58%
Surdna 2008	February and March 2008	375	259	69%
Surdna 2004	February and March 2004	256	183	71%

Survey Year	Year of Active Grants
Surdna 2020	2017 - 2020
Surdna 2014	June 2013 - July 2014
Surdna 2008	2008

Throughout this report, Surdna Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 300 funders. The full list of participating funders can be found at <https://cep.org/gpr-participants/>.

In order to protect the confidentiality of respondents results are not shown when CEP received fewer than five responses to a specific question.

Subgroups

In addition to showing Surdna's overall ratings, this report shows ratings segmented by Program Area. The online version of this report also shows ratings segmented by Program Area, Grant Size, and Program Officer.

Program Area	Number of Responses
Andrus Family Fund	28
Capacity and Infrastructure	6
Impact Investing	7
Inclusive Economies	36
Sustainable Environments	59
Thriving Cultures	37

Grant Size	Number of Responses
\$1 million +	11
\$500K to \$999K	22
\$250K to \$499K	43
\$100K to \$249K	62
Less than \$100K	39

Subgroup Methodology & Differences

Subgroup Methodology

Selected grantee groups are not displayed in this report because they had fewer than 5 responses.

Program Area: Using the grantee list provided by the Foundation, CEP tagged all grantees into one of the Foundation program areas.

Grant Size: Using data grantees provided in the survey, CEP tagged all grantees into five grant size groups.

Subgroup Differences

In order to perform statistical analysis, CEP requires at least 10 respondents per subgroup. Subgroups with less than 10 respondents are examined at the trend level, noting mean differences of 0.3. A "significant" difference refers to statistical significance, and a "trend" refers to mean differences of 0.3, which are used to compare smaller groups.

Program Area: Ratings from Impact Investing grantees trend higher on many measures in the report, including aspects of understanding of grantees' fields, local communities, and organizations. Thriving Cultures grantees trend lower for the majority of measures in the survey report.

Grant Size: No group consistently rates higher or lower than others when grantees are segmented by grant size.

Comparative Cohorts

Customized Cohort

Surdna selected a set of 13 funders to create a smaller comparison group that more closely resembles Surdna in scale and scope.

Custom Cohort

Andrew W. Mellon Foundation
Barr Foundation
Omidyar Network
Rockefeller Brothers Fund
Surdna Foundation, Inc.
The F.B. Heron Foundation
The Kresge Foundation
The Libra Foundation
The McKnight Foundation
The Nathan Cummings Foundation
The Rockefeller Foundation
The San Francisco Foundation
The William and Flora Hewlett Foundation

Standard Cohorts

CEP also included 16 standard cohorts to allow for comparisons to a variety of different types of funders.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	40	Funders with median grant size of \$20K or less
Large Grant Providers	90	Funders with median grant size of \$200K or more
High Touch Funders	36	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	42	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	82	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	100	Funders that make at most 10% of grants by invitation only
International Funders	55	Funders that fund outside of their own country
European Funders	25	Funders that are headquartered in Europe

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	58	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	70	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
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Private Foundations	158	All private foundations in the GPR dataset
Family Foundations	76	All family foundations in the GPR dataset
Community Foundations	34	All community foundations in the GPR dataset
Health Conversion Foundations	29	All health conversation foundations in the GPR dataset
Corporate Foundations	20	All corporate foundations in the GPR dataset

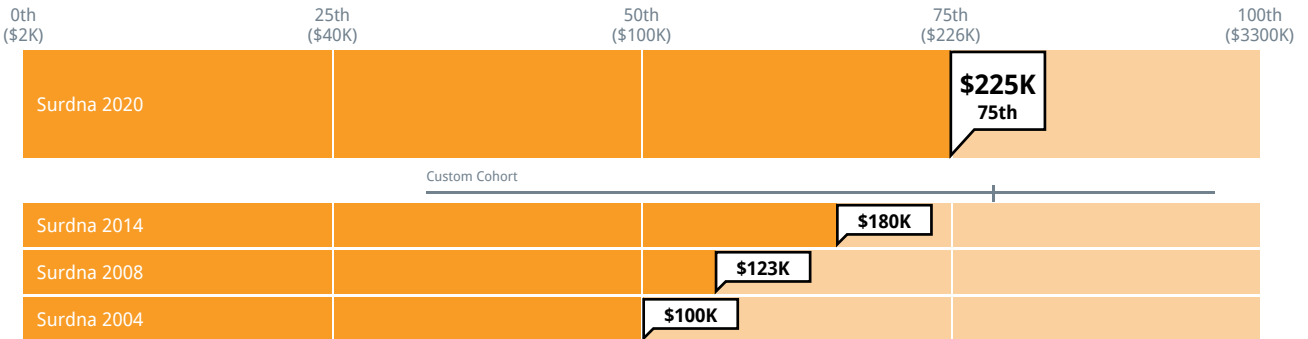
Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	39	Funders that are primarily based outside the United States
Recently Established Foundations	78	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	43	Funders who surveyed grantees during COVID-19 (GPR only)

Grantmaking Characteristics

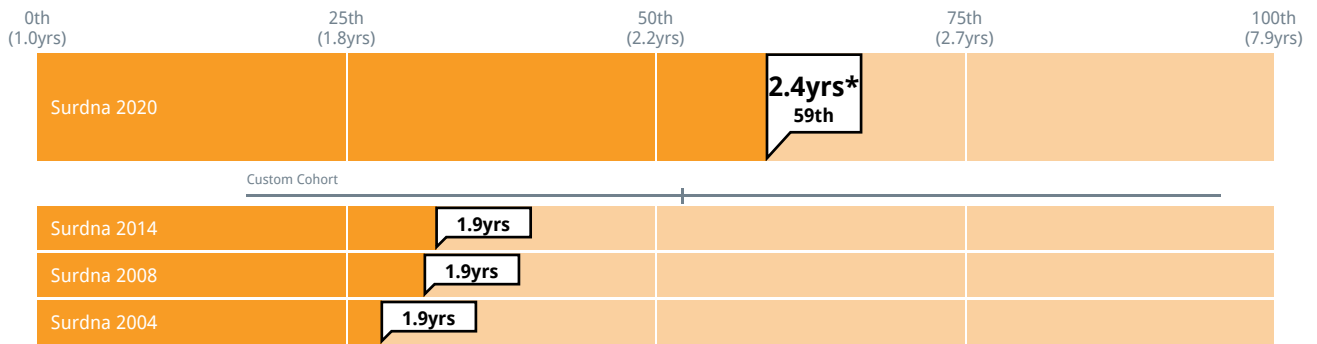
Foundations make different choices about the ways they organize themselves, structure their grants, and the types of grantees they support. The following charts and tables show some of these important characteristics. The information is based on self-reported data from funders and grantees, and further detail is available in the Contextual Data section of this report.

Median Grant Size



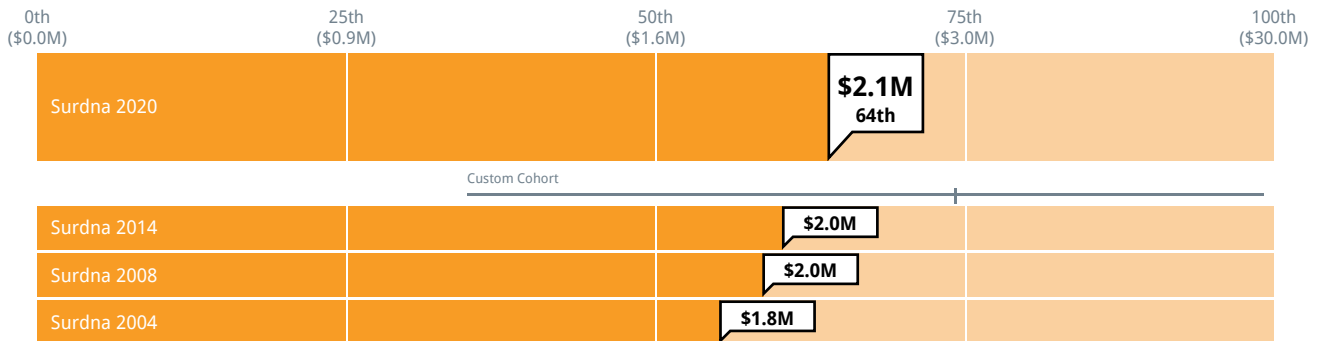
Cohort: Custom Cohort Past results: on Subgroup: None

Average Grant Length



Cohort: Custom Cohort Past results: on Subgroup: None

Median Organizational Budget



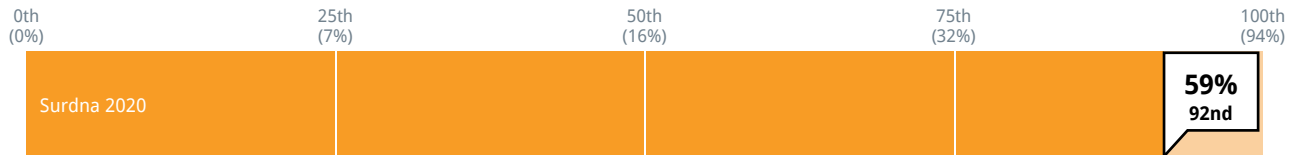
Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort				
Grant History	Surdna 2020	Surdna 2014	Average Funder	Custom Cohort
Percentage of first-time grants	22%	36%	28%	29%

Selected Cohort: Custom Cohort						
Program Staff Load	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	\$1.6M	\$2.9M	\$2.4M	\$2.4M	\$2.7M	\$3.6M
Applications per program full-time employee	9	31	22	38	26	17
Active grants per program full-time employee	11	36	78	44	30	39

Proportion of Unrestricted Funding

Proportion of grantees responding 'No, this funding was not restricted to a specific use (i.e. general operating, core support)'

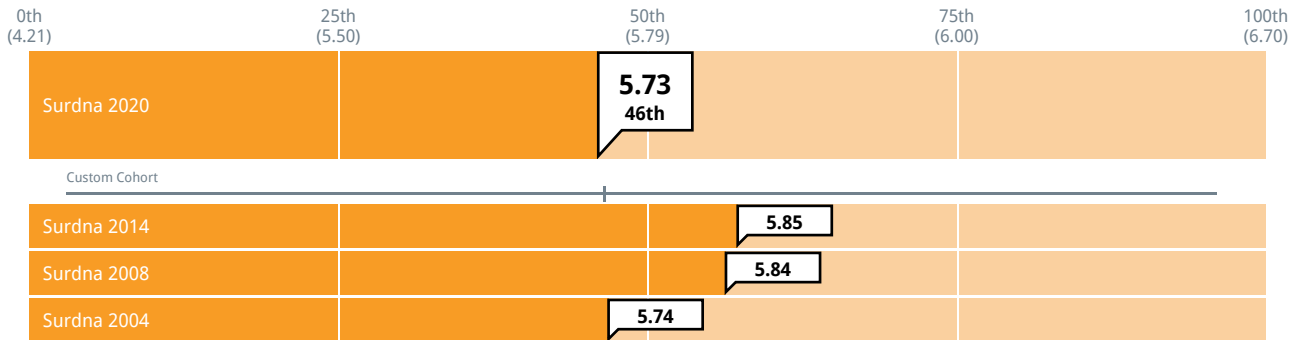


Cohort: None Past results: on Subgroup: None

Impact on and Understanding of Grantees' Fields

Overall, how would you rate the Foundation's impact on your field?

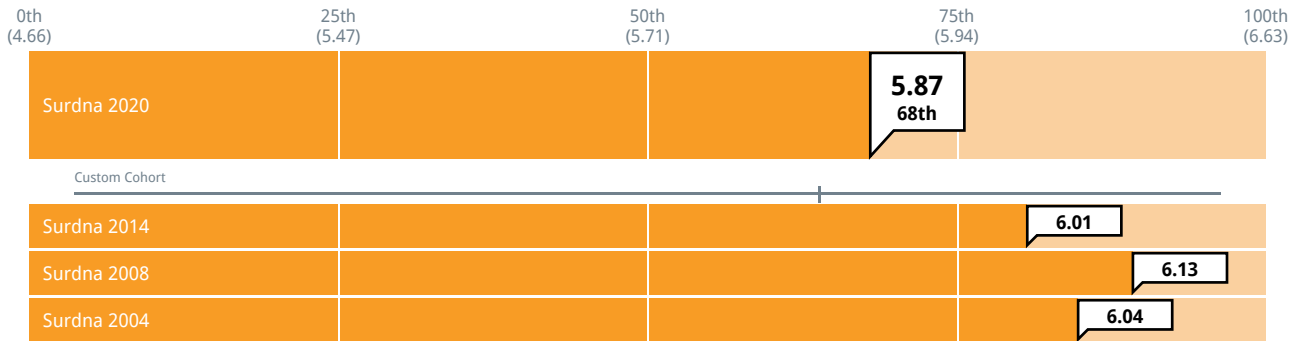
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

How well does the Foundation understand the field in which you work?

1 = Limited understanding of the field 7 = Regarded as an expert in the field

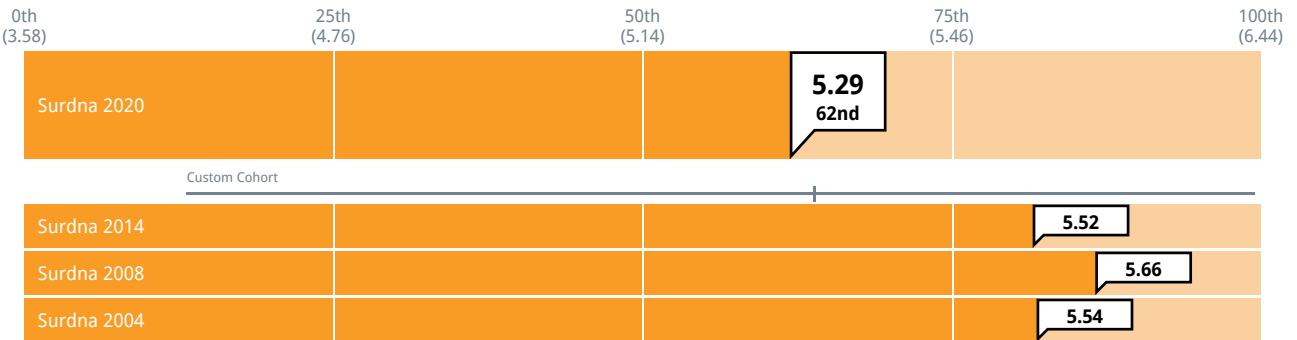


Cohort: Custom Cohort Past results: on Subgroup: None

Advancing Knowledge and Public Policy

To what extent has the Foundation advanced the state of knowledge in your field?

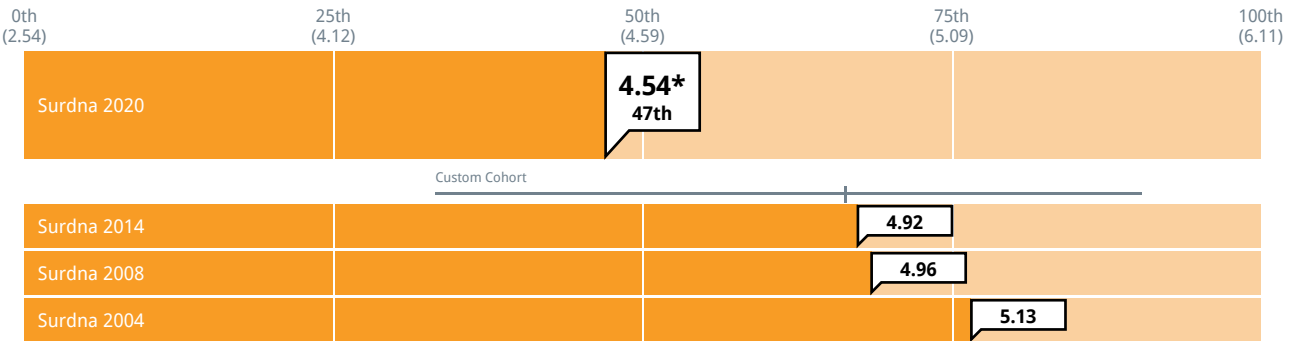
1 = Not at all 7 = Leads the field to new thinking and practice



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent has the Foundation affected public policy in your field?

1 = Not at all 7 = Major influence on shaping public policy

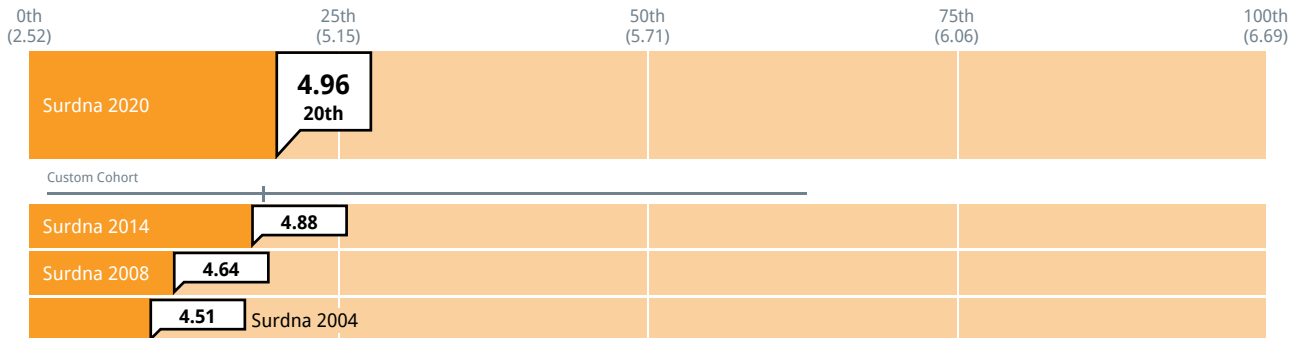


Cohort: Custom Cohort Past results: on Subgroup: None

Impact on and Understanding of Grantees' Local Communities

Overall, how would you rate the Foundation's impact on your local community?

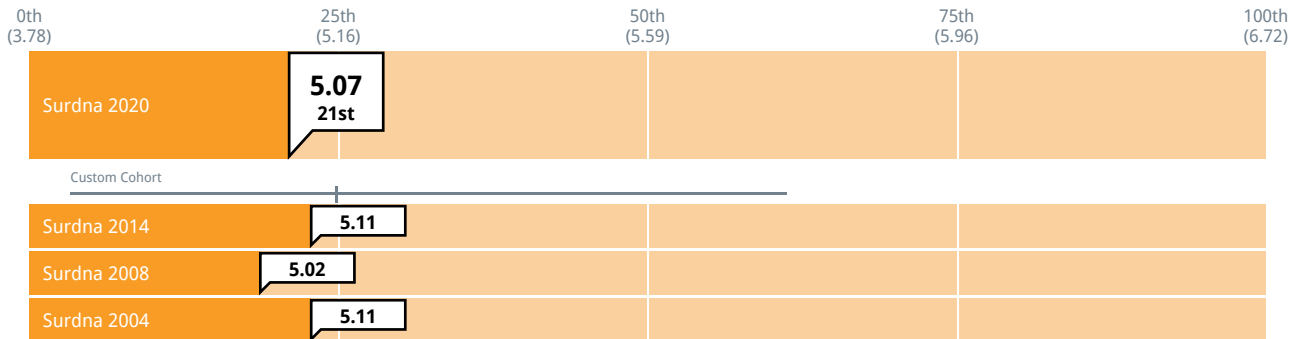
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

How well does the Foundation understand the local community in which you work?

1 = Limited understanding of the community 7 = Regarded as an expert on the community

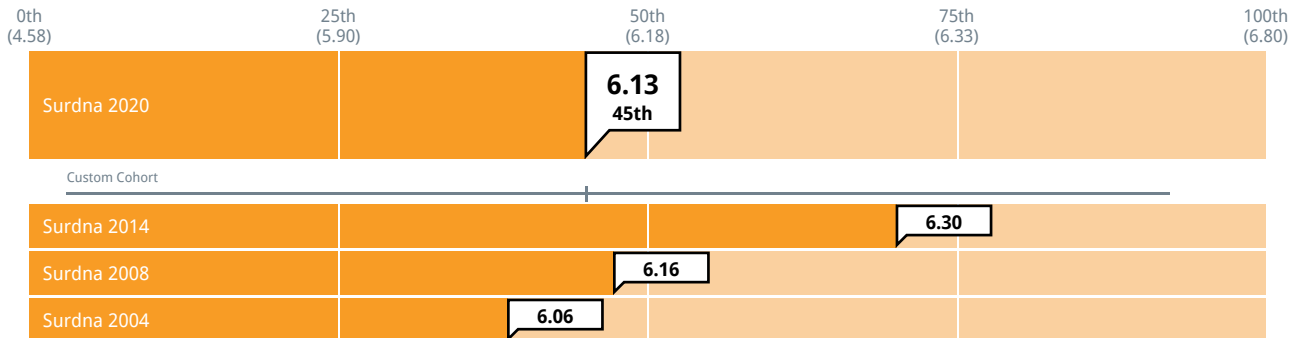


Cohort: Custom Cohort Past results: on Subgroup: None

Impact on and Understanding of Grantees' Organizations

Overall, how would you rate the Foundation's impact on your organization?

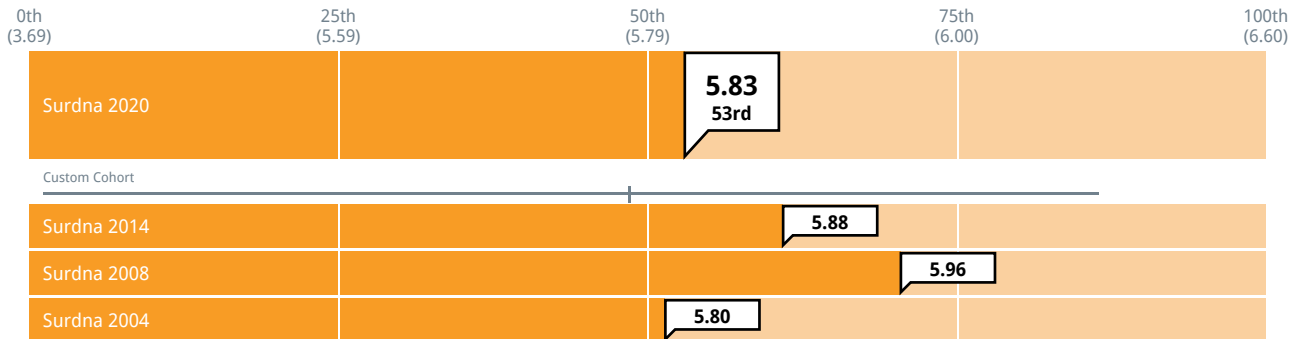
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

How well does the Foundation understand your organization's strategy and goals?

1 = Limited understanding 7 = Thorough understanding

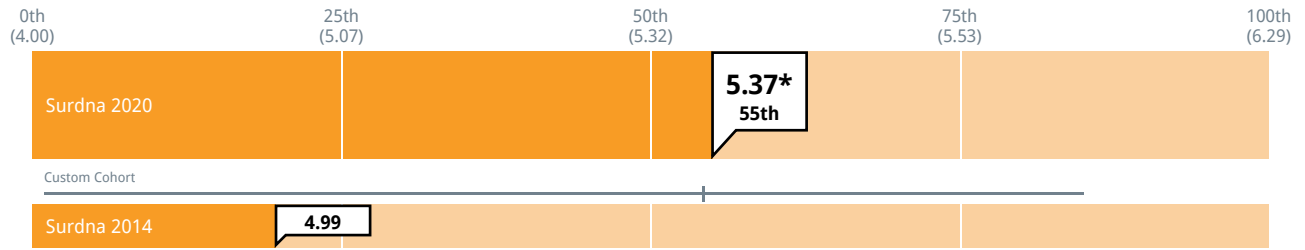


Cohort: Custom Cohort Past results: on Subgroup: None

Grantee Challenges

How aware is the Foundation of the challenges that your organization is facing?

1 = Not at all aware 7 = Extremely aware



Cohort: Custom Cohort Past results: on Subgroup: None

Funder-Grantee Relationships

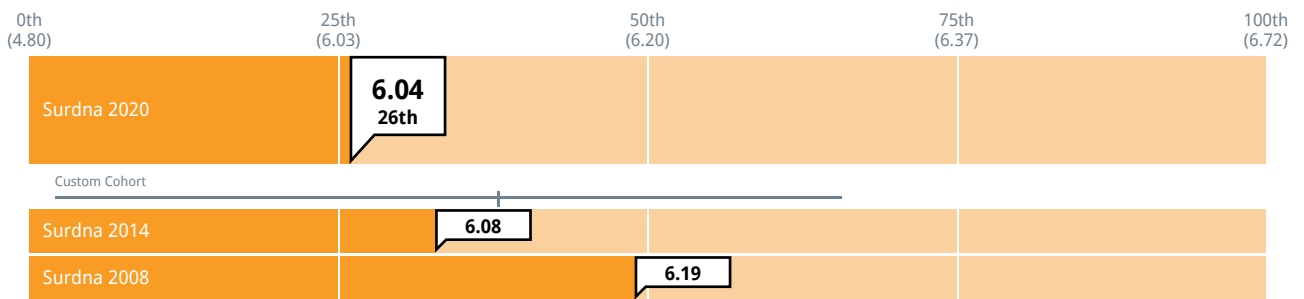
Funder-Grantee Relationships Summary Measure

The quality of interactions and the clarity and consistency of communications together create the larger construct that CEP refers to as "relationships." The relationships measure below is an average of grantee ratings on the following measures:

1. Fairness of treatment by Surdna
2. Comfort approaching Surdna if a problem arises
3. Responsiveness of Surdna staff
4. Clarity of communication of Surdna's goals and strategy
5. Consistency of information provided by different communications

Funder-Grantee Relationships Summary Measure

1 = Very negative 7 = Very positive

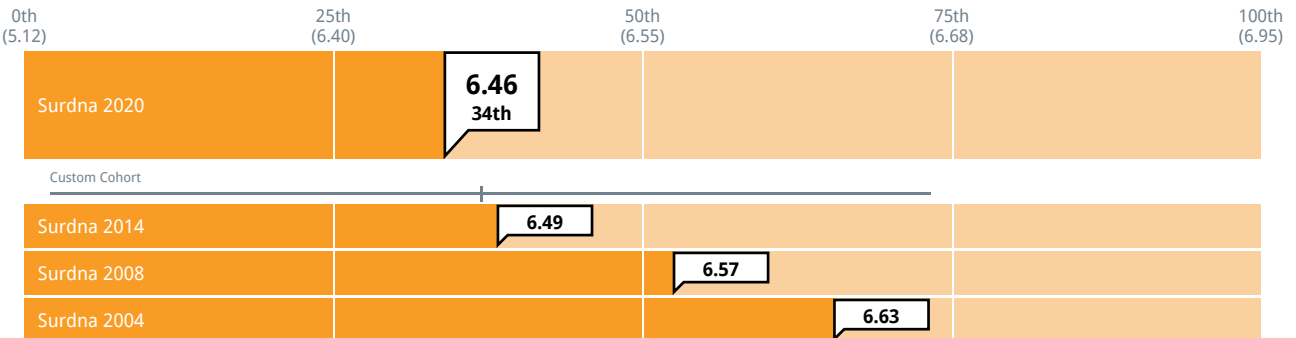


Cohort: Custom Cohort Past results: on Subgroup: None

Quality of Interactions

Overall, how fairly did the Foundation treat you?

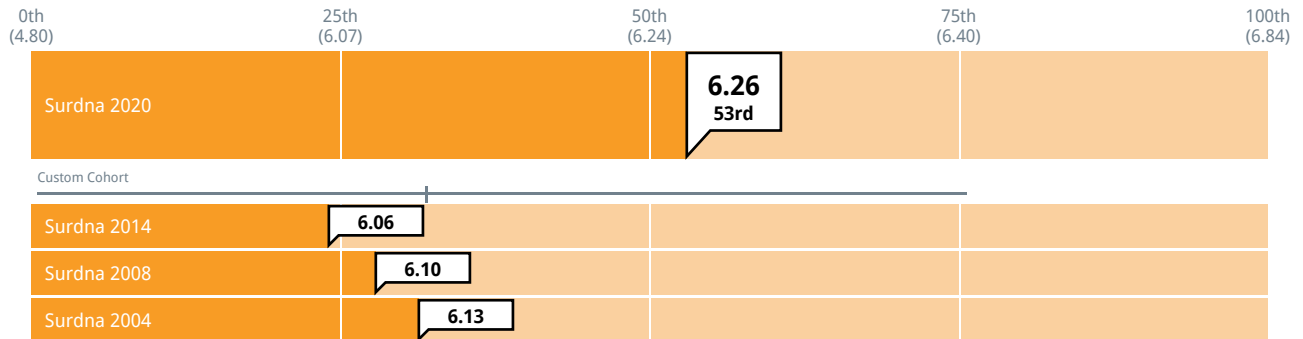
1 = Not at all fairly 7 = Extremely fairly



Cohort: Custom Cohort Past results: on Subgroup: None

How comfortable do you feel approaching the Foundation if a problem arises?

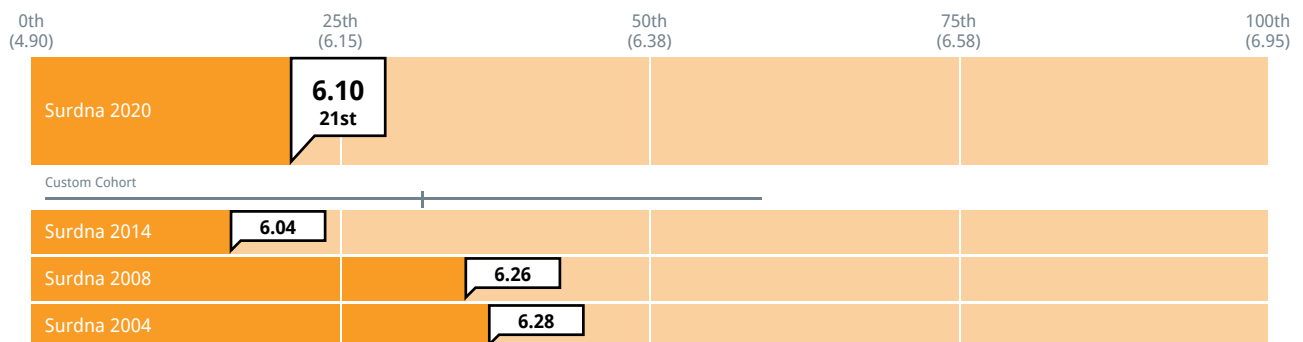
1 = Not at all comfortable 7 = Extremely comfortable



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, how responsive was Foundation staff?

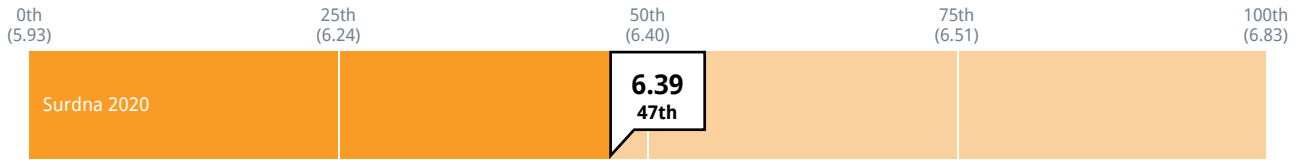
1 = Not at all responsive 7 = Extremely responsive



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent did the Foundation exhibit trust in your organization's staff during this grant?

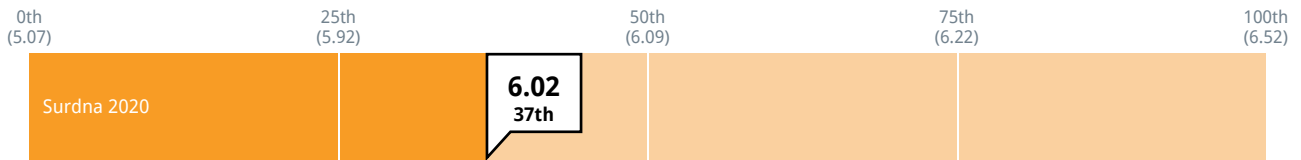
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: None Past results: on Subgroup: None

To what extent did the Foundation exhibit candor about the Foundation's perspectives on your work during this grant?

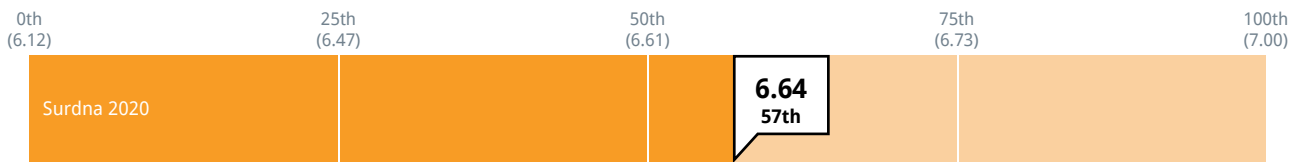
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: None Past results: on Subgroup: None

To what extent did the Foundation exhibit respectful interaction during this grant?

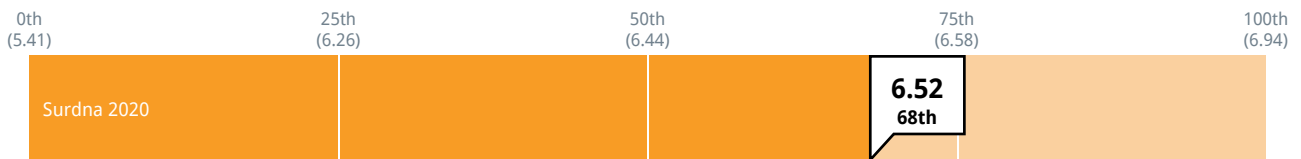
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: None Past results: on Subgroup: None

To what extent did the Foundation exhibit compassion for those affected by your work during this grant?

1 = Not at all 4 = Somewhat 7 = To a great extent

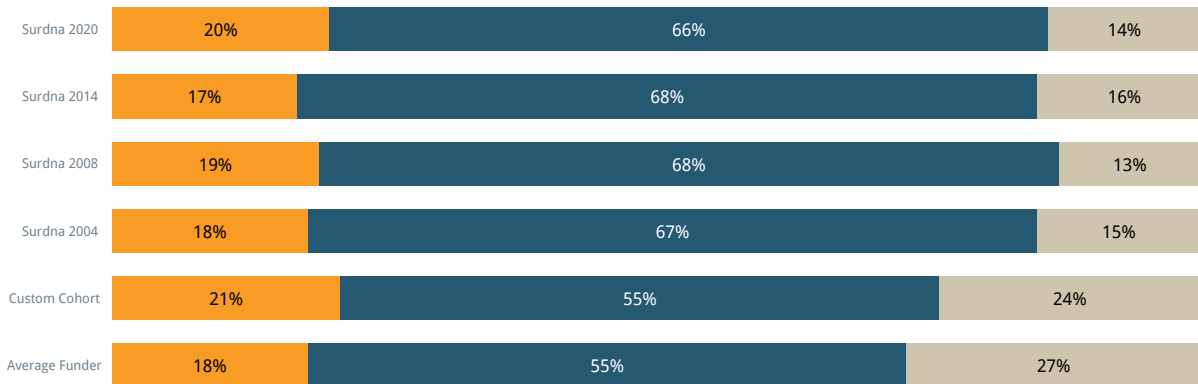


Cohort: None Past results: on Subgroup: None

Interaction Patterns

How often do/did you have contact with your program officer during this grant?

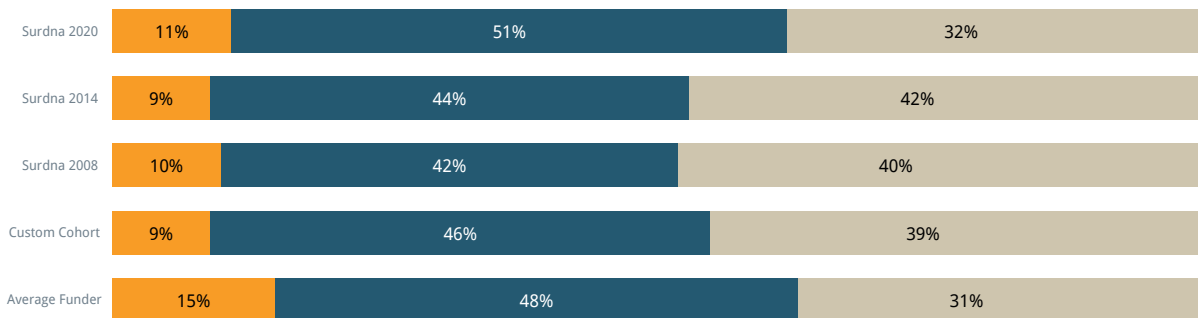
■ Yearly or less often
 ■ Once every few months
 ■ Monthly or more often



Cohort: Custom Cohort Past results: on

Who most frequently initiated the contact you had with Program Officer?

■ Program Officer
 ■ Both of equal frequency
 ■ Grantee

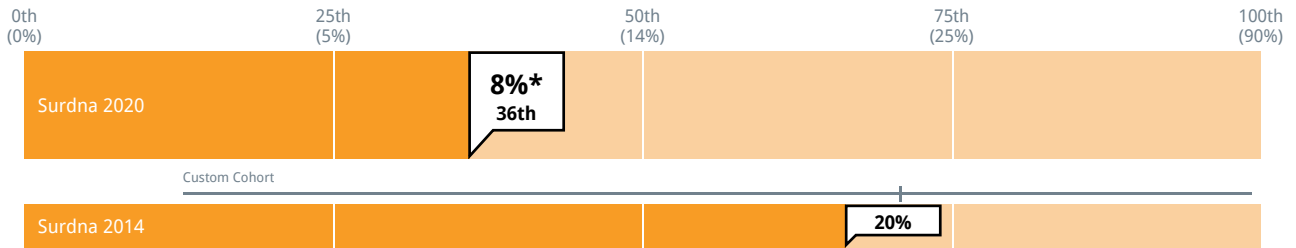


Cohort: Custom Cohort Past results: on

Contact Change and Site Visits

Has your main contact at the Foundation changed in the past six months?

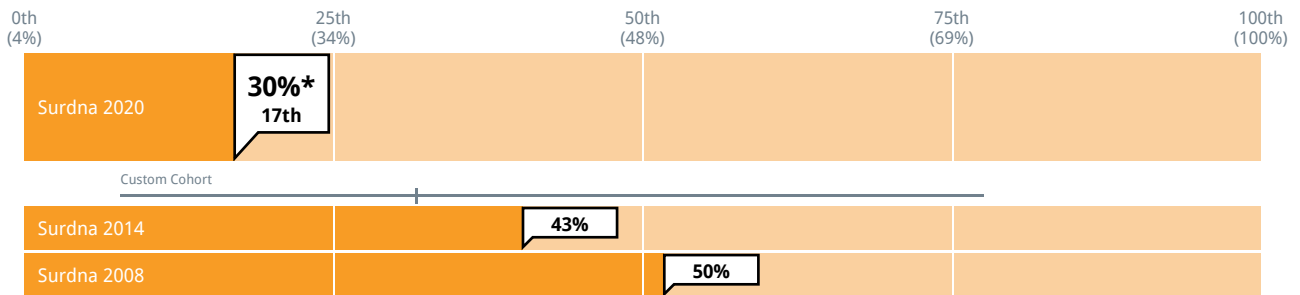
Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: on Subgroup: None

Did the Foundation conduct a site visit during the course of this grant?

Proportion of grantees responding 'Yes'

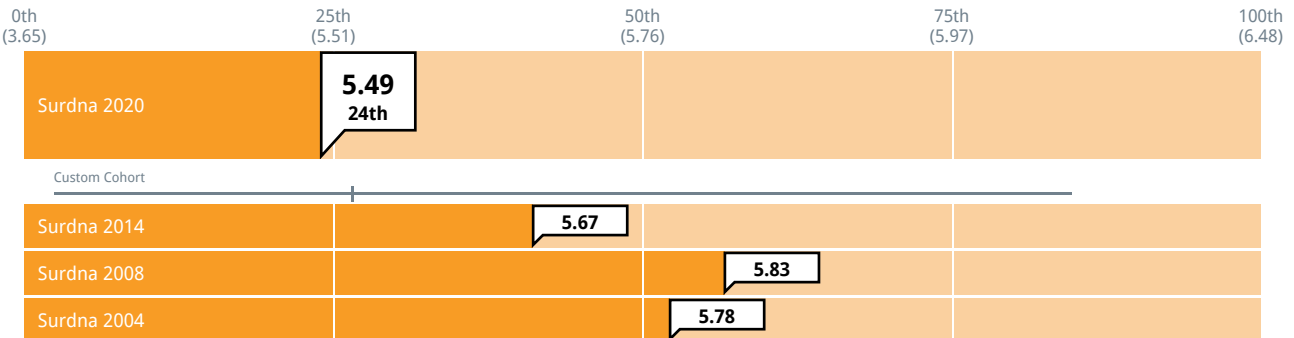


Cohort: Custom Cohort Past results: on Subgroup: None

Communication

How clearly has the Foundation communicated its goals and strategy to you?

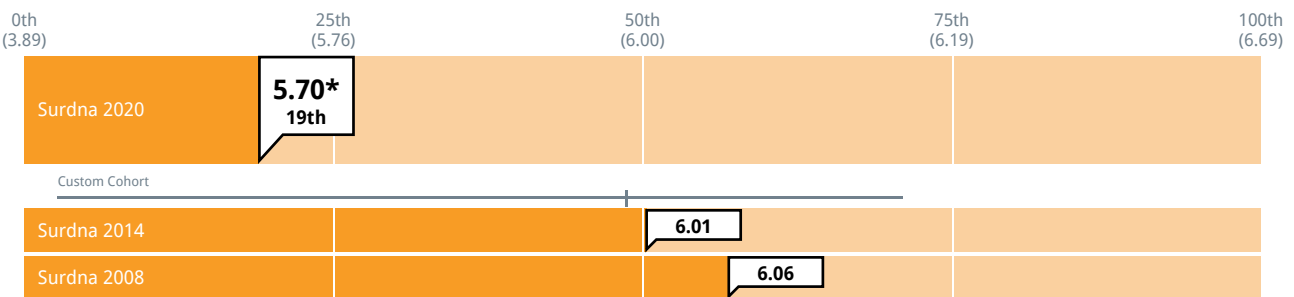
1 = Not at all clearly 7 = Extremely clearly



Cohort: Custom Cohort Past results: on Subgroup: None

How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?

1 = Not at all consistent 7 = Completely consistent



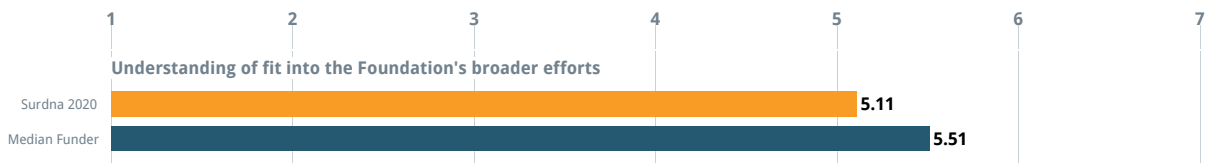
Cohort: Custom Cohort Past results: on Subgroup: None

The following question was recently added to the grantee survey and depicts comparative data from 42 funders in the grantee dataset.

How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?

1 = Limited understanding 7 = Thorough understanding

■ Surdna 2020 ■ Median Funder

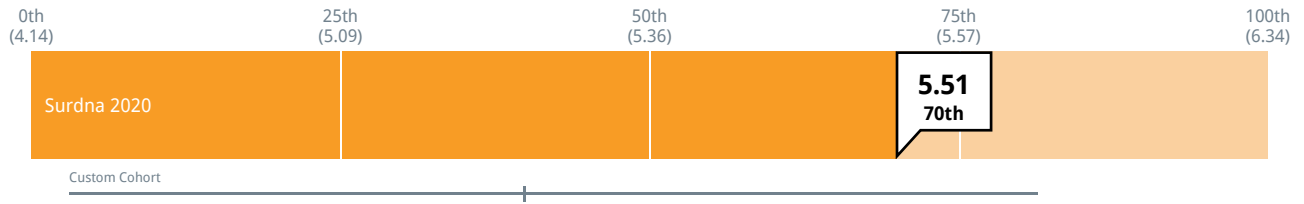


Cohort: None Past results: on

Openness

To what extent is the Foundation open to ideas from grantees about its strategy?

1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

Top Predictors of Relationships

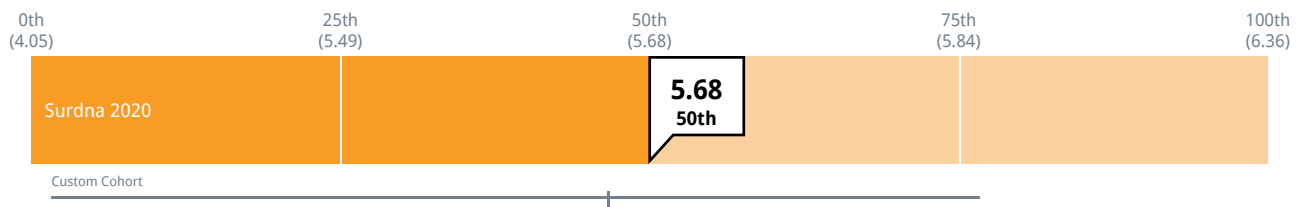
CEP's research has shown that the strongest predictors of the strength of funder-grantee relationships are transparency and understanding.

Seven related measures of understanding, together create the larger construct that CEP refers to as "understanding". The understanding summary measure below is an average of ratings on the following measures:

- Surdna's understanding of partner organizations' **strategy and goals**
- Surdna's awareness of partner **organizations' challenges**
- Surdna's understanding of the **fields** in which partners work
- Surdna's understanding of partners' **local communities**
- Surdna's understanding of the **social, cultural, or socioeconomic factors** that affect partners' work
- Surdna's understanding of intended **beneficiaries' needs**
- Extent to which Surdna's **funding priorities** reflect a deep understanding of partners' intended beneficiaries' needs

Understanding Summary Measure

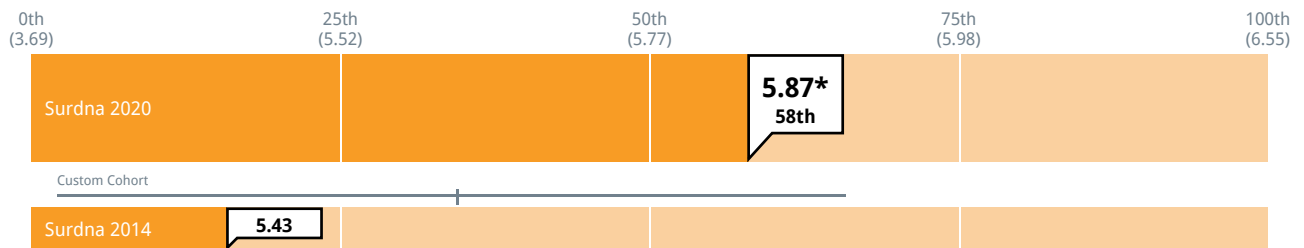
1 = Very negative 7 = Very positive



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, how transparent is the Foundation with your organization?

1 = Not at all transparent 7 = Extremely transparent

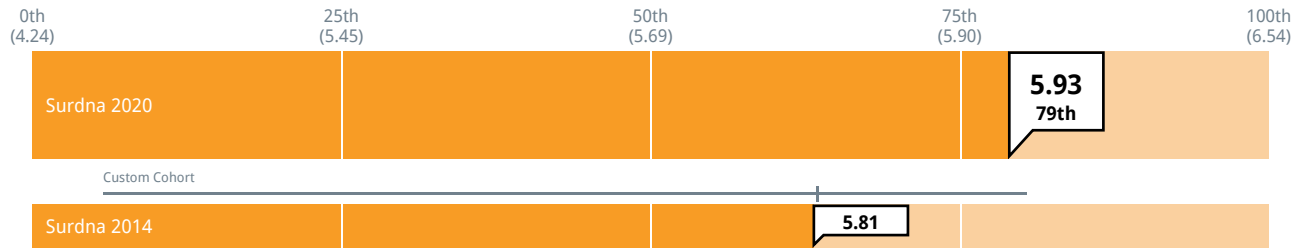


Cohort: Custom Cohort Past results: on Subgroup: None

Beneficiaries and DEI

How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?

1 = Limited understanding 7 = Thorough understanding

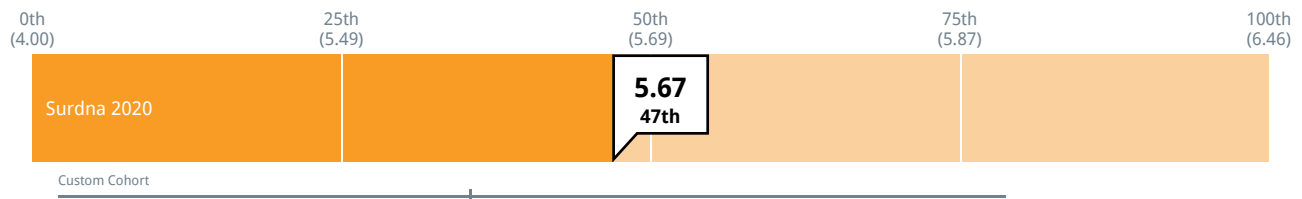


Cohort: Custom Cohort Past results: on Subgroup: None

In the following questions, we use the term "beneficiaries" to refer to those your organization seeks to serve through the services and/or programs it provides. Beneficiaries are often called end users, clients, constituents, or participants.

How well does the Foundation understand your intended beneficiaries' needs?

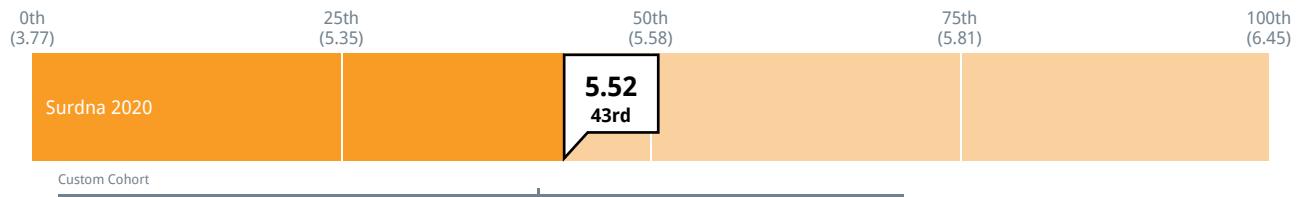
1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?

1 = Not at all 7 = To a great extent

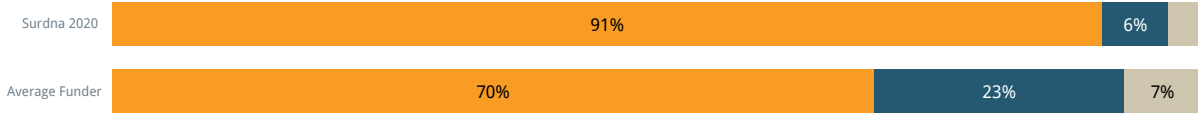


Cohort: Custom Cohort Past results: on Subgroup: None

The subsequent question was recently added to the grantee survey and depicts comparative data from 17 funders.

Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?

Yes No Don't know

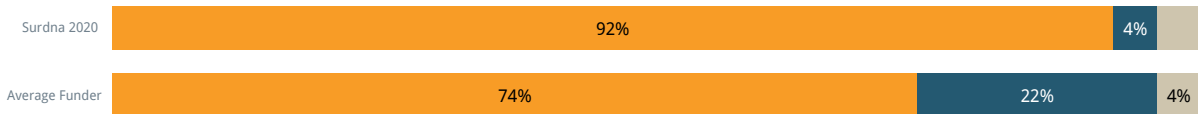


Cohort: None Past results: on

The subsequent question is asked only of grantees in the United States who answer "yes" to the question above. It was recently added to the grantee survey and depicts data from 15 funders in CEP's dataset.

Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant?

Yes No Don't know



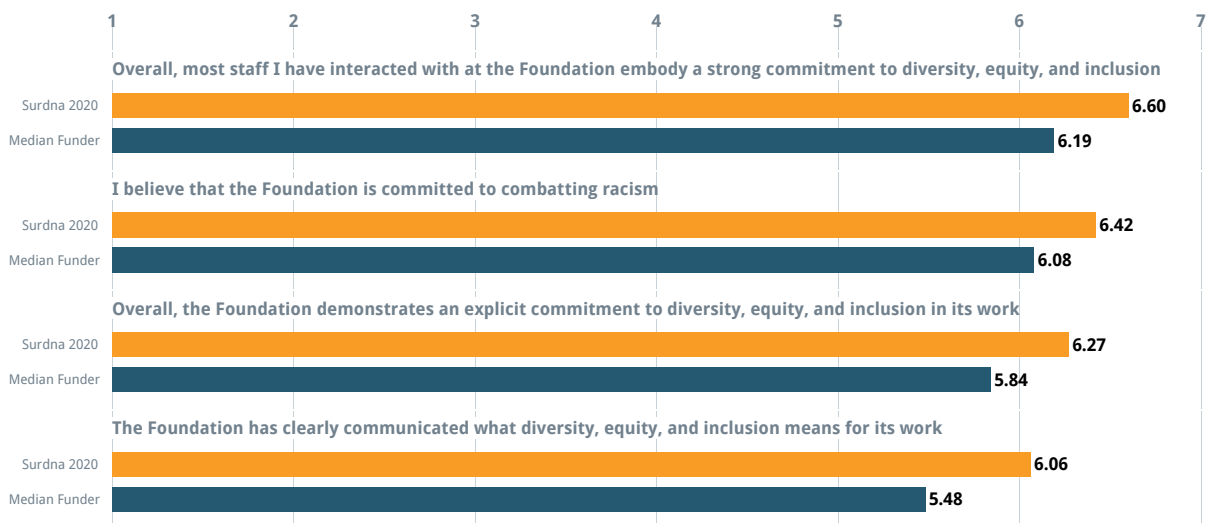
Cohort: None Past results: on

The subsequent question was recently added to the grantee survey and depicts data from 17 funders in CEP's dataset.

Please rate the extent to which you agree or disagree with the following statements about diversity, equity, and inclusion:

1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree

Surdna 2020 Median Funder

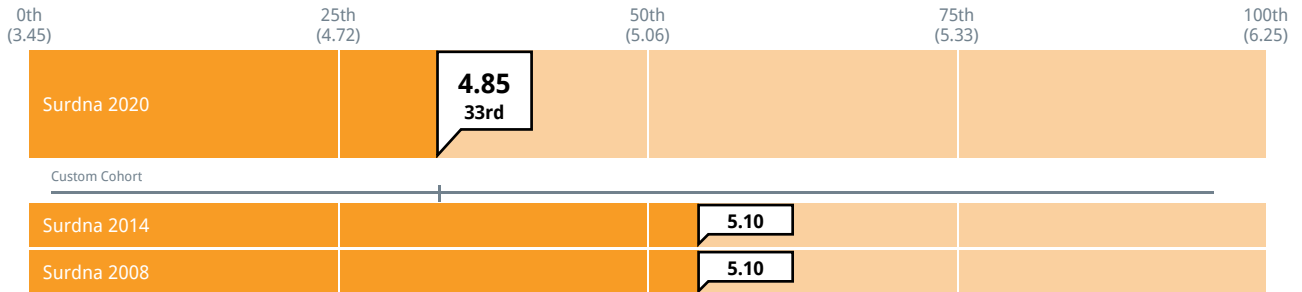


Cohort: None Past results: on

Grant Processes

How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?

1 = Not at all helpful 7 = Extremely helpful

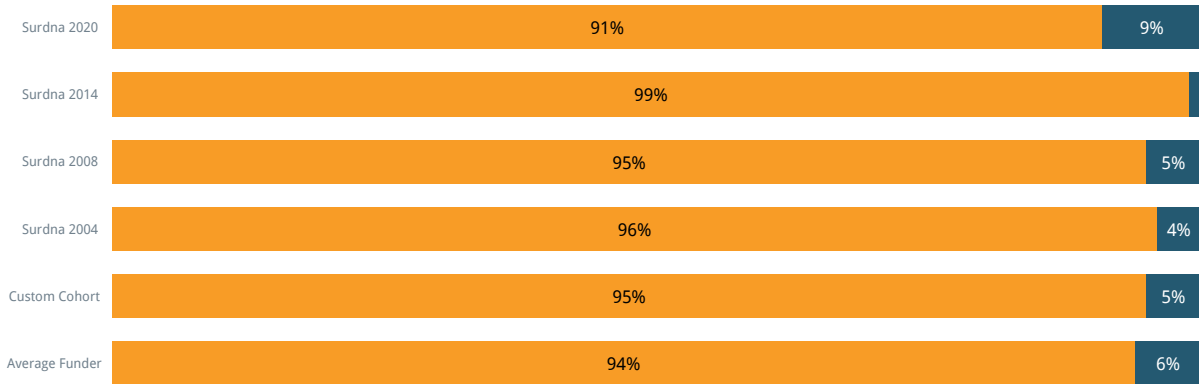


Cohort: Custom Cohort Past results: on Subgroup: None

Selection Process

Did you submit a proposal for this grant?

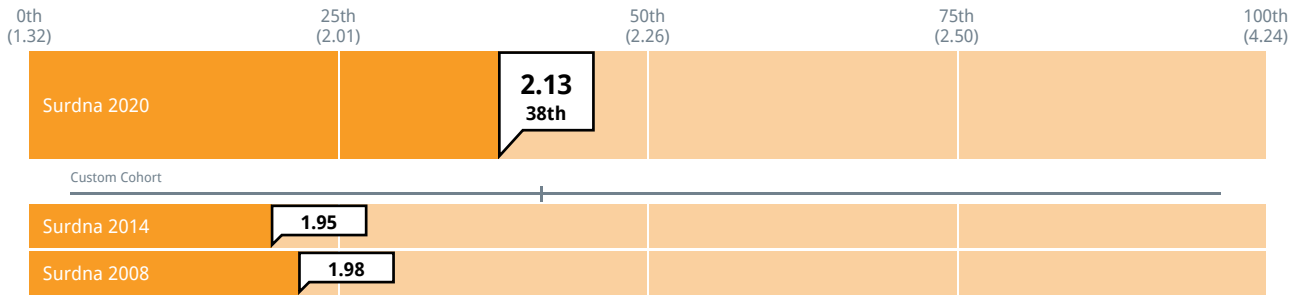
Submitted a proposal Did not submit a proposal



Cohort: Custom Cohort Past results: on

As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?

1 = No pressure 7 = Significant pressure



Cohort: Custom Cohort Past results: on Subgroup: None

Time Between Submission and Clear Commitment

“How much time elapsed from the submission of the grant proposal to clear commitment of funding?”

Selected Cohort: Custom Cohort						
Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
Less than 3 months	73%	73%	59%	64%	62%	64%
4 - 6 months	22%	21%	40%	29%	30%	26%
7 - 12 months	4%	3%	1%	6%	7%	8%
More than 12 months	2%	2%	0%	1%	2%	2%

Selected Subgroup: None	
Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	
Less than 3 months	
4 - 6 months	
7 - 12 months	
More than 12 months	

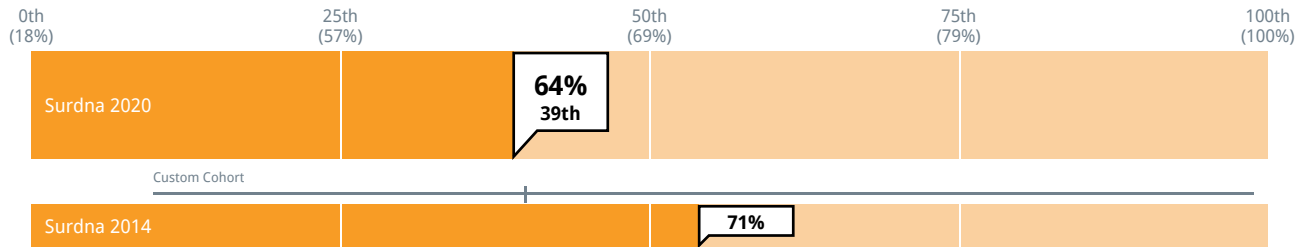
Reporting and Evaluation Process

Definition of Reporting and Evaluation

- "Reporting" - Surdna's standard oversight, monitoring, and grant reporting.
- "Evaluation" - formal activities *beyond reporting* undertaken by Surdna to assess or learn about a grant, a program, or Surdna's efforts.

At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?

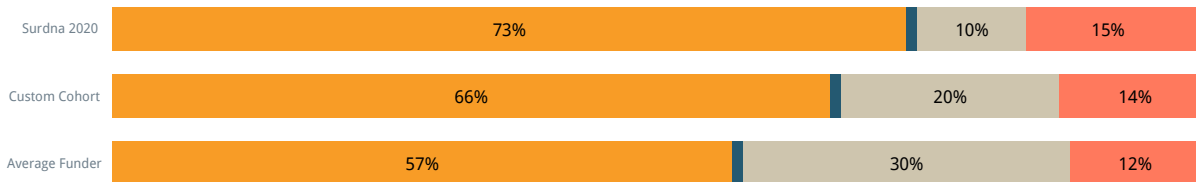
Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: on Subgroup: None

Participation in Reporting and/or Evaluation Processes

- Participated in a reporting process only
- Participated in an evaluation process only
- Participated in both a reporting and an evaluation process
- Participated in neither a reporting nor an evaluation process



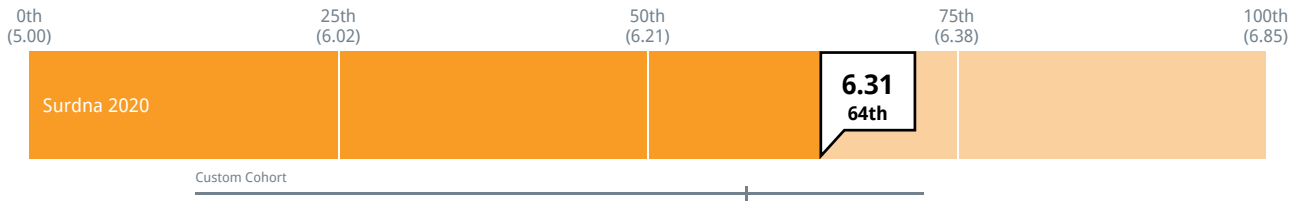
Cohort: Custom Cohort Past results: on

Reporting Process

The following questions were only asked of grantees that indicated having participated in a reporting process. See the "Reporting and Evaluation Process" page for data on the proportion of grantees participating in this process.

To what extent was the Foundation's reporting process straightforward?

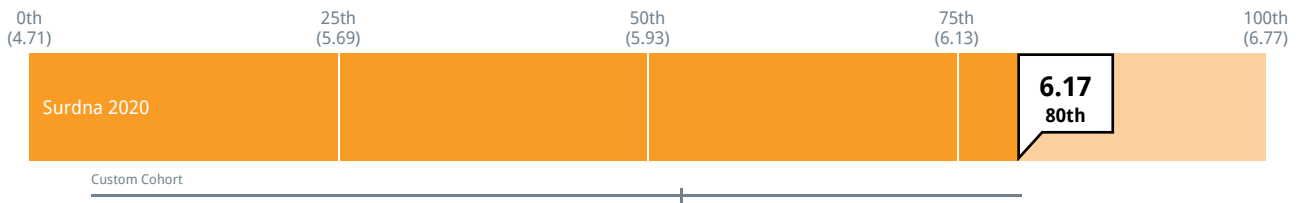
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?

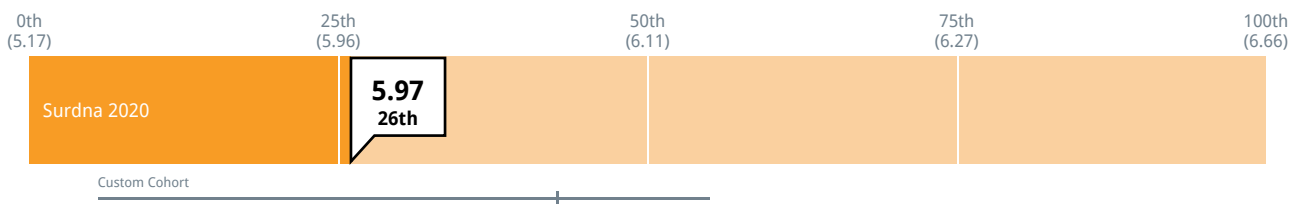
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?

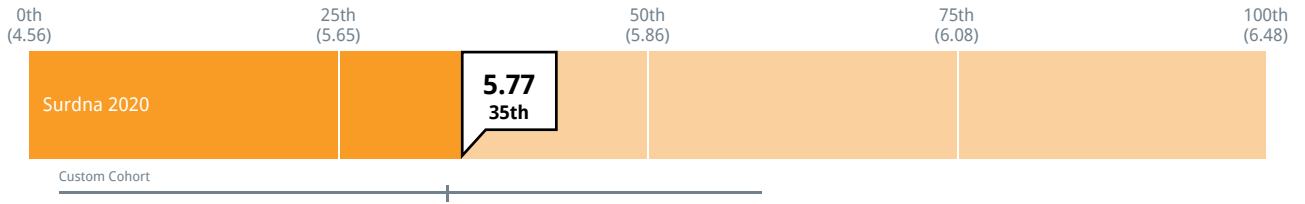
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?

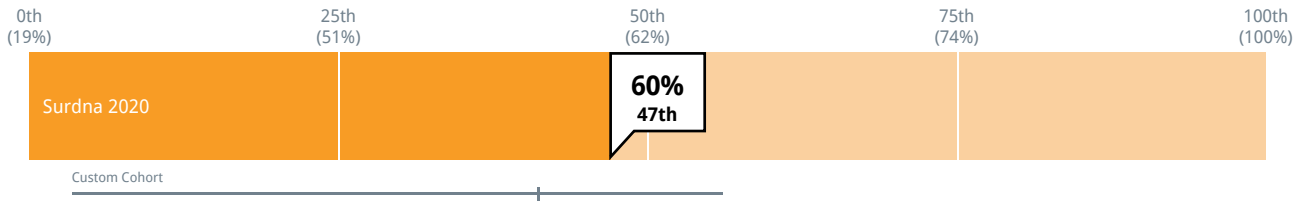
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

At any point have you had a substantive discussion with the Foundation about the report(s) you or your colleagues submitted as part of the reporting process?

Proportion of grantees responding 'Yes'



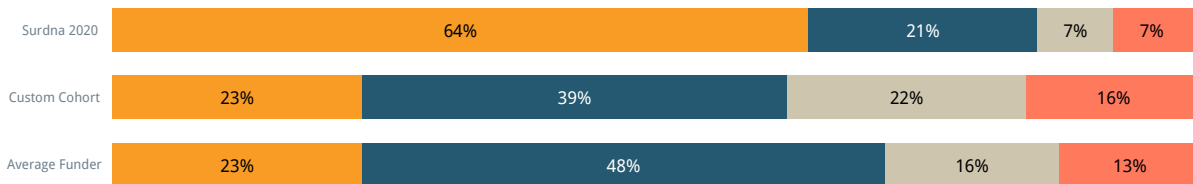
Cohort: Custom Cohort Past results: on Subgroup: None

Evaluation Process

The following questions were only asked of grantees that indicated having participated in an evaluation process. See the "Reporting and Evaluation Process" page for data on the proportion of grantees participating in this process.

Who was primarily responsible for carrying out the evaluation?

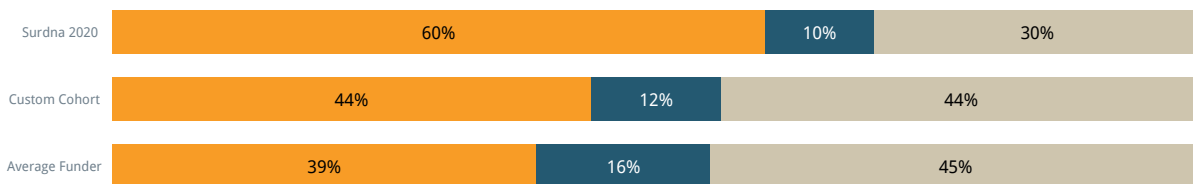
- Evaluation staff at the Foundation
- Evaluation staff at your organization
- External evaluator, chosen by the Foundation
- External evaluator, chosen by your organization



Cohort: Custom Cohort Past results: on

Did the Foundation provide financial support for the evaluation?

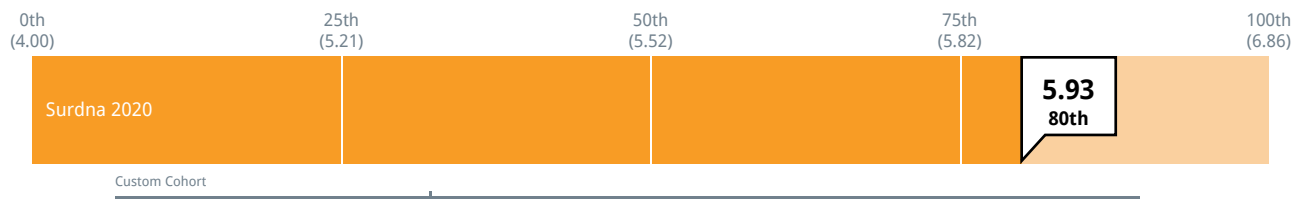
- Yes, the evaluation's costs were fully funded by the Foundation
- Yes, the evaluation's costs were partially funded by the Foundation
- No, the evaluation's costs were not funded by the Foundation



Cohort: Custom Cohort Past results: on

To what extent did the evaluation incorporate input from your organization in the design of the evaluation?

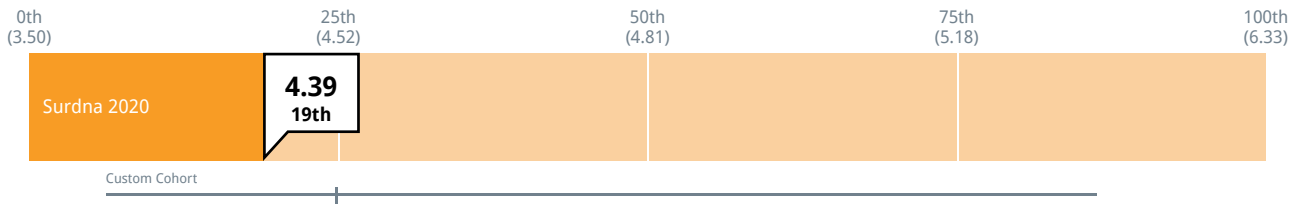
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent did the evaluation result in your organization making changes to the work that was evaluated?

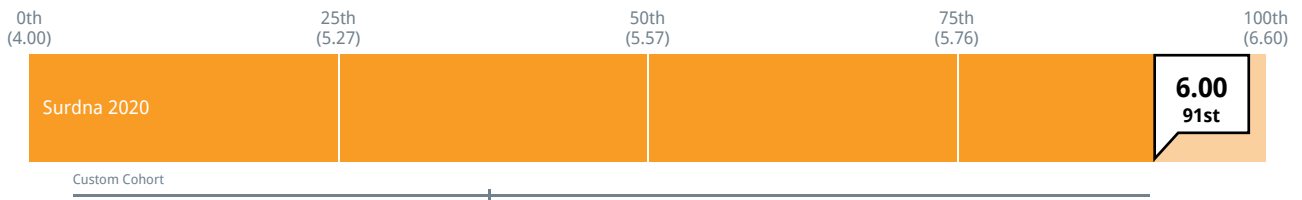
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent did the evaluation generate information that you believe will be useful for other organizations?

1 = Not at all 7 = To a great extent

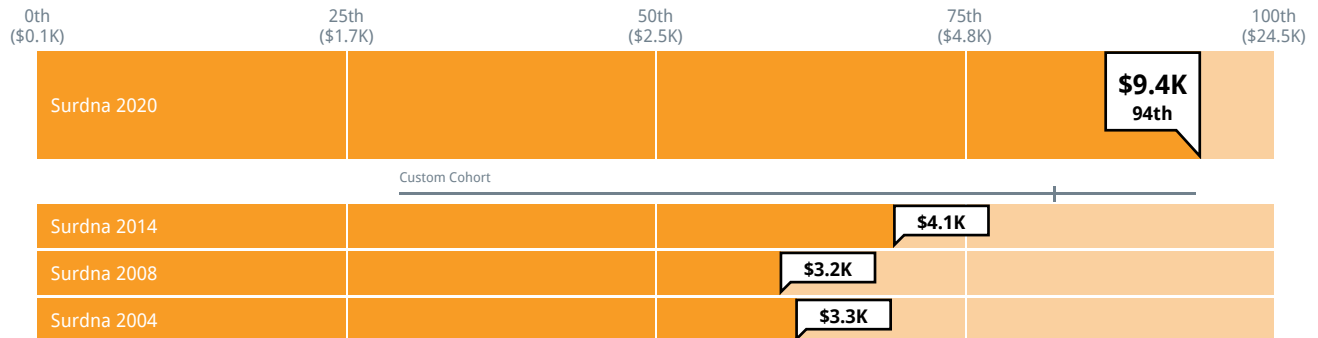


Cohort: Custom Cohort Past results: on Subgroup: None

Dollar Return and Time Spent on Processes

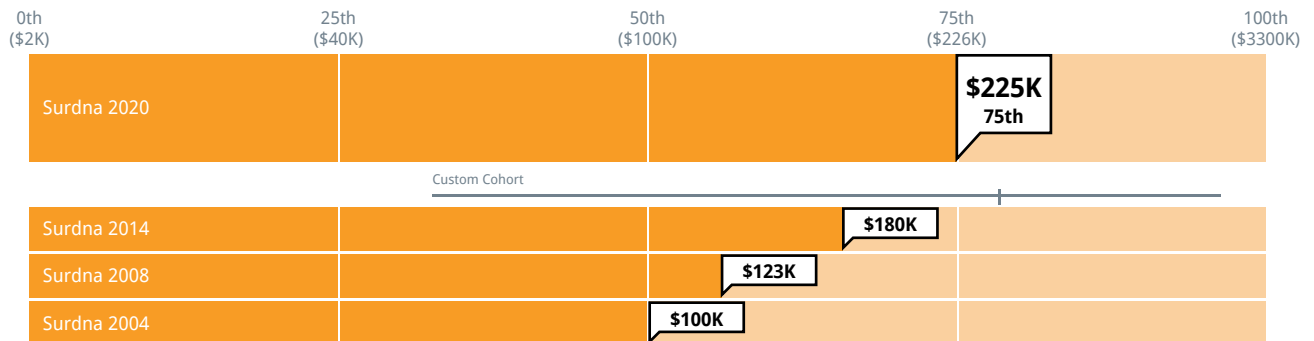
Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant



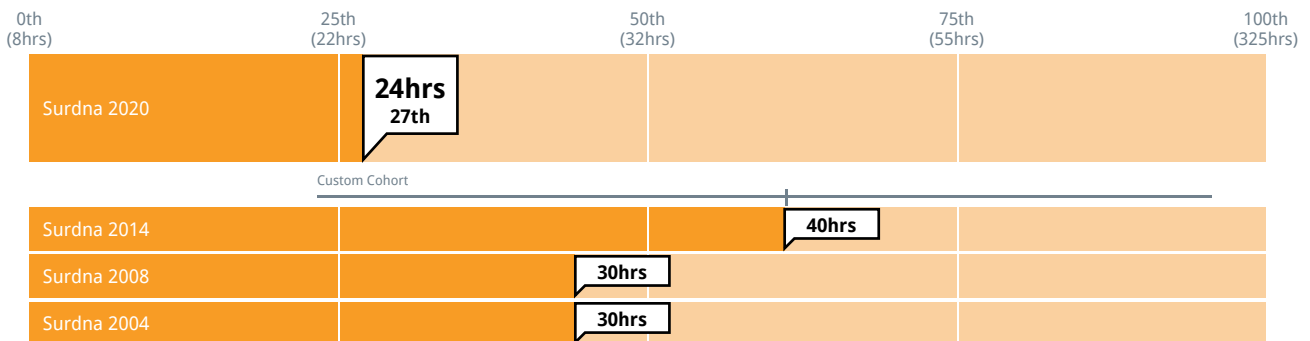
Cohort: Custom Cohort Past results: on Subgroup: None

Median Grant Size



Cohort: Custom Cohort Past results: on Subgroup: None

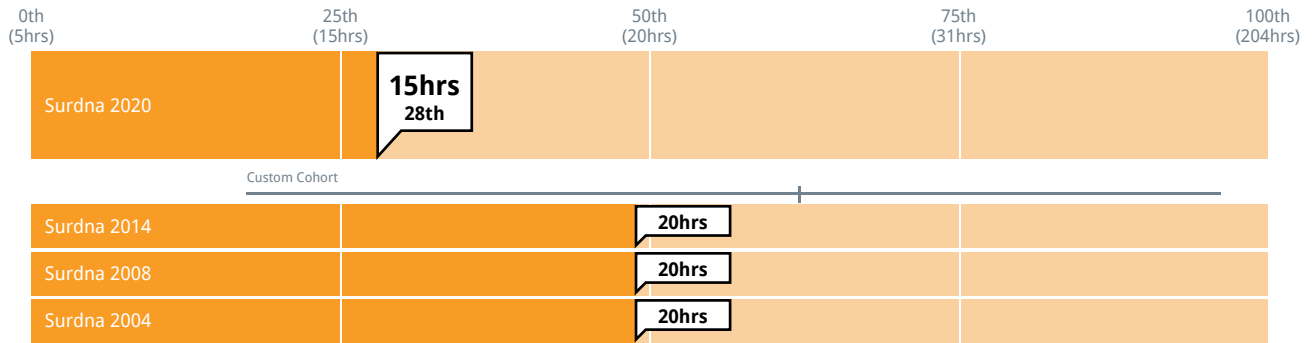
Median hours spent by grantees on funder requirements over grant lifetime



Cohort: Custom Cohort Past results: on Subgroup: None

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



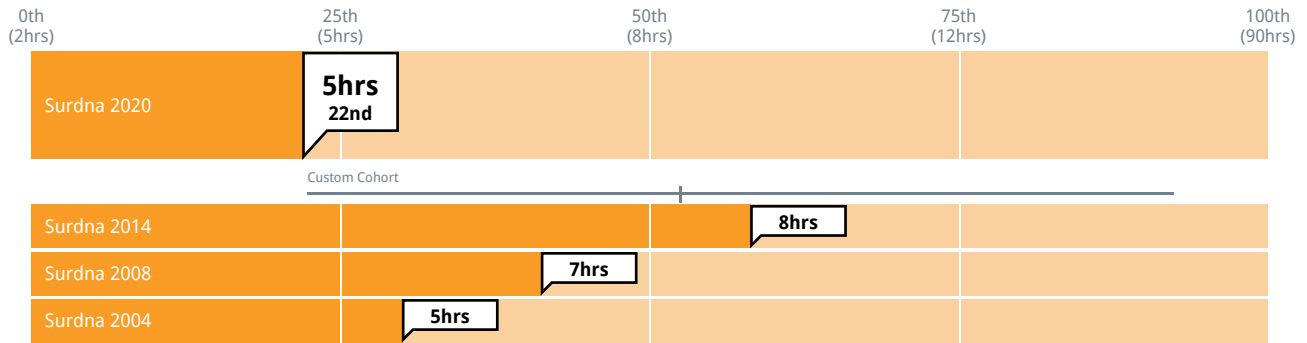
Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort						
Time Spent On Proposal And Selection Process	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
1 to 9 hours	26%	15%	19%	16%	21%	15%
10 to 19 hours	32%	22%	25%	28%	21%	19%
20 to 29 hours	21%	26%	22%	19%	18%	19%
30 to 39 hours	6%	10%	10%	11%	8%	8%
40 to 49 hours	6%	16%	12%	12%	12%	12%
50 to 99 hours	6%	8%	9%	12%	11%	14%
100 to 199 hours	1%	3%	2%	2%	6%	8%
200+ hours	0%	0%	1%	0%	4%	5%

Selected Subgroup: None
Time Spent On Proposal And Selection Process (By Subgroup)
1 to 9 hours
10 to 19 hours
20 to 29 hours
30 to 39 hours
40 to 49 hours
50 to 99 hours
100 to 199 hours
200+ hours

Time Spent on Reporting and Evaluation Process

Median Hours Spent on Monitoring, Reporting and Evaluation Process Per Year



Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort						
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
1 to 9 hours	70%	52%	59%	62%	53%	51%
10 to 19 hours	16%	27%	24%	27%	20%	21%
20 to 29 hours	9%	13%	8%	3%	10%	11%
30 to 39 hours	1%	1%	4%	3%	4%	4%
40 to 49 hours	1%	4%	1%	4%	4%	4%
50 to 99 hours	1%	3%	3%	1%	5%	4%
100+ hours	0%	0%	1%	0%	5%	4%

Selected Subgroup: None

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)

1 to 9 hours

10 to 19 hours

20 to 29 hours

30 to 39 hours

40 to 49 hours

50 to 99 hours

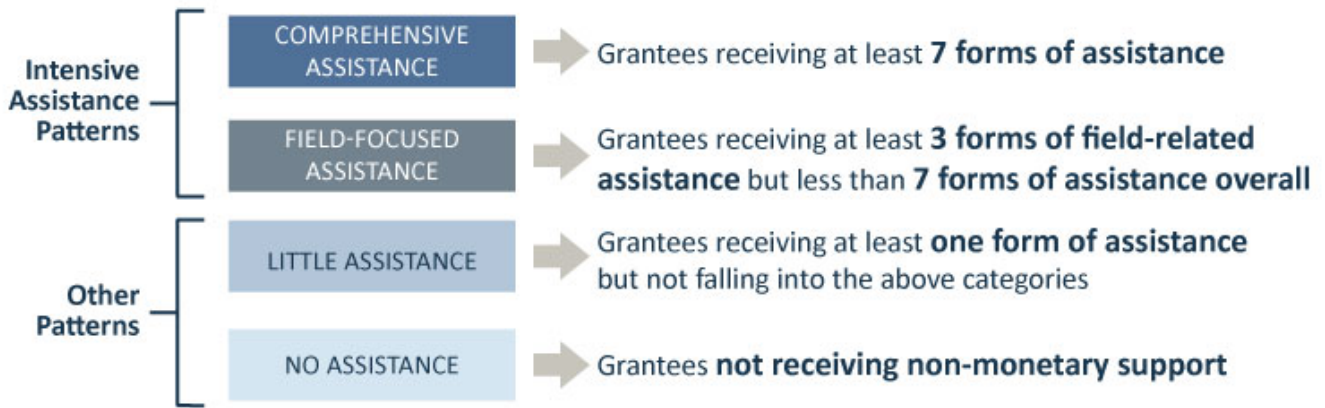
100+ hours

Non-Monetary Assistance

Grantees were asked to indicate whether they had received any of the following sixteen types of assistance provided directly or paid for by Surdna.

Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/publicity assistance
Development of performance measures	Provided research or best practices	Use of Surdna facilities
	Provided seminars/forums/convenings	Staff/management training
		Fundraising support
		Diversity, equity, and inclusion assistance

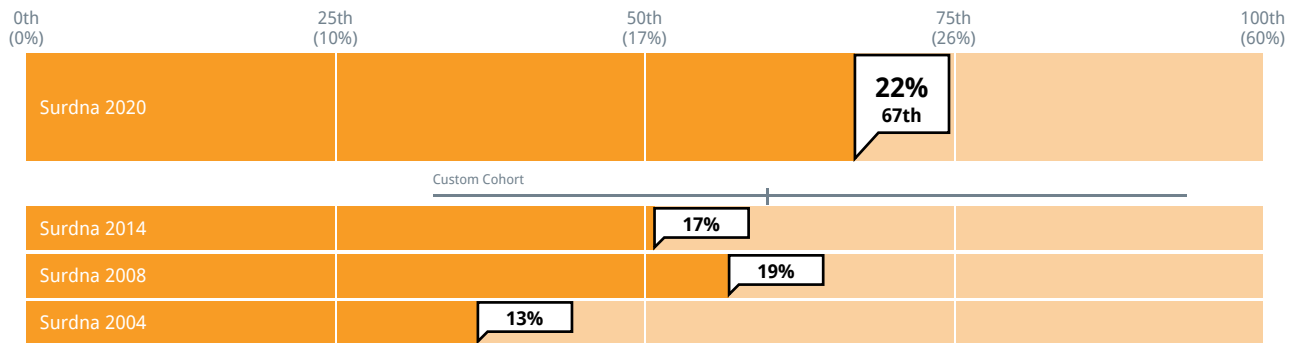
Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.



Selected Cohort: Custom Cohort						
Non-Monetary Assistance Patterns	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
Comprehensive	2%	2%	3%	2%	7%	7%
Field-focused	20%	15%	16%	11%	12%	15%
Little	39%	37%	39%	40%	40%	40%
None	39%	45%	42%	47%	41%	38%

Selected Subgroup: None
Non-Monetary Assistance Patterns (By Subgroup)
Comprehensive
Field-focused
Little
None

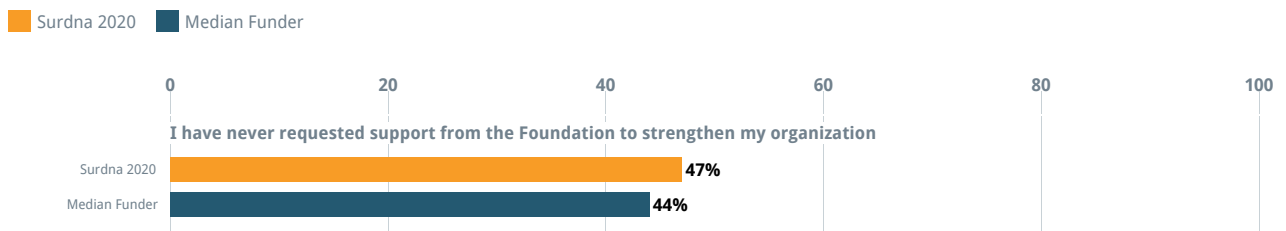
Proportion of grantees that received field-focused or comprehensive assistance



Cohort: Custom Cohort Past results: on Subgroup: None

The following question was recently added to the grantee survey and depicts comparative data from 104 funders in the dataset.

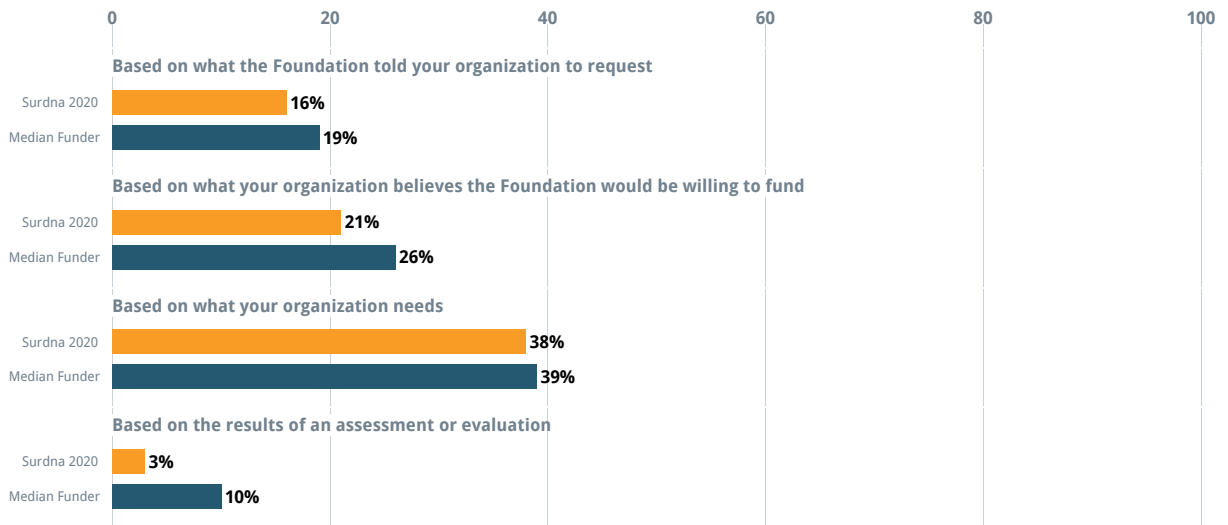
Have you ever requested support from the Foundation to help strengthen your organization?



Cohort: None Past results: on

If you have ever requested support from the Foundation to help strengthen your organization, how did you determine what specific support to ask for?

Surdna 2020 Median Funder

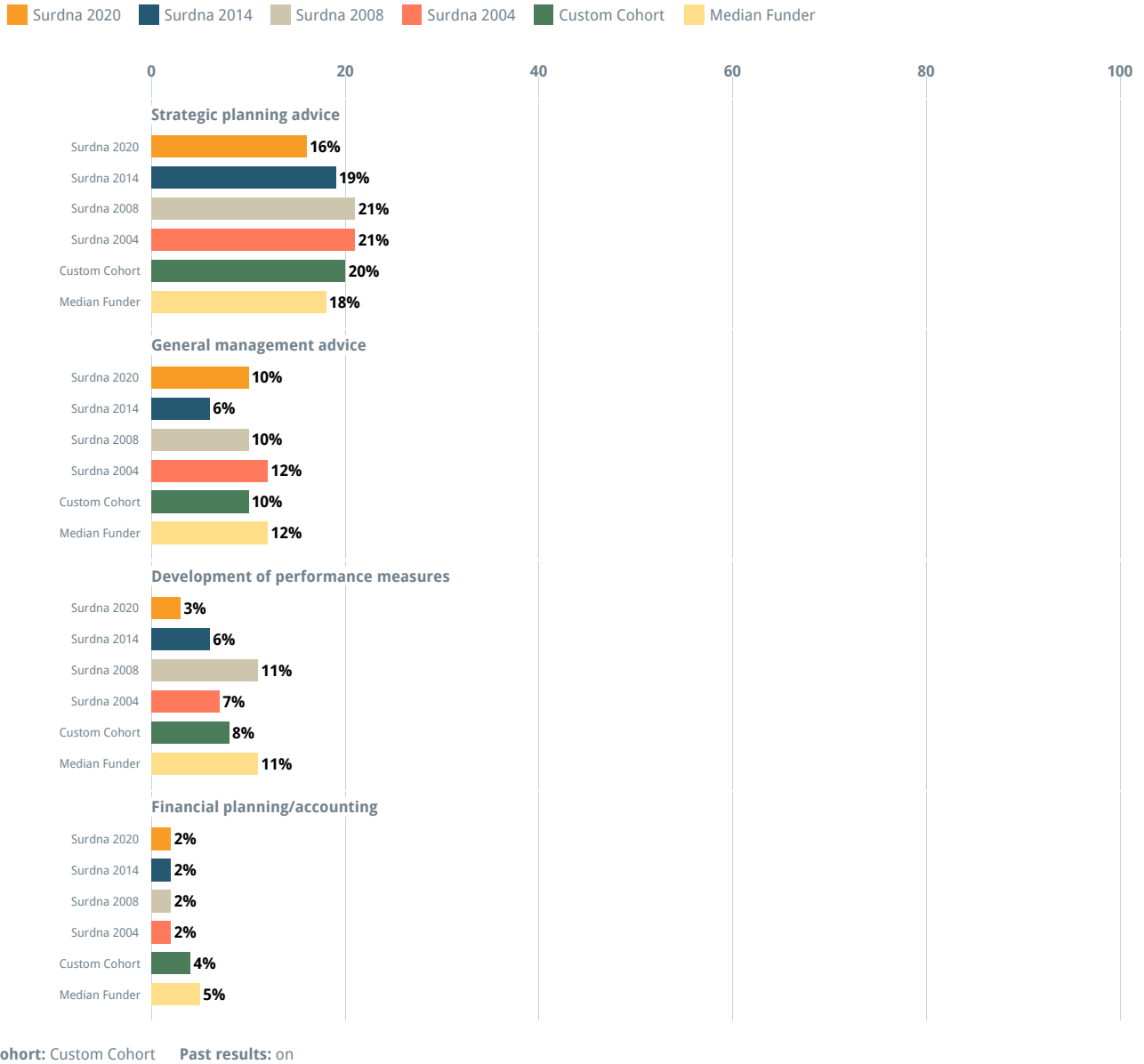


Cohort: None Past results: on

Management Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by Surdna) associated with this funding."

Percentage of Grantees that Received Management Assistance

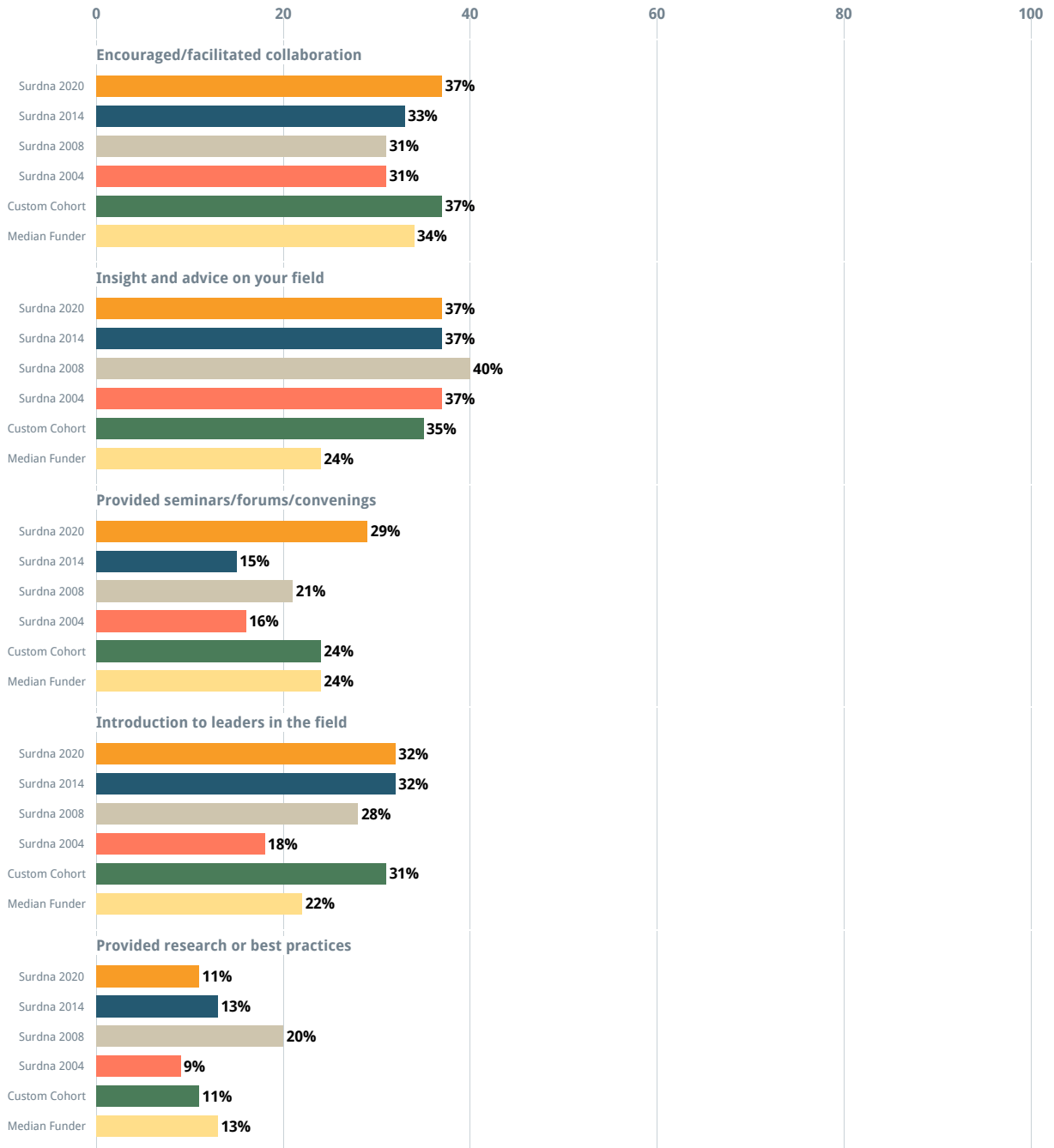


Field-Related Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by Surdna) associated with this funding."

Percentage of Grantees that Received Field-Related Assistance

■ Surdna 2020
 ■ Surdna 2014
 ■ Surdna 2008
 ■ Surdna 2004
 ■ Custom Cohort
 ■ Median Funder



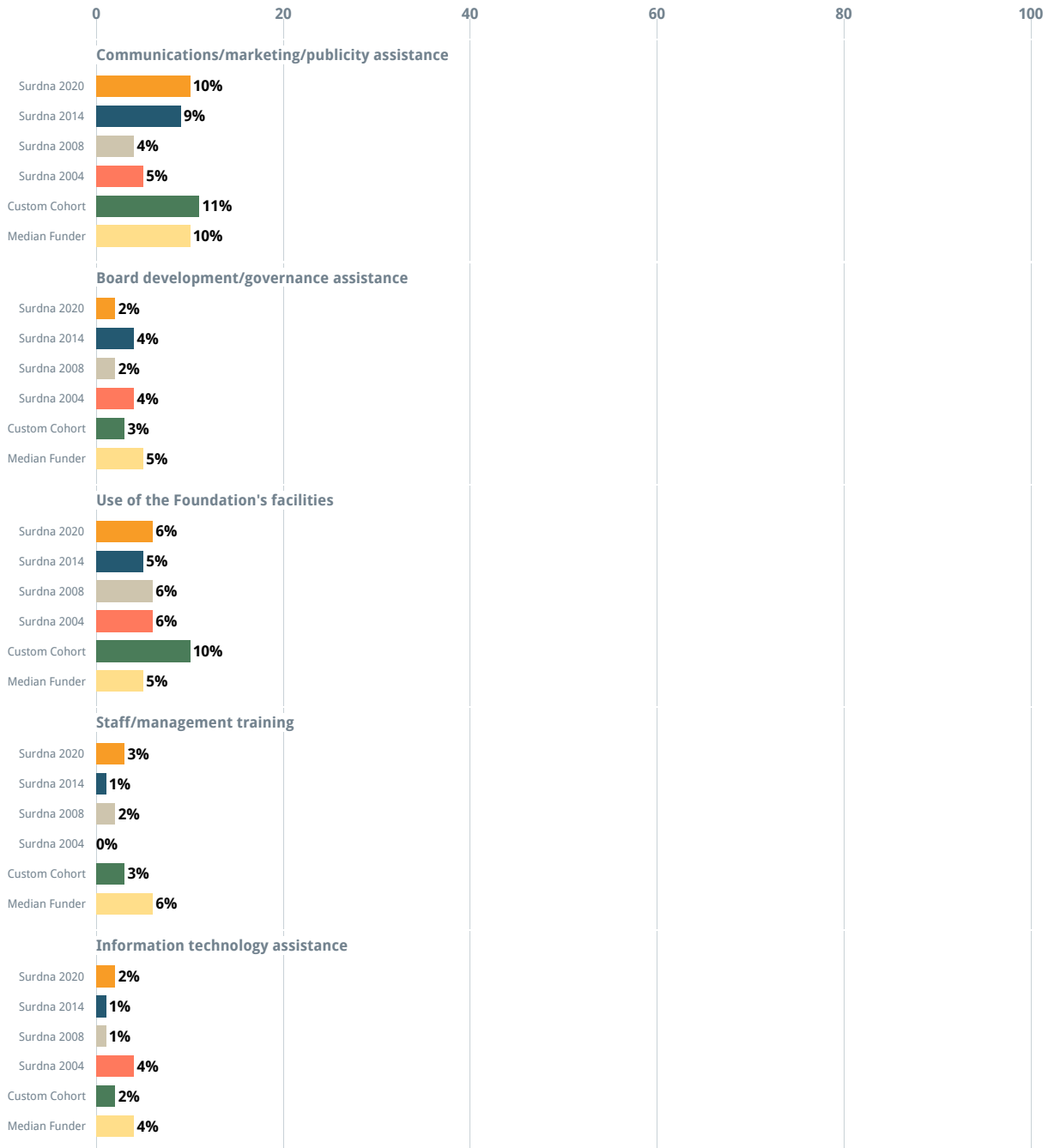
Cohort: Custom Cohort Past results: on

Other Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by Surdna) associated with this funding."

Percentage of Grantees that Received Other Assistance

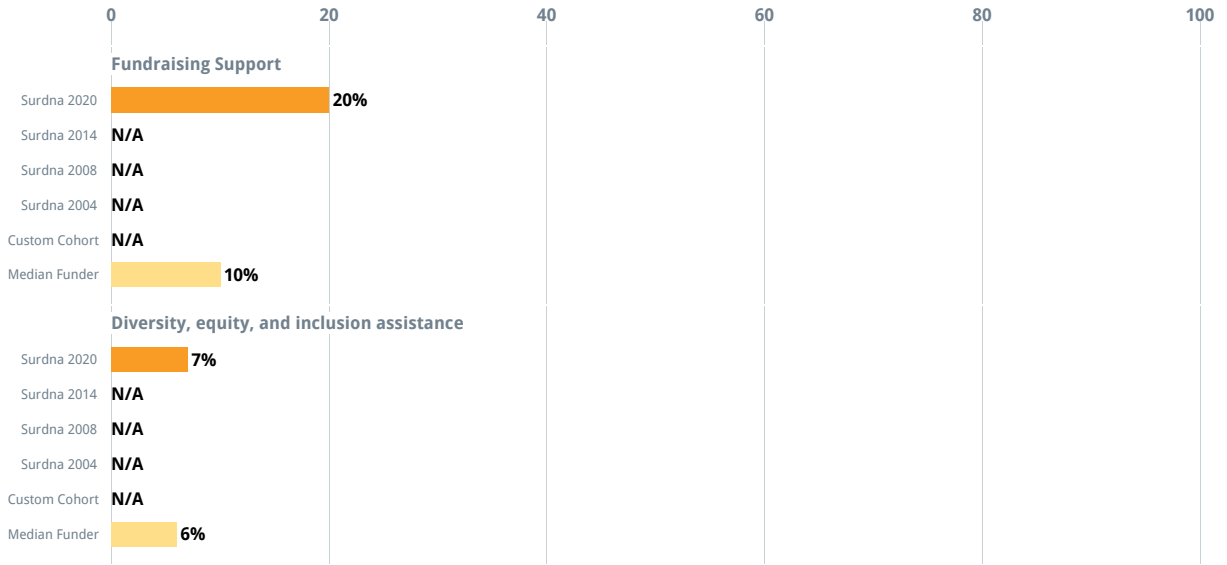
■ Surdna 2020
 ■ Surdna 2014
 ■ Surdna 2008
 ■ Surdna 2004
 ■ Custom Cohort
 ■ Median Funder



Cohort: Custom Cohort Past results: on

Percentage of Grantees that Received Other Assistance (cont.)

■ Surdna 2020
 ■ Surdna 2014
 ■ Surdna 2008
 ■ Surdna 2004
 ■ Custom Cohort
 ■ Median Funder



Cohort: Custom Cohort Past results: on

COVID-19 Data

As part of Surdna Foundation's October 2020 grantee perception survey, the Center for Effective Philanthropy (CEP) included questions to gather grantees' input and advice regarding the impact of the COVID-19 pandemic on their organizations.

Note: The questions in this section were recently added to the grantee survey and do not yet have comparative data.

Impact of COVID-19 on Nonprofits

As a result of COVID-19, what barriers are inhibiting your organization from carrying out its work?

Barriers:	This is a significant barrier	I anticipate this will be a significant barrier	This is not now, nor do I anticipate it being, a significant barrier in the future	Don't know/N/A
Ability to create social distancing in your organization's physical space(s)	19%	17%	60%	5%
Creating social distancing while carrying out programming	44%	23%	31%	3%
Accessing beneficiary populations (due to mobility issues, lack of transportation, lack of internet connectivity)	37%	22%	36%	5%
Lack of necessary supplies required to safely conduct business (i.e. PPE, disinfectants, etc.)	4%	10%	81%	5%
Cash flow problems	8%	32%	55%	5%
Loss of revenue/Budget challenges	16%	42%	34%	7%
Infrastructure costs to accommodate COVID-19 (i.e. reconfiguring work and/or programmatic spaces, investing in technology, etc.)	18%	27%	53%	2%
Maintaining staff levels needed to resume and/or carry out programming	16%	24%	53%	6%
Other	57%	19%	0%	24%

Below are verbatim responses from grantees who selected "Other (please describe):" in the previous question:

Grantee Comment

Staff bandwidth available to pivot

Maintaining staff productivity, mental health, and morale needed to carry out programming

Staff capacity to meet the high demands (both for YEF and for our grantees/movement partners)

Conduct travel for grassroots organizing

we serve local businesses, so they have cash flow concerns and even more limited time and attention than before, so its been an increasing challenge to keep them engaged in ways that allow us to best serve them and meet their needs

We simply work remotely

Our network members have lack of PPE, cash flow problems, loss of revenue, personal trauma, and technology needs.

Fulfilling our mission/commitment to community

Social isolation from WFH

huge increase in demand for services

Securing future sustaining partnerships with foundations, which are focused almost exclusively on their current grantees.

We have made the decision to end the lease agreement for our current office in Los Angeles due to concerns that we cannot ensure staff safety under the building's current conditions; barriers we will face in finding an appropriate new space are unclear.

Lack of multi-lingual capacity in public decision-making systems

Staff isolation and morale

Age out population challenges during COVID-19

None

Inability to hold in-person meetings; Zoom fatigue; lost revenues from conference fees; IT capacity.

Securing enough financial assistance to assist businesses during this recovery period

DOE School Partners ability to collaborate

Technology and new forms of educational delivery and access

Lack of ability to travel for face-to-face work

We run a co-working space and are facing a serious loss in rental income due to our lease and the social impact co-working space that we run

Balancing Family Care and Child Care with Work Demands

Impact of COVID-19 on Nonprofits - By Subgroup

As a result of COVID-19, what barriers are inhibiting your organization from carrying out its work?

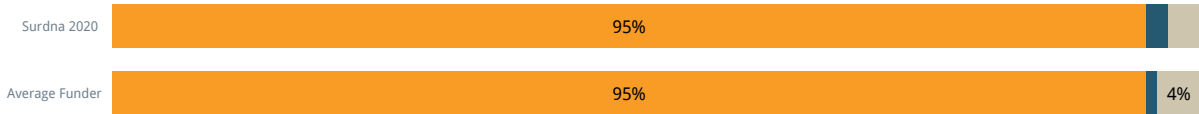
Communicating COVID-19 Issues with the Foundation

The following questions were recently added to the grantee survey and depict comparative data from 17 funders.

When communicating with Surdna about the COVID-19 pandemic, I feel comfortable discussing the...

Evolving needs of the populations we serve

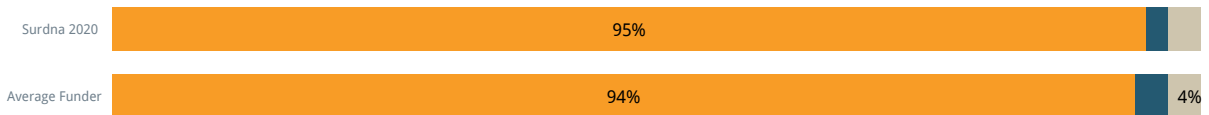
Yes No Don't know



Cohort: None Past results: on

Evolving needs of our organization

Yes No Don't know

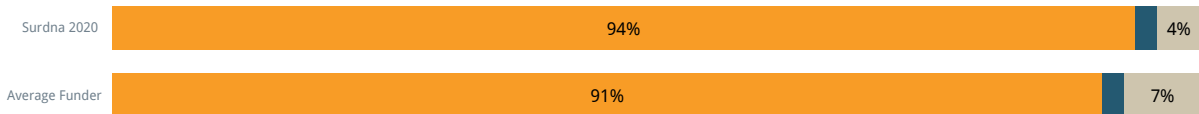


Cohort: None Past results: on

The following question was asked only of grantees based in the United States.

Implications of race in our organization's response to COVID-19

Yes No Don't know



Cohort: None Past results: on

Customized Questions

To what extent are you aware of the Foundation's strategy or theory of change for the program area from which you receive funding?

- I am not aware of the strategy or theory of change for the program area from which I receive funding.
- I am aware of the strategy or theory of change for the program from which I receive funding.



Cohort: None Past results: on

To what extent were you given the opportunity to provide input into the Foundation's strategy or theory of change for the program area from which you receive funding?

- I was given an opportunity to provide input and did provide input.
- I was given an opportunity to provide input but did not choose to do so.
- I was not given an opportunity to provide input.



Cohort: None Past results: on

To what extent are you aware of the Foundation's plans for learning and assessing progress for the program area from which you receive funding?

- I am not aware of plans for learning and assessing progress for the program area from which I receive funding.
- I am aware of plans for learning and assessing progress for the program from which I receive funding.



Cohort: None Past results: on

To what extent were you given the opportunity to provide input into the Foundation's plans for learning and assessing progress for the program area from which you receive funding?

- I was given an opportunity to provide input and provided input.
- I was given an opportunity to provide input but did not choose to do so.
- I was not given an opportunity to provide input.



Cohort: None Past results: on

Did the Foundation share information, data, or reporting related to assessing progress on the Foundation's strategy or theory of change?

- I did not receive any information, data, or reporting.
- I did receive information, data, or reporting.



Cohort: None Past results: on

Did the Foundation actively attempt to assist you in obtaining additional funding from other sources?

No Yes



Cohort: None Past results: on

How much impact did the Foundation's efforts have on your ability to obtain additional funding from other sources?

1 = No impact 7 = Significant positive impact

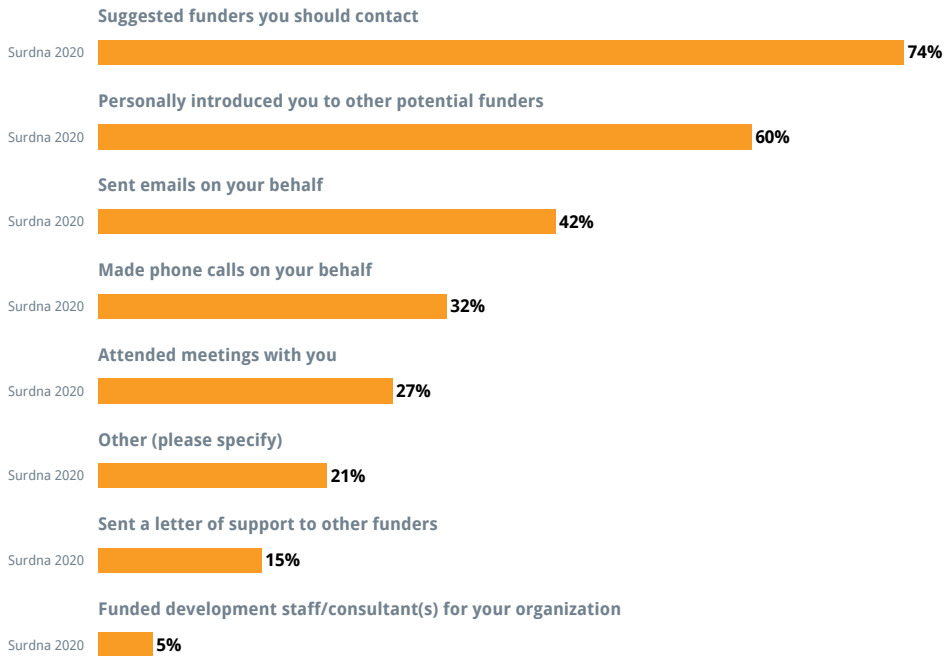
Surdna 2020



Cohort: None Past results: on

How did the Foundation assist you in obtaining additional funding from other sources? (please check all that apply)

Surdna 2020



Cohort: None Past results: on

Grantees' Open-Ended Comments

In the Grantee Perception Report survey, CEP asks three open-ended questions:

1. "Please comment on the quality of Surdna's processes, interactions, and communications. Your answer will help us better understand what it is like to work with Surdna."
2. "Please comment on the impact Surdna is having on your field, community, or organization. Your answer will help us to better understand the nature of Surdna's impact."
3. "What specific improvements would you suggest that would make Surdna a better funder?"

To download the full set of grantee comments and suggestions, please refer to the "Attachments" dropdown menu at the top right of your report. Please note that some comments may be redacted or removed to protect the confidentiality of respondents.

CEP's Qualitative Analysis

CEP thoroughly reviews each comment submitted and conducts comprehensive qualitative analysis on two of these questions in the GPR.

The following pages outline the results of CEP's analyses.

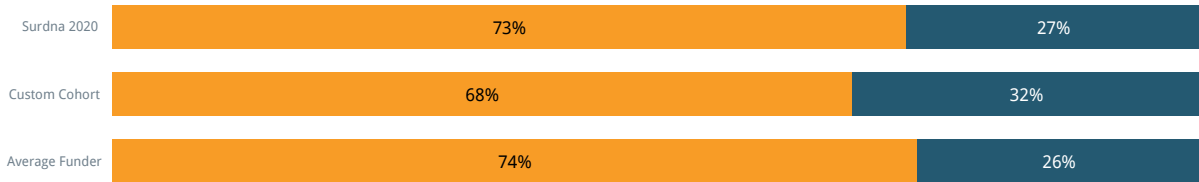
Quality of Processes, Interactions and Communications

Grantees were asked to comment on the quality of Surdna's processes, interactions, and communications. Their comments were then categorized by the nature of their content, specifically whether the content is positive, neutral or constructive.

For a comment to be categorized as constructive, there must have been at least one constructive topic in its content.

Positivity of Comments about the Quality of the Foundation's Processes, Interactions, and Communications

Positive comment Comment with at least one constructive theme



Cohort: Custom Cohort Past results: on

Grantees' Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. The 177 grantees that responded to the survey provided 112 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Grantmaking Characteristics	18%
Interactions	17%
Non-Monetary Assistance	17%
Field Impact and Understanding	13%
Diversity, Equity, Inclusion	10%
Grant Processes	10%
Communications	6%
Community Impact and Understanding	4%
Impact on and Understanding of Grantee Organizations	4%
Other	2%

Selected Comments

Grantees were asked to provide any suggestions for how the Surdna Foundation could improve. The 177 grantees that responded to the survey provided a total of 112 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Grantmaking Characteristics (18% N=20)

- General Operating Support (N = 8)
 - "...General operating support helps organizations stay nimble and responsive, especially in challenging and uncertain times."
 - "Issue funds directly to grassroots organizations and artists, rather than rely so much on large intermediaries to re-grant. This way more funds will get to the actual work, communication channels between the foundation and practitioners will be more clear and direct, and directly impacted BIPOC people will be more able to direct the work."
 - "Give increased, no-barrier funding to current grantees when a crisis hits."
- Multi-Year Support (N = 6)
 - "Multi-year grants...would allow us more visibility into our finances."
 - "Larger long-term investments, modeled similarly to Ford's BUILD initiative..."
- Size (N = 6)
 - "[We] need additional resources to meet...challenges."
 - "... Keep giving more than minimum philanthropic requirement."

Interactions (17% N=19)

- More Frequent and More Responsive (N = 10)
 - "A bit more responsiveness would be helpful."
 - "...[Acknowledge] receipt of emails/questions even if [the Foundation doesn't] have an answer yet."
 - "I would welcome a more one-on-one relationship with foundation staff and the opportunity to talk together about the work in addition to/ in between our annual reports."
 - "Reach out to grantees more often on an informal basis to build trust."
- Add Staff (N = 3)
 - "More staff capacity to engage regularly with grantees."
 - "I would recommend that you hire more program staff..."
- Site Visits (N = 3)
 - "Twice a year annual visits would be helpful...to connect more closely to our mission and the work we do would be hugely beneficial."
- Request for Partnership (N = 2)
- Other (N = 1)

Non-Monetary Assistance (17% N=19)

- Convening and Collaboration (N = 10)
 - "The Foundation convened a collective of grantees at the beginning of the pandemic, which was super helpful. I submit for consideration that another like session is organized.... This serves a purpose of cultivating a peer-to-peer support network."
 - "I would love to get to know some of the other grantees...to cross-fertilize ideas and strengthen [our] network."
 - "The Foundation can...support in sharing events and resources between grantees."
- Funding Assistance (N = 4)
 - "Make introductions to other funders."
 - "Help connect organizations to additional funders in the field."
- Capacity Building (N = 3)
 - "Provide more non-financial resources that organizations can use to strengthen their infrastructure and capacity."
- Communication of Opportunities (N = 2)

Field Impact and Understanding (13% N=15)

- Sector Impact (N = 11)
 - "We encourage the Foundation as a whole to deepen its commitment to changing the story of philanthropy: to shift resources and power to frontline

- communities at scale."
- "...The Foundation [should hold] itself accountable to improving the larger field of philanthropy..."
- "...You may have done this already, but do a power analysis of philanthropy and make some strategic decisions about which other funders need your guidance, and how to shift other funders in the direction of racial justice and equity."
- "More explicit focus on dismantling systemic racism by being proactive in grant-making in that space."
- Foundation Strategy (N = 1)
- Public Policy (N = 1)
 - "Advocate for changes to the tax law..."
- Other (N = 2)

Diversity, Equity, Inclusion (10% N=11)

- Strategy (N = 6)
 - "There is a lot of appetite within the field to create an affirmative vision for an anti-monopoly world...Much of this work has only gotten more difficult in light of the pandemic and requires injecting more resources to ensure that this work is possible."
 - "If the foundation is concerned with equity I would advocate for funding other small non-profits in low income BIPOC communities because the impact they have is direct and outsized."
- Staff (N = 4)
 - "Leadership should reflect the communities and as such, diversity becomes an important element."
 - "More women on staff, particularly in program officer and director roles."
- Non-Monetary Assistance (N = 1)
 - "Support for fellowships and/or leadership development opportunities at this time with BIPOC leaders."

Grant Processes (10% N=11)

- Evaluation (N = 8)
 - "Minimize/eliminate reporting and...track...documents/financial [information] you receive from us so we don't have to fill out the same [information] over and over again."
 - "...We'd love consistent or increased support with lighter reporting and proposal writing requirements."
 - "When offering flexibility around reporting requirements due to COVID (i.e. waiving requirements) it's not helpful to do this the day before the report is due. We had already spent many hours completing the report."
- Proposal (N = 3)
 - "... On one hand, I'm really happy that I was able to have a more informal process and such a hands-off experience. And I guess in some way it would have been nice to be a little more stitched in to a program of some kind, or connected to people there. I come out of it not knowing very much about Surdna, its work or vision, or whether there could be some way to connect again in the future."
 - "... Portal questions should be minimal and broad to allow grantees to lead with their strategies, rather than try to fit the foundation's frameworks. Surdna could easily follow the lead of many of their peers and suggest in their portal that a proposal created for another foundation could be uploaded instead of answering the portal questions...."

Communications (6% N=7)

- Consistent and Clear Communication (N = 4)
 - "More consistent and frequent communication..."
 - "...[Ensure] that organizational leadership receives notification about opportunities to apply for resources."
- Responsive and Transparent Communication (N = 2)
- Other (N = 1)

Community Impact and Understanding (4% N=4)

- Understanding of Grantees' Communities (N = 4)
 - "...Work to understand local communities/the South better..."
 - "Be more open to the knowledge and expertise of local communities in identifying the priorities that matter in the local context."

Impact on and Understanding of Grantee Organizations (4% N=4)

- Foundation's Understanding of Grantees' Organizations (N = 4)
 - "Please continue to empower your leadership to see and know our work directly...."
 - "The deeper the engagement with grantees, the better....[this] will ultimately mean more opportunities to connect and deepen the work of grantees that will make our impact greater."

Other (2% N=2)

- Other (N = 2)

Contextual Data

Please note that all information below is based on self-reported data from grantees.

Grantmaking Characteristics

Selected Cohort: Custom Cohort						
Length of Grant Awarded	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Average grant length	2.4 years	1.9 years	1.9 years	1.9 years	2.2 years	2.3 years

Selected Cohort: Custom Cohort						
Length of Grant Awarded	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
1 year	24%	31%	38%	46%	43%	34%
2 years	28%	46%	31%	24%	24%	32%
3 years	44%	22%	30%	28%	20%	22%
4 years	1%	1%	0%	2%	4%	5%
5 or more years	3%	0%	0%	0%	9%	7%

Selected Cohort: None		
Proportion of Unrestricted Funding	Surdna 2020	Average Funder
No, this funding was not restricted to a specific use (i.e. general operating, core support)	59%	23%
Yes, this funding was restricted to a specific use (e.g. supported a specific program, project, capital need, etc.)	41%	77%

Grantmaking Characteristics - By Subgroup

Selected Subgroup: None	
Length of Grant Awarded (By Subgroup)	
Average grant length	

Selected Subgroup: None	
Length of Grant Awarded (By Subgroup)	
1 year	
2 years	
3 years	
4 years	
5 or more years	

Selected Subgroup: None	
Proportion of Unrestricted Funding (By Subgroup)	
No, this funding was not restricted to a specific use (i.e. general operating, core support)	
Yes, this funding was restricted to a specific use (e.g. supported a specific program, project, capital need, etc.)	

Grant Size

Selected Cohort: Custom Cohort						
Grant Amount Awarded	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Median grant size	\$225K	\$180K	\$122.5K	\$100K	\$100K	\$250K

Selected Cohort: Custom Cohort						
Grant Amount Awarded	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
Less than \$10K	1%	1%	2%	1%	9%	3%
\$10K - \$24K	2%	4%	7%	9%	12%	5%
\$25K - \$49K	3%	11%	4%	7%	12%	6%
\$50K - \$99K	11%	15%	25%	27%	15%	15%
\$100K - \$149K	8%	8%	16%	16%	9%	11%
\$150K - \$299K	36%	36%	36%	28%	16%	20%
\$300K - \$499K	19%	19%	9%	10%	9%	11%
\$500K - \$999K	13%	7%	2%	1%	8%	14%
\$1MM and above	7%	0%	0%	0%	9%	16%

Selected Cohort: Custom Cohort						
Median Percent of Budget Funded by Grant (Annualized)	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	6%	4%	3%	3%	4%	5%

Grant Size - By Subgroup

Selected Subgroup: None	
Grant Amount Awarded (By Subgroup)	
Median grant size	

Selected Subgroup: None
Grant Amount Awarded (By Subgroup)
Less than \$10K
\$10K - \$24K
\$25K - \$49K
\$50K - \$99K
\$100K - \$149K
\$150K - \$299K
\$300K - \$499K
\$500K - \$999K
\$1MM and above

Selected Subgroup: None
Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)
Size of grant relative to size of grantee budget

Grantee Characteristics

Selected Cohort: Custom Cohort						
Operating Budget of Grantee Organization	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Median Budget	\$2.1M	\$2M	\$2M	\$1.8M	\$1.6M	\$3M

Selected Cohort: Custom Cohort						
Operating Budget of Grantee Organization	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
<\$100K	2%	1%	2%	1%	8%	2%
\$100K - \$499K	8%	8%	12%	12%	18%	12%
\$500K - \$999K	17%	17%	18%	17%	13%	12%
\$1MM - \$4.9MM	50%	49%	40%	46%	30%	38%
\$5MM - \$24MM	17%	21%	24%	15%	19%	23%
>=\$25MM	5%	4%	4%	8%	12%	13%

Grantee Characteristics - By Subgroup

Selected Subgroup: None
Operating Budget of Grantee Organization (By Subgroup)
Median Budget

Selected Subgroup: None
Operating Budget of Grantee Organization (By Subgroup)
<\$100K
\$100K - \$499K
\$500K - \$999K
\$1MM - \$4.9MM
\$5MM - \$24MM
>=\$25MM

Funding Relationship

Selected Cohort: Custom Cohort						
Funding Status	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	83%	87%	74%	69%	82%	83%

Selected Cohort: Custom Cohort				
Pattern of Grantees' Funding Relationship with the Foundation	Surdna 2020	Surdna 2014	Average Funder	Custom Cohort
First grant received from the Foundation	22%	36%	28%	29%
Consistent funding in the past	59%	44%	54%	51%
Inconsistent funding in the past	18%	20%	18%	20%

Funding Relationship - by Subgroup

Selected Subgroup: None
Funding Status (By Subgroup)
Percent of grantees currently receiving funding from the Foundation

Selected Subgroup: None
Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)
First grant received from the Foundation
Consistent funding in the past
Inconsistent funding in the past

Grantee Demographics

Selected Cohort: Custom Cohort						
Job Title of Respondents	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Average Funder	Custom Cohort
Executive Director	50%	55%	42%	55%	47%	49%
Other Senior Management	18%	16%	13%	12%	17%	19%
Project Director	6%	10%	12%	7%	13%	10%
Development Director	11%	6%	15%	16%	8%	9%
Other Development Staff	8%	8%	12%	7%	8%	8%
Volunteer	1%	0%	0%	0%	1%	0%
Other	6%	4%	8%	3%	5%	5%

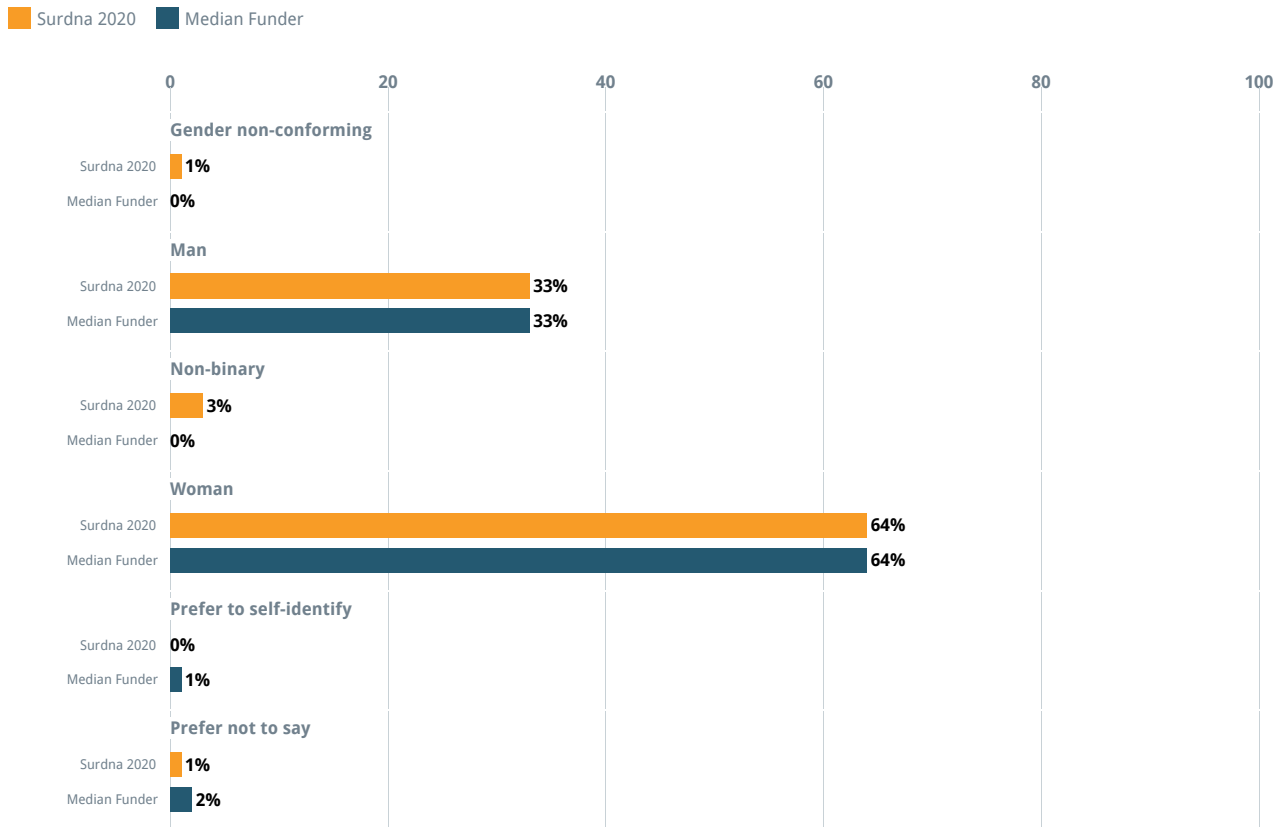
Note: Survey questions about race and ethnicity and gender were recently modified to match best practices, and depict comparative data from 17 funders in the dataset.

Survey language and response options for questions about race and ethnicity are guided by best practices shared by [National Institutes of Health](#), [Pew Research Center](#), [Psi Chi Journal of Psychological Research](#), and the [US Census Bureau](#).

Survey language and response options for questions about gender are guided by best practices shared by [Funders For LGBTQ Issues](#), [HRC Foundation's Welcoming Schools](#), and the [Williams Institute of the University of California – Los Angeles School of Law](#).

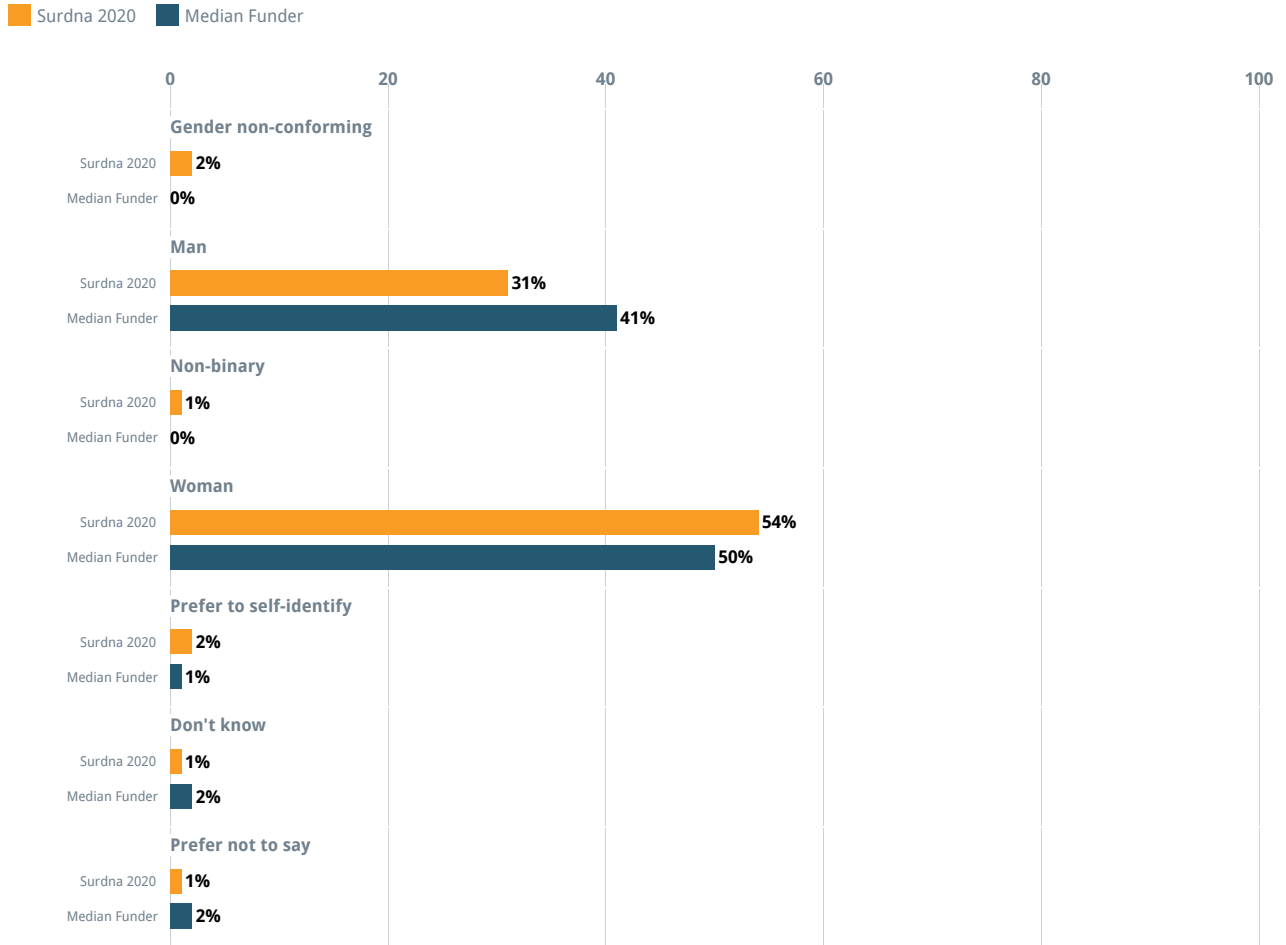
In CEP's previous version of the question on gender identity, 63% of the the average funder's respondents identified as female, 34% male, 0% preferred to self-identify, and 3% indicated they preferred not to say. Respondents could only select one answer option to this question.

Please select the option that represents how you describe yourself:



Cohort: None Past results: on

Please select the option that represents how the CEO/Executive Director of your organization describes themselves:

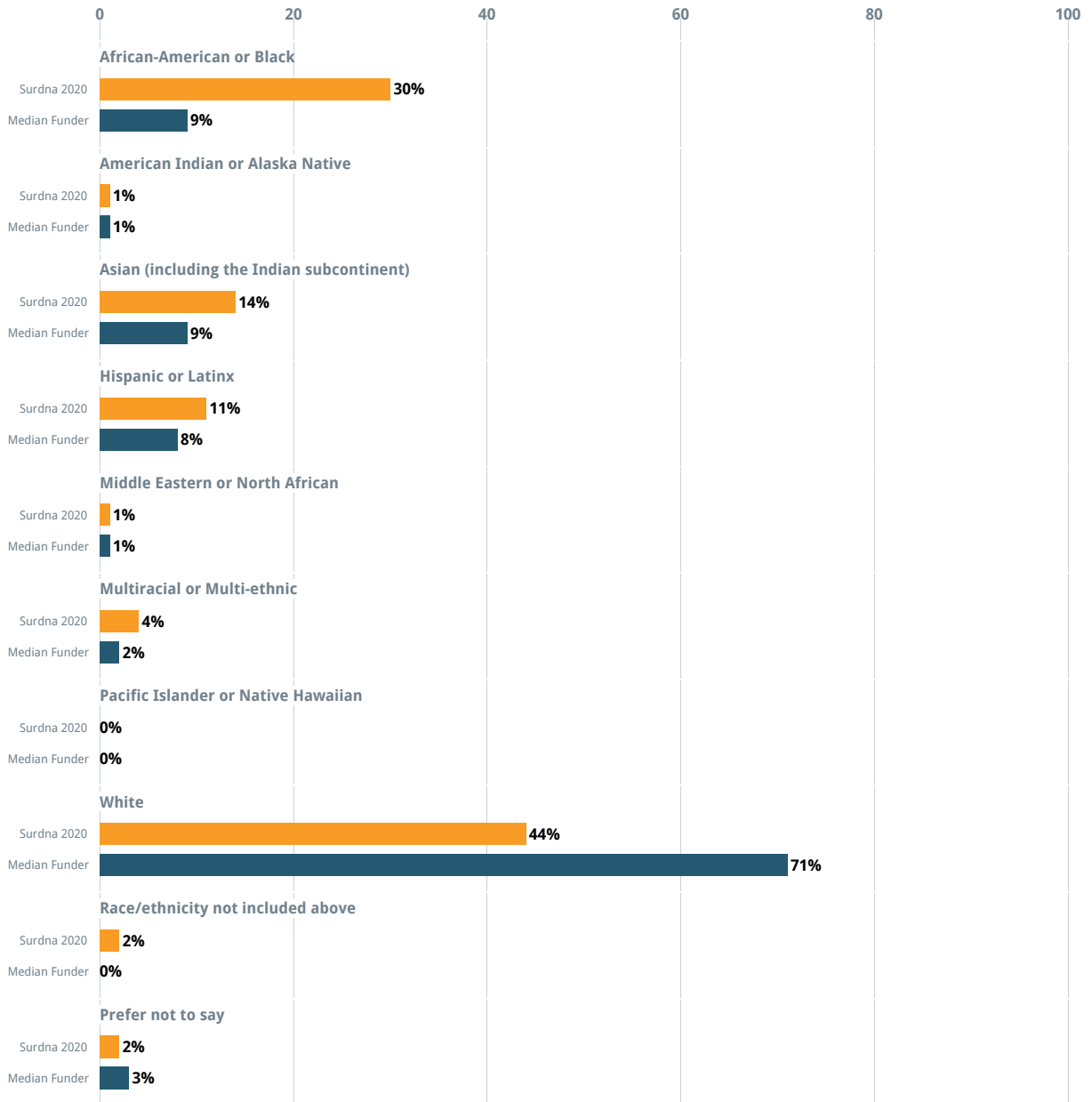


Cohort: None Past results: on

In CEP's previous version of the question on racial/ethnic identity, 7% of the the average funder's respondents identified as African-American or Black, 1% American Indian or Alaskan Native, 4% Asian (incl. Indian subcontinent), 5% Hispanic or Latinx, 0% Pacific Islander or Native Hawaiian, 78% White, and 1% indicated their race/ethnicity was not included in the above options. Respondents could select multiple answers to this question.

What is your race/ethnicity?

■ Surdna 2020
 ■ Median Funder



Cohort: None Past results: on

The following questions were recently added to the grantee survey and depict comparative data from 48 funders in the dataset.

Selected Cohort: None		
Do you identify as a person of color?	Surdna 2020	Average Funder
Yes	54%	19%
No	45%	76%
Prefer not to say	2%	5%

Selected Cohort: None		
Does the CEO/Executive Director of your organization identify as a person of color?	Surdna 2020	Average Funder
Yes	61%	21%
No	37%	73%
Don't know	1%	3%
Prefer not to say	1%	4%

Funder Characteristics

Selected Cohort: Custom Cohort						
Financial Information	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Total assets	\$1028.6M	\$929.6M	\$859.2M	\$604.6M	\$238.8M	\$1448.1M
Total giving	\$41.3M	\$34.6M	\$30.6M	\$28.9M	\$17.6M	\$45.1M

Selected Cohort: Custom Cohort						
Funder Staffing	Surdna 2020	Surdna 2014	Surdna 2008	Surdna 2004	Median Funder	Custom Cohort
Total staff (FTEs)	28	23	20	12	16	60
Percent of staff who are program staff	93%	52%	65%	100%	43%	34%

Selected Cohort: Custom Cohort						
Grantmaking Processes	Surdna 2020	Surdna 2014	Surdna 2008	Median Funder	Custom Cohort	
Proportion of grants that are invitation-only	100%	98%	N/A	44%	97%	
Proportion of grantmaking dollars that are invitation-only	100%	98%	75%	60%	97%	

Additional Survey Information

On many questions in the grantee survey, grantees are allowed to select “don’t know” or “not applicable” if they are not able to provide an alternative answer. In addition, some questions in the survey are only displayed to a select group of grantees for which that question is relevant based on a previous response.

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Surdna’s grantee survey was 177.

Question Text	Number of Responses
Overall, how would you rate the Foundation’s impact on your field?	160
How well does the Foundation understand the field in which you work?	166
To what extent has the Foundation advanced the state of knowledge in your field?	143
To what extent has the Foundation affected public policy in your field?	107
Overall, how would you rate the Foundation’s impact on your local community?	118
How well does the Foundation understand the local community in which you work?	130
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	170
How well does the Foundation understand your organization’s strategy and goals?	168
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	148
How well do you understand the way in which the work funded by this grant fits into the Foundation’s broader efforts?	166
How often do/did you have contact with your program officer during this grant?	176
Who most frequently initiated the contact you had with your program officer during this grant?	176
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	159
Has your main contact at the Foundation changed in the past six months?	170
Did you submit a proposal to the Foundation for this grant?	170
As you developed your grant proposal, how much pressure did you feel to modify your organization’s priorities in order to create a grant proposal that was likely to receive funding?	154
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	129
Are you currently receiving funding from the Foundation?	171
Which of the following best describes the pattern of your organization’s funding relationship with the Foundation?	170
How well does the Foundation understand your intended beneficiaries’ needs?	158
To what extent do the Foundation’s funding priorities reflect a deep understanding of your intended beneficiaries’ needs?	158
Have you participated in a reporting or evaluation process?	168
To what extent was the Foundation’s reporting process...Adaptable, if necessary, to fit your circumstances?	130
To what extent was the Foundation’s reporting process...A helpful opportunity for you to reflect and learn?	133
To what extent was the Foundation’s reporting process...Relevant, with questions and measures pertinent to the work funded by this grant?	128
To what extent was the Foundation’s reporting process...Straightforward?	134
Did the Foundation provide financial support for the evaluation?	10
To what extent did the evaluation...Result in you making changes to the work that was evaluated?	18
To what extent did the evaluation...Incorporate your input in the design of the evaluation?	14
To what extent did the evaluation...Generate information that you believe will be useful for other organizations?	15
Funder-Grantee Relationships Summary Measure	138
Understanding Summary Measure	153
To what extent did the Foundation exhibit the following during this grant...Trust in your organization’s staff	171

Question Text	Number of Responses
To what extent did the Foundation exhibit the following during this grant...Candor about the Foundation's perspectives on your work	171
To what extent did the Foundation exhibit the following during this grant...Respectful interaction	171
To what extent did the Foundation exhibit the following during this grant...Compassion for those affected by your work	170
Was the funding you received restricted to a specific use?	171
If you have ever requested support from the Foundation to help strengthen your organization, how did you determine what specific support to ask for?	
Based on what the Foundation told your organization to request	171
Based on what your organization believes the Foundation would be willing to fund	171
Based on what your organization needs	171
Based on the results of an assessment or evaluation	171
Not applicable - I have never requested support from the Foundation to strengthen my organization	171
Please rate the extent to which you agree or disagree with the following statements about Diversity, Equity and Inclusion:	
The Foundation has clearly communicated what Diversity, Equity and Inclusion means for its work	163
Overall, the Foundation demonstrates an explicit commitment to Diversity, Equity and Inclusion in its work	166
Overall, most staff I have interacted with at the Foundation embody a strong commitment to Diversity, Equity and Inclusion	166
I believe that the Foundation is committed to combatting racism	166
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	173
Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant?	157
Does the CEO/Executive Director of your organization identify as a person of color?	155
Please select the option that represents how the CEO/Executive Director of your organization describes themselves (gender)	169
Custom Questions	
How did the Foundation assist you in obtaining additional funding from other sources? (please check all that apply)	62
How much impact did the Foundation's efforts have on your ability to obtain additional funding from other sources?	57

About CEP and Contact Information

Mission:

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

Vision:

We seek a world in which pressing social needs are more effectively addressed.

We believe improved performance of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

About the GPR

Since 2003, the Grantee Perception Report® (GPR) has provided funders with comparative, candid feedback based on grantee perceptions. The GPR is the only grantee survey process that provides comparative data, and is based on extensive research and analysis. Hundreds of funders of all types and sizes have commissioned the GPR, and tens of thousands of grantees have provided their perspectives to help funders improve their work. CEP has surveyed grantees in more than 150 countries and in 8 different languages.

The GPR's quantitative and qualitative data helps foundation leaders evaluate and understand their grantees' perceptions of their effectiveness, and how that compares to their philanthropic peers.

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