
GRANTEE PERCEPTION REPORT®

PREPARED FOR

Walter and Elise Haas Fund

January 2018



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EFFECTIVE PHILANTHROPY

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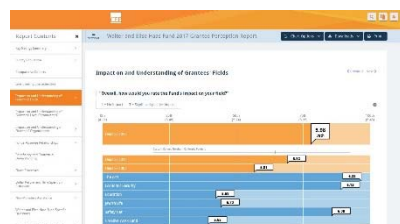
Key Findings and Recommendations from the Walter and Elise Haas Fund 2017 Grantee Perception Report

Prepared by The Center For Effective Philanthropy

In September and October of 2017, The Center for Effective Philanthropy conducted a survey of the Walter and Elise Haas Fund's ("Haas Sr." or "the Fund") grantees, achieving a 63% response rate. The memo below outlines CEP's summary of key strengths, opportunities, and recommendations. Haas Sr.'s grantee perceptions should be interpreted in light of its goals and strategies.

This memo accompanies the comprehensive survey results found in the Fund's interactive online report at <https://cep.surveymaterials.org> and in the downloadable online materials.

The Fund's full report also contains more information about survey analysis and methodology.



Overview

- Walter and Elise Haas Fund grantees continue to provide higher than typical ratings for the Fund's impact on and understanding of their fields and communities.
- The Fund receives higher than typical ratings for the overall quality of its relationships with grantees, with particular strengths related to its responsiveness and fairness. Grantees also provide higher than typical ratings on measures related to the Fund's communications and transparency.
- Ratings for the Fund's impact on grantees' organizations have trended downward since its last survey in 2012, with the Fund now rated similar to the typical funder. As in 2012, grantees also report receiving grants that are smaller than typical in size.
- Haas Sr. grantees report experiencing streamlined processes, spending fewer hours on funder requirements than do grantees at the typical funder.

Strong Impact on Grantees' Fields and Local Communities

- Overall, grantees view Haas Sr. as having a strong, positive impact on the fields in which they work. Grantees' ratings have steadily trended upward over the last two surveys, and the fund is now rated in the top quarter of CEP's dataset for this measure.
 - As in 2012, the Fund receives higher than typical ratings for the extent to which it has advanced the state of knowledge in grantees' fields, and is now rated higher than eighty percent of funders in CEP's dataset. Grantees also continue to rate the Fund higher than typical for the extent to which it has affected public policy in their fields.

- Furthermore, Haas Sr. again receives higher than typical ratings for the extent to which it understands the fields in which grantees work.
- Grantees also continue to view the Fund as having a strong positive impact on their local communities, providing higher than typical ratings for Haas Sr.'s overall impact on and understanding of their communities, as well as for its understanding of the social, cultural, and socioeconomic contexts affecting their work.



“Haas fund is making enormous and significant positive impacts in our field and our community - through training, research, counseling [and] advocacy...”



“The Fund continues to be a leader on many issues affecting the Bay Area community.... They are a leader among other funders supporting these areas and help to develop collaborative strategies to combat these issues.”

Strong Relationships with Grantees

- Haas Sr. continues to receive higher than typical ratings for the overall quality of its relationships with grantees. CEP's research finds that strong funder-grantee relationships – defined by high quality interactions and clear, consistent communications – are the single strongest predictor of grantees' perceived impact on their organizations, and are also a driver of higher perceived impact on grantees' fields and local communities.
 - The Fund receives typical ratings for the extent to which grantees feel comfortable approaching the Fund if a problem arises.
 - But Haas Sr. is rated particularly highly for its responsiveness and the extent to which grantees perceive they are treated fairly, receiving ratings in the top quarter of funders on both of these measures.
- Haas Sr. also continues to receive higher than typical ratings for both the clarity and consistency of its communications with grantees.
- Additionally, the Fund receives higher than typical ratings for the extent to which it is transparent with grantees, placing the Fund in the top quarter of funders and at the top of its custom comparative cohort of Northern California funders for this measure.
 - CEP's research finds that perceptions of funder transparency are a key predictor of strong relationships.
- Compared to previous years, Haas Sr. program officers are more proactively initiating contact with grantees. Twenty-one percent of grantees indicate that their program officer initiates contact most frequently in their relationship, a notable increase from the nine percent of grantees making this indication in 2012.
- The proportion of grantees that report receiving a site visit from the Fund during the course of their grant, however, has significantly declined since 2012, with the Fund now falling lower than the typical funder for this measure.
 - Grantees that report receiving a site visit from Haas Sr. rate the Fund significantly higher for its impact on their communities, impact on their organizations, and the overall quality its relationships with grantees.



"The biggest strength of the fund by far is the staff. Our program officer is essential in our ability to successfully obtain funding from the Haas fund. She has an authentic knowledge of our org, our community and the field at large and offers us important insights."



"Refreshingly friendly, accommodating and easy to communicate with. Quick, accurate and honest responses. Always helpful and supportive in any situation. The Fund feels like a true "angel in our corner" always there to give support, advice, suggestions or help in any way."

Impact on and Understanding of Grantee Organizations

- While rated higher than typical for its impact on grantees' organizations in 2012, these ratings have since trended downward, with the Fund now rated similar to the typical funder.
 - Similarly, although still higher than typical, grantees provide significantly lower ratings than in 2012 for the Fund's impact on grantees' ability to sustain the work funded by the grant.
- Haas Sr. grantees continue to provide higher than typical ratings, however, for the Fund's understanding of their organizations' goals and strategies.
- Grantmaking characteristics can be an important component of impact on organizations. CEP's broader research indicates that grants that are multi-year, substantive in size (often six figures or more), and in the form of general operating support tend to be associated with the highest ratings of impact on organizations.
 - The Fund currently provides a higher proportion of general operating support as compared to the typical funder, doing so for roughly a third of its grantees.
 - And even with this high proportion, nine grantees provide suggestions that specifically request consideration for general operating support.
 - Those that do receive general support frequently champion its impact, stating, for example, that it provides them with "the flexibility to use the funding where it is needed most."
 - However, when considering grant length, the majority of Haas Sr. grantees, 58 percent, continue to report receiving single-year grants.
 - Further, four grantees provide suggestions specifically relating to the requirement of having at least one "sit out" year from funding, citing the challenges that it poses for their organizations and expressing desire to change this model.
 - Haas Sr. provides grants that are, on average, smaller than those provided by both the typical funder and the majority of funders in the Fund's custom cohort of Northern California funders.
 - As a result, Haas Sr. grants, on average, cover a lower than typical proportion of grantees' operating budgets—just two percent.
 - Additionally, when asked to rate the extent to which various aspects of their grant help them achieve their expected results, grantees agree least strongly that the size of the grant is appropriate.
 - Haas Sr. grantees that report receiving grants that are six-figures or larger provide significantly higher ratings for the Fund's impact on their organizations.

- And in grantees' open-ended suggestions, eleven grantees request larger grants, the second most common suggestion in the report.



"Since the amount of local, state and federal funding continues to decrease, increasing our annual funding would help to defray the budget shortfalls."



"The 'sit-out' year is hard for our organizations. Multi-year grants would be preferred."

Streamlined Processes

- Haas Sr. grantees report spending fewer hours than typical on funder requirements, with the selection, reporting, and evaluation processes requiring a lower than typical amount of total hours to complete.
 - Despite this low time commitment, grantees rate the selection process to be a helpful one, placing it in line with the typical funder for overall helpfulness. Grantees also report a typical level of involvement by Fund staff during development of the proposal.
- Haas Sr. grantees report experiencing less pressure than do grantees of the typical funder to modify their organizational priorities in order to create a grant proposal that is likely to receive funding.
- Grantees also report receiving funding in a particularly timely manner, with 80 percent receiving their funding in three months or less – substantially more than the 62 percent of grantees that fall into this category at the typical funder.
- A lower than typical proportion of grantees – 48 percent – report exchanging ideas with the Fund during the application or grant period regarding how to assess the results of the funded work. This proportion has significantly declined from the 69 percent that reported having these discussions in 2012.
 - Grantees who have such discussions rate Haas Sr. significantly higher for its understanding of the contextual factors affecting their work, its awareness of the challenges facing their organizations, the clarity of its communications, and its overall transparency.
- Similarly, a lower than typical proportion of grantees report having had a substantive discussion with the Fund about the submitted report(s) as part of the reporting process.
 - Those that indicate having had these discussions provide significantly higher ratings for the extent to which the Fund is advancing the state of knowledge in their field, the overall quality of their relationships with the Fund, and the extent to which the reporting process is straightforward and adaptable to fit their circumstances.



"The Fund's process is easy to use and was made much easier by the support and facilitation we received from our program officer."



"The formal process itself is very straightforward, but is certainly augmented by the terrific program officers we have been privileged to have. There has always been a very open and honest chain of communication between parties, and we find the 'personal touch' to be priceless."

Response to 2016 Elections

- When asked about the impact of the changing U.S. political landscape on grantees' organizations' ability to carry out their intended missions, 83 percent of Haas Sr. grantees report that they anticipate it will have a generally negative impact.
- Of the grantees that report modifying or making plans to modify their work as a result of the changing U.S. political landscape, 77 percent report that these plans include increased emphasis on policy work, and 84 percent report that they include increased emphasis on community engagement efforts.
- More than half of grantees report that they do not currently but would like to receive communications from the Fund relating to the changing political landscape. Sixty-two percent report that they would like public communications from the Fund, and 63 percent would like communication from their program officer about the Fund's work.

CEP Recommendations

- Given the Fund's strong ratings from grantees regarding its impact on and understanding of grantees' fields and communities, consider what aspects of Haas Sr.'s practices can continue to reinforce these strengths.
- Maintain strong responsiveness and proactive outreach to grantees, and continue to support staff in these efforts.
- Discuss whether the observed decrease in grantee site visits is an intentional aspect of Haas Sr.'s strategy, and if not, explore whether and how to incorporate more site visits during engagements.
- Taking Haas Sr.'s resources and strategy into account, explore the possibility of providing more multi-year and/or larger grants to grantees whose organizational goals are best aligned with those of the Fund.
- Continue to build upon already helpful discussions with grantees during the reporting and evaluation processes, with the goal of incorporating more opportunities for helpful discussion while maintaining the processes' streamlined nature.
- Consider whether providing communications regarding the changing political landscape would be relevant and helpful to grantees, and whether such communications would serve the Fund's goals and strategy.

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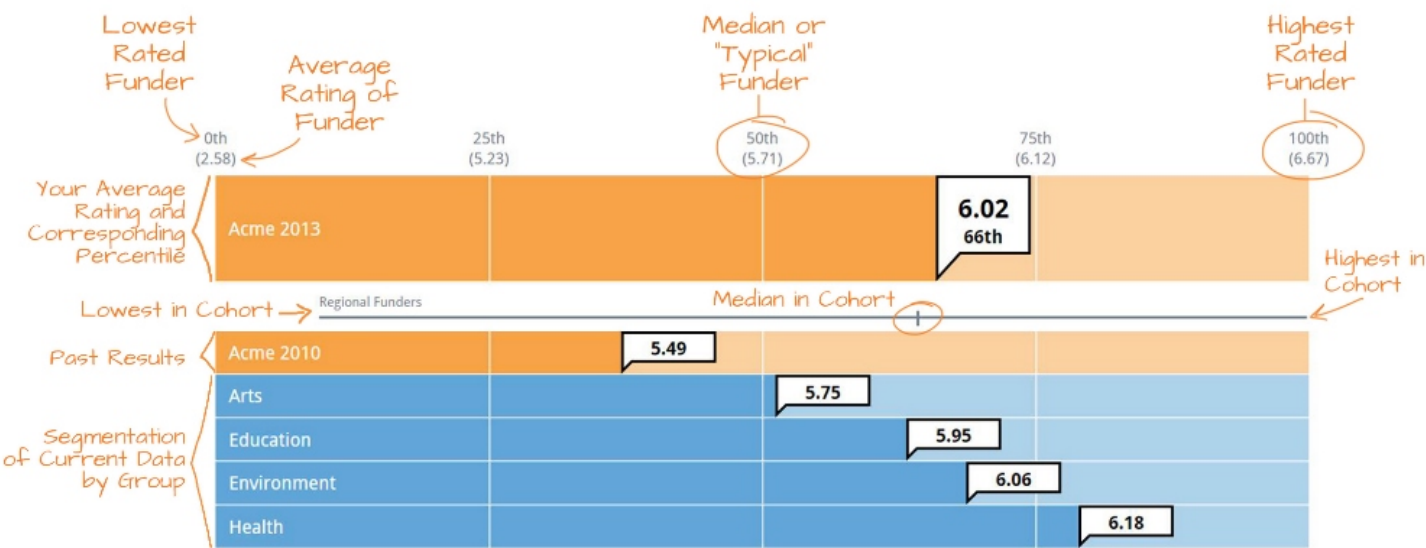
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Interpreting Your Charts

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.



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.



Summary of Differences by Subgroup

Grant Program: Safety Net grantees spend significantly fewer hours than other grantees on Fund processes.

New vs. Returning: New grantees provide significantly higher ratings than returning grantees for the Fund's understanding of their organizations, its impact on their ability to continue the funded work, and its awareness of the challenges facing their organizations. They also report receiving significantly longer grants.

Grant Amount: Grantees receiving grants of \$100,000 or more provide significantly more positive ratings than grantees receiving smaller grants on most measures in the report.

Long-Term-Commitment Trusted
 Nurturing Sustaining Engaging Needed
 Good Necessary Forward-Thinking
 Fast Active Invested Significant
 Lifeline Bay-Area Limited
 Immigrant Intentional Flexible
 General Helpful-but-narrow Visionary
 Committed Proactive Engaged Historical
 Dynamic Inexplicable Loyal Compassion
 Enigma Important Constant Sensitive Arts Basic-Needs Involved
 Effective Generous
 Blessing Innovative Partner Compassionate Connected
 Respected Supportive Well-Known
 Stalwart
 Stable Foundation Transformative Beacon Excellent Vital Large
 Kind Facilitative Small Reliable
 Helpful Collaborative Charitable Impactful
 Evolving Accessible Catalytic Wonderful
 Progressive Support Responsive
 Strategic Leadership Relevant Steadfast Art Caring
 Venerable Far-Reaching Provides Benevolent Communicative
 Phenomenal Hands-Off Inclusive Consistent Supporter
 Systemic Art-Education Professional
 Awesome Influential Critical Focused
 Legacy Invaluable Myopic Opportunity

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Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Haas Sr 2017	September and October 2017	353	222	63%
Haas Sr 2012	May and June 2012	272	186	68%
Haas Sr 2007	February and March 2007	243	193	79%

Survey Year	Year of Active Grants
Haas Sr 2017	2016
Haas Sr 2012	2011
Haas Sr 2007	2006

Throughout this report, Walter and Elise Haas Fund'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 250 funders. The full list of participating funders can be found at <http://cep.org/assessments/grantee-and-applicant-perception-reports/>.

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 Haas Sr's overall ratings, this report shows ratings segmented by Grant Program. The online version of this report also shows ratings segmented by New vs. Returning and Grant Amount.

Grant Program	Number of Responses
The Arts	53
Economic Security	32
Education	29
Jewish Life	25
Safety Net	25
Creative Work Fund	24

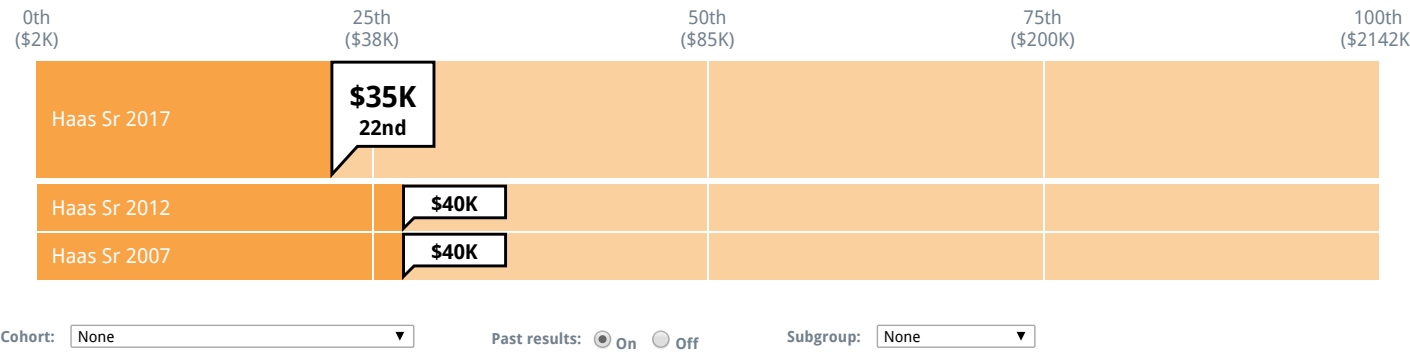
New vs. Returning	Number of Responses
New	133
Returning	89

Grant Amount	Number of Responses
\$5,000 or less	40
\$5,001-\$25,000	65
\$25,001-\$50,000	78
\$50,001-\$100,000	23
More than \$100,000	16

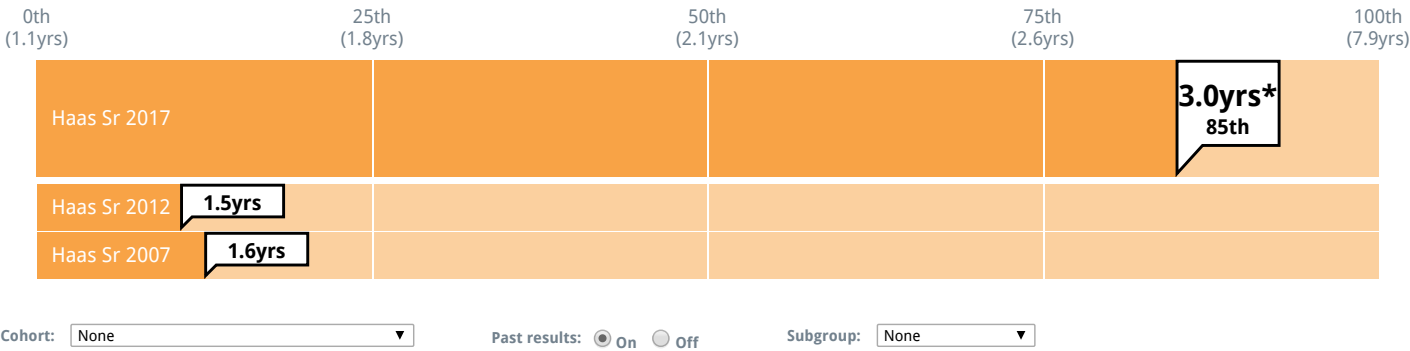
Grantmaking Characteristics

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.

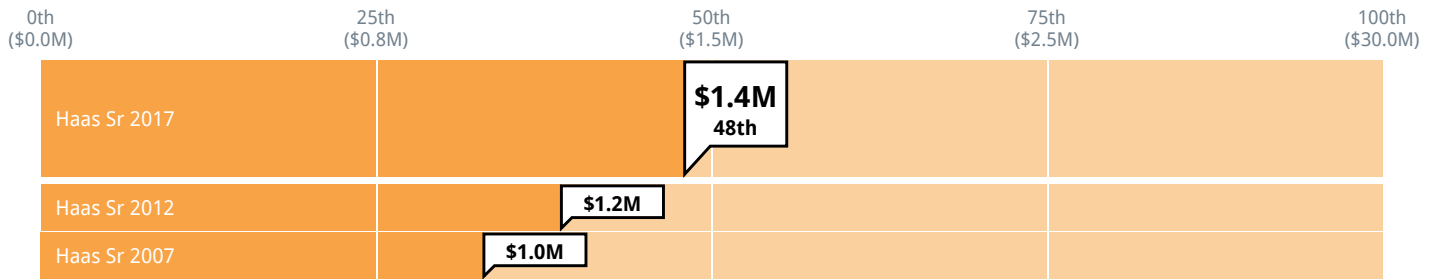
Median Grant Size



Average Grant Length



Median Organizational Budget



Cohort: None

Past results: ☒ On ☐ Off

Subgroup: None

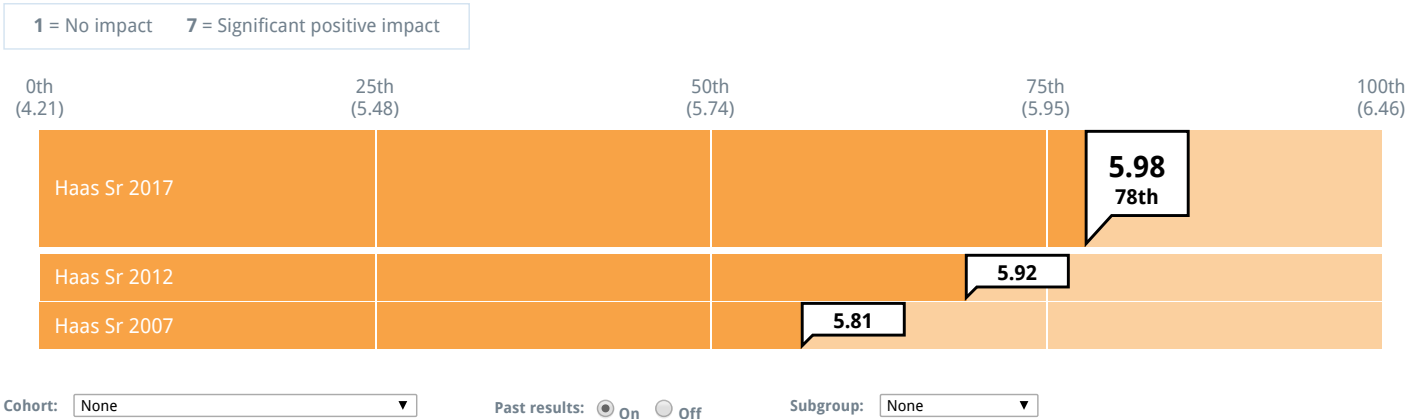
Type of Support	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Percent of grantees receiving general operating/core support	32%	30%	14%	21%
Percent of grantees receiving program/project support	62%	66%	80%	65%
Percent of grantees receiving other types of support	6%	4%	6%	14%

Grant History	Haas Sr 2017	Haas Sr 2012	Average Funder
Percentage of first-time grants	17%	19%	29%

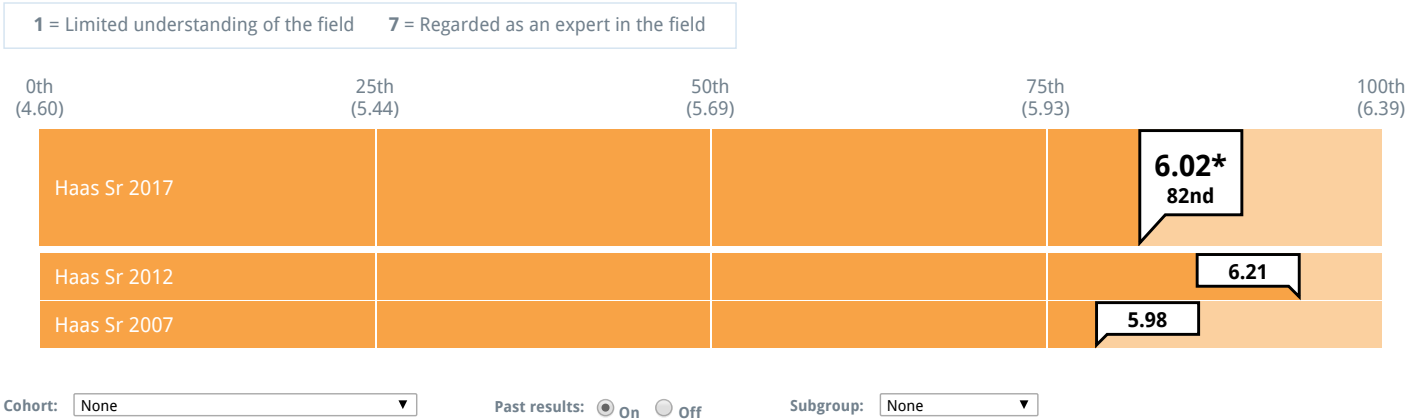
Program Staff Load	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Dollars awarded per program staff full-time employee	\$1.2M	\$3.2M	\$1.3M	\$2.6M
Applications per program full-time employee	39	55	35	29
Active grants per program full-time employee	38	99	29	33

Impact on and Understanding of Grantees' Fields

“Overall, how would you rate the Fund’s impact on your field?”



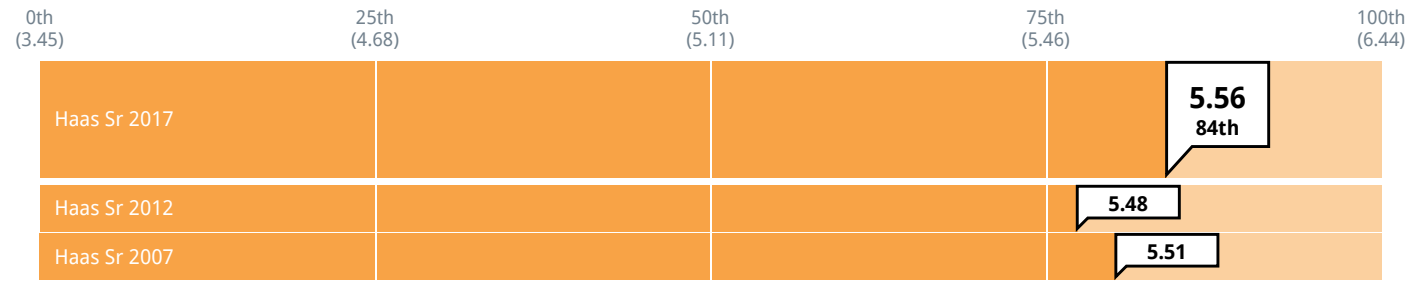
“How well does the Fund understand the field in which you work?”



Advancing Knowledge and Public Policy

“To what extent has the Fund advanced the state of knowledge in your field?”

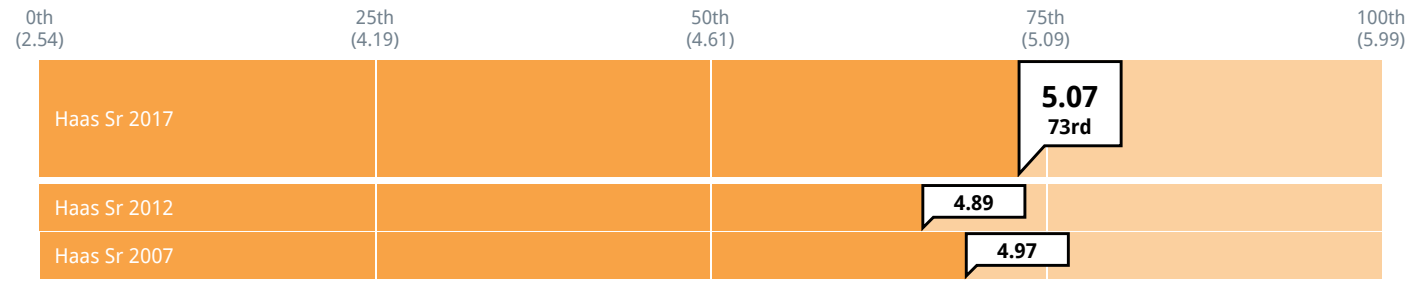
1 = Not at all 7 = Leads the field to new thinking and practice



Cohort: None Past results: ☒ On ☐ Off Subgroup: None

“To what extent has the Fund affected public policy in your field?”

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

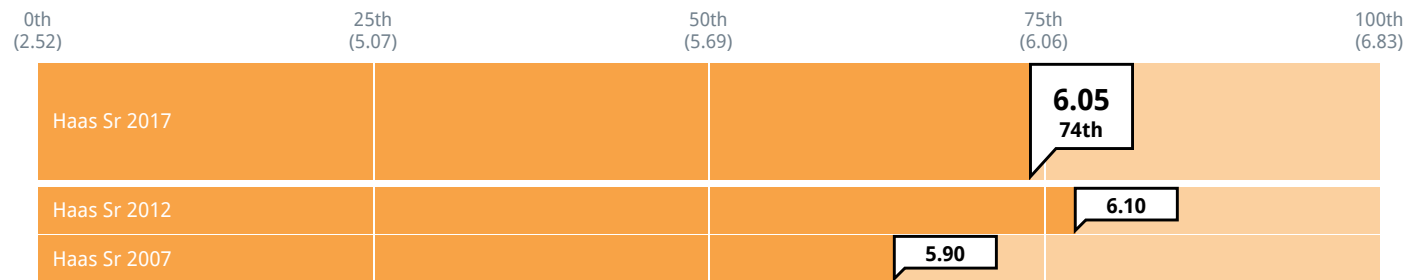


Cohort: None Past results: ☒ On ☐ Off Subgroup: None

Impact on and Understanding of Grantees' Local Communities

“Overall, how would you rate the Fund’s impact on your local community?”

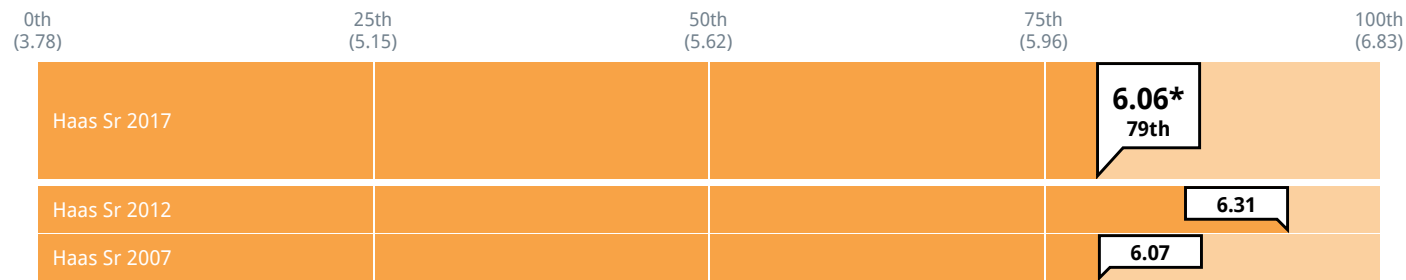
1 = No impact 7 = Significant positive impact



Cohort: None Past results: ☒ On ☐ Off Subgroup: None

“How well does the Fund understand the local community in which you work?”

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

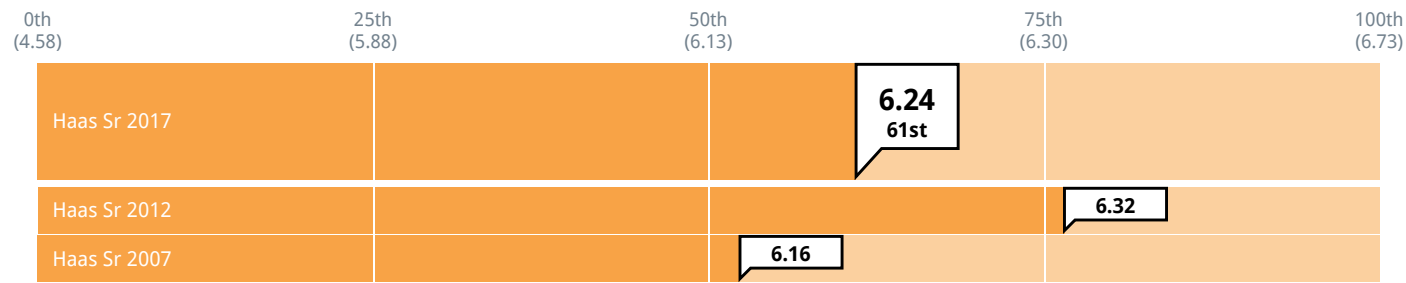


Cohort: None Past results: ☒ On ☐ Off Subgroup: None

Impact on and Understanding of Grantees' Organizations

“Overall, how would you rate the Fund’s impact on your organization?”

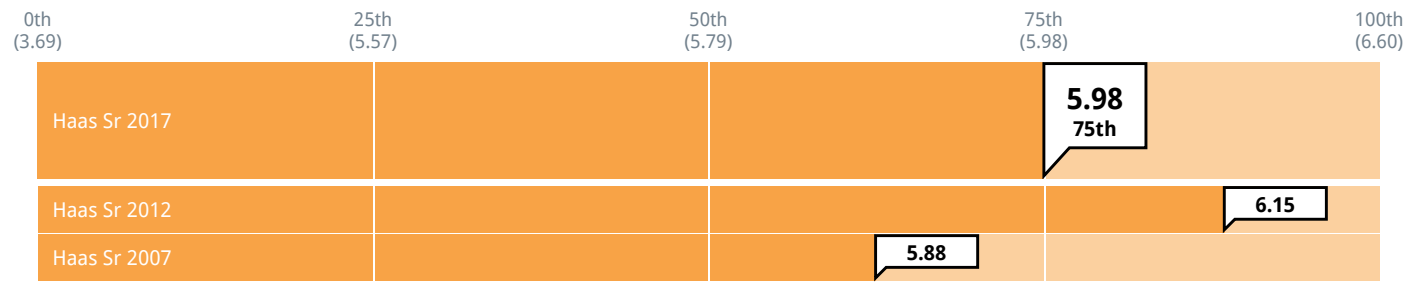
1 = No impact 7 = Significant positive impact



Cohort: None Past results: ☒ On ☐ Off Subgroup: None

“How well does the Fund understand your organization’s strategy and goals?”

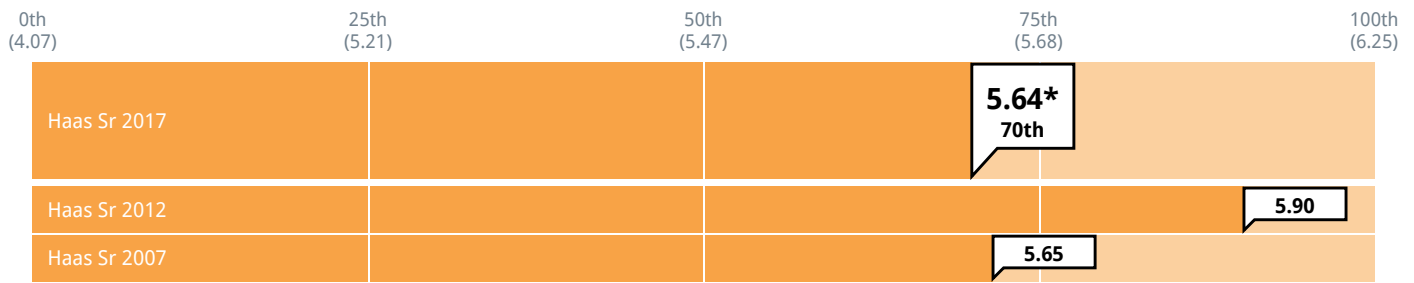
1 = Limited understanding 7 = Thorough understanding



Cohort: None Past results: ☒ On ☐ Off Subgroup: None

"How much, if at all, did the Fund improve your ability to sustain the work funded by this grant in the future?"

1 = Did not improve ability 7 = Substantially improved ability



Cohort: None

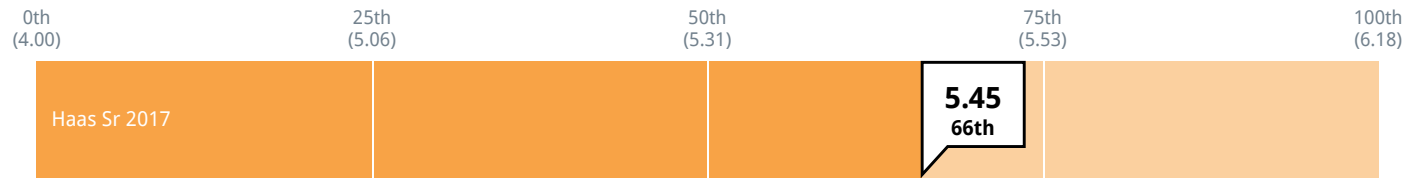
Past results: ☒ On ☐ Off

Subgroup: None

Grantee Challenges

"How aware is the Fund of the challenges that your organization is facing?"

1 = Not at all aware 7 = Extremely aware



Cohort: None

Past results: ☒ On ☐ Off

Subgroup: None

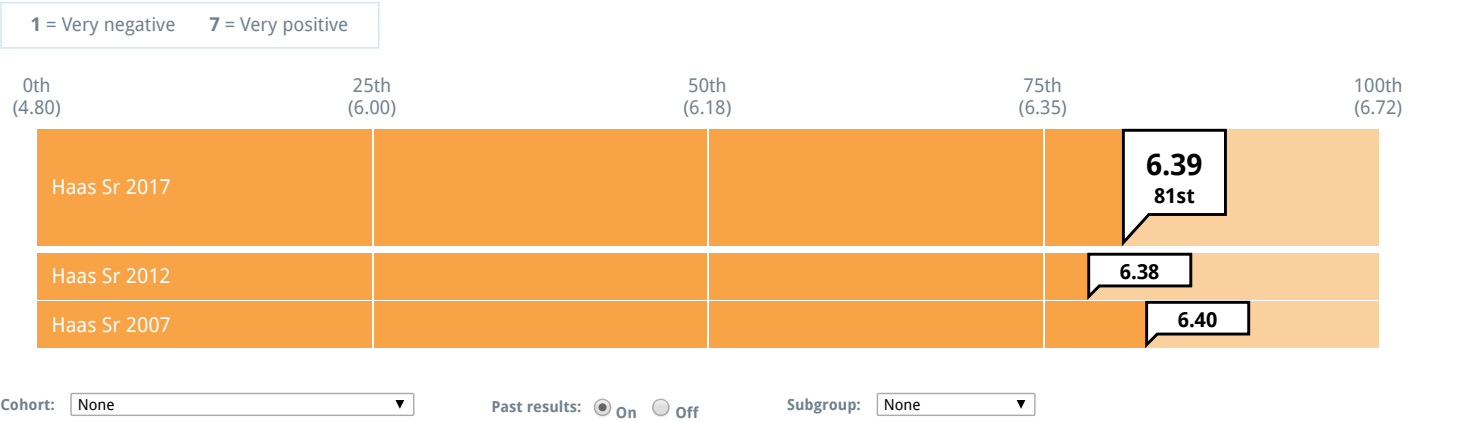
Funder-Grantee Relationships

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 the Fund
- 2. Comfort approaching the Fund if a problem arises
- 3. Responsiveness of Fund staff
- 4. Clarity of communication of the Fund’s goals and strategy
- 5. Consistency of information provided by different communications

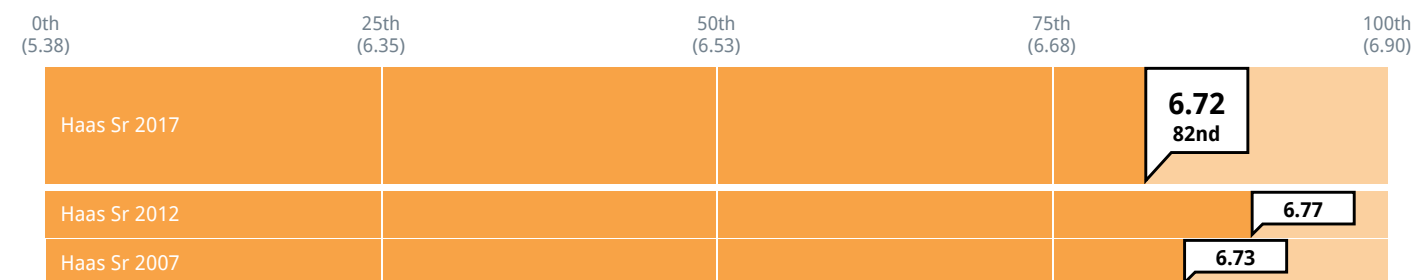
Funder-Grantee Relationships Summary Measure



Quality of Interactions

“Overall, how fairly did the Fund treat you?”

1 = Not at all fairly 7 = Extremely fairly



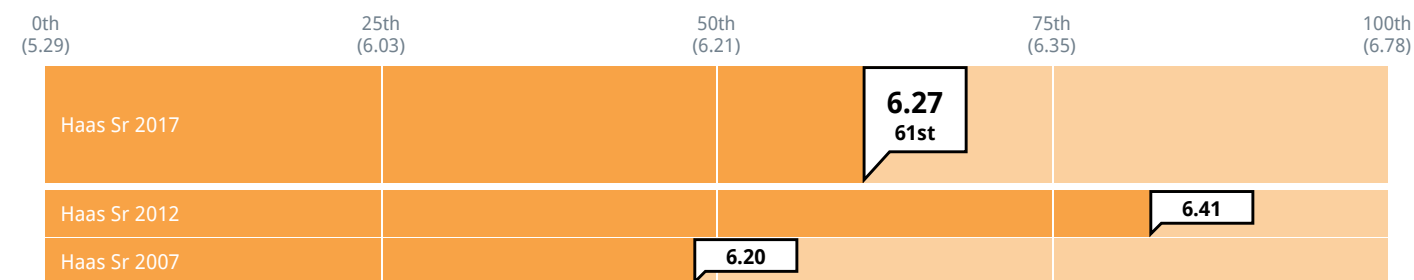
Cohort: None

Past results: ☒ On ☐ Off

Subgroup: None

“How comfortable do you feel approaching the Fund if a problem arises?”

1 = Not at all comfortable 7 = Extremely comfortable



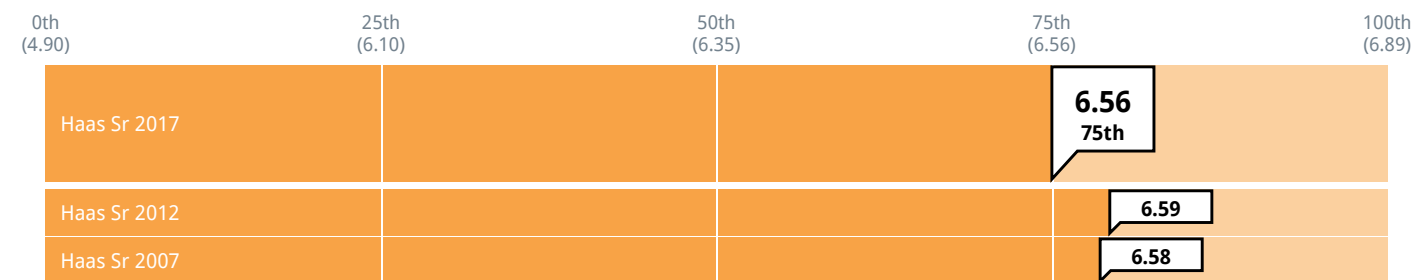
Cohort: None

Past results: ☒ On ☐ Off

Subgroup: None

“Overall, how responsive was the Fund staff?”

1 = Not at all responsive 7 = Extremely responsive



Cohort: None

Past results: ☒ On ☐ Off

Subgroup: None

Interaction Patterns

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

Frequency of Contact with Program Officer	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Weekly or more often	3%	2%	1%	3%
A few times a month	5%	5%	9%	11%
Monthly	5%	9%	11%	15%
Once every few months	56%	66%	68%	53%
Yearly or less often	31%	17%	11%	18%

Frequency of Contact with Program Officer (By Subgroup)

Weekly or more often
A few times a month
Monthly
Once every few months
Yearly or less often

"Who most frequently initiated the contact you had with your program officer?"

Initiation of Contact with Program Officer	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Program Officer	21%	9%	5%	15%
Both of equal frequency	42%	46%	52%	50%
Grantee	37%	45%	43%	35%

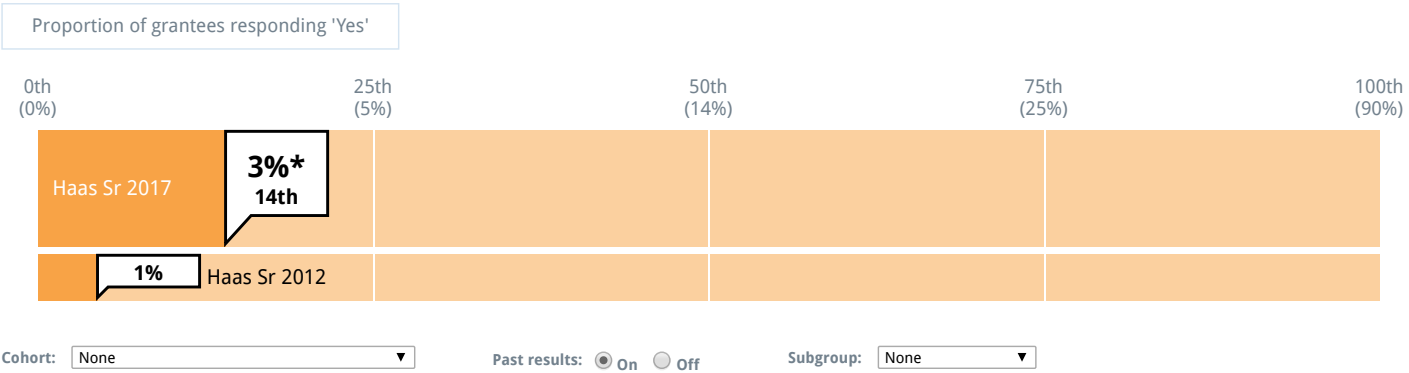
Initiation of Contact with Program Officer (By Subgroup)

Program Officer
Both of equal frequency
Grantee

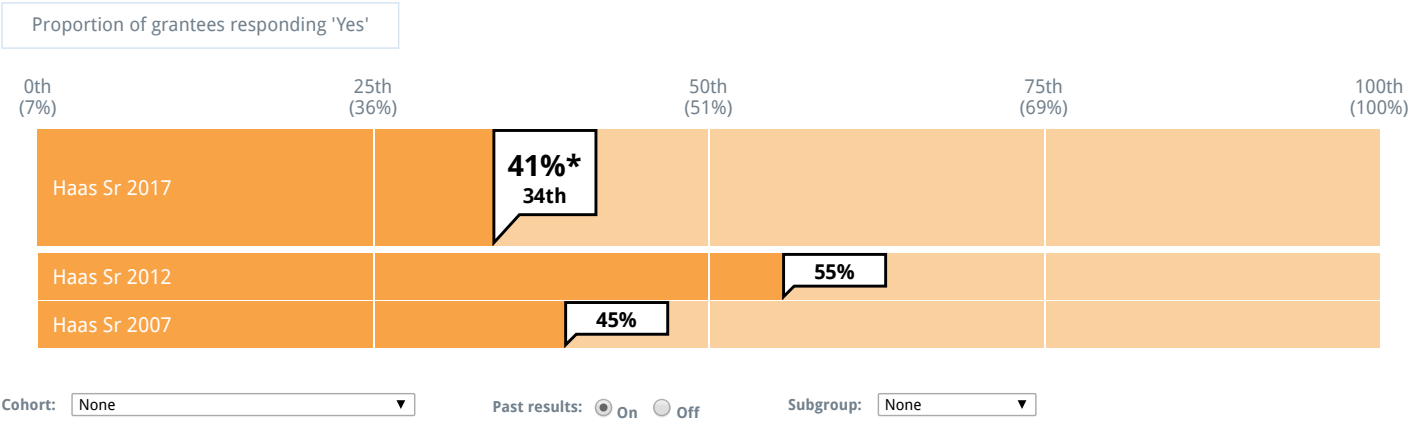
Behind the numbers: Grantees that did not initiate contact most frequently rate the Fund significantly more positively on several measures, including the Fund's impact on their local communities, the overall quality of their relationships with the Fund, and the extent to which the Fund is transparent with grantees.

Contact Change and Site Visits

“Has your main contact at the Fund changed in the past six months?”



“Did the Fund conduct a site visit during the course of this grant?”

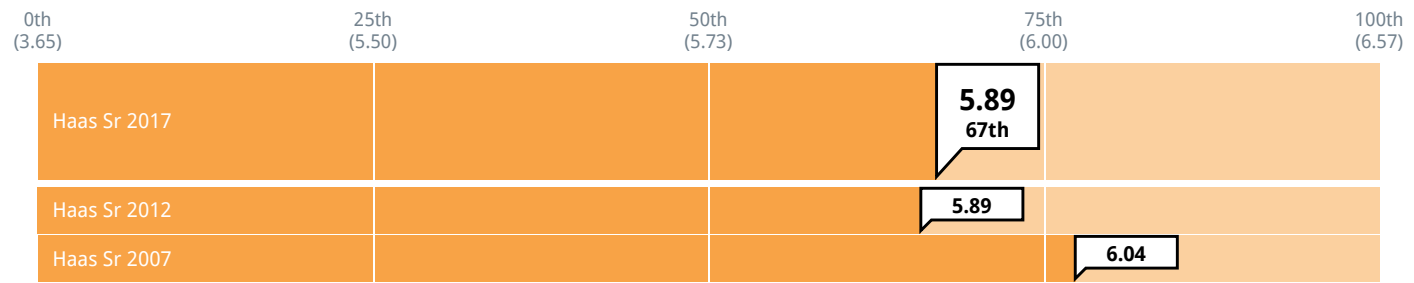


Behind the numbers: Grantees that report receiving a site visit during the course of their grant a rate the Fund significantly more positively for its impact on their communities, impact on their organizations, and the overall quality of its relationships with grantees.

Fund Communication

“How clearly has the Fund communicated its goals and strategy to you?”

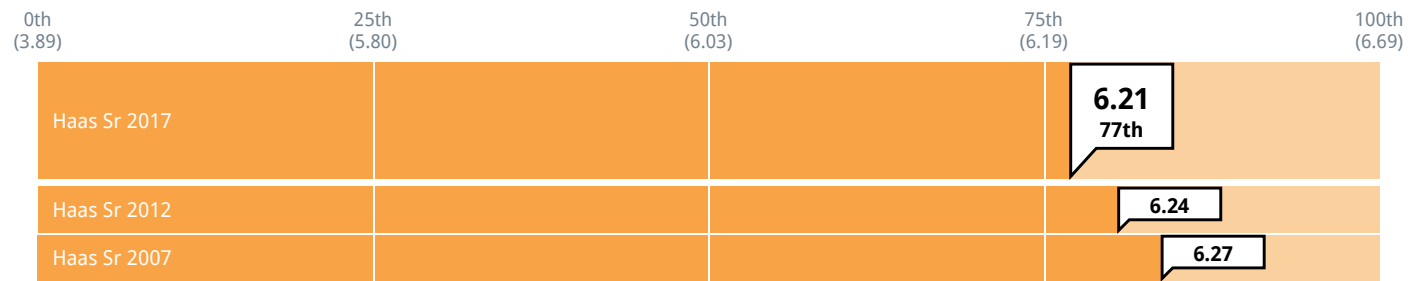
1 = Not at all clearly 7 = Extremely clearly



Cohort: None Past results: ☒ On ☐ Off Subgroup: None

“How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Fund?”

1 = Not at all consistent 7 = Completely consistent



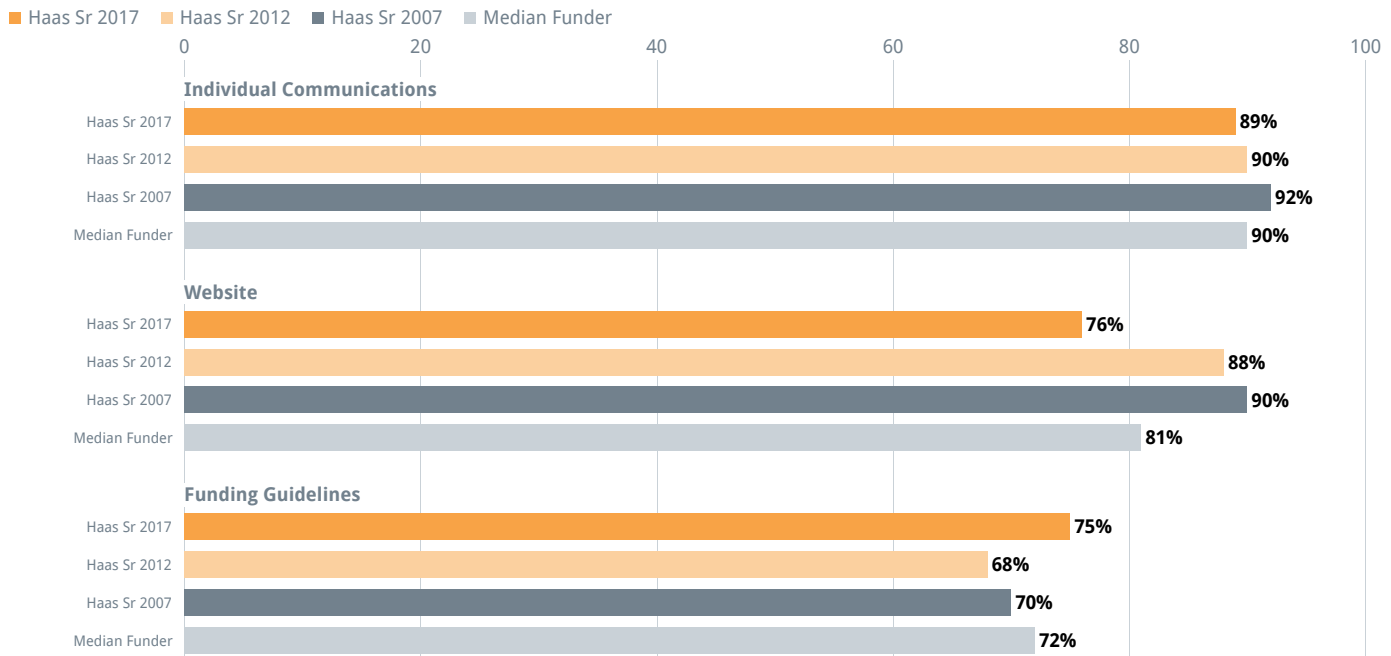
Cohort: None Past results: ☒ On ☐ Off Subgroup: None

Communication Resources

Grantees were asked whether they used each of the following communications resources from Haas Sr and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

"Please indicate whether you used any of the following resources, and if so how helpful you found each."

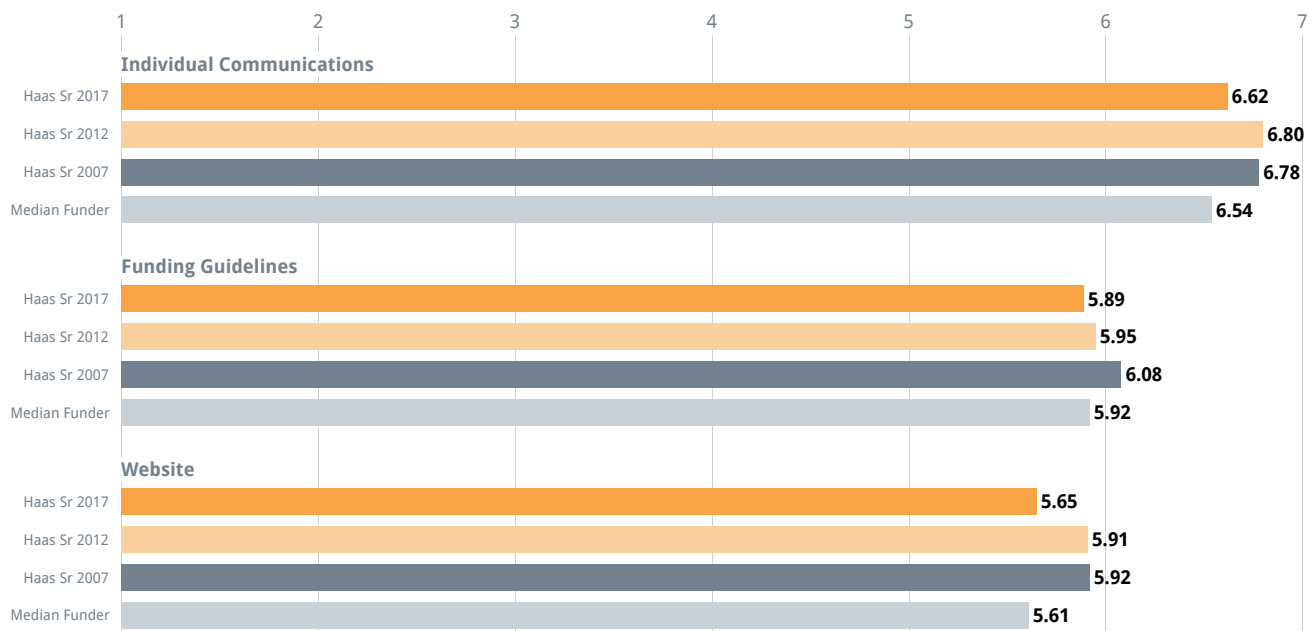
Usage of Communication Resources - Overall



Helpfulness of Communication Resources - Overall

1 = Not at all helpful 7 = Extremely helpful

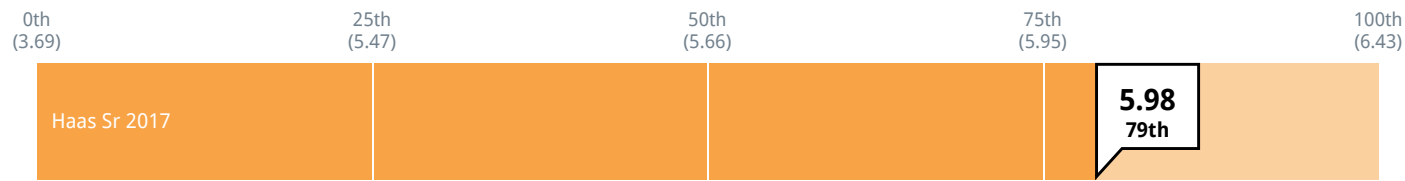
■ Haas Sr 2017 ■ Haas Sr 2012 ■ Haas Sr 2007 ■ Median Funder



Funder Transparency

"Overall how transparent is the Fund with your organization?"

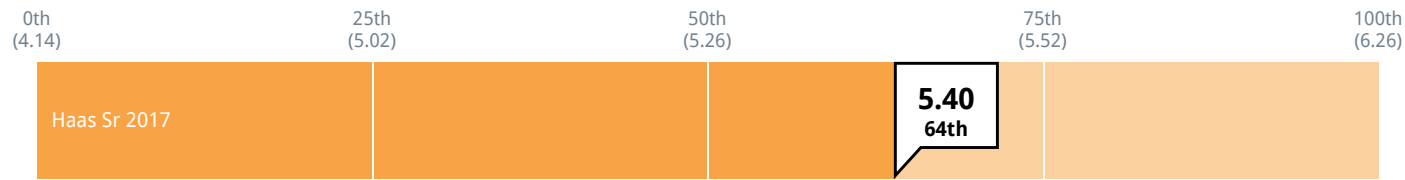
1 = Not at all transparent 7 = Extremely transparent



Cohort: None Past results: ☒ On ☐ Off Subgroup: None

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

1 = Not at all 7 = To a great extent

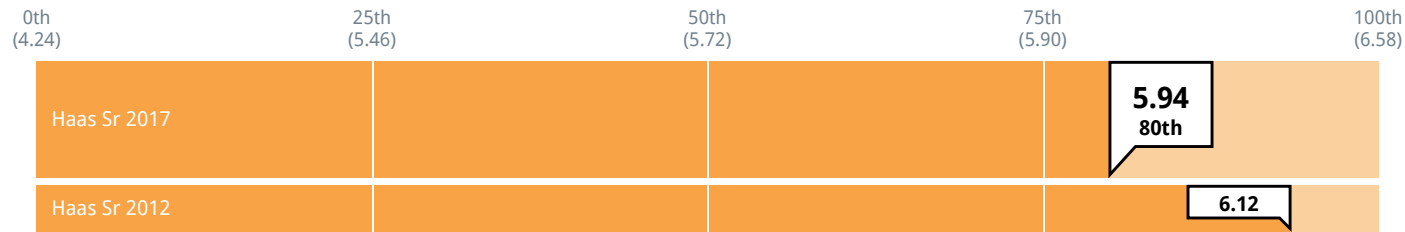


Cohort: None Past results: ☒ On ☐ Off Subgroup: None

Beneficiary and Contextual Understanding

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

1 = Limited understanding 7 = Thorough understanding



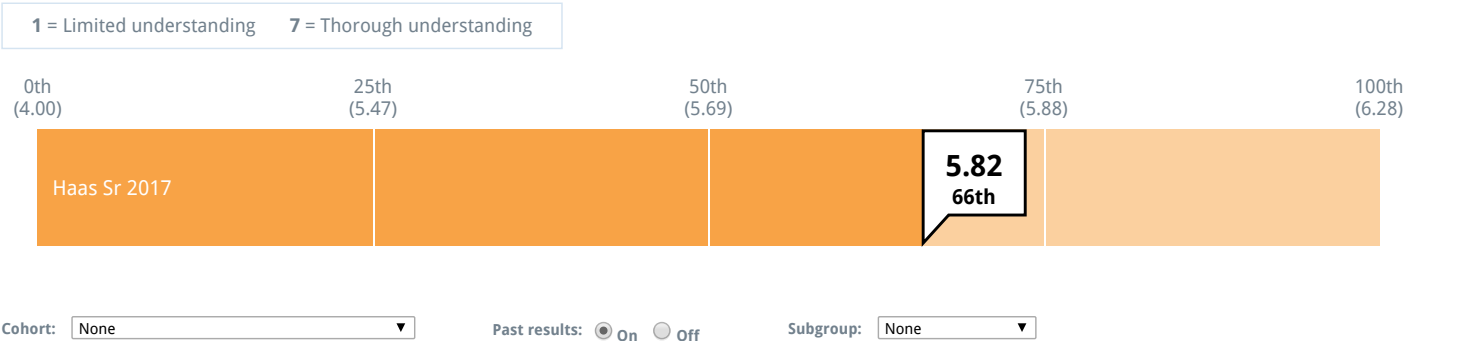
Cohort: None

Past results: ☒ On ☐ Off

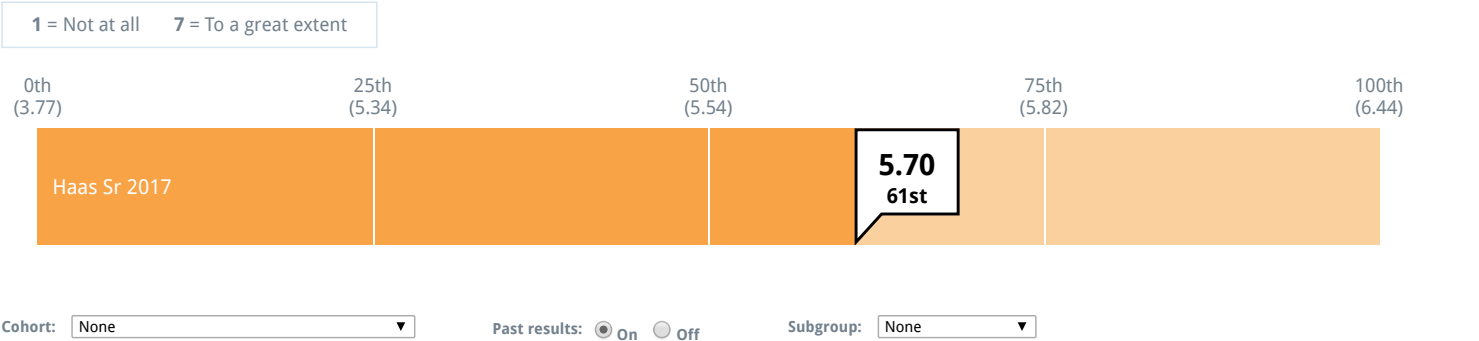
Subgroup: None

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, or participants.

"How well does the Fund understand your intended beneficiaries' needs?"



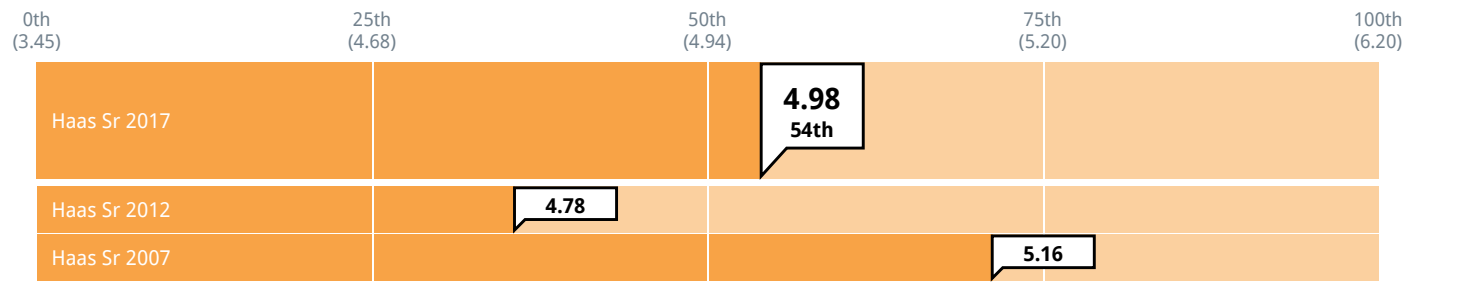
"To what extent do the Fund's funding priorities reflect a deep understanding of your intended beneficiaries' needs?"



Grant Processes

“How helpful was participating in the Fund’s selection process in strengthening the organization/program funded by the grant?”

1 = Not at all helpful 7 = Extremely helpful



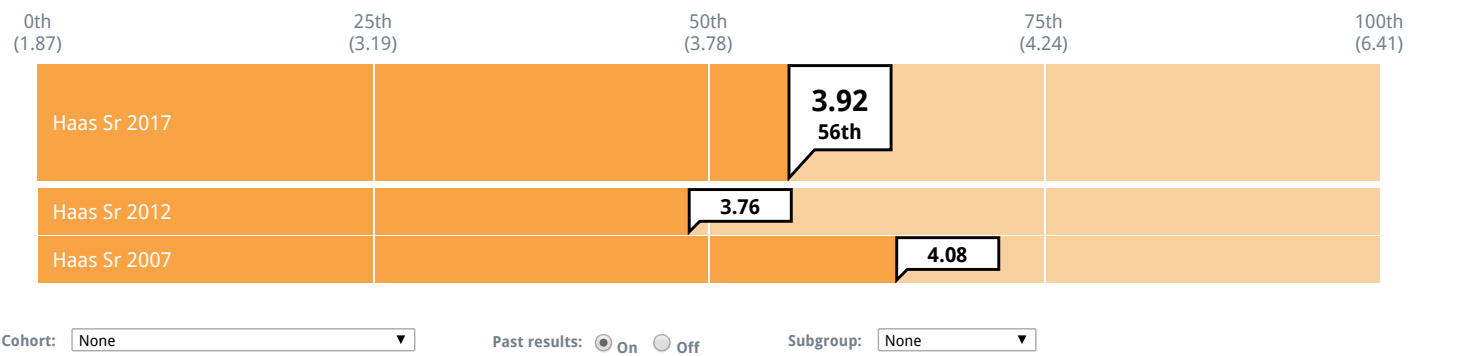
Cohort: None Past results: ☒ On ☐ Off Subgroup: None

Selection Process

Did you submit a proposal for this grant?	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Submitted a Proposal	86%	96%	94%	95%
Did Not Submit a Proposal	14%	4%	6%	5%

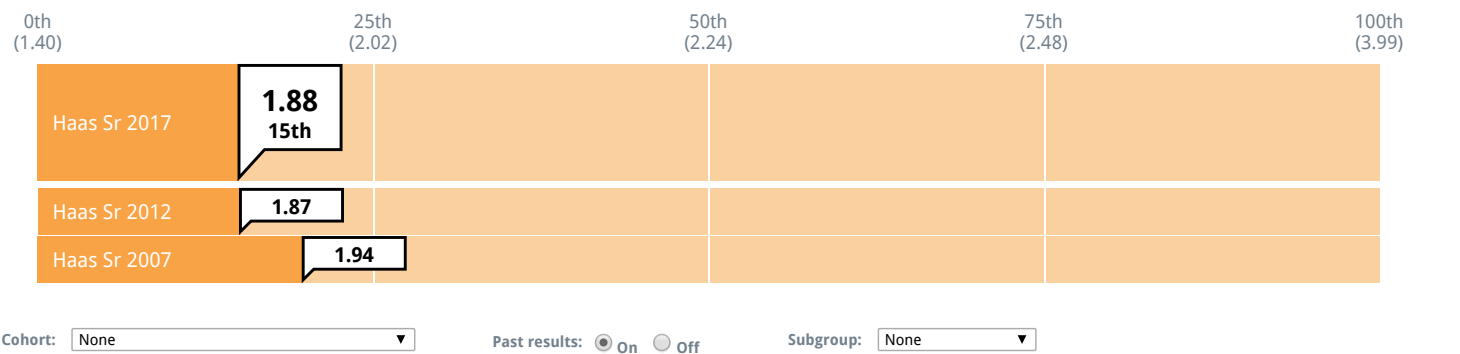
“How involved was the Fund staff in the development of your proposal?”

1 = No involvement 7 = Substantial involvement



“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



Time Between Submission and Clear Commitment

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

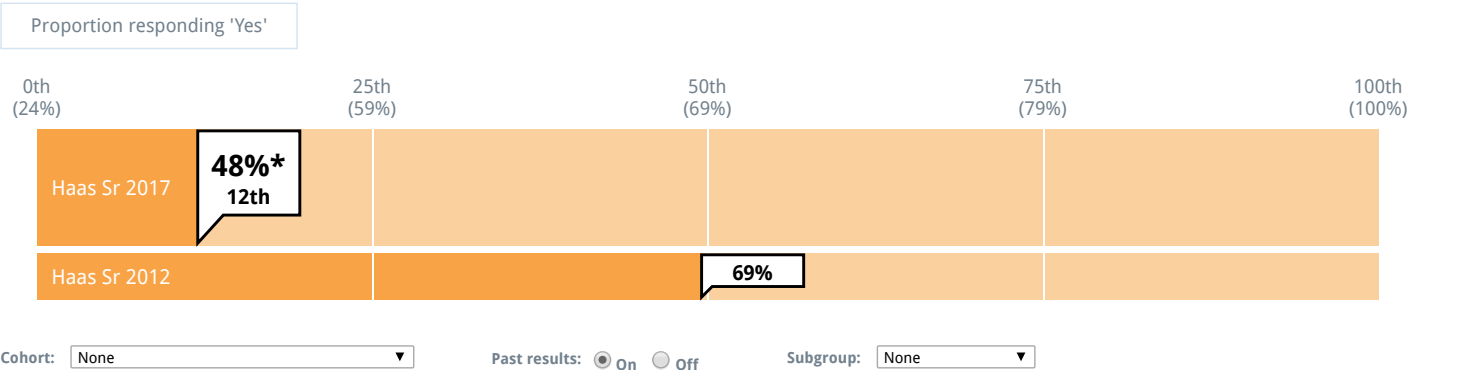
Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Less than 1 month	16%	7%	7%	6%
1 - 3 months	64%	57%	58%	56%
4 - 6 months	18%	30%	26%	29%
7 - 9 months	1%	5%	8%	5%
10 - 12 months	1%	0%	1%	2%
More than 12 months	0%	1%	1%	2%

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)

Less than 1 month
1 - 3 months
4 - 6 months
7 - 9 months
10 - 12 months
More than 12 months

Reporting and Evaluation Process

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



Behind the numbers: Grantees who have such discussions rate Haas Sr. significantly higher for its understanding of the contextual factors affecting their work, its awareness of the challenges facing their organizations, the clarity of its communications, and its overall transparency.

The following questions were recently added to the grantee survey and depict comparative data from fewer than one-third of funders in the dataset.

Participation in Reporting and/or Evaluation Processes	Haas Sr 2017	Average Funder
Participated in a reporting process only	72%	56%
Participated in an evaluation process only	0%	1%
Participated in both a reporting and an evaluation process	15%	31%
Participated in neither a reporting nor an evaluation process	13%	12%

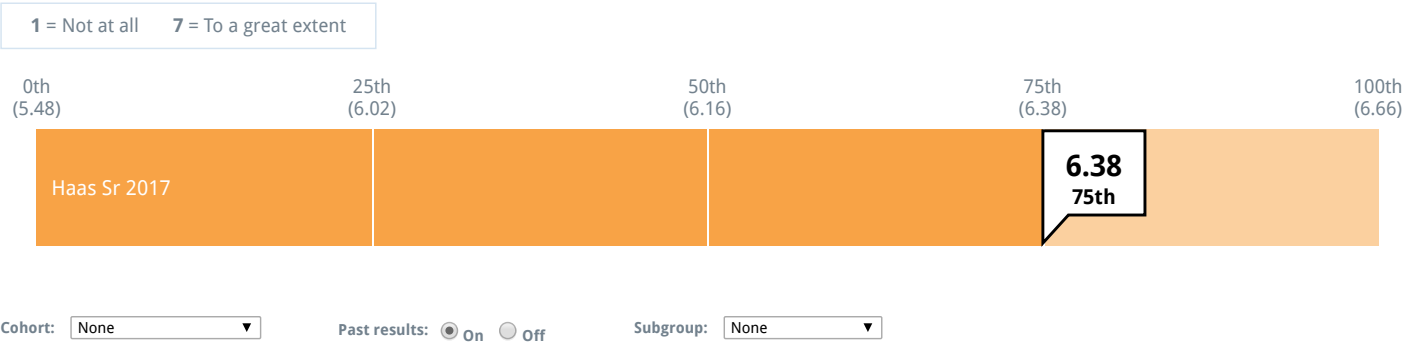
Participation in Reporting and/or Evaluation Processes (By Subgroup)

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

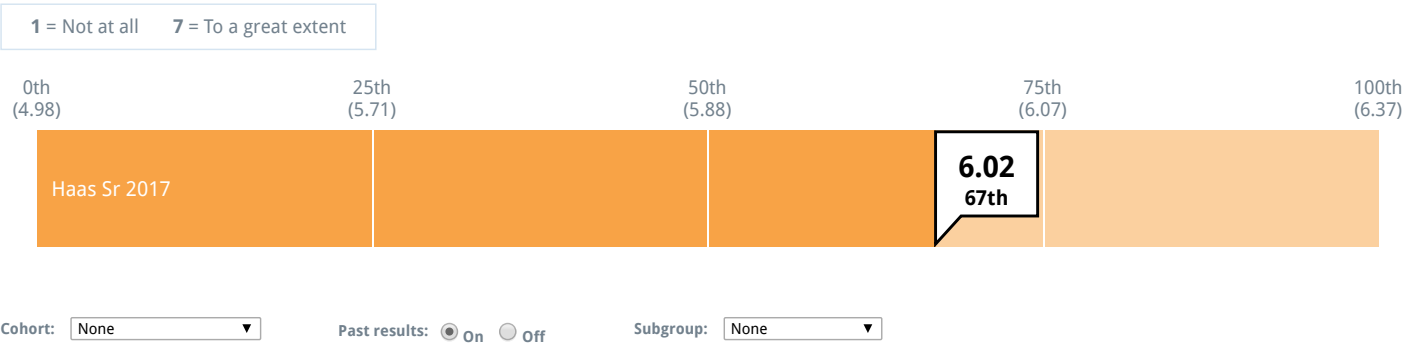
Reporting Process

The following questions were recently added to the grantee survey and depict comparative data from fewer than one-third of funders in the dataset.

"To what extent was the Fund's reporting process straightforward?"

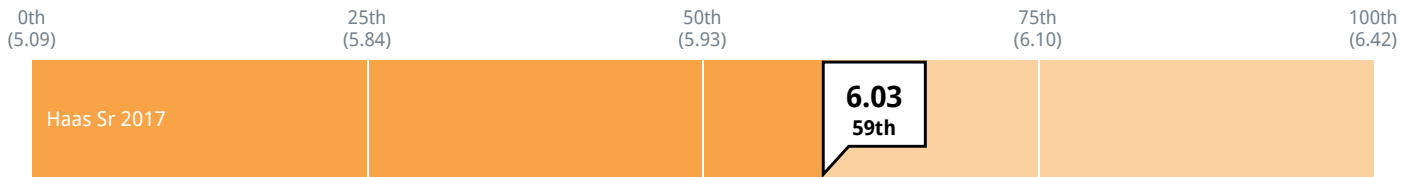


"To what extent was the Fund's reporting process adaptable, if necessary, to fit your circumstances?"



"To what extent was the Fund's reporting process aligned appropriately to the timing of your work?"

1 = Not at all 7 = To a great extent



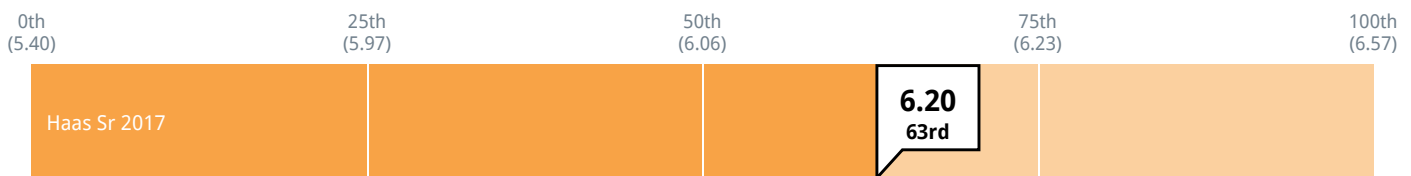
Cohort:

Past results: ☒ On ☐ Off

Subgroup:

"To what extent was the Fund'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



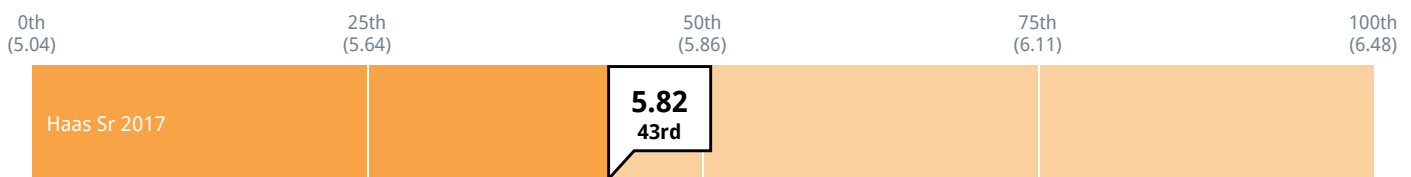
Cohort:

Past results: ☒ On ☐ Off

Subgroup:

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

1 = Not at all 7 = To a great extent



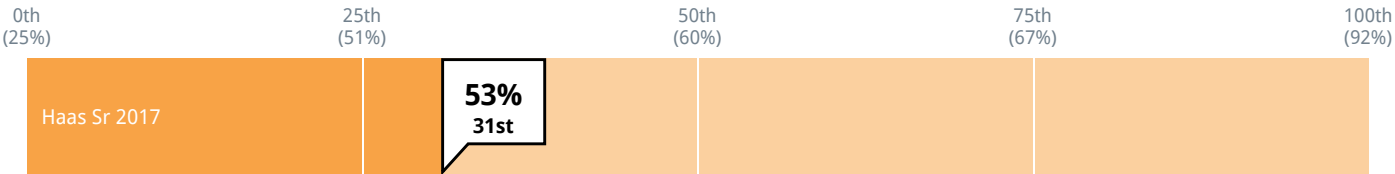
Cohort:

Past results: ☒ On ☐ Off

Subgroup:

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

Proportion of grantees responding 'Yes'



Cohort: None ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

Behind the numbers: Grantees that report having had these discussions provide significantly higher ratings for the extent to which the Fund is advancing the state of knowledge in their field, the overall quality of their relationships with the Fund, and the extent to which the reporting process is straightforward and adaptable to fit their circumstances.

Evaluation Process

The following questions were recently added to the grantee survey and depict comparative data from fewer than one-third of funders in the dataset.

"Who was primarily responsible for carrying out the evaluation?"	Haas Sr 2017	Average Funder
Evaluation staff at the Foundation	20%	19%
Evaluation staff at your organization	56%	51%
External evaluator, chosen by the Foundation	0%	15%
External evaluator, chosen by your organization	24%	15%

"Who was primarily responsible for carrying out the evaluation?" (By Subgroup)

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

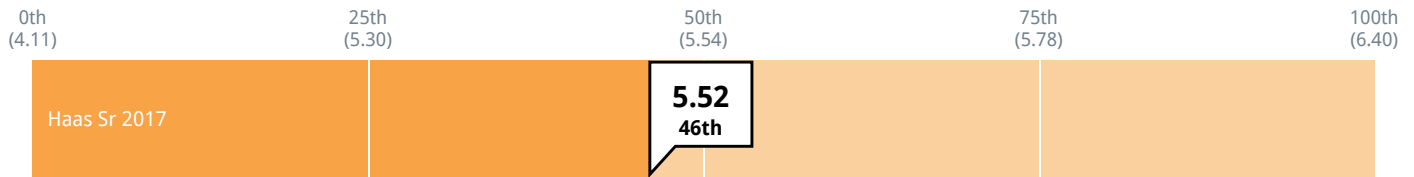
"Did the Foundation provide financial support for the evaluation?"	Haas Sr 2017	Average Funder
Yes, the evaluation's costs were fully funded by the Foundation	4%	32%
Yes, the evaluation's costs were partially funded by the Foundation	9%	16%
No, the evaluation's costs were not funded by the Foundation	87%	52%

"Did the Foundation provide financial support for the evaluation?" (By Subgroup)

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

"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



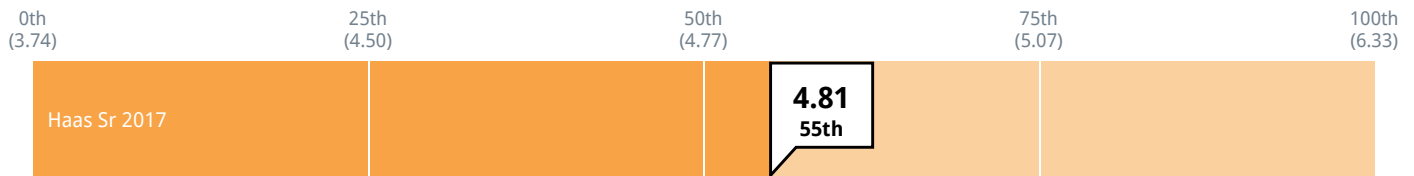
Cohort: None

Past results: ☒ On ☐ Off

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



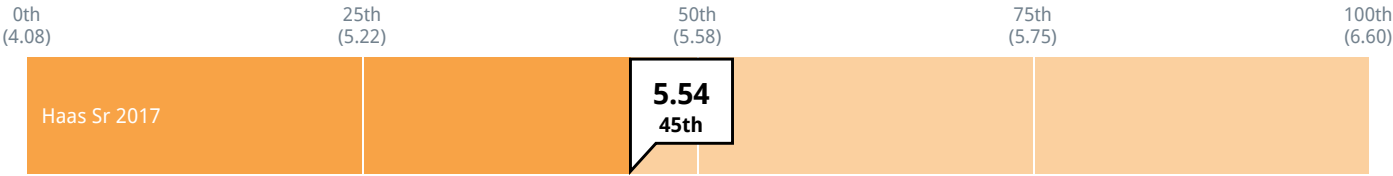
Cohort: None

Past results: ☒ On ☐ Off

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: None

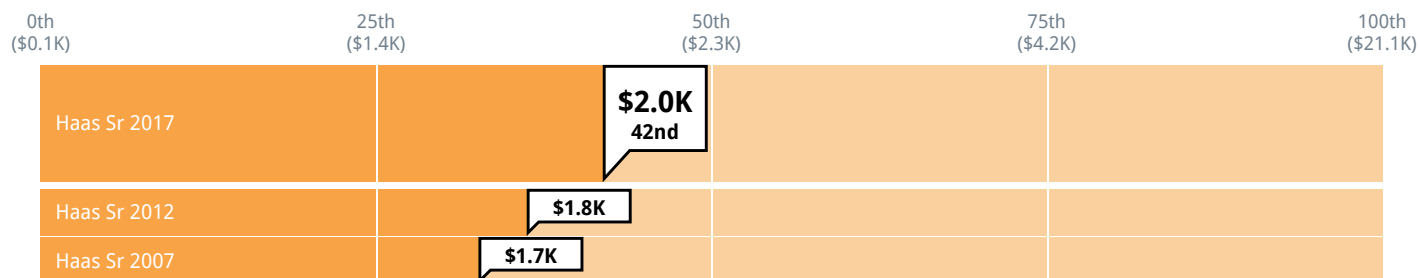
Past results: ☒ On ☐ Off

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

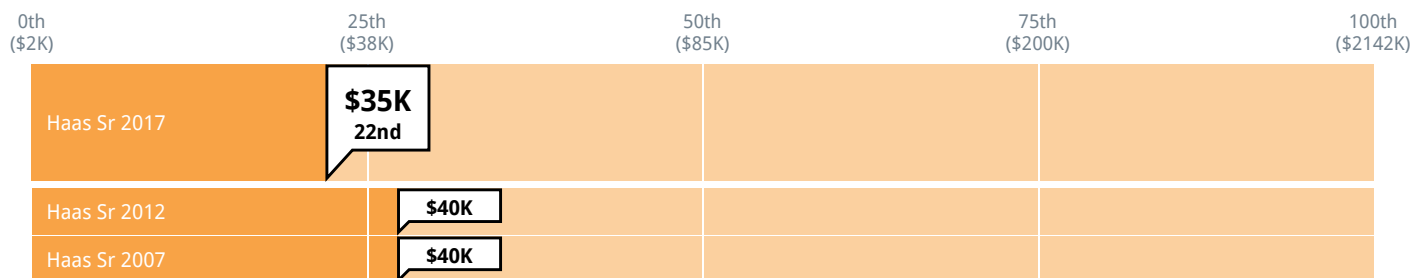


Cohort:

Past results: ☒ On ☐ Off

Subgroup:

Median Grant Size

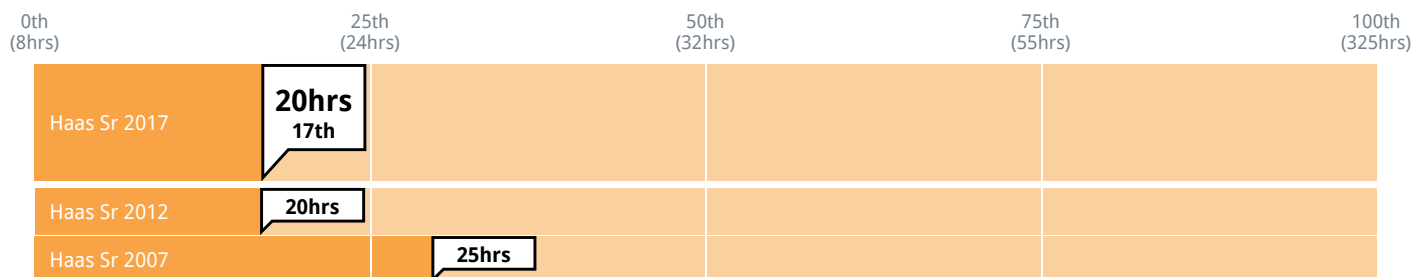


Cohort:

Past results: ☒ On ☐ Off

Subgroup:

Median hours spent by grantees on funder requirements over grant lifetime



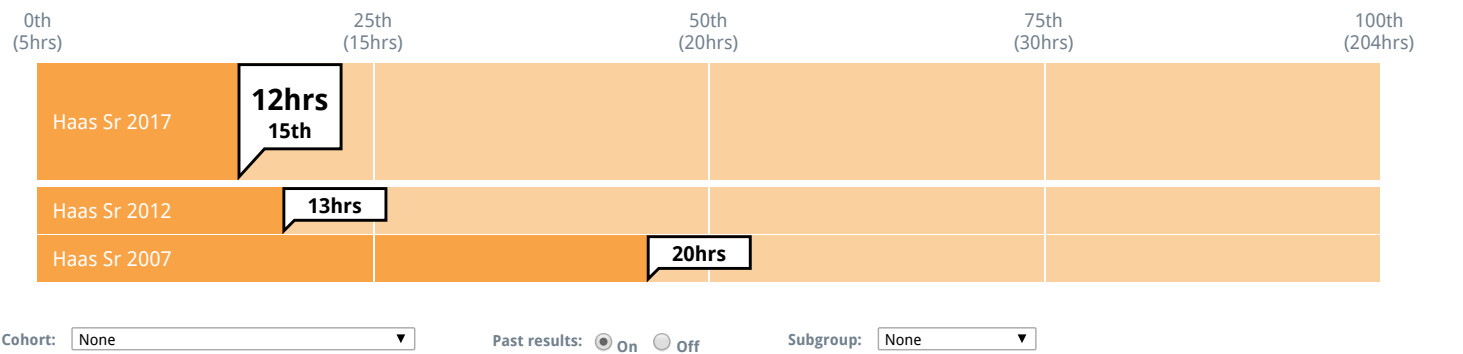
Cohort:

Past results: ☒ On ☐ Off

Subgroup:

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



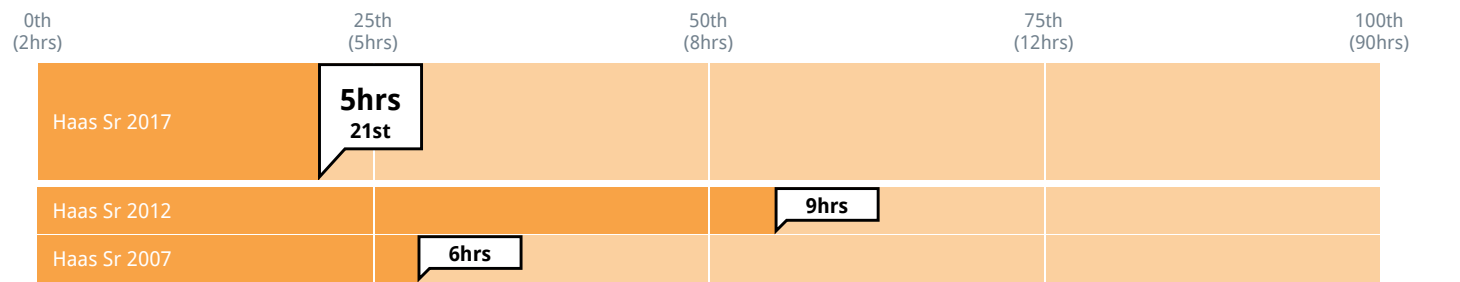
Time Spent On Proposal And Selection Process	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
1 to 9 hours	34%	31%	20%	20%
10 to 19 hours	29%	32%	26%	21%
20 to 29 hours	19%	19%	24%	18%
30 to 39 hours	6%	5%	8%	8%
40 to 49 hours	7%	6%	10%	12%
50 to 99 hours	5%	3%	11%	12%
100 to 199 hours	0%	3%	2%	6%
200+ hours	0%	0%	0%	3%

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: None Past results: ☒ On ☐ Off Subgroup: None

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
1 to 9 hours	66%	51%	61%	52%
10 to 19 hours	21%	27%	21%	20%
20 to 29 hours	9%	13%	10%	11%
30 to 39 hours	1%	1%	4%	4%
40 to 49 hours	3%	4%	1%	4%
50 to 99 hours	0%	4%	4%	5%
100+ hours	1%	0%	0%	4%

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

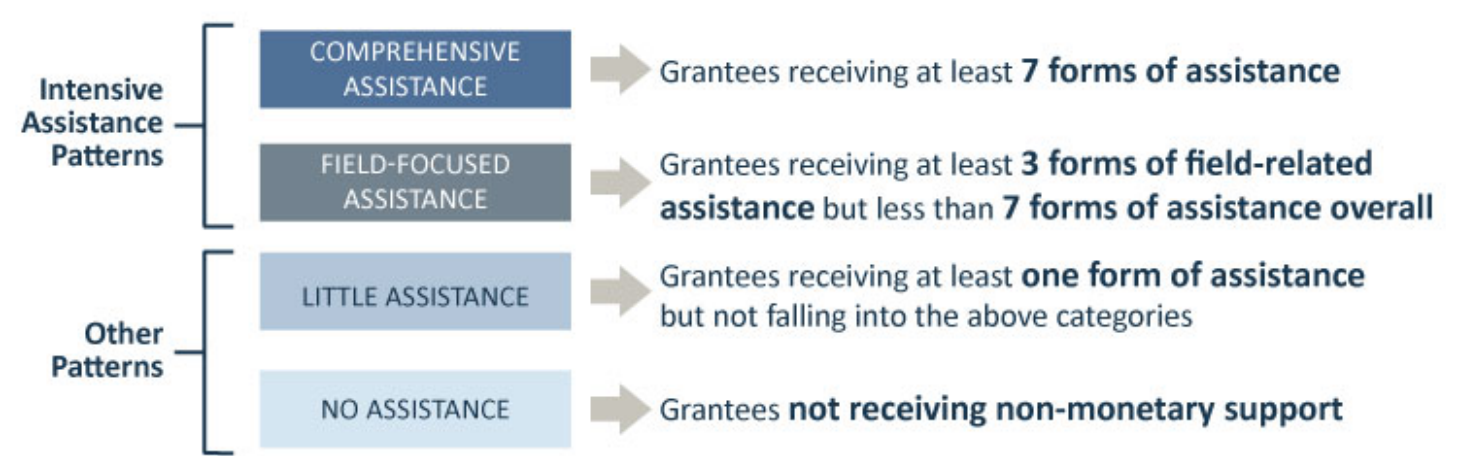
1 to 9 hours
10 to 19 hours
20 to 29 hours
30 to 39 hours
40 to 49 hours
50 to 99 hours
100+ hours

Non-Monetary Assistance

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

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 Foundation facilities
	Provided seminars/forums/convenings	Staff/management training

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.

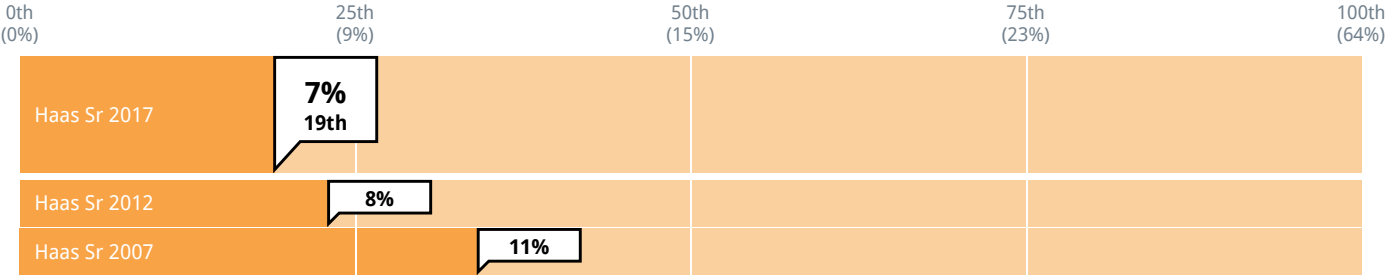


Non-Monetary Assistance Patterns	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Comprehensive	2%	2%	3%	7%
Field-focused	5%	6%	8%	11%
Little	33%	42%	36%	40%
None	60%	50%	53%	43%

Non-Monetary Assistance Patterns (By Subgroup)

Comprehensive
Field-focused
Little
None

Proportion of grantees that received field-focused or comprehensive assistance



Cohort: None

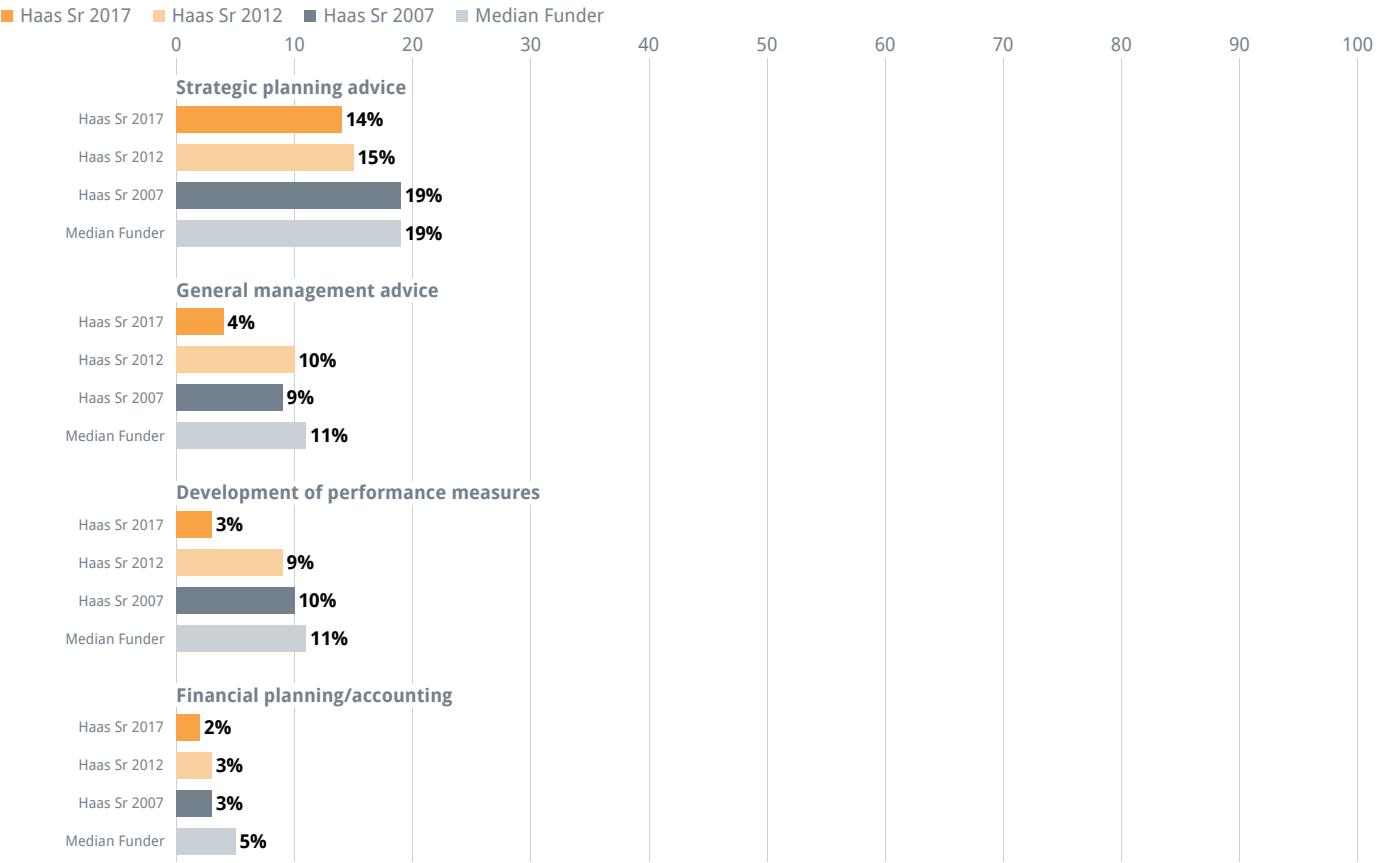
Past results: ☒ On ☐ Off

Subgroup: None

Management Assistance Activities

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

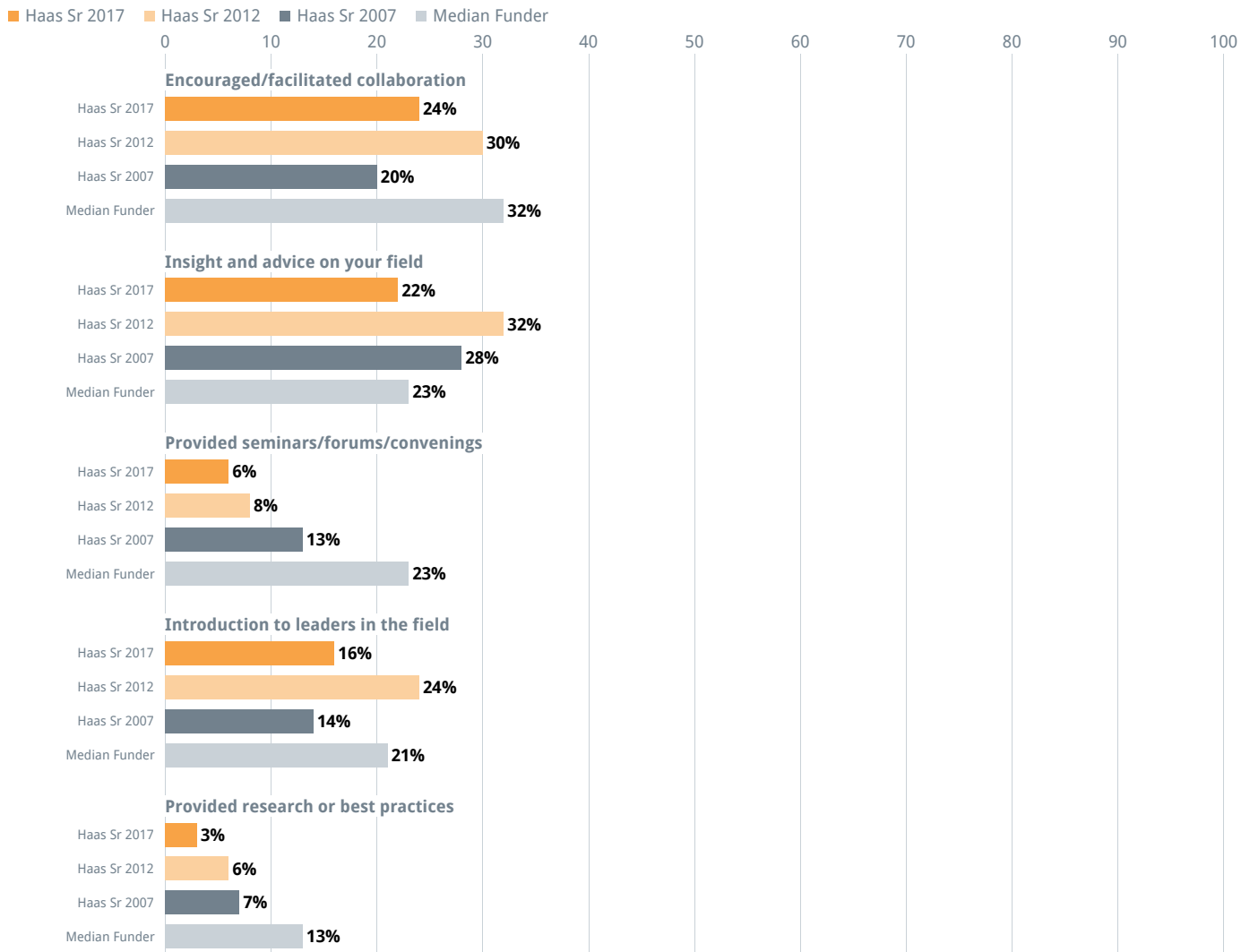
Percentage of Grantees that Received Management Assistance



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 the Fund) associated with this funding."

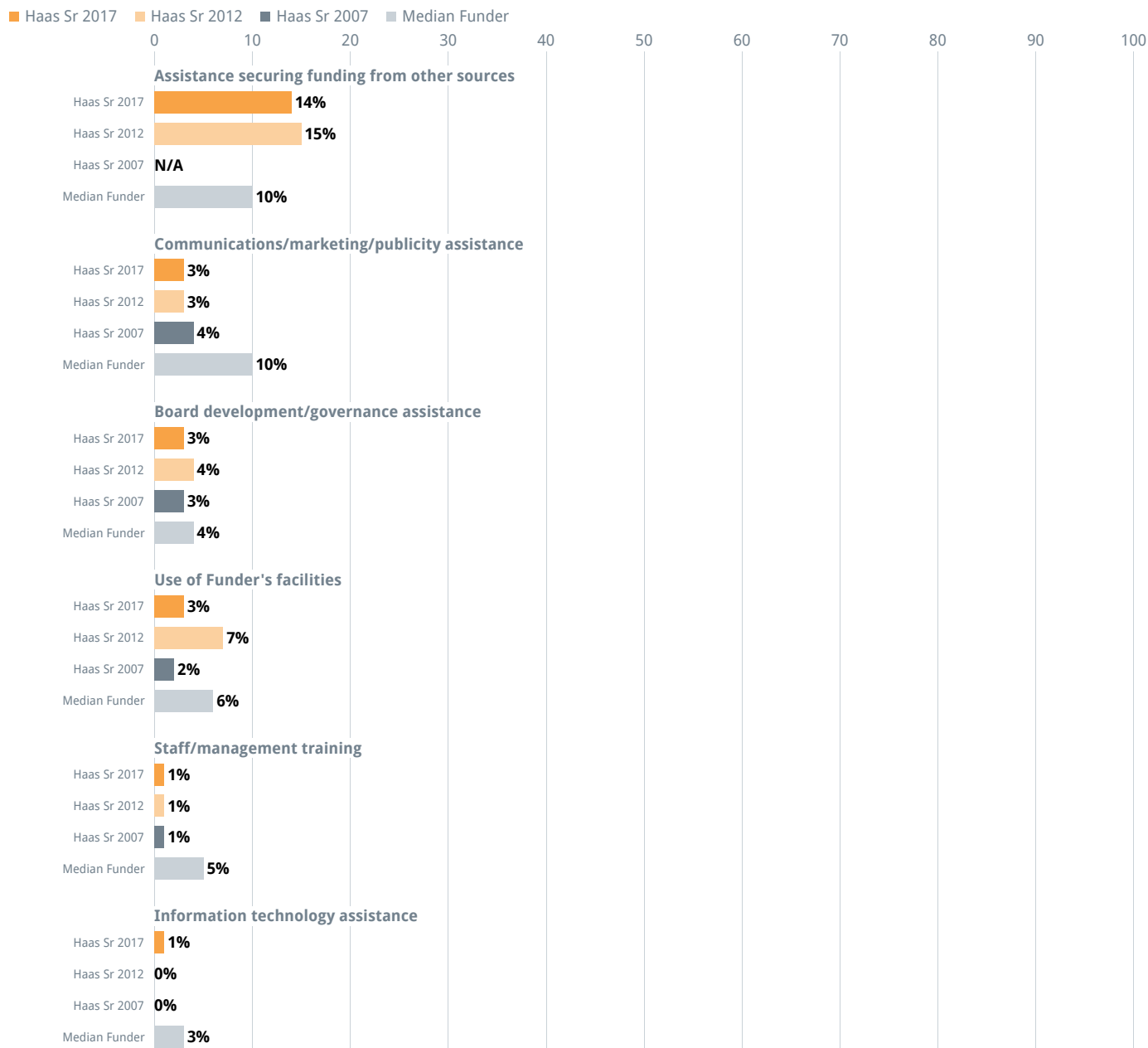
Percentage of Grantees that Received Field-Related Assistance



Other Assistance Activities

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

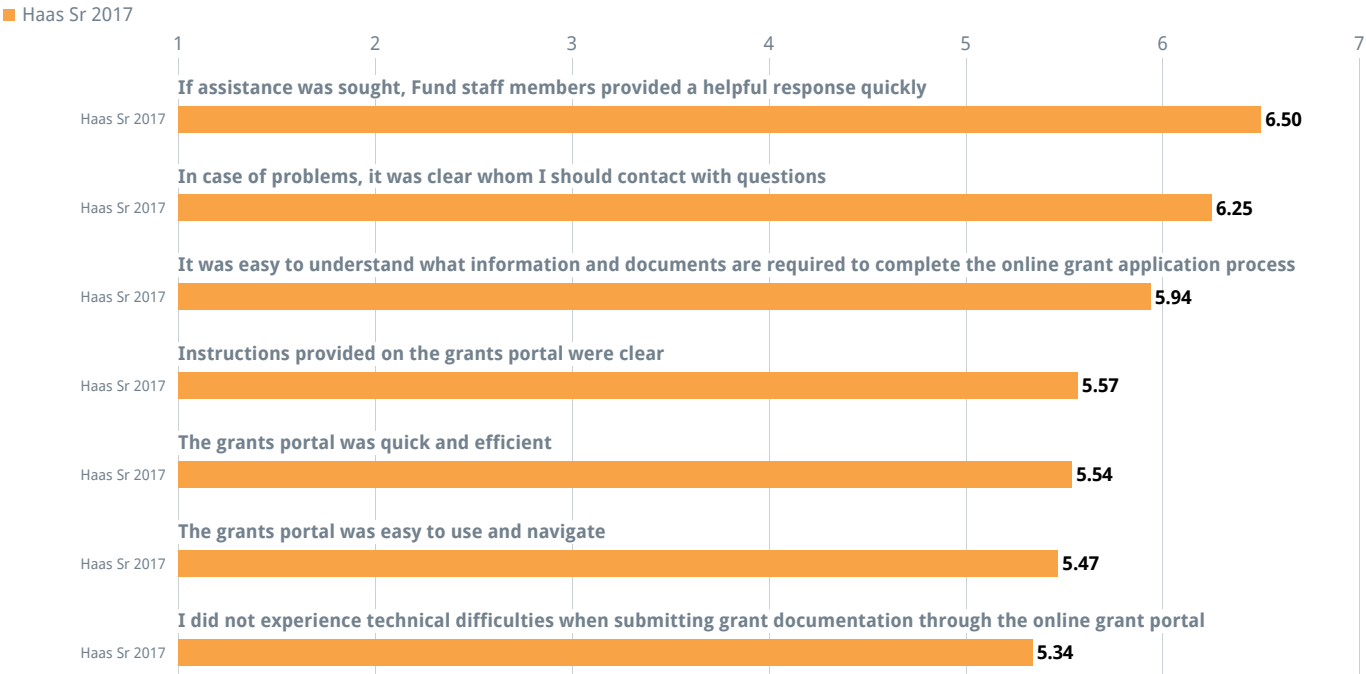
Percentage of Grantees that Received Other Assistance



Walter and Elise Haas Fund-Specific Questions

"Based on your experience using the online grants portal, how strongly do you agree or disagree with the following statements:" - Overall

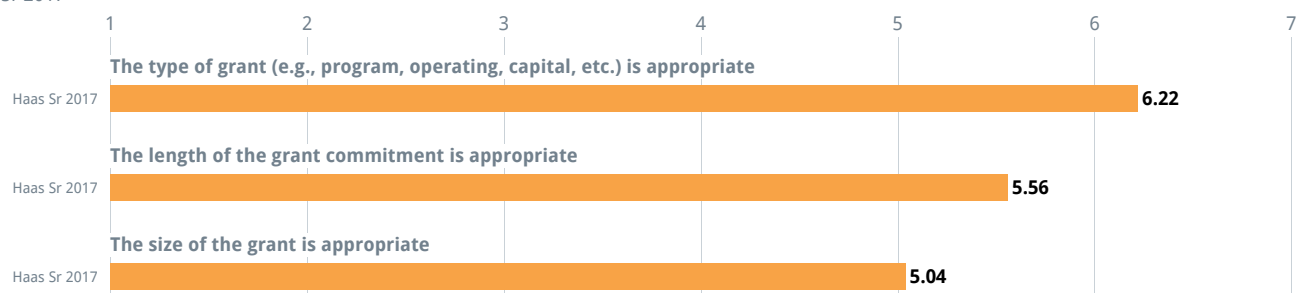
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



"How strongly do you agree or disagree with the following statements: In order to achieve the specific results my organization expects to achieve through this grant..." - Overall

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

■ Haas Sr 2017



"During the time period relevant to this grant, did/does your organization track demographic data on any of the following beneficiary populations?"

*Please see the 'Downloads' dropdown menu at the top right of your report for an additional table of estimated proportions of beneficiary populations served.

Ethnic and Racial Group

Ethnic and Racial Group	Haas Sr 2017
Yes	77%
No	23%

Ethnic and Racial Group (By Subgroup)

Yes
No

Social and Economic Status

Social and Economic Status	Haas Sr 2017
Yes	72%
No	28%

Social and Economic Status (By Subgroup)

Yes
No

Sexual Identity

Sexual Identity	Haas Sr 2017
Yes	32%
No	68%

Sexual Identity (By Subgroup)
Yes
No

Faith Affiliation

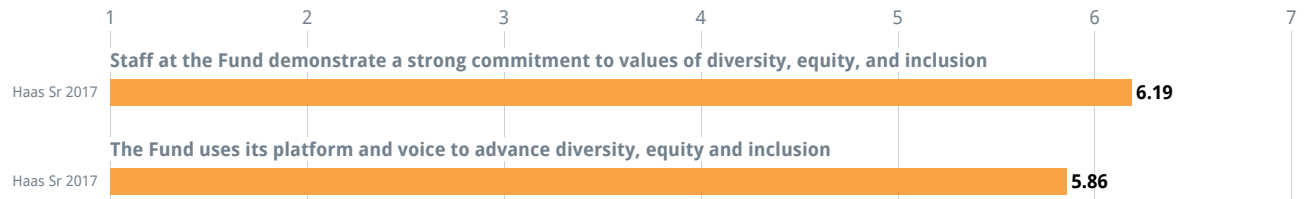
Faith Affiliation	Haas Sr 2017
Yes	11%
No	89%

Faith Affiliation (By Subgroup)
Yes
No

"How strongly do you agree or disagree with the following statements:" - Overall

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

■ Haas Sr 2017



Grantee Suggestions for the Fund

Grantees were asked to provide any suggestions for how the Fund could improve. These suggestions were then categorized by CEP and grouped into the topics below.

To download the full set of grantee comments and suggestions, please refer to the "Downloads" dropdown menu at the top right of your report. Please note that comments have been edited or deleted to protect the confidentiality of respondents.

Topic of Suggestion	Proportion
Grantmaking Characteristics	41%
Non-Monetary Assistance	16%
Qualtiy and Quantity of Interactions	14%
Communications	8%
Field Impact and Understanding	5%
Proposal and Selection Process	5%
Community Impact and Understanding	2%
Reporting and Evaluation Process	2%
Other	6%

Selected Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

Grantmaking Characteristics (41% N=38)

- Grant Type (N = 12)
 - "A recognition that in addition to targeted program/project support (producing measurable outcomes) general operational support is a critical need among non-profit organizations."
 - "...we would be thrilled to have the opportunity for general operating/capacity building support in addition to program support."
 - "With so many funders reassessing their priorities for a new, troubling age, it would be great if you would consider general operating funding."
- Grant Size (N = 11)
 - "Since the amount of local, state and federal funding continues to decrease, increasing our annual funding would help to defray the budget shortfalls."
 - "I think one area that the Fund can improve is to see the scale and impact of our programs that have grown and give us an opportunity to apply for higher level of funding."
 - "...while our budget has doubled in 3 years, our program funding level has remained flat. We would love the opportunity for increased funding/larger grant size."
- Grant Length (N = 8)
 - "I wish that the funding was for a 2-3 year period. Each year you must re-apply."
 - "Longer periods available for support. We are in the third year now and will miss the annual support we have received."
 - "We are wondering if we are a fit for multi year funding. We need to discuss this with the Fund."
- Strategy (N = 4)
 - "Just wish the Fund had more flexible priorities, but I know that's hard and complicated"
 - "Reducing the required two years off (for the arts program) to one year."
 - "The "sit-out" year is hard for our organizations."
- Other (N = 3)

Non-Monetary Assistance (16% N=15)

- Convenings (N = 5)
 - "Convening the cohort of grantees at some point, might be useful, if Fund staff see opportunities for networking/collaboration."
 - "Events that connect grantees of Walter & Elise Haas Fund."
 - "We find the convenings of grantees and donors extremely helpful and conducive for sharing ideas and collaborating and would encourage the Fund to continue and, if possible, to increase the frequency of these convenings."
- Assist Securing Funds from Other Sources (N = 4)
 - "Connect with other funders."
 - "Helping secure, or connect our organization, to other potential funders interested in our work would be extremely helpful."
- Collaborations (N = 3)
 - "It would be great to have opportunities to come together with other grantees in the field to exchange ideas, challenges and collaborate on solutions, best practices and efforts to move the work in the field forward. The Fund would need to facilitate such an effort. It seems like an opportunity like this one could potentially expand the Funds impact in the field."
 - "It would be nice to connect with other grantees a bit more"
- Other (N = 3)

Quality and Quantity of Interactions (14% N=13)

- More Frequent Interactions (N = 5)
 - "I would love to have more phone calls/meetings with the Fund to keep open communication and stay on top of their priorities, but also to get to know each other a bit better."
 - "Maybe quarterly check-ins via email or phone with us grantees"
 - "Would be nice to have quarterly phone meeting check-in's... just to discuss on things are going with our organization in terms of this grant. While this is always informally possible, probably would have been good to have a formal time-defined process."
- Site Visits (N = 5)
 - "A site visit and opportunity to show the impact we are having in the community would be very much welcomed in an effort to strengthen our current relationship."
 - "It would be great if they can do annual site visits."
 - "More site visits to interact with program staff"
- Other (N = 3)

Communications (8% N=7)

- Website (N = 3)
 - "The online portal is a little clunky with difficult to see sliders and cascading drop down boxes that are hard to find and navigate."
 - "The only issue we have had is with the online technology for the application process. It is cumbersome and very difficult to deal with."
- More Communications (N = 2)
 - "I don't know if the Fund shares best practices among its grantees, but it would be helpful if it did or if it made that information more readily available."
- Other (N = 2)

Field Impact and Understanding (5% N=5)

- Focus (N = 3)
 - "Perhaps being more flexible in supporting smart, creative folks... to link local efforts with broader national work that can bring greater strength and legitimacy, in turn, to the local efforts."
 - "...support for the arts service organizations would be welcomed!"
- Other (N = 2)

Proposal and Selection Process (5% N=5)

- Other (N = 3)
- Guidelines (N = 2)
 - "It would be helpful to know more about what particular aspect of our project and/or mission was of greatest interest to the Fund, so that we can build on the campaign's success, identify shared priorities, and extend the relationship beyond the campaign into long-term nonprofit sustainability."

Community Impact and Understanding (2% N=2)

- Focus (N = 2)
 - "The Bay Area is becoming more and more expensive to live and work, if the Haas Fund would consider an artistic housing initiative to keep artists living as well as working in the Bay Area, that would be ideal."

Reporting and Evaluation Process (2% N=2)

- Evaluation (N = 2)
 - "Organizations' objectives evolve over time as funders' funding priorities. I think there should be an assessment of each grantee's mission and accomplishments as it may open up new partnership opportunities and understanding of issues impacting communities the Fund endeavors to serve."

Other (6% N=6)

- Other (N = 6)

Contextual Data

Grantmaking Characteristics

Length of Grant Awarded	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Average grant length	3 years	1.5 years	1.6 years	2.1 years

Length of Grant Awarded	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
1 year	58%	73%	61%	46%
2 years	23%	15%	27%	24%
3 years	4%	7%	9%	18%
4 years	0%	3%	1%	4%
5 or more years	15%	2%	3%	8%

Type of Grant Awarded	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Program / Project Support	62%	66%	80%	65%
General Operating / Core Support	32%	30%	14%	21%
Capital Support: Building / Renovation / Endowment Support / Other	1%	2%	3%	5%
Technical Assistance / Capacity Building	0%	1%	3%	4%
Scholarship / Fellowship	1%	0%	0%	2%
Event / Sponsorship Funding	3%	1%	0%	2%

Grantmaking Characteristics - By Subgroup

Length of Grant Awarded (By Subgroup)

Average grant length

Length of Grant Awarded (By Subgroup)

1 year

2 years

3 years

4 years

5 or more years

Type of Grant Awarded (By Subgroup)

Program / Project Support

General Operating / Core Support

Capital Support: Building / Renovation / Endowment Support / Other

Technical Assistance / Capacity Building

Scholarship / Fellowship

Event / Sponsorship Funding

Grant Size

Grant Amount Awarded	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Median grant size	\$35K	\$40K	\$40K	\$84.6K

Grant Amount Awarded	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Less than \$10K	10%	4%	4%	10%
\$10K - \$24K	17%	18%	13%	13%
\$25K - \$49K	39%	35%	35%	13%
\$50K - \$99K	19%	26%	24%	16%
\$100K - \$149K	7%	10%	8%	9%
\$150K - \$299K	6%	6%	9%	16%
\$300K - \$499K	1%	0%	2%	8%
\$500K - \$999K	0%	1%	3%	7%
\$1MM and above	0%	0%	1%	8%

Median Percent of Budget Funded by Grant (Annualized)	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Size of grant relative to size of grantee budget	2%	3%	3%	4%

Grant Size - By Subgroup

Grant Amount Awarded (By Subgroup)

Median grant size

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

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)

Size of grant relative to size of grantee budget
--

Grantee Characteristics

Operating Budget of Grantee Organization	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Median Budget	\$1.4M	\$1.2M	\$1M	\$1.5M

Operating Budget of Grantee Organization	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
<\$100K	7%	4%	4%	8%
\$100K - \$499K	22%	20%	23%	19%
\$500K - \$999K	14%	20%	22%	14%
\$1MM - \$4.9MM	31%	33%	31%	30%
\$5MM - \$24MM	17%	17%	14%	18%
>=\$25MM	8%	6%	6%	11%

Grantee Characteristics - By Subgroup

Operating Budget of Grantee Organization (By Subgroup)
Median Budget

Operating Budget of Grantee Organization (By Subgroup)
<\$100K
\$100K - \$499K
\$500K - \$999K
\$1MM - \$4.9MM
\$5MM - \$24MM
>=\$25MM

Funding Relationship

Pattern of Grantees' Funding Relationship with the Foundation	Haas Sr 2017	Haas Sr 2012	Average Funder
First grant received from the Foundation	17%	19%	29%
Consistent funding in the past	73%	60%	53%
Inconsistent funding in the past	10%	21%	19%

Funding Status and Grantees Previously Declined Funding	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Percent of grantees currently receiving funding from the Foundation	93%	87%	81%	80%
Percent of grantees previously declined funding by the Foundation	25%	24%	35%	31%

Funding Relationship - By Subgroup

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

Funding Status and Grantees Previously Declined Funding (By Subgroup)
Percent of grantees currently receiving funding from the Foundation
Percent of grantees previously declined funding by the Foundation

Grantee Demographics

Job Title of Respondents	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Executive Director	39%	57%	52%	47%
Other Senior Management	10%	8%	13%	15%
Project Director	4%	4%	6%	12%
Development Director	18%	11%	13%	8%
Other Development Staff	20%	15%	7%	7%
Volunteer	1%	0%	0%	1%
Other	8%	4%	8%	9%

Gender of Respondents	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
Female	75%	71%	65%	64%
Male	25%	29%	35%	36%

Race/Ethnicity of Respondents	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Average Funder
African-American/Black	8%	6%	7%	7%
American Indian/Alaskan Native	1%	1%	1%	1%
Asian (incl. Indian subcontinent)	10%	7%	6%	4%
Caucasian/White	64%	74%	75%	80%
Hispanic/Latino	7%	5%	6%	5%
Multi-racial	7%	5%	4%	3%
Pacific Islander	0%	0%	1%	0%
Other	4%	3%	1%	1%

Funder Characteristics

Financial Information	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Total assets	\$213M	\$229M	\$254M	\$213M
Total giving	\$11.6M	\$12.7M	\$10.2M	\$15.3M

Funder Staffing	Haas Sr 2017	Haas Sr 2012	Haas Sr 2007	Median Funder
Total staff (FTEs)	10	10	10	15
Percent of staff who are program staff	100%	40%	80%	40%

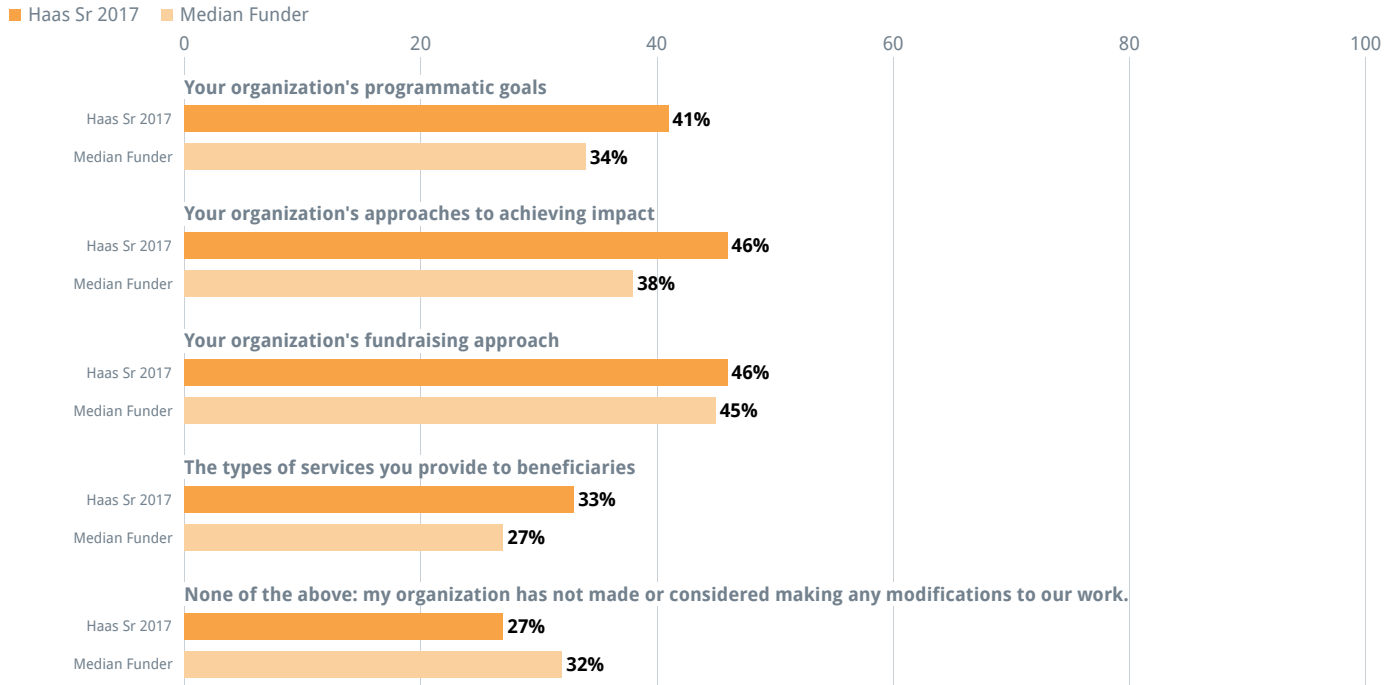
Grantmaking Processes	Haas Sr 2017	Haas Sr 2012	Median Funder
Proportion of grants that are proactive	28%	40%	46%
Proportion of grantmaking dollars that are proactive	9%	30%	65%

Response to 2016 Elections

*The following questions were recently added to the grantee survey and depict comparative data from 23 funders in the dataset.

"What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?"	Haas Sr 2017	Average Funder
Generally positive impact	7%	8%
No impact/Neutral	10%	15%
Generally negative impact	83%	77%

"Has your organization modified or made plans to modify your work in any of the following areas as a result of the changing U.S. political landscape?"



(If grantees indicated making at least one modification above)

"In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas:"

Direct service work	Haas Sr 2017	Average Funder
Increasing emphasis	44%	41%
No change in emphasis	56%	57%
Decreasing emphasis	0%	2%

Policy/advocacy work	Haas Sr 2017	Average Funder
Increasing emphasis	77%	71%
No change in emphasis	23%	28%
Decreasing emphasis	0%	1%

Collaboration with other nonprofit organizations	Haas Sr 2017	Average Funder
Increasing emphasis	75%	74%
No change in emphasis	25%	26%
Decreasing emphasis	0%	0%

Collaboration with other sectors	Haas Sr 2017	Average Funder
Increasing emphasis	69%	70%
No change in emphasis	31%	30%
Decreasing emphasis	0%	0%

Local community engagement efforts	Haas Sr 2017	Average Funder
Increasing emphasis	84%	75%
No change in emphasis	16%	24%
Decreasing emphasis	0%	1%

Collecting input from your beneficiaries	Haas Sr 2017	Average Funder
Increasing emphasis	64%	60%
No change in emphasis	36%	39%
Decreasing emphasis	0%	0%

"Has the changing U.S. political landscape had any impact on your organization's ability to raise funds in support of your work?"

Ability to raise funds from foundations	Haas Sr 2017	Average Funder
Generally positive impact	20%	18%
No impact/Neutral	62%	63%
Generally negative impact	18%	19%

Ability to raise funds from other sources (e.g., public funders, individual donors)	Haas Sr 2017	Average Funder
Generally positive impact	22%	22%
No impact/Neutral	48%	47%
Generally negative impact	30%	31%

"Have you received any of the following communications from the Fund related to the changing U.S. political landscape?"

Public communication from the Foundation (e.g., blog post, mass email, newsletter)	Haas Sr 2017	Average Funder
Yes	24%	36%
No, and I would like to receive this communication	62%	46%
No, and I don't think this communication would be helpful	14%	18%

Communication with your program officer about your organization's work	Haas Sr 2017	Average Funder
Yes	33%	32%
No, and I would like to receive this communication	56%	49%
No, and I don't think this communication would be helpful	11%	19%

Communication with your program officer about the Foundation's work	Haas Sr 2017	Average Funder
Yes	26%	31%
No, and I would like to receive this communication	63%	56%
No, and I don't think this communication would be helpful	11%	13%

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 Haas Sr’s grantee survey was 222.

Question Text	Count of Responses
Overall, how would you rate the Fund's impact on your field?	193
How well does the Fund understand the field in which you work?	199
To what extent has the Fund advanced the state of knowledge in your field?	129
To what extent has the Fund affected public policy in your field?	88
Overall, how would you rate the Fund's impact on your local community?	197
How well does the Fund understand the local community in which you work?	198
How well does the Fund understand the social, cultural, or socioeconomic factors that affect your work?	208
How much, if at all, did the Fund improve your ability to sustain the work funded by this grant in the future?	214
How well does the Fund understand your organization's strategy and goals?	210
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Fund?	200
Who most frequently initiated the contact you had with your program officer during this grant?	222
Did the Fund conduct a site visit during the selection process or during the course of this grant?	191
Has your main contact at the Fund changed in the past six months?	214
Did you submit a proposal to the Fund for this grant?	217
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?	186
How involved was Fund staff in the development of your grant proposal?	185
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	178
Have you ever been declined funding from the Fund?	150
Are you currently receiving funding from the Fund?	215
Which of the following best describes the pattern of your organization's funding relationship with the Fund?	220
How well does the Fund understand your intended beneficiaries' needs?	199
To what extent do the Fund's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	197
Have you participated in a reporting or evaluation process?	211
To what extent was the Fund's reporting process...Adaptable, if necessary, to fit your circumstances?	161
To what extent was the Fund's reporting process...A helpful opportunity for you to reflect and learn?	176
To what extent was the Fund's reporting process...Relevant, with questions and measures pertinent to the work funded by this grant?	172
To what extent was the Fund's reporting process...Straightforward?	177
To what extent was the Fund's reporting process...Aligned appropriately to the timing of your work ?	175
Did the Fund provide financial support for the evaluation?	23
To what extent did the evaluation...Result in you making changes to the work that was evaluated?	27
To what extent did the evaluation...Incorporate your input in the design of the evaluation?	23
To what extent did the evaluation...Generate information that you believe will be useful for other organizations?	26
The grants portal was easy to use and navigate	199
The grants portal was quick and efficient	199

Instructions provided on the grants portal were clear	197
I did not experience technical difficulties when submitting grant documentation through the online grant portal	196
It was easy to understand what information and documents are required to complete the online grant application process	198
In case of problems, it was clear whom I should contact with questions	181
If assistance was sought, Fund staff members provided a helpful response quickly	155
During the time period relevant to this grant, did/does your organization track demographic data on any of the following beneficiary populations? Ethnic and Racial Group	192
During the time period relevant to this grant, did/does your organization track demographic data on any of the following beneficiary populations? Social and Economic Status	193
During the time period relevant to this grant, did/does your organization track demographic data on any of the following beneficiary populations? Sexual Identity	191
During the time period relevant to this grant, did/does your organization track demographic data on any of the following beneficiary populations? Faith Affiliation	191

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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