GRANTEE PERCEPTION REPORT®
APPLICANT PERCEPTION REPORT®

PREPARED FOR
Weingart Foundation

January 2014

The online version of this report can be accessed at cep.surveyresults.org.
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HOW TO READ CHARTS

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements, or view the video on your landing page.

PERCENTILE SCALE
Every participating funder’s average rating is ranked along a percentile scale.

YOUR RESULTS

COMPARATIVE COHORT

PAST RESULTS/SEGMENTATION DATA

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 five responses.
EXECUTIVE SUMMARY

Overall, grantees and declined applicants of Weingart Foundation (Weingart) have positive experiences with the Foundation and provide higher than typical ratings on most measures in the Grantee and Applicant Perception Reports. Ratings for Weingart’s impact on grantees’ and applicants’ fields and the strength of the Foundation’s relationships with its grantees are particularly strong. One of the main opportunities highlighted by grantees is improving the helpfulness of the Foundation’s reporting and evaluation process in strengthening their organizations.

» Ratings for Weingart’s impact on and understanding of grantees’ fields and communities are above typical.
  » Weingart’s declined applicants rate the foundation higher than any other funder in CEP’s dataset for the Foundation’s understanding of the fields in which they work and its understanding of the social, cultural, and socioeconomic factors that affect their work.

» Grantees rate higher than typical for the Foundation’s impact on and understanding of their organizations.

» Grantees provide higher than typical ratings for their relationships with the Foundation, including the clarity and consistency of communications, and the quality of interactions they have with Foundation staff.
  » Declined applicants rate Weingart higher than typical for their interactions with staff and for the Foundation’s communications.

» Weingart’s selection process is rated as more helpful than typical in strengthening organizations/programs of both grantees and declined applicants. In contrast, ratings of the helpfulness of the reporting and evaluation process in strengthening grantee organizations/programs are below those of the median funder.

» The Weingart Foundation provides a smaller than typical proportion of its grantees with the most intensive and high-impact patterns of nonmonetary support, but those grantees that do receive this type of assistance from the Foundation rate higher on most measures in the report.

Summary of Differences by Grantee Subgroups

» SGP/RGP: Grantees of the Regular Grant Program rate higher than the Small Grant Program for most measures in the report.

» Field of Focus: Grantees that work in education rate the Foundation lower than grantees working in other fields for impact on and understanding of their organizations, as well as the Foundation’s effect on sustaining the funded work in the future. Grantees working in health rate the Foundation lower than grantees working in other fields for the clarity and consistency of the Foundation’s communications, impact on their communities, and the overall strength of their relationships with the Foundation. Human services grantees rate higher than grantees working in other fields for most measures in the report. Grantees that work across multiple fields rate lower for the Foundation’s impact on their fields.

» Region Served: Grantees that serve Los Angeles county rate the Foundation higher than grantees serving other counties for its impact on and understanding of their communities, impact on public policy and on their fields. Grantees that serve Riverside or San Bernardino counties rate the Foundation lower for its understanding of their local communities. Grantees that serve multiple regions rate lower than grantees serving a single region for the Foundation’s understanding of their fields.

» Date of Grant Award: Grantees that received their grant prior to 2012 rate similarly to grantees that received their grants in 2012 or later for most measures, but grantees that received their grant prior to 2012 rate higher for the Foundation’s understanding of their organizations and its effect on their ability to sustain the funded work in the future.

» Type of Support: Grantees receiving core support rate the Foundation higher for impact on and understanding of their organizations, as well as for the Foundation’s effect on improving their ability to sustain the funded work in the future.
The chart below shows Weingart Foundation’s percentile rankings on key areas of the GPR and APR relative to CEP’s overall comparative datasets, where 0% indicates the lowest rated funder, and 100% indicates the highest rated funder. GPR Rankings are also shown for Weingart’s selected peer cohort.
Grantees were asked, “At this point in time, what is one word that best describes the Foundation?” In the “word cloud” below, the size of each word indicates the frequency with which it was written by grantees. The color of each word is stylistic and not indicative of its frequency. Only words used two or more times are included below. Forty-nine grantees described Weingart as “responsive,” the most commonly used word.
Applicants were asked, “At this point in time, what is one word that best describes the Foundation?” In the “word cloud” below, the size of each word indicates the frequency with which it was written by applicants. The color of each word is stylistic and not indicative of its frequency. Two applicants described Weingart as “thorough,” the most commonly used word.

**SURVEY POPULATION**

CEP surveyed Weingart’s grantees and applicants in September and October of 2013.

**GRANTEE SURVEY METHODOLOGY:**

<table>
<thead>
<tr>
<th>Survey</th>
<th>Survey Fielded</th>
<th>Year of Active Grants</th>
<th>Number of Responses Received</th>
<th>Survey Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>September and October 2013</td>
<td>2012</td>
<td>472</td>
<td>69%</td>
</tr>
</tbody>
</table>

Throughout this report, Weingart Foundation’s survey results are compared to CEP’s broader dataset of more than 40,000 grantees built up over more than decade of grantee surveys of 300 funders. The full list of participating funders can be found at [http://www.effectivephilanthropy.org/index.php?page=gpr-subscribers](http://www.effectivephilanthropy.org/index.php?page=gpr-subscribers).

**Small Grant Program (SGP) or Regular Grants Program (RGP)**

In addition to showing Weingart’s overall ratings, this report shows ratings segmented by SGP or RGP.

<table>
<thead>
<tr>
<th>SGP or RGP</th>
<th>Number of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>SGP</td>
<td>193</td>
</tr>
<tr>
<td>RGP</td>
<td>279</td>
</tr>
</tbody>
</table>

Grantee ratings are also shown segmented by Date of Grant Award, Type of Support, Field of Focus, and Region Served.

**APPLICANT SURVEY METHODOLOGY:**

<table>
<thead>
<tr>
<th>Survey</th>
<th>Survey Fielded</th>
<th>Year of Declined Applications</th>
<th>Number of Responses Received</th>
<th>Survey Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>September and October 2013</td>
<td>2012</td>
<td>21</td>
<td>55%</td>
</tr>
</tbody>
</table>
GRANTMAKING AND APPLICATION CHARACTERISTICS

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

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weingart 2013 Grantees</th>
<th>Weingart 2013 Applicants</th>
<th>Median Funder (GPR)</th>
<th>Median Cohort Funder</th>
<th>Median Funder (APR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median Grant/Grant Request Size</td>
<td>$99K</td>
<td>$110K</td>
<td>$60K</td>
<td>$60K</td>
<td>$50K</td>
</tr>
<tr>
<td>Typical Grantee/Applicant Budget</td>
<td>$1.4M</td>
<td>$2.0M</td>
<td>$1.4M</td>
<td>$1.4M</td>
<td>$655K</td>
</tr>
<tr>
<td>Percentage of First-Time Grants</td>
<td>23%</td>
<td>N/A</td>
<td>26%</td>
<td>15%</td>
<td>N/A</td>
</tr>
<tr>
<td>Percentage of First-Time Applicants</td>
<td>N/A</td>
<td>30%</td>
<td>N/A</td>
<td>N/A</td>
<td>45%</td>
</tr>
<tr>
<td>Percentage of Applicants Considering Reapply</td>
<td>N/A</td>
<td>95%</td>
<td>N/A</td>
<td>N/A</td>
<td>88%</td>
</tr>
</tbody>
</table>

PERCENTAGE RECEIVING/APPLYING FOR TYPES OF SUPPORT

<table>
<thead>
<tr>
<th></th>
<th>Weingart 2013</th>
<th>Weingart 2013</th>
<th>Median Funder (GPR)</th>
<th>Median Cohort Funder</th>
<th>Median Funder (APR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Support</td>
<td>71%</td>
<td>75%</td>
<td>20%</td>
<td>45%</td>
<td>12%</td>
</tr>
<tr>
<td>Program/Project Support</td>
<td>18%</td>
<td>15%</td>
<td>63%</td>
<td>43%</td>
<td>66%</td>
</tr>
<tr>
<td>Other Types of Support</td>
<td>11%</td>
<td>10%</td>
<td>16%</td>
<td>12%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Structural Characteristics of Funders in the dataset

The number of grants processed and managed per professional program staff full-time employee at Weingart is larger than that of the typical funder.

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weingart 2013</th>
<th>Full Dataset</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROGRAM STAFF LOAD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dollars awarded per program staff full-time employee</td>
<td>$4.5M</td>
<td>$2.5M</td>
<td>$4.5M</td>
</tr>
<tr>
<td>Applications per program full-time employee</td>
<td>90</td>
<td>27</td>
<td>34</td>
</tr>
<tr>
<td>Active grants per program full-time employee</td>
<td>73</td>
<td>32</td>
<td>46</td>
</tr>
</tbody>
</table>
IMPACT ON AND UNDERSTANDING OF FIELDS

GRANTEE RATINGS

Weingart 2013

6.05
82nd

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

Similar Funder Cohort

SGP

5.93

RGP

6.12

APPLICANT RATINGS

Weingart 2013

4.85
83rd

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

Selected Grantee Comments:

» "They have done pioneering work in the arena of homelessness and in battling poverty. Their leadership is important."

» "The Weingart Foundation is the premier philanthropic organization in Los Angeles working on the problem of homelessness."

» "I believe they have made a substantial impact on the field of education."

» "The Weingart Foundation’s contribution to education is truly remarkable, but there is room for improvement in their understanding of arts education and how the visual & performing arts can be seamlessly integrated into LA’s local schools."

» "I do not personally see Weingart Foundation taking strong positions on issues related to the child welfare field. I think - and I could be wrong - that they believe they are supporting those they provide funding to for their expertise."

» "Weingart is known as being a thought leader in healthcare and the provision of services to low income and underserved areas."

» "Weingart Foundation continues to be an organization that facilitates multi-stakeholder convenings, and continues to lead the way in thinking about large-scale systems change. From its investment in capacity building to its commitment to core support, to its convenings of grantees in special initiative areas, Weingart tries to put collaboration into practice."

» "They are supporting capacity building and innovation in our field that creates real change. They are truly committed to seeing us as the experts but assisting the nonprofit community in group development."
Understanding of Fields

**GRANTEE RATINGS**

<table>
<thead>
<tr>
<th></th>
<th>0th</th>
<th>25th</th>
<th>50th</th>
<th>75th</th>
<th>100th</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>5.85</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Similar Funder Cohort</td>
<td>5.65</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“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

**APPLICANT RATINGS**

<table>
<thead>
<tr>
<th></th>
<th>0th</th>
<th>25th</th>
<th>50th</th>
<th>75th</th>
<th>100th</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>5.53</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“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
**Advancing Knowledge and Public Policy**

**GRANTEE RATINGS**

Weingart 2013:

5.13 (58th)

**Similar Funder Cohort**

SGP:

4.89

RGP:

5.25

"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

---

Weingart 2013:

4.65 (55th)

**Similar Funder Cohort**

SGP:

4.38

RGP:

4.79

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

1 = Not at all
7 = Major influence on shaping public policy
IMPACT ON AND UNDERSTANDING OF LOCAL COMMUNITIES

**GRANTEE RATINGS**

<table>
<thead>
<tr>
<th></th>
<th>0th (2.58)</th>
<th>25th (5.23)</th>
<th>50th (5.71)</th>
<th>75th (6.12)</th>
<th>100th (6.67)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>6.09</td>
<td></td>
<td></td>
<td></td>
<td>72nd</td>
</tr>
</tbody>
</table>

**Similar Funder Cohort**

<table>
<thead>
<tr>
<th></th>
<th>0th (2.25)</th>
<th>25th (3.65)</th>
<th>50th (4.19)</th>
<th>75th (5.09)</th>
<th>100th (6.12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SGP</td>
<td>5.89</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>6.21</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“Overall, how would you rate the Foundation’s impact on your local community?”
1 = No impact
7 = Significant positive impact

**APPLICANT RATINGS**

<table>
<thead>
<tr>
<th></th>
<th>0th (2.25)</th>
<th>25th (3.65)</th>
<th>50th (4.19)</th>
<th>75th (5.09)</th>
<th>100th (6.12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>4.71</td>
<td></td>
<td></td>
<td></td>
<td>64th</td>
</tr>
</tbody>
</table>

“Overall, how would you rate the Foundation’s impact on your local community?”
1 = No impact
7 = Significant positive impact

**Selected Grantee Comments:**

» "The Weingart Foundation is an incredible group of people doing powerful and profound things for the community of Los Angeles!"

» "The Weingart Foundation is major contributor to the public welfare of southern California and to the social fabric of our community."

» "I believe that the foundation could do more to educate the broader philanthropic community about all the needs in LA."

» "San Bernardino county is underserved by foundations and Weingart is one of the few trying to fill that void."

» "I regularly read the Foundation’s newsletters, review its website etc. and believe it has a profound impact on the nonprofit community. The Foundation is committed to maintaining the highest level of responsiveness to community needs and establishes best practices based on real, current assessments."

» "The Foundation is having an impact on how the LA not for profit world operates both with each other and how we view ourselves."

» "Weingart seems very in touch with the complexity and needs of underserved communities in LA."

**Selected Applicant Comments:**

» "These are smart, savvy people who are committed to making a difference in our community."
### Understanding of Local Communities

#### GRANTEE RATINGS

<table>
<thead>
<tr>
<th>Percentile</th>
<th>SGP</th>
<th>RGP</th>
</tr>
</thead>
<tbody>
<tr>
<td>0th</td>
<td>5.54</td>
<td>6.02</td>
</tr>
<tr>
<td>25th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**“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

#### APPLICANT RATINGS

<table>
<thead>
<tr>
<th>Percentile</th>
<th>SGP</th>
<th>RGP</th>
</tr>
</thead>
<tbody>
<tr>
<td>0th</td>
<td>5.44</td>
<td></td>
</tr>
<tr>
<td>25th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**“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
**Understanding of Contextual Factors**

**GRANTEE RATINGS**

<table>
<thead>
<tr>
<th></th>
<th>0th (4.93)</th>
<th>25th (5.52)</th>
<th>50th (5.69)</th>
<th>75th (5.91)</th>
<th>100th (6.41)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td><img src="sign" alt="" /> 5.96</td>
<td><img src="sign" alt="" /> 79th</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Similar Funder Cohort</td>
<td><img src="sign" alt="" /> 5.70</td>
<td><img src="sign" alt="" /> 8.13</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

1 = Limited understanding  7 = Thorough understanding

**APPLICANT RATINGS**

<table>
<thead>
<tr>
<th></th>
<th>0th (3.60)</th>
<th>25th (4.03)</th>
<th>50th (4.25)</th>
<th>75th (4.70)</th>
<th>100th (5.00)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td><img src="sign" alt="" /> 5.00</td>
<td><img src="sign" alt="" /> 100th</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

1 = Limited understanding  7 = Thorough understanding
**IMPACT ON AND UNDERSTANDING OF ORGANIZATIONS**

**GRANTEE RATINGS**

<table>
<thead>
<tr>
<th>Weingart 2013</th>
<th>6.39</th>
<th>79th</th>
</tr>
</thead>
<tbody>
<tr>
<td>Similar Funder Cohort</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SGP</td>
<td>6.16</td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>6.54</td>
<td></td>
</tr>
</tbody>
</table>

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

1 = No impact  
7 = Significant positive impact

**GRANTEE RATINGS**

<table>
<thead>
<tr>
<th>Weingart 2013</th>
<th>5.92</th>
<th>85th</th>
</tr>
</thead>
<tbody>
<tr>
<td>Similar Funder Cohort</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SGP</td>
<td>5.59</td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>6.14</td>
<td></td>
</tr>
</tbody>
</table>

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

1 = Did not improve ability  
7 = Substantially improved ability
Understanding of Organizations

**GRANTEE RATINGS**

```
<table>
<thead>
<tr>
<th></th>
<th>0th</th>
<th>25th</th>
<th>50th</th>
<th>75th</th>
<th>100th</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>(4.85)</td>
<td>(5.55)</td>
<td>(5.80)</td>
<td>(5.97)</td>
<td>(6.59)</td>
</tr>
<tr>
<td>Similar Funder Cohort</td>
<td>6.05</td>
<td>83rd</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SGP</td>
<td>5.80</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>6.21</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

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

1 = Limited understanding
7 = Thorough understanding

**APPLICANT RATINGS**

```
<table>
<thead>
<tr>
<th></th>
<th>0th</th>
<th>25th</th>
<th>50th</th>
<th>75th</th>
<th>100th</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>(3.02)</td>
<td>(3.53)</td>
<td>(4.11)</td>
<td>(4.35)</td>
<td>(5.32)</td>
</tr>
<tr>
<td></td>
<td>4.81</td>
<td>94th</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

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

1 = Limited understanding
7 = Thorough understanding
Grantee and Applicant Comments

Selected Grantee Comments:

» "The Foundation has listened to the needs of local nonprofits and been flexible with funding guidelines. They have been a leader in understanding the philanthropy picture and funding challenges for nonprofits."

» "We find the foundation [to be]...one of the most understanding of the challenges for Non Profit agencies."

» "Core support from the foundation allowed us to maintain and strengthen our programs and services."

» "We were told that Weingart does not renew grants; [this] can really hamper an organization's ability to have impact over a longer period of time. One year is just not enough to do considerable work, particularly with issues faced in So Cal."

Selected Applicant Comments:

» "Weingart has a broad understanding of our programs and the issues the people we support face. They also seem to recognize the issue of government funding that is inadequate, specifically as it relates to community based programs."
Effect of Grant on Organization

GRANTEE RESPONSES:

"Which of the following statements best describes the primary effect the receipt of this grant had on your organization’s programs or operations?"

Primary Effect of Grant on Grantee’s Organization

<table>
<thead>
<tr>
<th>Percent of Grantees</th>
<th>Weingart 2013</th>
<th>Similar Funder Cohort</th>
<th>Average Funder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintained Existing Program</td>
<td>20%</td>
<td>40%</td>
<td>60%</td>
</tr>
<tr>
<td>Added New Program Work</td>
<td>0%</td>
<td>20%</td>
<td>40%</td>
</tr>
<tr>
<td>Expanded Existing Program Work</td>
<td>40%</td>
<td>60%</td>
<td>80%</td>
</tr>
<tr>
<td>Enhanced Capacity</td>
<td>40%</td>
<td>20%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Primary Effect of Grant on Grantee’s Organization – By Subgroup

<table>
<thead>
<tr>
<th>Percent of Respondents</th>
<th>SGP</th>
<th>RGP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintained Existing Program</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Added New Program Work</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Expanded Existing Program Work</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Enhanced Capacity</td>
<td>20%</td>
<td>40%</td>
</tr>
</tbody>
</table>
INTERACTIONS

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

GRANTEE RATINGS

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Funder-Grantee Relationships
Summary Measure

1 = Very negative
7 = Very positive

Selected Grantee Comments:

» "The Program Officer was very clear [about] the Foundation’s objectives and how our organization fit."

» "I enjoyed my contact and communication with the Foundation’s staff, however, both of the years that I had a grant the staff contact person changed during the process making it harder to keep a connection and I felt I had to start all over both times."

» "Accessible, responsive, very helpful. Would have liked the opportunity to meet in person."

» "All communications were extremely helpful. The staff always provided us with complete responses to questions. We always felt comfortable and at ease with the phone conferences."

» "The honest communication, guidance and partnership from the program officers is such a strength of the Weingart Foundation."

» "Of all the Foundations we work with Weingart’s program officers are the most transparent and helpful. Your program officers consider themselves our advocates."
### Responsiveness

**GRANTEE RATINGS**

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<tr>
<th>0th</th>
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<td>(4.95)</td>
<td>(6.11)</td>
<td>(6.31)</td>
<td>(6.50)</td>
<td>(6.89)</td>
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Weingart 2013: 6.59 86th

Similar Funder Cohort

SGP: 6.51

RGP: 6.64

*“Overall, how responsive was the Foundation staff?”*

1 = Not at all responsive
7 = Extremely responsive

**APPLICANT RATINGS**

<table>
<thead>
<tr>
<th>0th</th>
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<tr>
<td>(3.48)</td>
<td>(4.05)</td>
<td>(4.52)</td>
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<td>(5.96)</td>
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</table>

Weingart 2013: 5.95 98th

*“Overall, how responsive was the Foundation staff?”*

1 = Not at all responsive
7 = Extremely responsive
### Fairness

#### GRANTEE RATINGS

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

1 = Not at all fairly
7 = Extremely fairly

#### APPLICANT RATINGS

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

1 = Not at all fairly
7 = Extremely fairly
Comfort and Accessibility

**GRANTEE RATINGS**

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<td>Similar Funder Cohort</td>
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<td>RGP</td>
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<td>6.32</td>
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“How comfortable do you feel approaching the Foundation if a problem arises?”

1 = Not at all comfortable
7 = Extremely comfortable

**APPLICANT RATINGS**

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<th>25th</th>
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<td>4.75</td>
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</tr>
</tbody>
</table>

“How accessible do you believe the Foundation is to applicants?”

1 = Some organizations are favored over others
7 = Everyone has equal access
Grantee Interaction Patterns

GRANTEE RESPONSES:

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

Frequency of Interactions with Grantees

Weingart 2013
Similar Funder Cohort
Average Funder

Frequency of Interactions with Grantees – By Subgroup

SGP
RGP
“Who most frequently initiated the contact you had with your program officer?”

Initiation of Interactions with Grantees

Initiation of Interactions with Grantees – By Subgroup

Program Officer  Both of equal frequency  Grantee
Contact Change and Site Visits

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

Proportion of grantees responding 'Yes'

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

Proportion of grantees responding 'Yes'

Behind the Numbers

Weingart grantees that report receiving a site visit rate the Foundation higher for most measures.
**COMMUNICATION**

**GRANTEE RATINGS**

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<tr>
<th>Percentage</th>
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```

“**How clearly has the Foundation communicated its goals and strategy with you?**”

1 = Not at all clearly  
7 = Extremely clearly

**APPLICANT RATINGS**

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<table>
<thead>
<tr>
<th>Percentage</th>
<th>Weingart 2013</th>
<th>Similar Funder Cohort</th>
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</tbody>
</table>
```

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

1 = Not at all clearly  
7 = Extremely clearly
**Consistency of Communication**

**GRANTEE RATINGS**

<table>
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<tr>
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<td>(5.83)</td>
<td>(6.04)</td>
<td>(6.22)</td>
<td>(6.69)</td>
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</table>

- **Weingart 2013**: 6.34 90th
- **Similar Funder Cohort**: SGP 6.28, RGP 6.38

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

1 = Not at all consistent  
7 = Completely consistent

**APPLICANT RATINGS**

<table>
<thead>
<tr>
<th>0th</th>
<th>25th</th>
<th>50th</th>
<th>75th</th>
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<tbody>
<tr>
<td>(3.60)</td>
<td>(4.51)</td>
<td>(4.82)</td>
<td>(5.19)</td>
<td>(5.89)</td>
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</tbody>
</table>

- **Weingart 2013**: 5.35 89th

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

1 = Not at all consistent  
7 = Completely consistent
Communication Resources

Grantees and applicants were asked whether they used each of the following communications resources from the Foundation and how helpful they found each resource. The following charts show the proportions of respondents 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 – Grantees

Usage of Communication Resources – Applicants
**Social Media**

“*How helpful did you find the Foundation’s social media resources to learn about information relevant to the fields or communities in which you work?*”

1 = Not at all helpful  
7 = Extremely helpful

GRANTEE RATINGS

<table>
<thead>
<tr>
<th></th>
<th>0th (3.67)</th>
<th>25th (4.65)</th>
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<td>RGP</td>
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<td></td>
<td></td>
<td>4.62</td>
<td></td>
</tr>
</tbody>
</table>

“*How helpful did you find the Foundation’s social media resources to interact and share ideas with the Foundation?*”

1 = Not at all helpful  
7 = Extremely helpful

GRANTEE RATINGS

<table>
<thead>
<tr>
<th></th>
<th>0th (2.56)</th>
<th>25th (3.80)</th>
<th>50th (4.17)</th>
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<tr>
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<td>RGP</td>
<td>3.08</td>
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</tbody>
</table>
Social Media Activities

Grantees and applicants were asked whether they used each of the following communications resources from the Foundation and how helpful they found each resource. The following charts show the proportions of grantees and applicants who have used each resource.

**Usage of Social Media Resources – Grantees**

- Blog: 3%, 2%, 3%
- Twitter: 0%, 2%, 3%
- Facebook: 1%, 3%, 6%
- Video: 1%, 3%, 4%

**Helpfulness of Social Media Resources – Grantees**

- Blog: 4.86, 5.13, 5.04
- Video: 4.33, 5.04, 5.13
Grantees' Potential Use of Social Media

"Do you think you would utilize the following online resources if they were available from the Foundation or its staff?"

![Bar chart showing the potential use of social media resources by grantees. The chart includes data for Blog, Facebook, Twitter, and Video, with comparison to Weingart 2013, Similar Funder Cohort, and Median Funder. The percentages vary for each resource, with Video showing the highest potential use at 58%.](image-url)
Applicant's Potential Use of Social Media

"Do you think you would utilize the following online resources if they were available from the Foundation or its staff?"

- Blog: 50%
- Video Sharing (e.g. YouTube): 45%
- Facebook: 40%
- Twitter: 26%

Source: Weingart 2013
**SELECTION PROCESS**

**GRANTEE RATINGS**

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</table>

“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

**APPLICANT RATINGS**

<table>
<thead>
<tr>
<th></th>
<th>0th</th>
<th>25th</th>
<th>50th</th>
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</tbody>
</table>

“How helpful was participating in the Foundation’s selection process in strengthening the organization/program to which the grant funding would have been directed?”

1 = Not at all helpful
7 = Extremely helpful

**Selected Grantee Comments:**

- "Although the process was lengthy, the staff and application were complete in the information needed for Weingart to evaluate our project and need for funding."
- "We felt the process was well supported and relevant to our mission."
- "Felt like a very guided process where our goals were respected."
- "We appreciate the Foundation staff’s time and feedback to help develop a competitive application."
- "We have seen their process develop and become a bit more ‘user-friendly’"
- "I thought the Weingart Fdn process was rigorous and very helpful. The staff and leadership team held high standards, yet were very “caring” in their execution."
- "We find the process as a good way to evaluate the program we are asking for support. It is a great time to evaluate whether or not we should [be] performing the job requiring funding."
- "Helpful to get good feedback from the program officer on what to focus on in the application, but would have been better to get it earlier in the process not at/after site visit."
"Overall the processes, interactions and communications between our staff and the Foundation's have been quite smooth. However, it seemed like we were asked for a lot of financial information for a relatively small grant...."

**Selected Applicant Comments:**

» "The application process, as well as all staff communications involved were professional and easily accessible."

» "Stellar organization, and while not funded it was an excellent process."
**Pressure to Modify Priorities**

**GRANTEE RATINGS**

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“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

**APPLICANT RATINGS**

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“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
Involvement in Proposal Development

**GRANTEE RATINGS**

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

1 = No involvement  
7 = Substantial involvement

**APPLICANT RATINGS**

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</table>

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

1 = No involvement  
7 = Substantial involvement
Time Between Submission and Funding Decision

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

![Chart showing time between submission and clear commitment (Grantees)]

![Chart showing time between submission and clear commitment (Grantees) - By Subgroup]

Legend:
- More than 12 months
- 10 – 12 months
- 7 – 9 months
- 4 – 6 months
- 1 – 3 months
- Less than 1 month
“How much time elapsed from initial submission of your grant proposal to the final decision not to fund your request?”

The image shows a bar chart titled "Time Between Submission and Funding Decision (Applicants)." The chart compares Weingart 2013 and Average Funder with different time intervals:

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

The chart visually represents the distribution of time between submission and funding decision among applicants.
"Which selection/proposal process activities were a part of your process?"
### Selection Process Activities (Grantees) – By Subgroup

- **Communication About Expected Results**
  - SGP: 61%
  - RGP: 81%
  - SGP: 92%
  - RGP: 90%

- **Phone Conversations**
  - SGP: 67%
  - RGP: 87%

- **Letter of Intent / Letter of Inquiry**
  - SGP: 61%
  - RGP: 92%

- **In-Person Conversations**
  - SGP: 16%

- **Logic Model / Theory of Change**
  - SGP: 4%
  - RGP: 6%
Weingart 2013 Median Funder

Selection Process Activities (Applicants)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Weingart 2013</th>
<th>Median Funder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication About Expected Results</td>
<td>67%</td>
<td>37%</td>
</tr>
<tr>
<td>Phone Conversations</td>
<td>86%</td>
<td>45%</td>
</tr>
<tr>
<td>Letter of Intent/Letter of Inquiry</td>
<td>76%</td>
<td>73%</td>
</tr>
<tr>
<td>In-Person Conversations</td>
<td>43%</td>
<td>20%</td>
</tr>
<tr>
<td>Logic Model/Theory of Change</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

CONFIDENTIAL

44
Time Spent on Selection Process

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weingart 2013</th>
<th>Full Dataset</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIME SPENT ON PROPOSAL AND SELECTION PROCESS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Hours</td>
<td>20 hrs</td>
<td>20 hrs</td>
<td>20 hrs</td>
</tr>
<tr>
<td>Measure</td>
<td>SGP</td>
<td>RGP</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>--------</td>
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<td></td>
</tr>
<tr>
<td>TIME SPENT ON PROPOSAL AND SELECTION PROCESS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Hours</td>
<td>12 hrs</td>
<td>24 hrs</td>
<td></td>
</tr>
<tr>
<td>Measure</td>
<td>Weingart 2013</td>
<td>Full Dataset</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>----------------</td>
<td>--------------</td>
<td></td>
</tr>
<tr>
<td>TIME SPENT ON PROPOSAL AND SELECTION PROCESS</td>
<td>40 hrs</td>
<td>20 hrs</td>
<td></td>
</tr>
</tbody>
</table>

- Median Hours
Comparison to Previous Experience for Grantees

"How did your most recent application process compare to your previous experience?"

- Clarity of guidelines
- Responsiveness of staff
- Guidance from staff
- Response time

Scale: 0 - 100

- Worse
- The Same
- Better
"How did your most recent application process compare to your previous experience?"

- Clarity of guidelines
- Responsiveness of staff
- Guidance from staff
- Response time

[Bar chart showing the comparison]
DECLINED APPLICATIONS

APPLICANT RESPONSES:

"Why did you apply to the Foundation for funding?"

![Bar chart showing reasons for applying for funding](chart)

- **Read Guidelines**: 62% (Weingart 2013) vs. 62% (Median Funder)
- **Major Local Funder**: 33% vs. 38%
- **Encouraged By Others**: 14% vs. 31%
- **Major Field Funder**: 33% vs. 31%
- **Encouraged By Foundation Staff**: 22% vs. 38%
- **Call for Proposals**: 5% vs. 13%
- **Follow-up to a Previous Grant**: 15% vs. 38%
Feedback on Declined Applications

APPLICANT RESPONSES:

“After your request was declined did you request/receive any feedback or advice from the Foundation?”

**APPLICANT RATINGS**

<table>
<thead>
<tr>
<th>0th 25th 50th 75th 100th</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.00 4.15 4.67 5.07 5.80</td>
</tr>
</tbody>
</table>

Weingart 2013

**Proportion of Applicants that Requested/Received Feedback**

- Requested Feedback: 55% (85% Median Funder)
- Received Feedback: 58% (95% Median Funder)
- Requested Feedback, But Did Not Receive It: 0% (10% Median Funder)

```
“Please rate the feedback and advice you received in terms of its helpfulness in strengthening future proposals to this funder.”

1 = Not at all helpful
7 = Extremely helpful
```

Weingart 2013 (5.63)

92nd
Reasons Provided for Declining Proposal

APPLICANT RESPONSES

"Please choose the option that most resembles the reason the Foundation gave when it declined to fund your proposal."

![Bar chart showing reasons for declining proposal]

Weingart 2013 Average Funder

- Other
- No reason provided
- Doesn’t fit Foundation priorities/guidelines, with explanation as to why
- Doesn’t fit Foundation priorities/guidelines, with no explanation as to why
- Not enough funds/too many good proposals

“How would you rate the honesty of the reason(s) the Foundation gave for declining to fund your proposal?”

1 = Not at all honest
7 = Extremely honest

<table>
<thead>
<tr>
<th>0th (3.45)</th>
<th>25th (4.46)</th>
<th>50th (4.70)</th>
<th>75th (5.04)</th>
<th>100th (6.10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td></td>
<td></td>
<td></td>
<td>6.10</td>
</tr>
</tbody>
</table>

“Confidential”
Implications for Future Applications

“Would you consider applying for funding from the Foundation in the future?”

Proportion that responded "Yes"

History with the Foundation of Respondents

- Previously declined
- Previously received funding
- First-time applicant
**REPORTING AND EVALUATION PROCESS**

### GRANTEE RATINGS

<table>
<thead>
<tr>
<th></th>
<th>0th (3.08)</th>
<th>25th (4.20)</th>
<th>50th (4.56)</th>
<th>75th (4.87)</th>
<th>100th (5.91)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>4.38</td>
<td>38th</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Similar Funder Cohort</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SGP</td>
<td>4.28</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>4.45</td>
<td></td>
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</tr>
</tbody>
</table>

**Question:** How helpful was participating in the Foundation’s reporting/evaluation process in strengthening the organization/program funded by the grant?  

1 = Not at all helpful  
7 = Extremely helpful

### GRANTEE RATINGS

<table>
<thead>
<tr>
<th></th>
<th>0th (7%)</th>
<th>25th (33%)</th>
<th>50th (47%)</th>
<th>75th (63%)</th>
<th>100th (100%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>23%</td>
<td>13th</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Similar Funder Cohort</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SGP</td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>24%</td>
<td></td>
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</tr>
</tbody>
</table>

**Question:** After submission of your report/evaluation, did the Foundation or the evaluator discuss it with you?  

Proportion responding "Yes"

### GRANTEE RATINGS

<table>
<thead>
<tr>
<th></th>
<th>0th (24%)</th>
<th>25th (59%)</th>
<th>50th (70%)</th>
<th>75th (79%)</th>
<th>100th (94%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>58%</td>
<td>25th</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Similar Funder Cohort</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SGP</td>
<td>38%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>72%</td>
<td></td>
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</tr>
</tbody>
</table>

**Question:** 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 responding 'Yes'
"Which reporting/evaluation process activities were a part of your process?"

**Reporting and Evaluation Process Activities**

- **Participated in Only Reporting Process**
  - Weingart 2013: 86%
  - Similar Funder Cohort: 80%
  - Median Funder: 74%
- **Participated in Reporting and Evaluation Processes**
  - Weingart 2013: 13%
  - Similar Funder Cohort: 9%
  - Median Funder: 23%
- **Participated in Only Evaluation Process**
  - Weingart 2013: 4%
  - Similar Funder Cohort: 2%
  - Median Funder: 2%

**Reporting and Evaluation Process Activities – By Subgroup**

- **Participated in Only Reporting Process**
  - SGP: 88%
  - RGP: 14%
- **Participated in Reporting and Evaluation Processes**
  - SGP: 10%
  - RGP: 2%
- **Participated in Only Evaluation Process**
  - SGP: 2%
  - RGP: 2%
## Dollar Return

### GRANTEE RESPONSES:

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Weingart 2013</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>0th</td>
<td>$0.1K</td>
<td>$0.8K</td>
</tr>
<tr>
<td>25th</td>
<td>$1.3K</td>
<td>$4.1K</td>
</tr>
<tr>
<td>50th</td>
<td>$2.2K</td>
<td>$4.1K</td>
</tr>
<tr>
<td>75th</td>
<td>$3.8K</td>
<td>$4.1K</td>
</tr>
<tr>
<td>100th</td>
<td>$21.1K</td>
<td>$4.1K</td>
</tr>
</tbody>
</table>

### Dollar Return: Median grant dollars awarded per process hour required

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Dollar Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>58th</td>
<td>$2.5K</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Weingart 2013</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>0th</td>
<td>(4hrs)</td>
<td>18hrs</td>
</tr>
<tr>
<td>25th</td>
<td>(20hrs)</td>
<td>30hrs</td>
</tr>
<tr>
<td>50th</td>
<td>(30hrs)</td>
<td></td>
</tr>
<tr>
<td>75th</td>
<td>(41hrs)</td>
<td></td>
</tr>
<tr>
<td>100th</td>
<td>(325hrs)</td>
<td></td>
</tr>
</tbody>
</table>

### Median Grant Size

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Weingart 2013</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>63rd</td>
<td>$99K</td>
<td>$15K</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Dollar Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd</td>
<td>$99K</td>
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</tbody>
</table>

### Median administrative hours spent by grantees on funder requirements over grant lifetime

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Weingart 2013</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>43rd</td>
<td>25hrs</td>
<td>SGP 18hrs RGP 30hrs</td>
</tr>
</tbody>
</table>
### Time Spent on Reporting and Evaluation Process

#### Hours Spent by Grantees on Monitoring, Reporting, and Evaluation Processes (Annualized)

<table>
<thead>
<tr>
<th>Percent of Grantees</th>
<th>Weingart 2013</th>
<th>Similar Funder Cohort</th>
<th>Average Funder</th>
</tr>
</thead>
<tbody>
<tr>
<td>100+</td>
<td>7</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>50 to 99</td>
<td>15</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td>40 to 49</td>
<td>25</td>
<td>20</td>
<td>25</td>
</tr>
<tr>
<td>30 to 39</td>
<td>18</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>20 to 29</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>10 to 19</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>1 to 9</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

#### Measure

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weingart 2013</th>
<th>Full Dataset</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Spent on Monitoring, Reporting, and Evaluation Processes (Annualized)</td>
<td>5 hrs</td>
<td>7 hrs</td>
<td>6 hrs</td>
</tr>
<tr>
<td>Measure</td>
<td>SGP</td>
<td>RGP</td>
<td></td>
</tr>
<tr>
<td>---------</td>
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<td>-----</td>
<td></td>
</tr>
<tr>
<td>TIME SPENT ON MONITORING, REPORTING, AND EVALUATION PROCESSES (ANNUALIZED)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Hours</td>
<td>5 hrs</td>
<td>5 hrs</td>
<td></td>
</tr>
</tbody>
</table>
Grantees were asked to indicate whether they had received any of 14 types of assistance provided directly or paid for by the Foundation. The specific types of assistance asked about are listed at the end of this section.

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.

- **Comprehensive Assistance**: Grantees receiving at least 7 forms of assistance
- **Field-focused Assistance**: Grantees receiving at least 3 forms of field-related assistance but less than 7 forms of assistance overall
- **Little Assistance**: Grantees receiving at least one form of assistance but not falling into the above categories
- **No Assistance**: Grantees not receiving non-monetary support
Grantees were asked to select whether they had received any of the following types of assistance provided directly or paid for by the Foundation:

**Management Assistance**
- General management advice
- Strategic planning advice
- Financial planning/accounting
- Development of performance measures

**Field-Related Assistance**
- Encouraged/facilitated collaboration
- Insight and advice on your field
- Introductions to leaders in field
- Provided research or best practices
- Provided seminars/forums/convenings

**Other Assistance**
- Board development/governance assistance
- Information technology assistance
- Communications/marketing/publicity assistance
- Use of Foundation facilities
- Staff/management training

**Selected Comments**

- “Periodically hold convenings of grantees working in similar fields to increase awareness of one another. This may lead to future collaborations or partnerships to more efficiently and effectively address the same issue.”

- “The Weingart Foundation has a major impact in professional development for nonprofit professionals. They regularly send out notices about where to go for upcoming trainings, which is much needed since most small nonprofits have limited funding for professional development.”

- “Potential improvements could include pointing grantees to additional resources that support capacity building for organizations. These resources could be those that are not necessary provided by the Foundation but that could be helpful to the grantee.”

- “The Foundation has a depth of knowledge to offer small nonprofits; assistance with board development, strategic planning, etc., that would further assist in the growth and stability of programs like ours. It would be of great value to be able to access this knowledge, and direct guidance between programs and the Foundation.”

- “…the Weingart Foundation is a leading voice for philanthropy in Southern California. The Weingart Foundation has pushed for and supported collaboration not only between nonprofits but also partnership with the public sector.”
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 Foundation) associated with this funding."

![Percentage of Grantees that Received Management Assistance](image_url)

- **Strategic planning advice**: 10% Weingart 2013, 16% Similar Funder Cohort, 16% Median Funder
- **General management advice**: 7% Weingart 2013, 10% Similar Funder Cohort, 11% Median Funder
- **Development of performance measures**: 5% Weingart 2013, 6% Similar Funder Cohort, 9% Median Funder
- **Financial planning/accounting**: 4% Weingart 2013, 7% Similar Funder Cohort, 7% Median Funder
Percentage of Grantees that Received Management Assistance – By Subgroup

- Strategic planning advice: 15% (SGP: 3%, RGP: 12%)
- General management advice: 4% (SGP: 4%, RGP: 0%)
- Development of performance measures: 8% (SGP: 2%, RGP: 6%)
- Financial planning/accounting: 9% (SGP: 3%, RGP: 6%)
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 Foundation) associated with this funding."

![Percentage of Grantees that Received Field-Related Assistance](image-url)

- **Encouraged/facilitated collaboration**
  - Weingart 2013: 11%
  - Similar Funder Cohort: 23%
  - Median Funder: 26%

- **Insight and advice on your field**
  - Weingart 2013: 4%
  - Similar Funder Cohort: 18%
  - Median Funder: 20%

- **Provided seminars/forums/convenings**
  - Weingart 2013: 4%
  - Similar Funder Cohort: 14%
  - Median Funder: 16%

- **Introduction to leaders in the field**
  - Weingart 2013: 6%
  - Similar Funder Cohort: 13%
  - Median Funder: 15%

- **Provided research or best practices**
  - Weingart 2013: 5%
  - Similar Funder Cohort: 9%
  - Median Funder: 9%
Percentage of Grantees that Received Field-Related Assistance – By Subgroup

- Encouraged/facilitated collaboration: 15% (SGP: 5%, RGP: 10%)
- Insight and advice on your field: 12% (SGP: 4%, RGP: 8%)
- Provided seminars/forums/convenings: 12% (SGP: 4%, RGP: 8%)
- Introduction to leaders in the field: 10% (SGP: 4%, RGP: 6%)
- Provided research or best practices: 5% (SGP: 4%, RGP: 1%)
"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by the Foundation) associated with this funding."

**Percentage of Grantees that Received Other Assistance**

- Funding assistance: 6% (Weingart 2013), 11% (Similar Funder Cohort), 11% (Median Funder)
- Communications/marketing/publicity assistance: 3% (Weingart 2013), 7% (Similar Funder Cohort), 8% (Median Funder)
- Board development/governance assistance: 4% (Weingart 2013), 4% (Similar Funder Cohort), 7% (Median Funder)
- Use of Funder’s facilities: 1% (Weingart 2013), 1% (Similar Funder Cohort), 4% (Median Funder)
- Staff/management training: 3% (Weingart 2013), 3% (Similar Funder Cohort), 1% (Median Funder)
- Information technology assistance: 1% (Weingart 2013), 1% (Similar Funder Cohort), 3% (Median Funder)
Proportion of Grantees

Percentage of Grantees that Received Other Assistance – By Subgroup

- Funding assistance: 8% (SGP), 8% (RGP)
- Communications/marketing/publicity assistance: 4% (SGP), 5% (RGP)
- Board development/governance assistance: 8% (SGP), 8% (RGP)
- Use of Funder’s facilities: 0% (SGP), 1% (RGP)
- Staff/management training: 1% (SGP), 1% (RGP)
- Information technology assistance: 1% (SGP), 1% (RGP)
Grantees and applicants 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.

To download the full set of grantee and applicant comments and suggestions, click here. Please note that comments have been edited or deleted to protect the confidentiality of respondents.
Selected Grantee 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.

**IMPACT ON AND UNDERSTANDING OF GRANTEE ORGANIZATIONS (19%)**

- **Understanding of Grantee Organizations (N=8)**
  - “Work to understand the depth and complexity of the changes that [our organization] has undergone in the past year.”

- **Support More Large/Medium/Small Organizations (N=7)**
  - “It would be helpful for the foundation to fund mid-size organizations beyond the small grants programs in order to help to build capacity and help organizations grow.”

- **Generally Increase/Continue Funding (N=6)**
  - “We would like to continue the partnership long-term, as long as our work is solid and we continue to fall within Weingart's mission.”

- **Flexibility in Funding (N=5)**
  - “Allow for submission of a one or two year renewal grant if the grantee is meeting their objectives.”

**INTERACTIONS (19%)**

- **Site Visit (N=23)**
  - “In-person meetings and site visits would assist the Foundation in understanding the day to day successes and challenges of the non-profits they fund.”
  - “Having them come out to see the program would be something that might add to the process. But more than anything, I hope that it would give them the opportunity to feel the impact of their support firsthand.”

- **More Frequent (N=6)**
  - “More regular communication with the program officer.”

**NONMONETARY ASSISTANCE (14%)**

- **More Nonmonetary Assistance (N=11)**
  - “The Foundation might ask us for our top 2-3 capacity-building priorities post-grant to assess whether there might be future synergies to support via contacts, research, funding, or in other ways.”

- **Convene (N=7)**
  - “Hosting an informal reception with other grantees would help organizations network with one another and open opportunities for collaboration.”

- **Training (N=6)**
  - “Providing more educational opportunities for staff and board members during the granting period and prepare organizations for future growth.”

**GRANTMAKING CHARACTERISTICS (11%)**

- **Type (N=12)**
  - “Provide core support yearly.”

- **Length (N=7)**
  - "Not limiting the small grant program to three years."

- **Size (N=3)**
  - "Consideration of larger grant amounts.”
SELECTION PROCESS (8%)

» Time Between Submission and Decision (N=10)
  » “The time between submitting a proposal and getting the final decision could be shorter and that would help in at least small nonprofits such as ours, to budget and plan more effectively.”

» Streamline Application Process (N=4)
  » “Make the grant application process more efficient and less grueling for the grant writer/non-profit by determining what information is needed right from the start.”

IMPACT ON AND UNDERSTANDING OF GRANTEES’ FIELDS (7%)

» “Continue to observe the external environment and continue to reach out to help us better understand the implications the rapidly changing environment has on our agencies and on our clients.”

IMPACT ON AND UNDERSTANDING OF GRANTEES’ COMMUNITIES (7%)

» “Continue to support grassroots community based organizations that play an important role in bringing meaningful change in diverse communities.”

OTHER (16%)

» Philanthropy Field-Building (N=9)
  » “Help other foundations to work from the kind of community knowledge and engaged compassion that characterizes the leadership of Weingart Foundation.”

» Clarity of Communications (N=8)
  » “Clearer funding guidelines and limitations.”

» Assistance Securing Funding from Other Sources (N=5)
  » “Help us identify other funding sources.”

» Reporting and Evaluation Process (N=4)
  » “A more specific and active evaluation process may help the agency monitor progress towards its global goals.”
Applicant Comments

Applicants 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.

Understanding of Organizations (N=3)

- "Making sure program officers are not encouraging applicants and asking them to spend more time to see and understand our programming when applying for core operating support if the decision makers are going to look primarily at the organizations financial history. The past 4 years have been extremely challenging for all non-profits, especially those of us that have primarily state and federal funding that has been greatly reduced. It doesn’t mean we aren’t still running great programs or that we’re not a good investment. We are a recognized leader in our field, both locally, statewide, and nationally and I had really hoped we could count on the Foundation to be guided more by our good works than by our bottom line."

- "I understand that they are looking to fund organizations that have financial stability, but if we had financial stability we wouldn’t be seeking funding. I think they should look more at the quality and quantity of services the organization is providing its community."

- "Foundation was very conservative on fiscal matters. Foundation was focused on agency achieving financial goals that, in hind sight, were unrealistic. We will continue [our] relationship with Foundation. It is a community resource that is important to our field and community."

Clarity of Communication (N=2)

- "Better communication between foundation staff and applicants to determine initial eligibility, appropriateness/alignment between the request's objectives and the foundation's priorities, and overall potential competitiveness should a proposal go forward."

- "Be more consistent in responses."

Interactions (N=2)

- "I would have liked the foundation staff to have come to meet our Board and discuss with them the concerns they had about the application."

- "Come and visit us and meet the kids we work with and what we are accomplishing."

Community Impact (N=1)

- "Perhaps be more specific of their interest or percentage of grants awarded outside of LA county."

Grantmaking (N=1)

- "Assist those non-profits with a great track record but in need of core support for cash flow and to help build reserves."
## Contextual Data

### Grantmaking Characteristics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2013 Grantees</th>
<th>2013 Applicants</th>
<th>Full Grantee Dataset</th>
<th>Custom Cohort</th>
<th>Full Applicant Dataset</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grant Amount Awarded/Requested</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Grant Size</td>
<td>$99K</td>
<td>$110K</td>
<td>$60K</td>
<td>$60K</td>
<td>$50K</td>
</tr>
<tr>
<td>Less than $10K</td>
<td>2%</td>
<td>0%</td>
<td>11%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>$10K - $24K</td>
<td>33%</td>
<td>0%</td>
<td>15%</td>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td>$25K - $49K</td>
<td>6%</td>
<td>22%</td>
<td>15%</td>
<td>19%</td>
<td>19%</td>
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<tr>
<td>$50K - $99K</td>
<td>9%</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
<td>18%</td>
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<tr>
<td>$100K - $149K</td>
<td>19%</td>
<td>17%</td>
<td>9%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>$150K - $299K</td>
<td>26%</td>
<td>44%</td>
<td>14%</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>$300K - $499K</td>
<td>2%</td>
<td>0%</td>
<td>7%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>$500K - $999K</td>
<td>2%</td>
<td>0%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>$1MM and above</td>
<td>1%</td>
<td>0%</td>
<td>7%</td>
<td>4%</td>
<td>2%</td>
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<tr>
<td><strong>Median Percent of Budget Funded by Grant (Annualized)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Size of grant relative to size of grantee budget</td>
<td>3%</td>
<td>N/A</td>
<td>3%</td>
<td>3%</td>
<td>N/A</td>
</tr>
<tr>
<td>Measure</td>
<td>2013 Grantees</td>
<td>2013 Applicants</td>
<td>Full Grantee Dataset</td>
<td>Custom Cohort</td>
<td>Full Applicant Dataset</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------------------</td>
<td>--------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>LENGTH OF GRANT AWARDED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average grant length</td>
<td>1.6 years</td>
<td>N/A</td>
<td>2.1 years</td>
<td>2.1 years</td>
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<tr>
<td>1 year</td>
<td>45%</td>
<td>N/A</td>
<td>51%</td>
<td>47%</td>
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<tr>
<td>2 years</td>
<td>51%</td>
<td>N/A</td>
<td>21%</td>
<td>32%</td>
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<tr>
<td>3 years</td>
<td>3%</td>
<td>N/A</td>
<td>17%</td>
<td>14%</td>
<td>N/A</td>
</tr>
<tr>
<td>4 years</td>
<td>0%</td>
<td>N/A</td>
<td>3%</td>
<td>2%</td>
<td>N/A</td>
</tr>
<tr>
<td>5 or more years</td>
<td>1%</td>
<td>N/A</td>
<td>8%</td>
<td>5%</td>
<td>N/A</td>
</tr>
<tr>
<td>TYPE OF GRANT AWARDED/REQUESTED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program/Project Support</td>
<td>18%</td>
<td>15%</td>
<td>63%</td>
<td>43%</td>
<td>66%</td>
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<tr>
<td>General Operating Support</td>
<td>71%</td>
<td>75%</td>
<td>20%</td>
<td>45%</td>
<td>12%</td>
</tr>
<tr>
<td>Capital Support</td>
<td>8%</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>Technical Assistance</td>
<td>3%</td>
<td>0%</td>
<td>5%</td>
<td>4%</td>
<td>5%</td>
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<tr>
<td>Scholarship / Fellowship</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Event / Sponsorship Funding</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>
### Grantee/Applicant Characteristics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2013 Grantees</th>
<th>2013 Applicants</th>
<th>Full Grantee Dataset</th>
<th>Custom Cohort</th>
<th>Full Applicant Dataset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median Budget</td>
<td>$1.4M</td>
<td>$2M</td>
<td>$1.4M</td>
<td>$1.4M</td>
<td>$0.7M</td>
</tr>
<tr>
<td>&lt;$100K</td>
<td>1%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>15%</td>
</tr>
<tr>
<td>$100K - $499K</td>
<td>23%</td>
<td>12%</td>
<td>20%</td>
<td>20%</td>
<td>28%</td>
</tr>
<tr>
<td>$500K - $999K</td>
<td>17%</td>
<td>0%</td>
<td>14%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>$1MM - $4.9MM</td>
<td>33%</td>
<td>65%</td>
<td>30%</td>
<td>34%</td>
<td>25%</td>
</tr>
<tr>
<td>$5MM - $24MM</td>
<td>20%</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>&gt;=$25MM</td>
<td>6%</td>
<td>0%</td>
<td>10%</td>
<td>10%</td>
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</table>

### Grantee Characteristics

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weingart 2013</th>
<th>Full Dataset</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pattern of Grantees' Funding Relationship with the Foundation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First grant received from the Foundation</td>
<td>23%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Consistent funding in the past</td>
<td>42%</td>
<td>54%</td>
<td>69%</td>
</tr>
<tr>
<td>Inconsistent funding in the past</td>
<td>35%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Funding Status and Grantees Previously Declined Funding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent of grantees currently receiving funding from the Foundation</td>
<td>61%</td>
<td>76%</td>
<td>81%</td>
</tr>
<tr>
<td>Percent of grantees previously declined funding by the Foundation</td>
<td>39%</td>
<td>32%</td>
<td>34%</td>
</tr>
</tbody>
</table>
## Grantee/Applicant Demographics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2013 Grantees</th>
<th>2013 Applicants</th>
<th>Full Grantee Dataset</th>
<th>Custom Cohort</th>
<th>Full Applicant Dataset</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>JOB TITLE OF RESPONDENTS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive Director</td>
<td>66%</td>
<td>57%</td>
<td>47%</td>
<td>56%</td>
<td>50%</td>
</tr>
<tr>
<td>Other Senior Management</td>
<td>7%</td>
<td>0%</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Project Director</td>
<td>2%</td>
<td>5%</td>
<td>10%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Development Director</td>
<td>12%</td>
<td>14%</td>
<td>13%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Other Development Staff</td>
<td>7%</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Volunteer</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>10%</td>
<td>10%</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Measure</th>
<th>2013 Grantees</th>
<th>2013 Applicants</th>
<th>Full Grantee Dataset</th>
<th>Custom Cohort</th>
<th>Full Applicant Dataset</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GENDER OF RESPONDENTS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>63%</td>
<td>95%</td>
<td>63%</td>
<td>65%</td>
<td>63%</td>
</tr>
<tr>
<td>Male</td>
<td>31%</td>
<td>5%</td>
<td>37%</td>
<td>35%</td>
<td>37%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Measure</th>
<th>2013 Grantees</th>
<th>2013 Applicants</th>
<th>Full Grantee Dataset</th>
<th>Custom Cohort</th>
<th>Full Applicant Dataset</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RACE/ETHNICITY OF RESPONDENTS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caucasian/White</td>
<td>71%</td>
<td>80%</td>
<td>80%</td>
<td>78%</td>
<td>81%</td>
</tr>
<tr>
<td>African-American/Black</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Hispanic/Latino</td>
<td>12%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Asian (incl. Indian subcontinent)</td>
<td>7%</td>
<td>0%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Multi-racial</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>American Indian/Alaskan Native</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Pacific Islander</td>
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<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0.4%</td>
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<tr>
<td>Other</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
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</table>
## Funder Characteristics

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weingart 2013</th>
<th>Full Dataset</th>
<th>Similar Funder Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FINANCIAL INFORMATION</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total assets</td>
<td>$698.3M</td>
<td>$234.3M</td>
<td>$591.0M</td>
</tr>
<tr>
<td>Total giving</td>
<td>$35.0M</td>
<td>$14.1M</td>
<td>$25.3M</td>
</tr>
<tr>
<td><strong>FUNDER STAFFING</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total staff (FTEs)</td>
<td>17</td>
<td>13</td>
<td>17</td>
</tr>
<tr>
<td>Percent of staff (FTEs) actively managing grantees' relationships</td>
<td>41%</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>Percent of staff who are program staff</td>
<td>46%</td>
<td>47%</td>
<td>41%</td>
</tr>
<tr>
<td><strong>GRANTMAKING PROCESSES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proportion of grants that are proactive</td>
<td>1%</td>
<td>41%</td>
<td>12%</td>
</tr>
<tr>
<td>Proportion of grantmaking dollars that are proactive</td>
<td>1%</td>
<td>40%</td>
<td>33%</td>
</tr>
</tbody>
</table>
ADDITIONAL MEASURES

The following questions were recently added to the grantee and applicants surveys. Charts with grantee data depict comparative data from only 11 funders.

**GRANTEE RATINGS**

<table>
<thead>
<tr>
<th>0th (4.63)</th>
<th>25th (4.98)</th>
<th>50th (5.23)</th>
<th>75th (5.63)</th>
<th>100th (5.88)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weingart 2013</td>
<td>5.51</td>
<td>68th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SGP</td>
<td>5.04</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RGP</td>
<td>5.83</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

How aware is the Foundation of the challenges that your organization is facing?  
1 = Not at all aware  
7 = Extremely aware

**APPLICANT RATINGS**

How aware is the Foundation of the challenges that your organization is facing?  
1 = Not at all aware  
7 = Extremely aware

4.67
To what extent does the Foundation take advantage of its various resources to help your organization address its challenges?

1 = Not at all
7 = To a very great extent

How helpful has the Foundation been to your organization’s ability to assess progress towards your organization’s goals?

1 = Not at all helpful
7 = Extremely helpful
Respondents were asked to rate how transparent Weingart is in the following areas, where 1 = "Not at all transparent" and 7 = "Extremely transparent."
Foundation Transparency – Grantee Subgroups

- Changes that affect the funding grantees might receive in the future
  - SGP: 5.4
  - RGP: 5.7

- Foundation's processes for selecting grantees
  - SGP: 5.62
  - RGP: 5.83

- Best practices the Foundation has learned—through its work or through others' work—about the issue areas it funds
  - SGP: 5.23
  - RGP: 5.68

- Foundation's experience with what it has tried but has not worked in its past grantmaking
  - SGP: 4.69
  - RGP: 5.04
Changes that affect the funding grantees might receive in the future: 4.26
Foundation's processes for selecting grantees: 4.25
Best practices the Foundation has learned – through its work or through others' work – about the issue areas it funds: 4.21
Foundation's experience with what it has tried but has not worked in its past grantmaking: 3.85
Weingart-Specific Questions

The following question was only asked of Weingart grantees. No comparative data is available.

Overall, how effective is your organization in meeting its mission?

- **Weingart 2013**
  - 6.36

- **SGP/RGP**
  - 6.3
  - 6.41
**COMPARATIVE COHORTS**

**Customized Cohort**

Weingart selected two sets of funders to create smaller comparison groups that more closely resembles Weingart in scale and scope. The "Similar Funder Cohort" includes funders that are similar to Weingart in size and grantmaking approach. The "Regional Funder Cohort" includes funders that focus on the same region as the Foundation.

<table>
<thead>
<tr>
<th>Similar Funder Custom Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ahmanson Foundation</td>
</tr>
<tr>
<td>Blue Shield of California Foundation</td>
</tr>
<tr>
<td>California Community Foundation</td>
</tr>
<tr>
<td>California Wellness Foundation</td>
</tr>
<tr>
<td>Eugene and Agnes E. Meyer Foundation</td>
</tr>
<tr>
<td>George Gund Foundation</td>
</tr>
<tr>
<td>Harry and Jeanette Weinberg Foundation</td>
</tr>
<tr>
<td>McKnight Foundation</td>
</tr>
<tr>
<td>Meyer Memorial Trust</td>
</tr>
<tr>
<td>Morris and Gwendolyn Cafritz Foundation</td>
</tr>
<tr>
<td>Ralph M. Parsons Foundation</td>
</tr>
<tr>
<td>Stuart Foundation</td>
</tr>
<tr>
<td>Virginia G. Piper Charitable Trust</td>
</tr>
<tr>
<td>Weingart Foundation</td>
</tr>
<tr>
<td>Z. Smith Reynolds Foundation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Regional Funder Custom Cohort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ahmanson Foundation</td>
</tr>
<tr>
<td>Annenberg Foundation</td>
</tr>
<tr>
<td>Blue Shield of California Foundation</td>
</tr>
<tr>
<td>California Community Foundation</td>
</tr>
<tr>
<td>California Endowment</td>
</tr>
<tr>
<td>California Wellness Foundation</td>
</tr>
<tr>
<td>Carrie Estelle Doheny Foundation</td>
</tr>
<tr>
<td>James Irvine Foundation</td>
</tr>
<tr>
<td>Ralph M. Parsons Foundation</td>
</tr>
<tr>
<td>Santa Barbara Foundation</td>
</tr>
<tr>
<td>Weingart Foundation</td>
</tr>
</tbody>
</table>
**Standard Cohorts**

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

<table>
<thead>
<tr>
<th>Cohort Name</th>
<th>Count</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Foundations</td>
<td>33</td>
<td>All community foundations in the GPR dataset</td>
</tr>
<tr>
<td>Health Conversion Foundations</td>
<td>28</td>
<td>All health conversion funders in the GPR dataset</td>
</tr>
<tr>
<td>Small Private Funders</td>
<td>60</td>
<td>Private funders with annual giving of less than $10 million</td>
</tr>
<tr>
<td>Medium Private Funders</td>
<td>94</td>
<td>Private funders with annual giving of $10 million - $49 million</td>
</tr>
<tr>
<td>Large Private Funders</td>
<td>33</td>
<td>Private funders with annual giving of $50 million or more</td>
</tr>
<tr>
<td>Regional Funders</td>
<td>194</td>
<td>Funders that make grants in a specific community or region of the US</td>
</tr>
<tr>
<td>National Funders</td>
<td>57</td>
<td>Funders that make grants across the US</td>
</tr>
<tr>
<td>International Funders</td>
<td>36</td>
<td>Funders that make grants outside the US</td>
</tr>
</tbody>
</table>
The full list of funders included in each standard cohort is below.

### Community Foundations
- Ann Arbor Area Community Foundation
- California Community Foundation
- Central Indiana Community Foundation
- Chicago Community Trust
- Cleveland Foundation
- Columbus Foundation and Affiliated Organizations
- Community Foundation Silicon Valley
- East Bay Community Foundation
- Erie Community Foundation
- Fremont Area Community Foundation
- Grand Rapids Community Foundation
- Greater Cincinnati Foundation
- Gulf Coast Community Foundation of Venice
- Hampton Roads Community Foundation
- Hartford Foundation for Public Giving
- Kalamazoo Community Foundation
- Latino Community Foundation
- Maine Community Foundation
- Marin Community Foundation
- Minneapolis Foundation
- New Hampshire Charitable Foundation
- New York Community Trust
- Peninsula Community Foundation
- Philadelphia Foundation
- Pittsburgh Foundation
- Rhode Island Foundation
- Rochester Area Community Foundation
- Saint Paul Foundation
- Santa Barbara Foundation
- Santa Fe Community Foundation
- The Boston Foundation
- Vancouver Foundation
- Vermont Community Foundation

### Health Conversion Funders
- Baptist Community Ministries
- California Endowment
- California Wellness Foundation
- Caring for Colorado Foundation
- Colorado Health Foundation
- Colorado Trust
- Community Memorial Foundation
- Connecticut Health Foundation
- Danville Regional Foundation
- Endowment for Health
- Harvest Foundation of the Piedmont
- Health Care Foundation of Greater Kansas City
- Health Foundation of Greater Cincinnati
- Kansas Health Foundation
- Kessler Foundation
- Maine Health Access Foundation
- MetroWest Community Health Care Foundation
- Michael Reese Health Trust
- Missouri Foundation for Health
- Mt. Sinai Health Care Foundation
- New York State Health Foundation
- Northwest Health Foundation
- Quantum Foundation
- Rose Community Foundation
- Saint Luke's Foundation
- The Asisi Foundation of Memphis, Inc.
- Williamsburg Community Health Foundation
- Winter Park Health Foundation

### Small Private Funders
- 444S Foundation
- Adolph Coors Foundation
- Alphawood Foundation
- Amelia Peabody Foundation
- Benwood Foundation
- Blue Cross Blue Shield of Massachusetts Foundation
- Cannon Foundation
- Carrie Estelle Doheny Foundation
- Case Foundation
- Charles and Helen Schwab Foundation
- Clovies Fund
- Collins Foundation
- E. Rhodes and Leona B. Carpenter Foundation
- Eden Hall Foundation
- EMPower
- Eugene and Agnes E. Meyer Foundation
- F.B. Heron Foundation
- Fan Fox and Leslie R. Samuels Foundation
- First Fruit
- Frist Foundation
- GAR Foundation
- Gates Family Foundation
- Gaylord and Dorothy Donnelley Foundation
- Grable Foundation
- Harold K.L. Castle Foundation
- Helen Andrus Benedict Foundation
- Hess Foundation
- Hyams Foundation
- Jacob and Valeria Langeloth Foundation
- Jessie Smith Noyes Foundation
- John H. and Wilhelmina D. Harland Charitable Foundation, Inc.
- John P. McGovern Foundation
- Josiah Macy, Jr. Foundation
- Lenfest Foundation
- Lloyd A. Fry Foundation
- Louis Calder Foundation
- Lucile Packard Foundation for Children’s Health
- Medina Foundation
- Nord Family Foundation
- Overbrook Foundation
- Peter and Elizabeth C. Tower Foundation
- Raskob Foundation for Catholic Activities
- Raymond John Wean Foundation
- Rollin M. Gerstacker Foundation
- Ruth Mott Foundation
- S & G Foundation
- S. H. Cowell Foundation
- Shelton Family Foundation
- Soro Family Foundation
- The Abell Foundation
- The Bainerd Foundation
- The Brinson Foundation
- The Fund for New Jersey
- Victoria Foundation
- Watt Family Foundation
- Wilburforce Foundation
- William Caspar Graustein Memorial Fund
- William Stamps Farish Fund
- Woods Fund of Chicago
- Zeist Foundation
Medium Private Funders

Adessium Foundation
Ahmanson Foundation
Altmann Foundation
Ambrose Monell Foundation
Amon G. Carter Foundation
Andersen Foundation
Anschutz Foundation
Arcus Foundation
AVI CHAI Foundation
Belden Fund
Blandin Foundation
Blue Shield of California Foundation
Bradley Foundation
Bradley-Turner Foundation
Brown Foundation
Bush Foundation
Champlin Foundations
Charles and Lynn Schusterman Family Foundation
Christensen Fund
Clark Foundation
Claude Worthington Benedum Foundation
College Access Foundation of California
Conrad N. Hilton Foundation
Daniels Fund
Dekko Foundation
Dyson Foundation
Educational Foundation of America
El Pomar Foundation
Evelyn and Walter Haas, Jr. Fund
F. M. Kirby Foundation
Ford Family Foundation
France-Merrick Foundation
George Gund Foundation
George S. and Dolores Doré Eccles Foundation
Geraldine R. Dodge Foundation
Gill Foundation
Goizueta Foundation
Hall Family Foundation
Horace W. Goldsmith Foundation
Iowa West Foundation
J. A. and Kathryn Albertson Foundation
J. Bulow Campbell Foundation
J. Willard and Alice S. Marriott Foundation
James Graham Brown Foundation
Jay and Rose Phillips Family Foundation
Jessie Ball duPont Fund
John A. Hartford Foundation
John R. Oslolki Foundation
Kate B. Reynolds Charitable Trust
Kendeda Fund
Kronkosky Charitable Foundation
Leichtag Foundation
Longwood Foundation
M. J. Murdock Charitable Trust
Marguerite Casey Foundation
Mary Reynolds Babcock Foundation
Mathile Family Foundation
Meyer Memorial Trust
Morris and Gwendolyn Cafritz Foundation
Nathan Cummings Foundation
Nina Mason Pulliam Charitable Trust
Northwest Area Foundation
Omidyar Network
One Foundation
Paul G. Allen Foundations
Paul Hamlyn Foundation
Pears Foundation
Pritzker Foundation
Public Welfare Foundation
Ralph M. Parsons Foundation
Rasmussen Foundation
Richard and Rhoda Goldman Fund
Richard M. Fairbanks Foundation
Rockefeller Brothers Fund
Russell Family Foundation
Sherman Fairchild Foundation
Shubert Foundation
Skillman Foundation
Skoll Foundation
Stuart Foundation
Surdna Foundation
T.L.L. Temple Foundation
The Jim Joseph Foundation
Virginia G. Piper Charitable Trust
Walter & Elise Haas Fund
Wayne and Gladys Valley Foundation
Weingart Foundation
William K. Warren Foundation
William Randolph Hearst Foundations
William T. Kemper Foundation
Windgate Charitable Foundation
Yad Hanadiv
Z. Smith Reynolds Foundation

Large Private Funders

Alfred P. Sloan Foundation
Alliance for a Green Revolution in Africa
Annenberg Foundation
Barr Foundation
Bill & Melinda Gates Foundation
Carnegie Corporation of New York
Charles Stewart Mott Foundation
David and Lucile Packard Foundation
Doris Duke Charitable Foundation
Duke Endowment
Ford Foundation
Gordon and Betty Moore Foundation
Harry and Jeanette Weinberg Foundation
Heinz Endowments
Houston Endowment
James Irvine Foundation
John D. and Catherine T. MacArthur Foundation
John S. and James L. Knight Foundation
Kresge Foundation
Lumina Foundation for Education
McKnight Foundation
Pew Charitable Trusts
Richard King Mellon Foundation
Robert R. McCormick Tribune Foundation
Robert Wood Johnson Foundation
Rockefeller Foundation
Sea Change Foundation
The Atlantic Philanthropies
The Broad Foundation
The Wallace Foundation
W.K. Kellogg Foundation
William and Flora Hewlett Foundation
William Penn Foundation
International Funders

4445 Foundation
Adessium Foundation
Alliance for a Green Revolution in Africa
AVI CHAI Foundation
Bill & Melinda Gates Foundation
Bradley Foundation
Carnegie Corporation of New York
Charles and Lynn Schusterman Family Foundation
Charles Stewart Mott Foundation
Christensen Fund
Citi Foundation
Conrad N. Hilton Foundation
David and Lucile Packard Foundation
EMPower
Energy Foundation
First Fruit
Ford Foundation
Gordon and Betty Moore Foundation
Harry and Jeanette Weinberg Foundation
Humanity United
Inter-American Foundation
John D. and Catherine T. MacArthur Foundation
Levi Strauss Foundation
Nathan Cummings Foundation
New Profit
Oak Foundation
Omidyar Network
Overbrook Foundation
Raskob Foundation for Catholic Activities
Rockefeller Brothers Fund
Rockefeller Foundation
Skoll Foundation
The Atlantic Philanthropies
W.K. Kellogg Foundation
WILLURFICE Foundation
William and Flora Hewlett Foundation

National Funders

Alfred P. Sloan Foundation
Andersen Foundation
Anschutz Foundation
Arcus Foundation
Belden Fund
Case Foundation
Charles and Helen Schwab Foundation
Democracy Alliance
Doris Duke Charitable Foundation
E. Rhodes and Leona battery Foundation
Educational Foundation of America
F. M. Kirby Foundation
F.B. Heron Foundation
Fannie Mae Foundation
General Mills Foundation
Gill Foundation
Hess Foundation
Horace W. Goldsmith Foundation
Jessie Smith Noyes Foundation
John A. Hartford Foundation
John P. McGovern Foundation
John S. and James L. Knight Foundation
Josiah Macy, Jr. Foundation
Kendeda Fund
Kresge Foundation
Lumina Foundation for Education
Marguerite Casey Foundation
Ms. Foundation for Women
Nellie Mae Education Foundation
Nord Family Foundation
One Foundation
Partnership for Excellence in Jewish Education
Paul G. Allen Foundations
PetSmart Charities
Pew Charitable Trusts
Pritzker Foundation
PSEG Foundation
Public Welfare Foundation
Robert R. McCormick Tribune Foundation
Robert Wood Johnson Foundation
Rollin M. Gerstacker Foundation
S & G Foundation
SC Ministry Foundation
Sea Change Foundation
Sherman Fairchild Foundation
Shubert Foundation
Surdna Foundation
Susan G. Komen for the Cure
The Broad Foundation
The Jim Joseph Foundation
The Wallace Foundation
Walt Disney Foundation
Wellington Management Charitable Fund
William Randolph Hearst Foundations
William T. Kemper Foundation
Windgate Charitable Foundation
Yad Hanadiv
Regional Funders

Adolph Coors Foundation  
Abramson Foundation  
Alaska Mental Health Trust Authority  
Alliance for California Traditional Arts  
Alphawood Foundation  
Altmann Foundation  
Ambrose Monell Foundation  
Amelia Peabody Foundation  
Amon G. Carter Foundation  
Ann Arbor Area Community Foundation  
Annenberg Foundation  
Arts Council Silicon Valley  
Baptist Community Ministries  
Barr Foundation  
Benwood Foundation  
Biloxi Foundation  
Blue Cross and Blue Shield of Minnesota Foundation  
Blue Cross and Blue Shield of North Carolina Foundation  
Blue Cross Blue Shield of Massachusetts Foundation  
Blue Shield of California Foundation  
Bradley-Turner Foundation  
Brown Foundation  
Bush Foundation  
California Community Foundation  
California Endowment  
California HealthCare Foundation  
California Wellness Foundation  
Cannon Foundation  
Caring for Colorado Foundation  
Carrie Estelle Doheny Foundation  
Central Indiana Community Foundation  
Champlin Foundations  
Chicago Community Trust  
Clark Foundation  
Claude Worthington Benedum Foundation  
Cleveland Foundation  
Clowes Fund  
College Access Foundation of California  
Collins Foundation  
Colorado Health Foundation  
Colorado Trust  
Columbus Foundation and Affiliated Organizations  
Community Foundation Silicon Valley  
Community Memorial Foundation  
Community Technology Foundation of California  
Connecticut Health Foundation  
Cultural Council of Santa Cruz County  
Danville Regional Foundation  
Dekko Foundation  
Duke Endowment  
Dyson Foundation  
East Bay Community Foundation  
Eden Hall Foundation  
Edison International  
El Pomar Foundation  
Endowment for Health  
Erie Community Foundation  
Eugene and Agnes E. Meyer Foundation  
Evelyn and Walter Haas, Jr. Fund  
Fan Fox and Leslie R. Samuels Foundation  
First S Alameda County - Every Child Counts  
Ford Family Foundation  
France-Merrick Foundation  
Fremont Area Community Foundation  
Frist Foundation  
GAR Foundation  
Gates Family Foundation  
Gaylord and Dorothy Donnelley Foundation  
George Gund Foundation  
George S. and Dolores Dore Eccles Foundation  
Geraldine R. Dodge Foundation  
Goizueta Foundation  
Grable Foundation  
Grand Rapids Community Foundation  
Greater Cincinnati Foundation  
Greater Twin Cities United Way  
Gulf Coast Community Foundation of Venice  
Hali Foundation  
Hampton Roads Community Foundation  
Harold K.L. Castle Foundation  
Hartford Foundation for Public Giving  
Harvest Foundation of the Piedmont  
Health Care Foundation of Greater Kansas City  
Health Foundation of Greater Cincinnati  
Heinz Endowments  
Helen Andrus Benedict Foundation  
Helios Education Foundation  
Horizon Foundation for New Jersey  
Houston Endowment  
Hyams Foundation  
Iowa West Foundation  
J. A. and Kathryn Albertson Foundation  
J. B. Bowerman Foundation  
J. Willard and Alice S. Marriott Foundation  
Jacob and Valeria Langeloth Foundation  
James Graham Brown Foundation  
James Irvine Foundation  
Jay and Rose Phillips Family Foundation  
Jessie Ball duPont Fund  
John H. and Wilhelmina D. Harland Charitable Foundation, Inc.  
John R. Osheli Foundation  
Kalamazoo Community Foundation  
Kansai Health Foundation  
Kate B. Reynolds Charitable Trust  
Kessler Foundation  
Kronkosky Charitable Foundation  
Latino Community Foundation  
Lenfest Foundation  
Lloyd A. Fry Foundation  
Longwood Foundation  
Louis Calier Foundation  
Lucile Packard Foundation for Children’s Health  
M. J. Murdock Charitable Trust  
Maine Community Foundation  
Maine Health Access Foundation  
Marin Community Foundation  
Mary Reynolds Babcock Foundation  
Mathile Family Foundation  
Mat-Su Health Foundation  
McKnight Foundation  
Medina Foundation  
MetroWest Community Health Care Foundation  
Meyer Memorial Trust  
Michael Reese Health Trust  
Minneapolis Foundation  
Missouri Foundation for Health  
Morris and Gwendolyn Cafritz Foundation  
Mt. Sinai Health Care Foundation  
New Hampshire Charitable Foundation  
New York Community Trust  
New York State Health Foundation  
Nina Mason Pulliam Charitable Trust  
Northern Rock Foundation  
Northwest Area Foundation  
Northwest Health Foundation  
Ontario Trillium Foundation  
Peninsula Community Foundation  
Peter and Elizabeth C. Tower Foundation  
Philadelphia Foundation  
Pittsburgh Foundation   PNM Resources Foundation  
Polk Bros. Foundation  
Quantum Foundation  
Ralph Lauren Foundation  
Rasmussen Foundation  
Raymond John Wean Foundation  
Resources Legacy Fund  
Rhode Island Foundation  
Richard and Rhoda Goldman Fund  
Richard King Mellon Foundation  
Richard M. Fairbanks Foundation  
Robin Hood Foundation  
Rochester Area Community Foundation  
Rose Community Foundation  
Russell Family Foundation  
Ruth Mott Foundation  
S. H. Cowell Foundation  
Saint Luke’s Foundation  
Saint Paul Foundation  
Santa Barbara Foundation  
Santa Fe Community Foundation  
Shelton Family Foundation  
Skillman Foundation  
Soriano Family Foundation  
St. Louis County Children’s Service Fund  
Stuart Foundation  
T.L.L. Temple Foundation  
The Abell Foundation  
The Assisi Foundation of Memphis, Inc.  
The Boston Foundation  
The Brainerda Foundation  
The Brinson Foundation  
The Fund for New Jersey  
The Thrivent Financial for Lutherans Foundation  
Tufts Health Plan Foundation  
United Way of Massachusetts Bay  
Vancouver Foundation  
Vermont Community Foundation  
Victoria Foundation  
Virginia G. Piper Charitable Trust  
Wachovia Regional Foundation  
Wayne & Gladys Valley Foundation  
Weingart Foundation  
William Casper Graustein Memorial Fund  
William K. Warren Foundation  
William Penn Foundation  
William Stamps Farish Fund  
Williamsburg Community Health Foundation  
Winter Park Health Foundation  
Woods Fund of Chicago  
Z. Smith Reynolds Foundation  
Zepf Foundation
ABOUT CEP & 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.

Contact Information

Austin Long, Manager
(415) 391-3070 ext. 127
austinl@effectivephilanthropy.org

Karina Kocemba, Senior Research Analyst
(415) 391-3070 ext. 221
karinak@effectivephilanthropy.org