

Grantee Perception Report[®]

PREPARED FOR
The Heinz Endowments
August 2017



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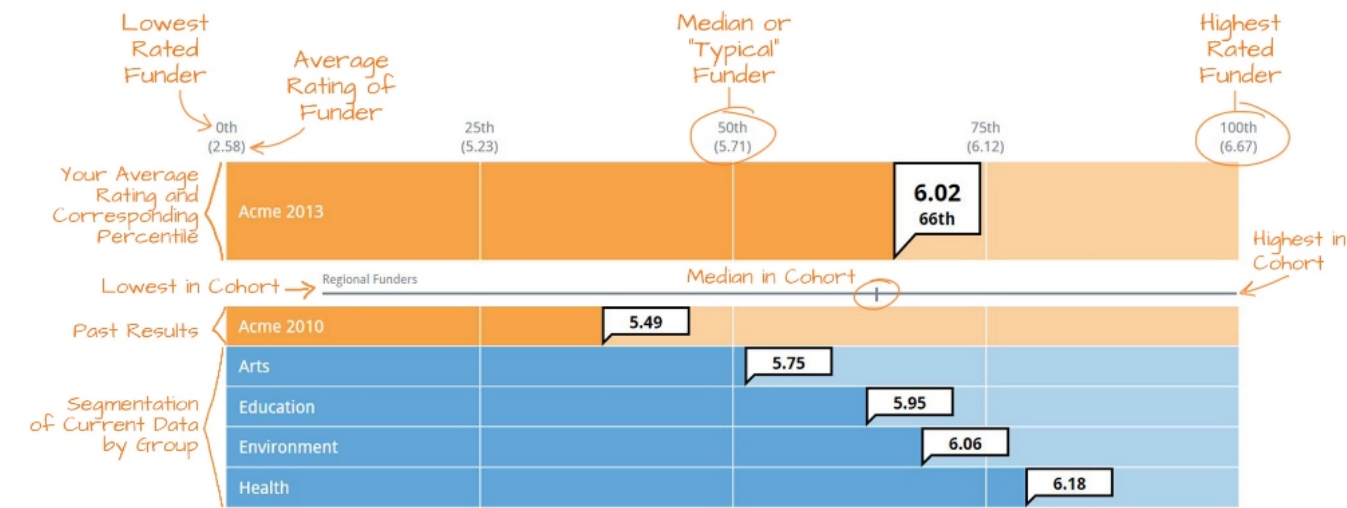
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The online version of this report can be accessed at cep.surveymresults.org.

Interpreting Your Charts

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



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

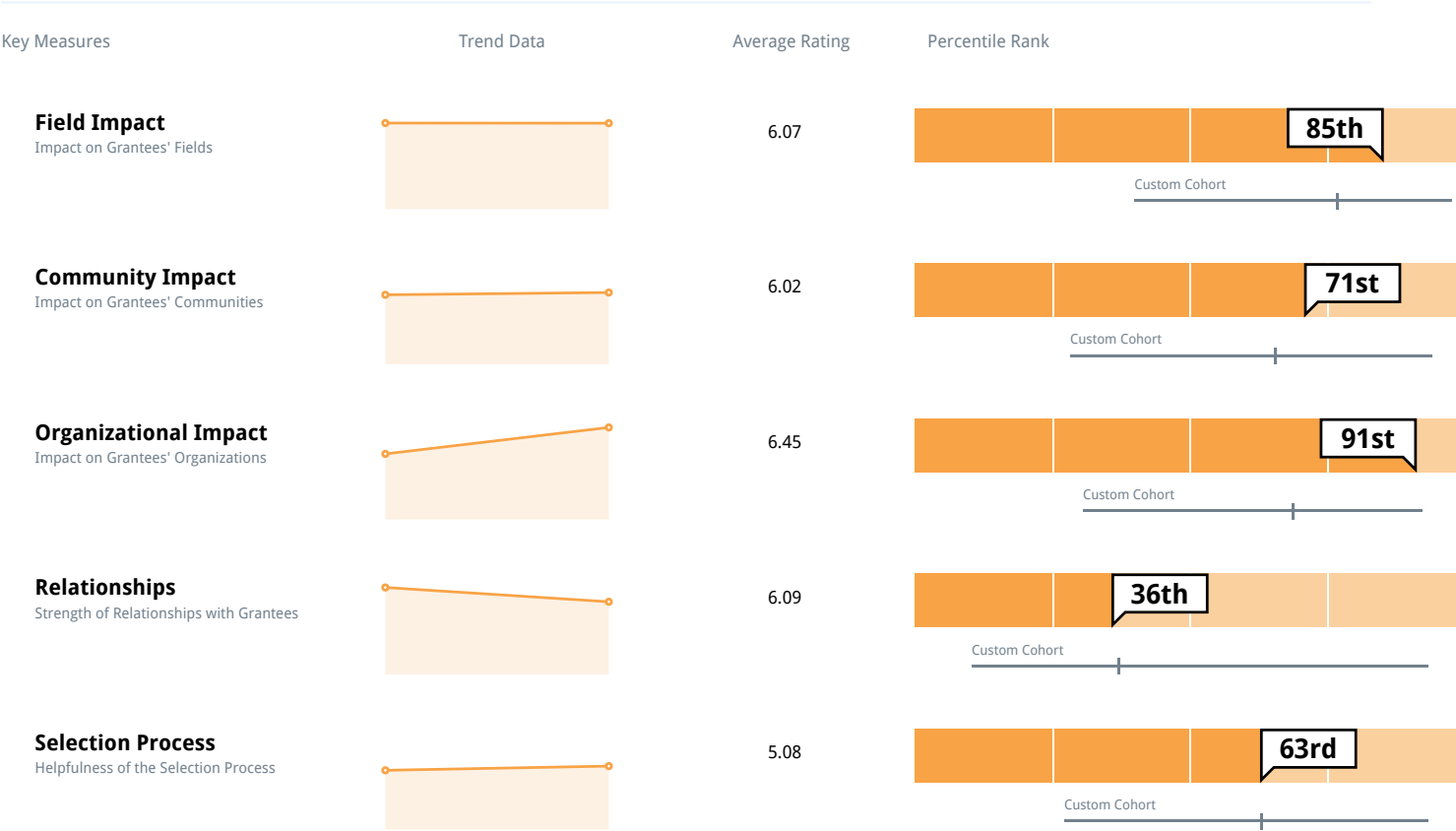
STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

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



Key Ratings Summary

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



Grantees were asked, "At this point in time, what is one word that best describes the Endowments?" 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. Twenty grantees described Heinz as "Supportive," the most commonly used word.



This image was produced using a free tool available at www.tagxedo.com. Copyright (c) 2006, ComponentAce. <http://www.componentace.com>.

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Heinz 2017	May and June 2017	419	293	70%
Heinz 2015	February and March 2015	490	318	65%

Survey Year	Year of Active Grants
Heinz 2017	2016
Heinz 2015	2015

Throughout this report, The Heinz Endowments’s survey results are compared to CEP’s broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 250 funders. The full list of participating funders can be found at <http://www.effectivephilanthropy.org/assessments/gpr-apr/>.

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

Comparative Cohorts

Customized Cohort

Heinz selected a set of 12 funders to create a smaller comparison group that more closely resembles Heinz in scale and scope.

Custom Cohort		
Barr Foundation		
Conrad N. Hilton Foundation		
Houston Endowment, Inc.		
The California Wellness Foundation		
The Duke Endowment		
The Heinz Endowments		
The James Irvine Foundation		
The Kresge Foundation		
The McKnight Foundation		
The Skillman Foundation		
The William Penn Foundation		
Weingart Foundation		

Standard Cohorts

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

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	36	Funders with median grant size of \$20K or less
Large Grant Providers	72	Funders with median grant size of \$200K or more
High Touch Funders	32	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	28	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	62	Funders that make at least 90% of grants proactively
Responsive Grantmakers	60	Funders that make at most 10% of grants proactively
International Funders	38	Funders with an international scope of work

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	55	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	53	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	140	All private foundations in the GPR dataset
Family Foundations	62	All family foundations in the GPR dataset
Community Foundations	37	All community foundations in the GPR dataset
Health Conversion Foundations	30	All health conversation foundations in the GPR dataset
Corporate Foundations	20	All corporate foundations in the GPR dataset

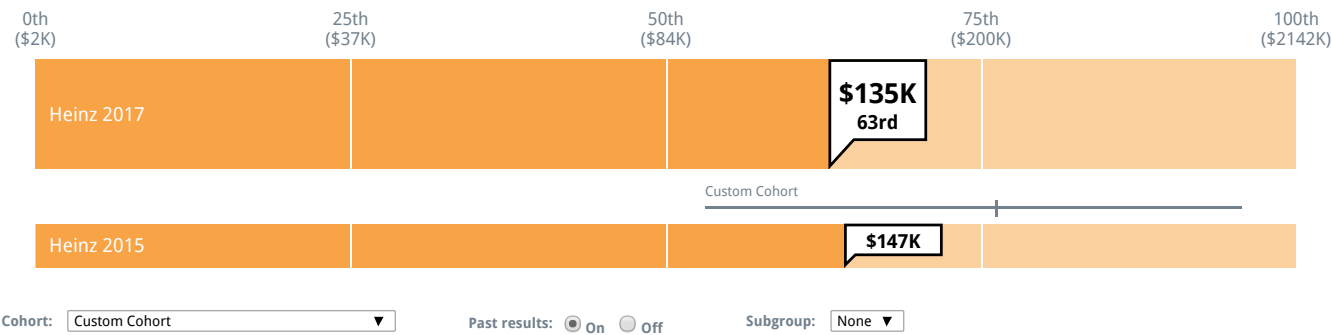
Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	22	Funders that are primarily based outside the United States
Recently Established Foundations	60	Funders that were established in 2000 or later

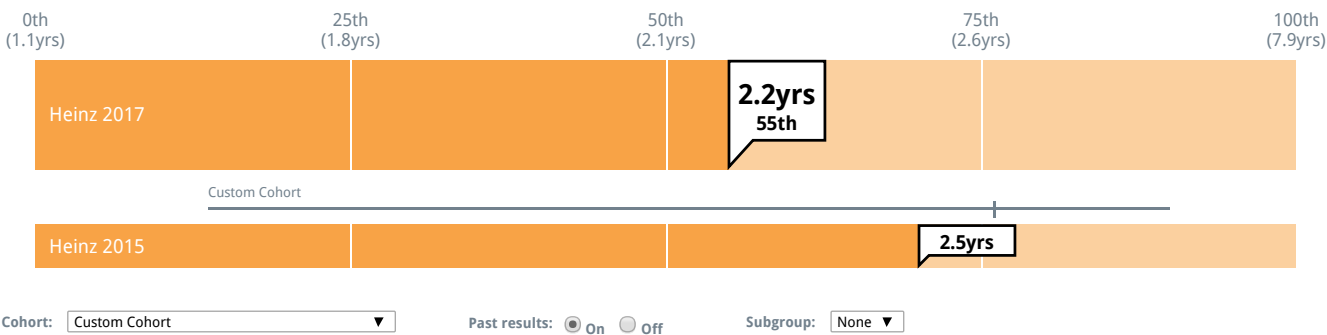
Grantmaking Characteristics

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

Median Grant Size



Average Grant Length



Median Organizational Budget

0th (\$0.0M) 25th (\$0.8M) 50th (\$1.5M) 75th (\$2.5M) 100th (\$30.0M)



Custom Cohort

Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

Type of Support

	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Percent of grantees receiving general operating/core support	27%	28%	21%	32%
Percent of grantees receiving program/project support	64%	66%	65%	59%
Percent of grantees receiving other types of support	9%	7%	14%	9%

Grant History

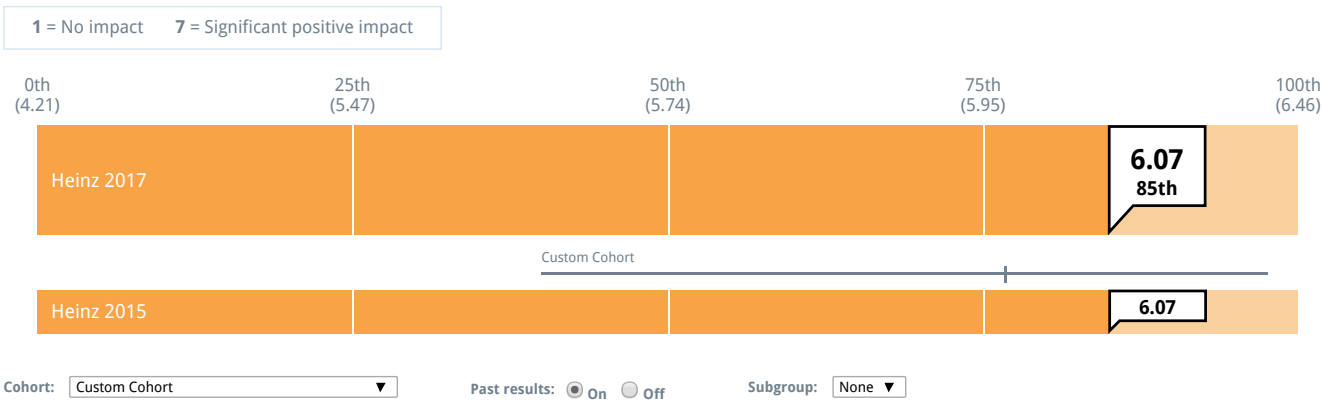
	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Percentage of first-time grants	18%	19%	29%	23%

Program Staff Load

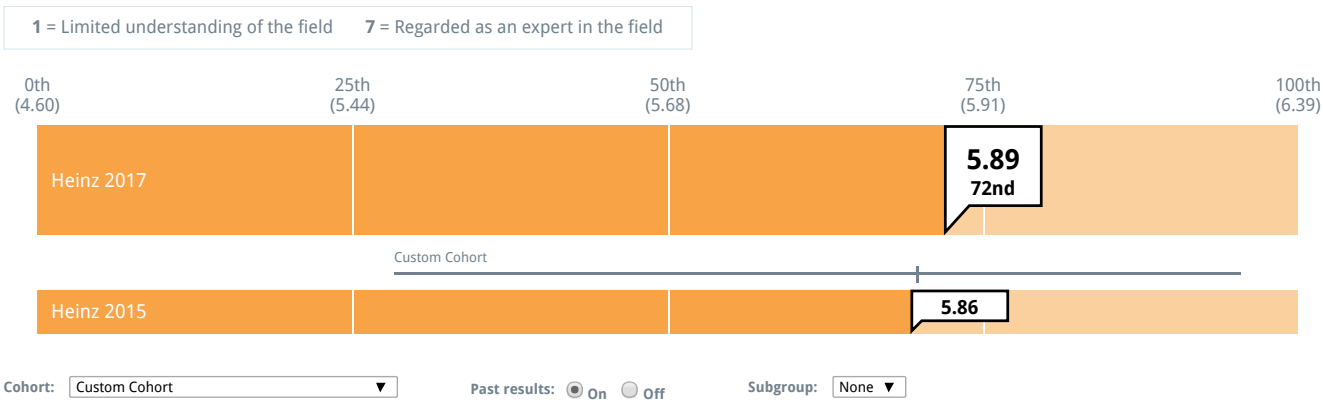
	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	\$4.2M	\$7.1M	\$2.6M	\$5M
Applications per program full-time employee	36	56	29	18
Active grants per program full-time employee	39	57	33	36

Impact on and Understanding of Grantees' Fields

“Overall, how would you rate the Endowments's impact on your field?”

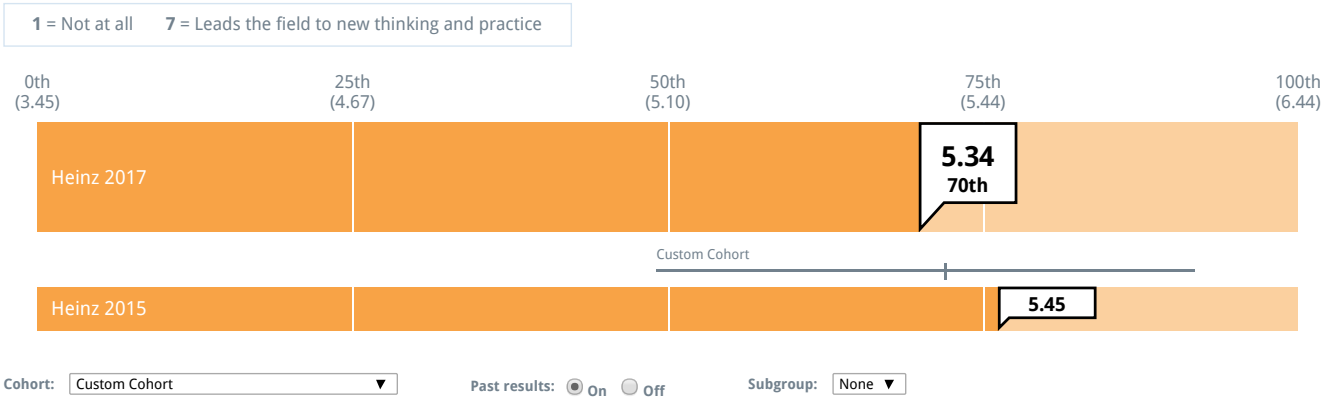


“How well does the Endowments understand the field in which you work?”

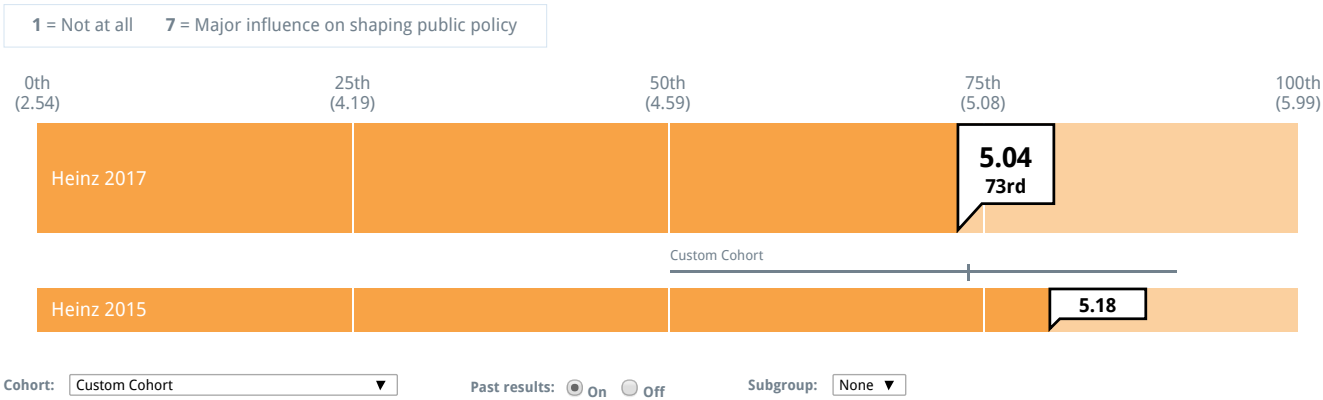


Advancing Knowledge and Public Policy

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

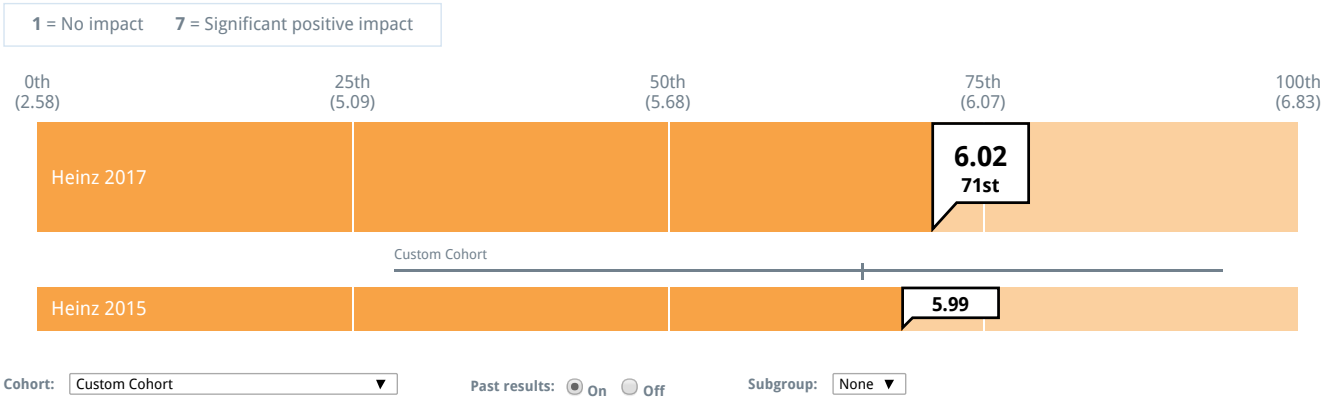


“To what extent has the Endowments affected public policy in your field?”



Impact on and Understanding of Grantees' Local Communities

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

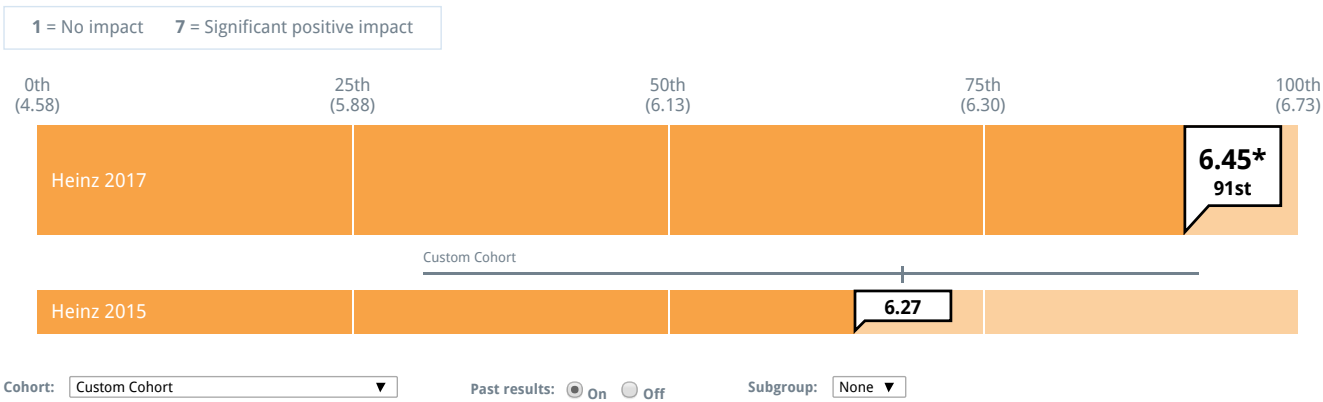


“How well does the Endowments understand the local community in which you work?”

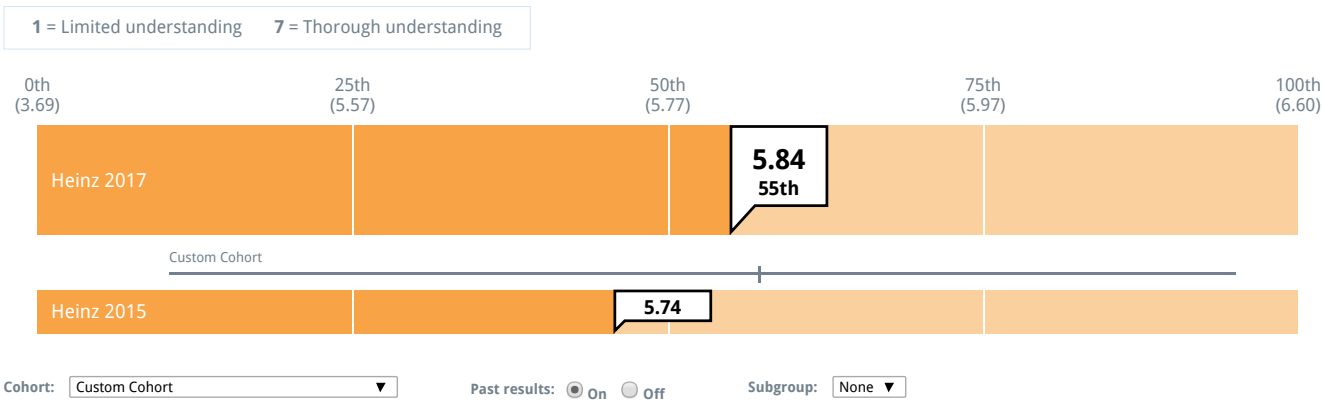


Impact on and Understanding of Grantees' Organizations

“Overall, how would you rate the Endowments's impact on your organization?”



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



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

1 = Did not improve ability 7 = Substantially improved ability

0th (4.07) 25th (5.22) 50th (5.47) 75th (5.68) 100th (6.25)



Custom Cohort



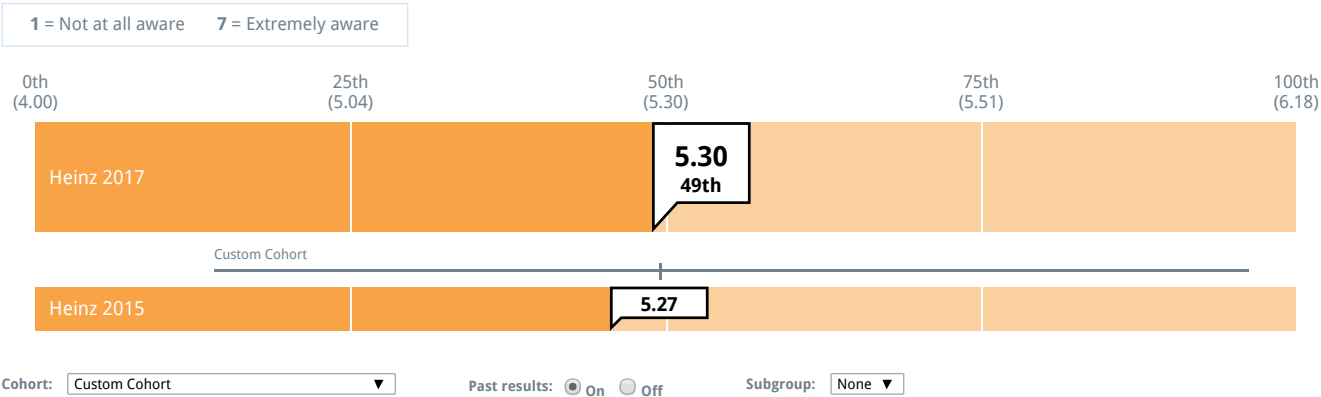
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

Grantee Challenges

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



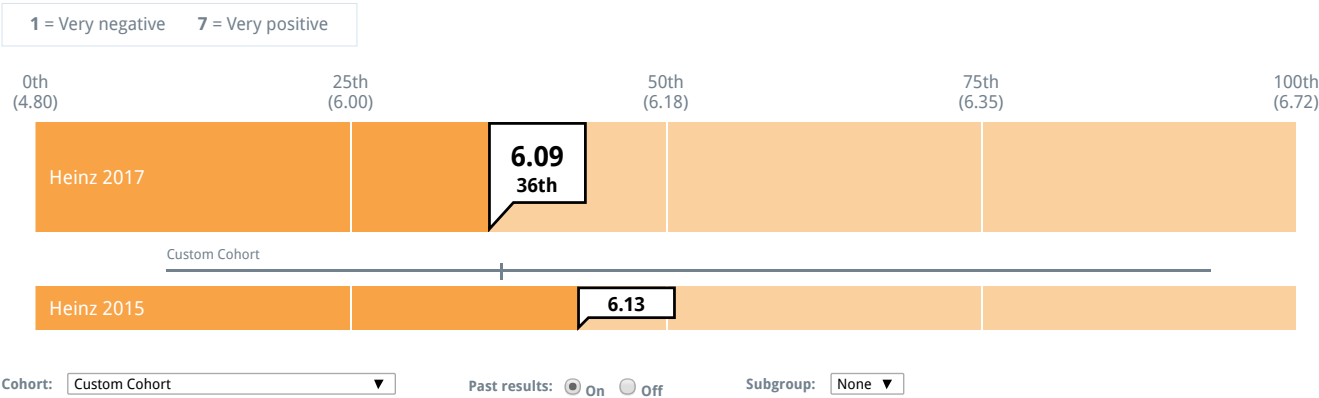
Funder-Grantee Relationships

Funder-Grantee Relationships Summary Measure

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

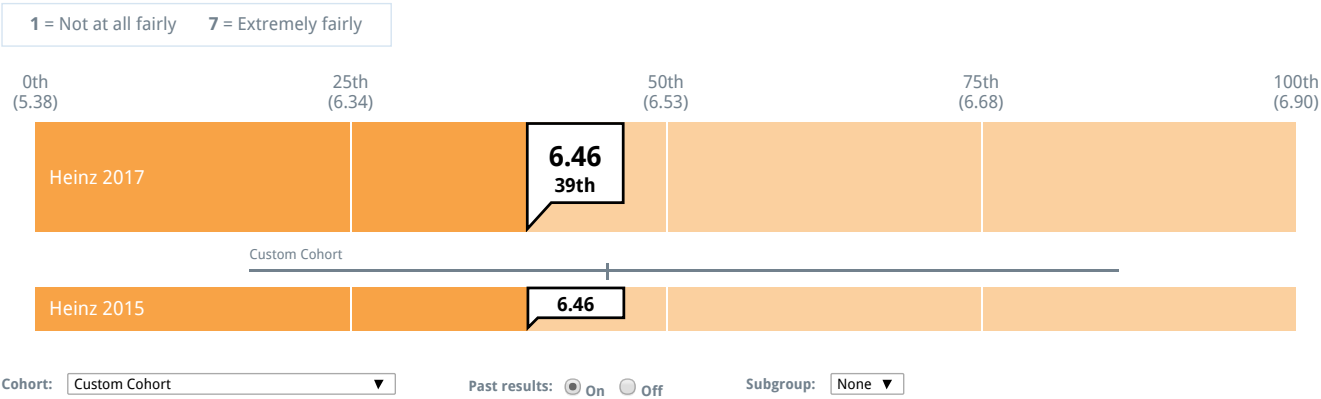
- 1. Fairness of treatment by the foundation
- 2. Comfort approaching the foundation if a problem arises
- 3. Responsiveness of foundation staff
- 4. Clarity of communication of the foundation's goals and strategy
- 5. Consistency of information provided by different communications

Funder-Grantee Relationships Summary Measure

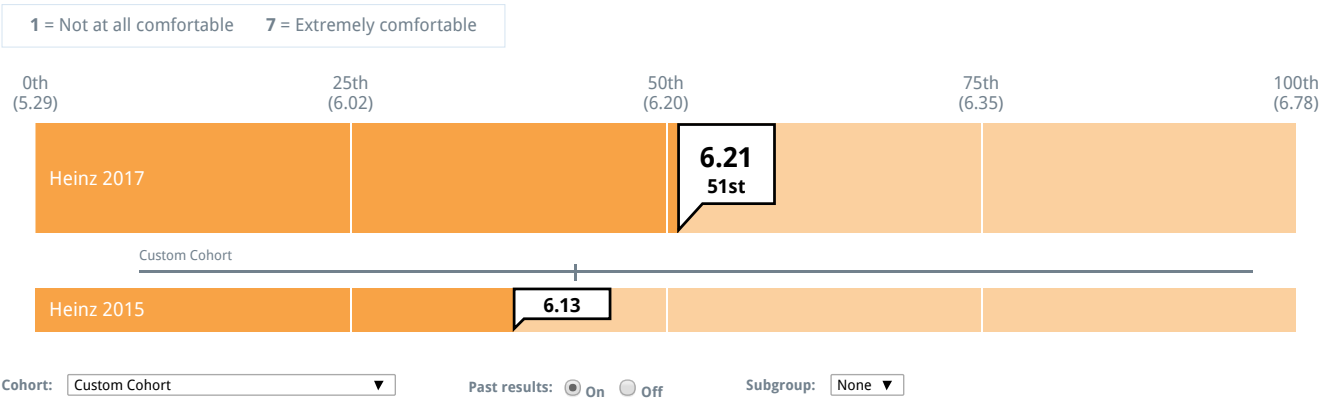


Quality of Interactions

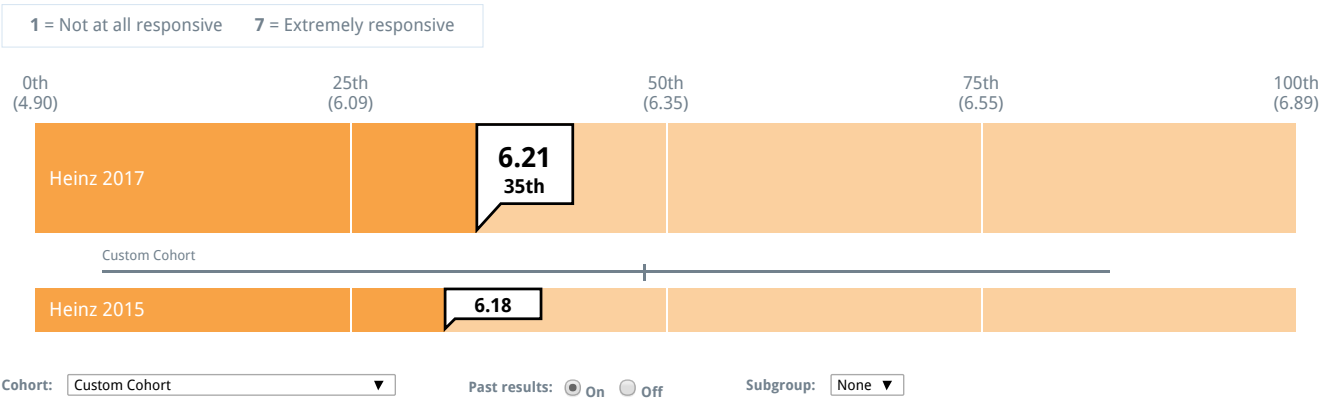
“Overall, how fairly did the Endowments treat you?”



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



“Overall, how responsive was the Endowments staff?”



Interaction Patterns

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

Frequency of Contact with Program Officer	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Weekly or more often	1%	3%	3%	2%
A few times a month	9%	8%	11%	9%
Monthly	15%	16%	15%	14%
Once every few months	55%	52%	53%	57%
Yearly or less often	20%	21%	18%	18%

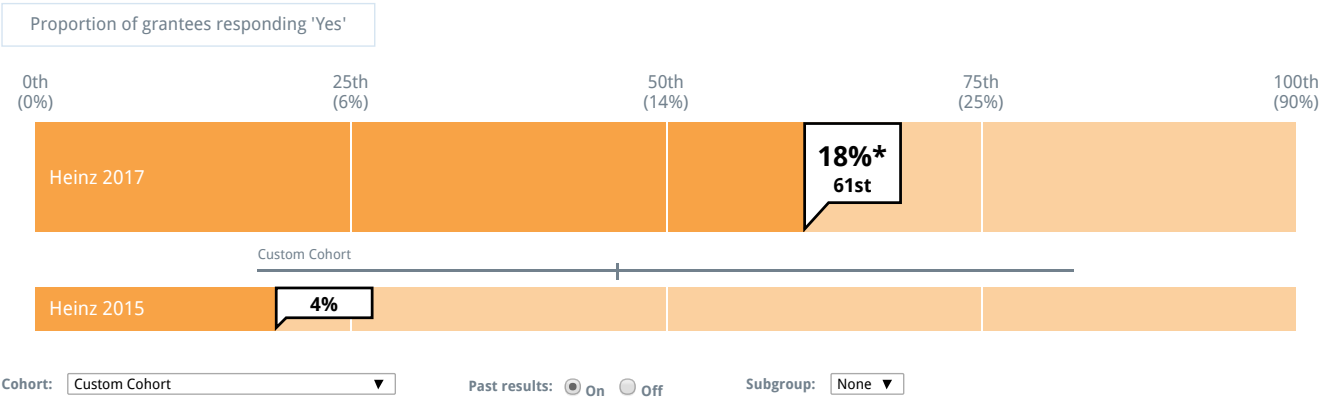
"Who most frequently initiated the contact you had with your program officer?"

Initiation of Contact with Program Officer	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Program Officer	8%	8%	15%	11%
Both of equal frequency	39%	44%	50%	47%
Grantee	53%	48%	35%	43%

Behind the numbers: Heinz grantees that report reciprocal or funder-led contact rate the Endowments significantly more positively than grantees who report most frequently initiating contact with the Endowments for many measures.

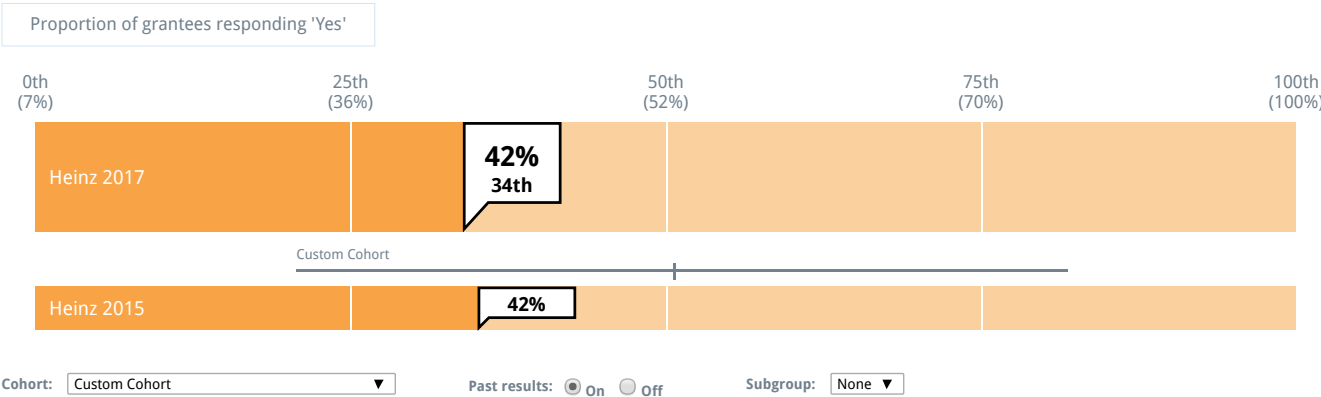
Contact Change and Site Visits

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



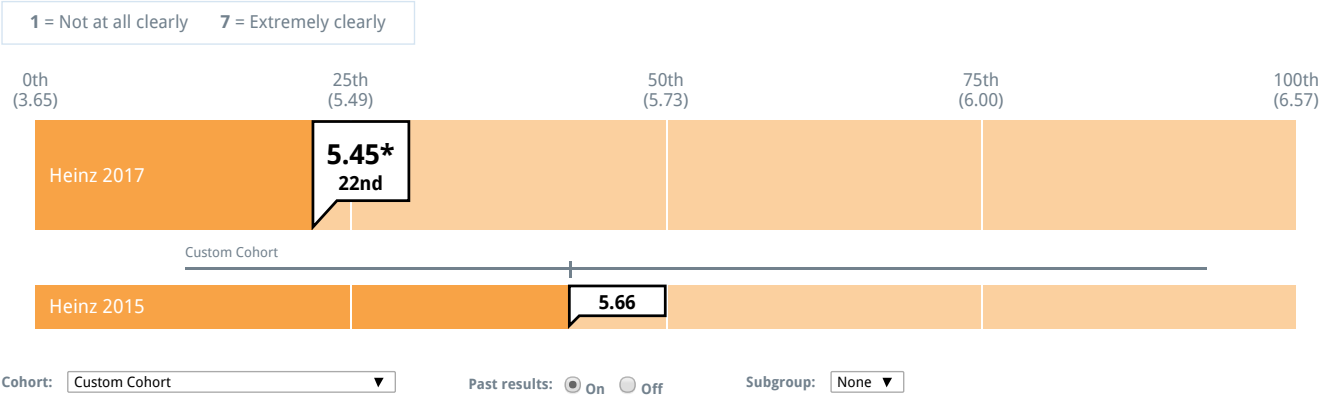
Behind the numbers: Heinz grantees that have experienced a contact change in the past six months rate the Endowments significantly less positively than grantees that did not have a contact change for the clarity of the Endowments communication of its goals and strategies.

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

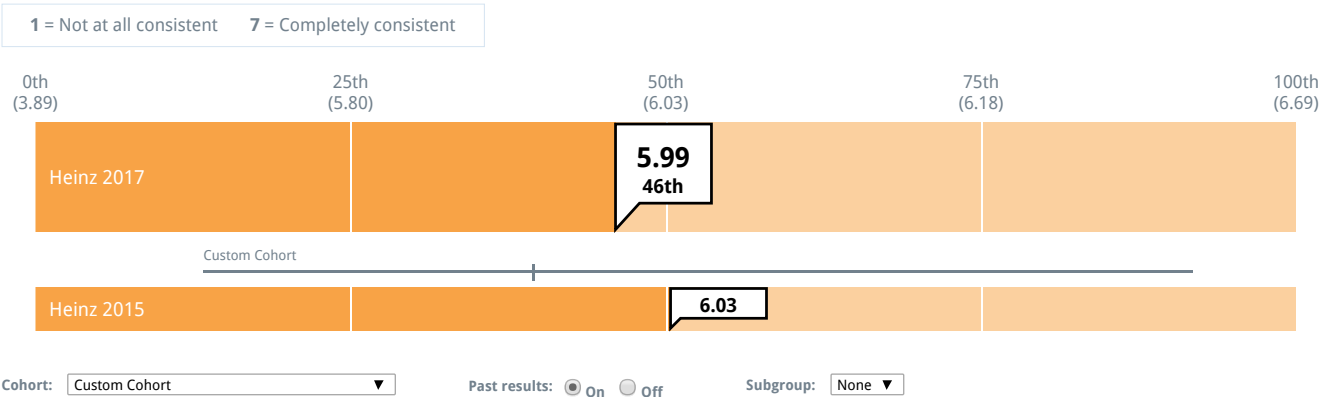


Endowments Communication

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



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

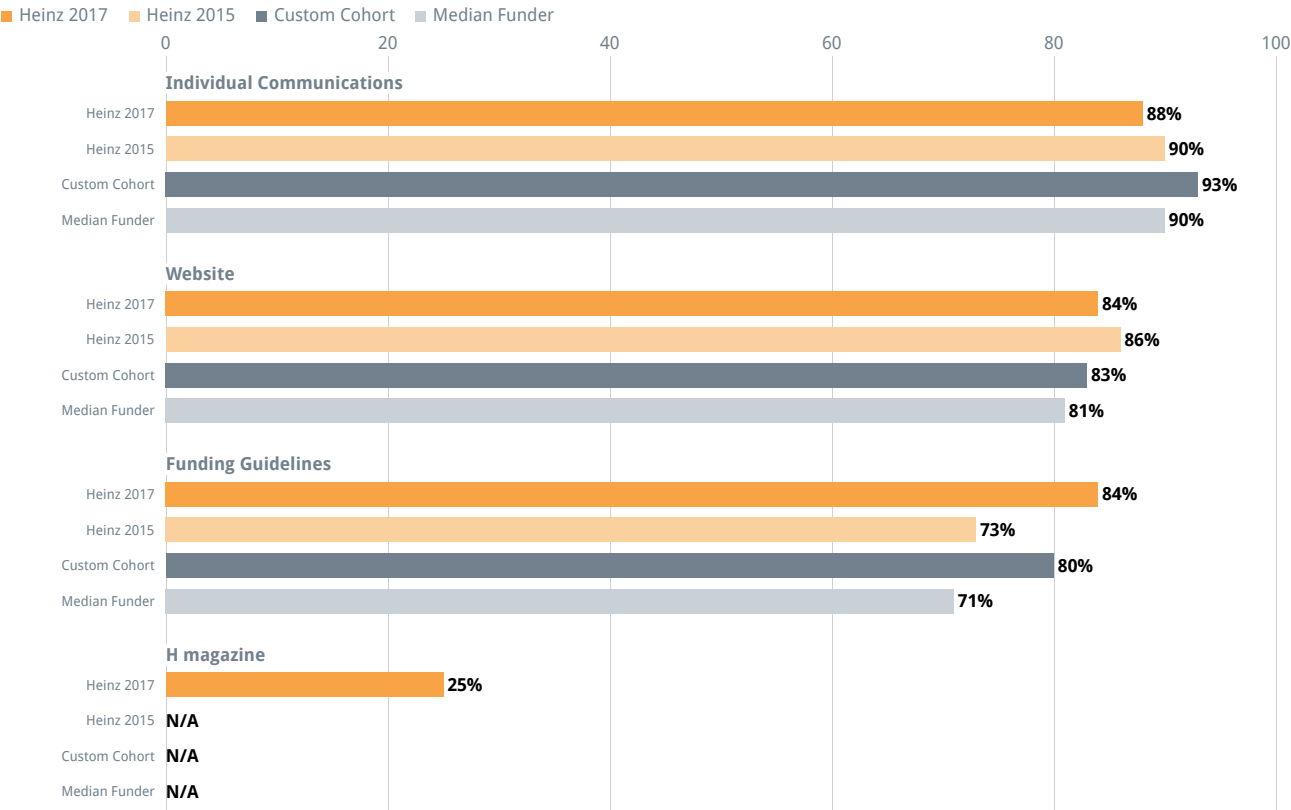


Communication Resources

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

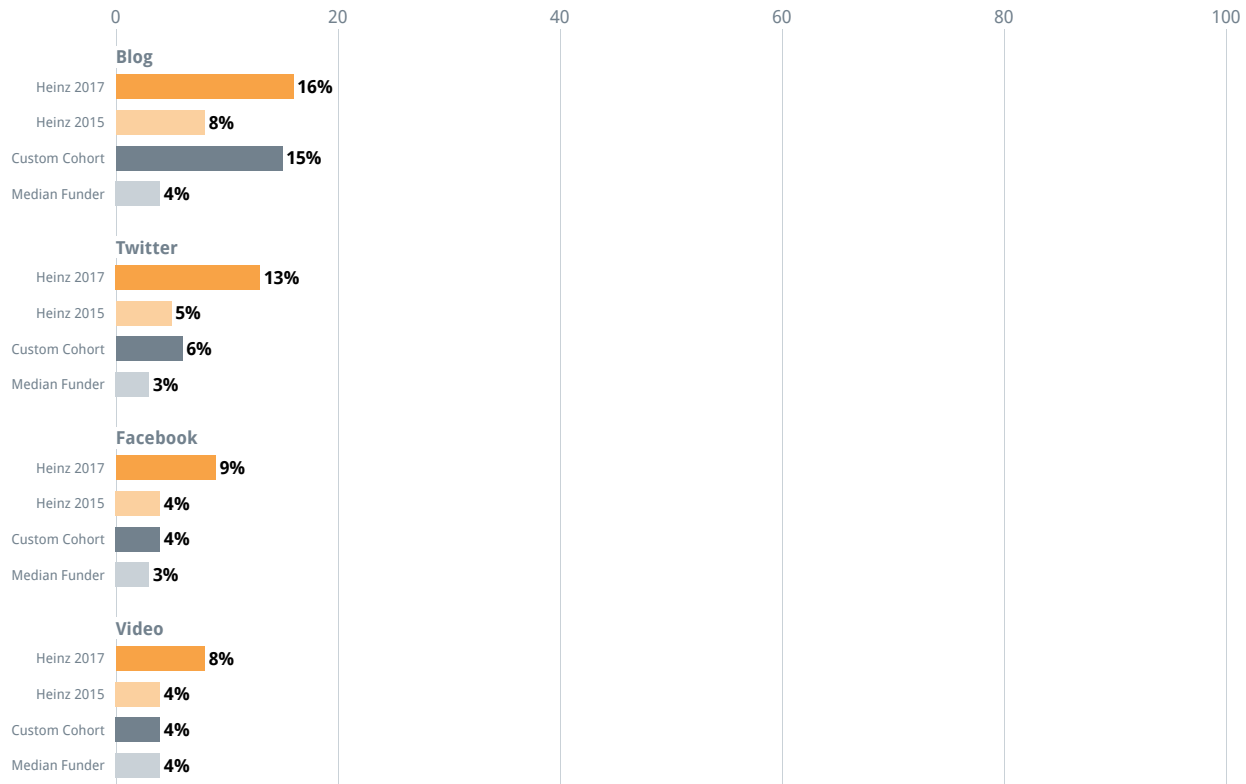
"Please indicate whether you used any of the following resources, and if so how helpful you found each."

Usage of Communication Resources - Overall



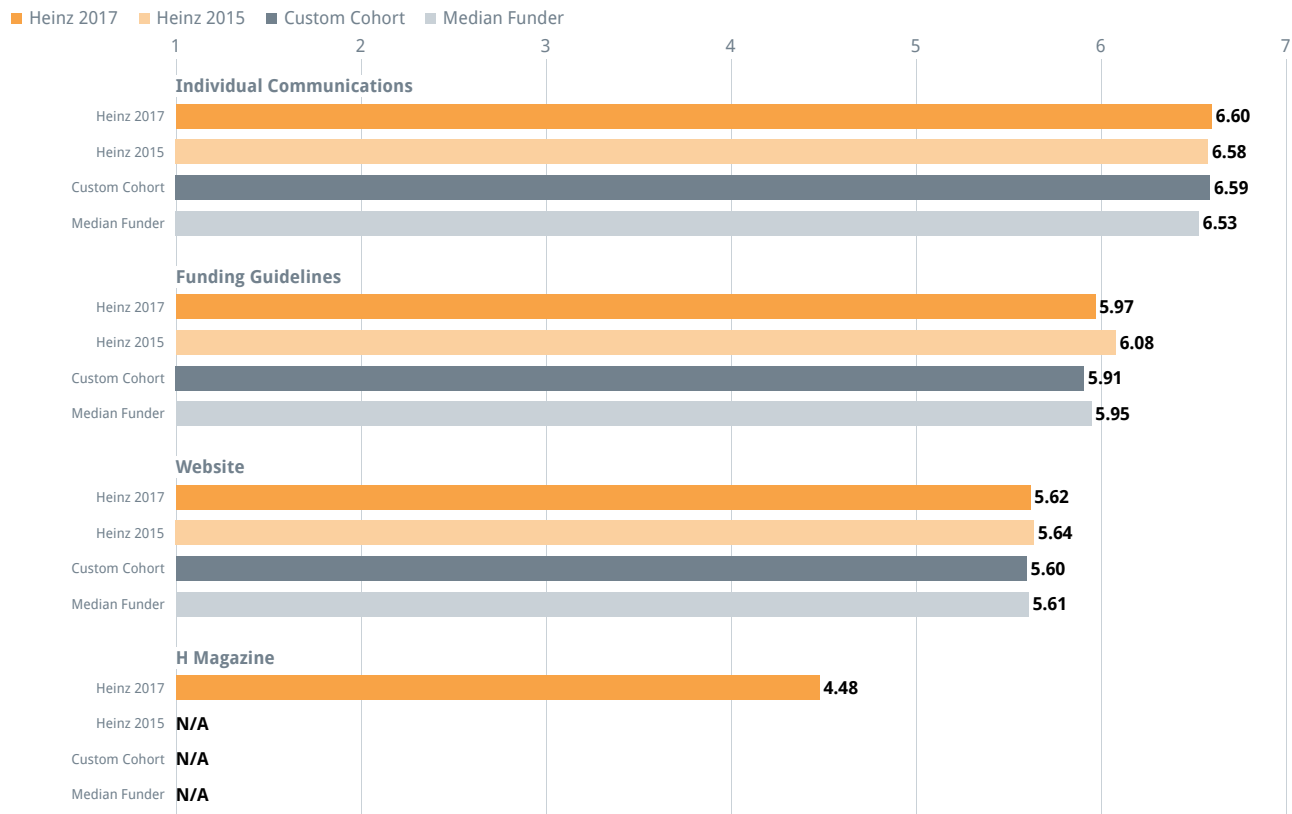
Usage of Social Media Communication Resources - Overall

Heinz 2017 Heinz 2015 Custom Cohort Median Funder



Helpfulness of Communication Resources - Overall

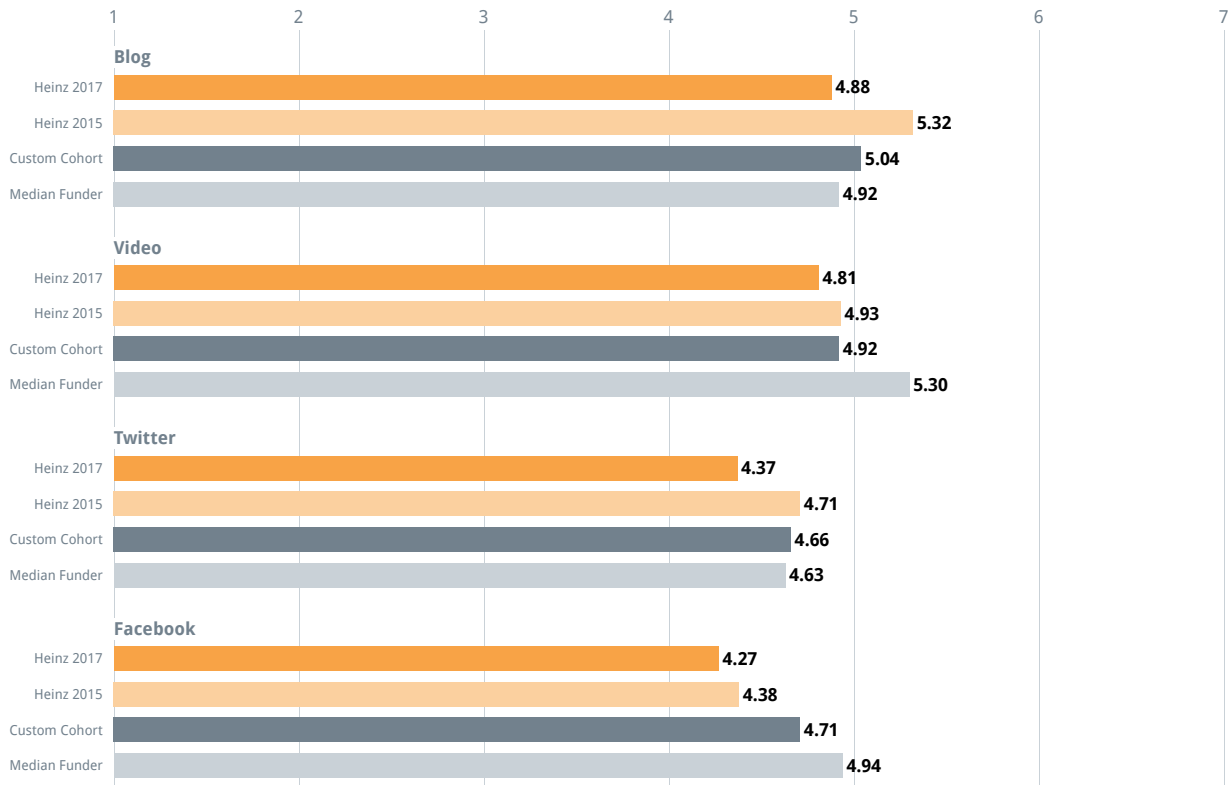
1 = Not at all helpful 7 = Extremely helpful



Helpfulness of Social Media Resources - Overall

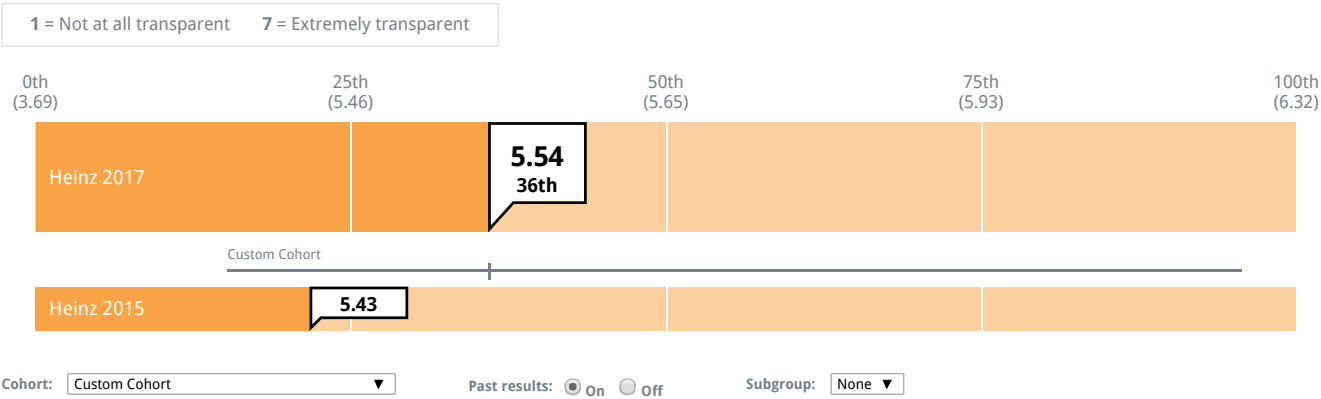
1 = Not at all helpful 7 = Extremely helpful

■ Heinz 2017 ■ Heinz 2015 ■ Custom Cohort ■ Median Funder

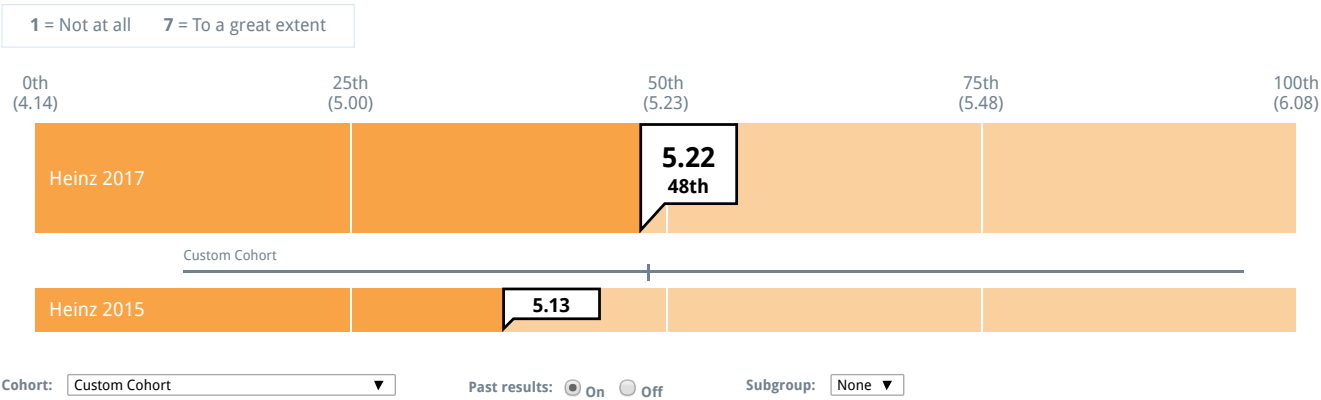


Funder Transparency

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

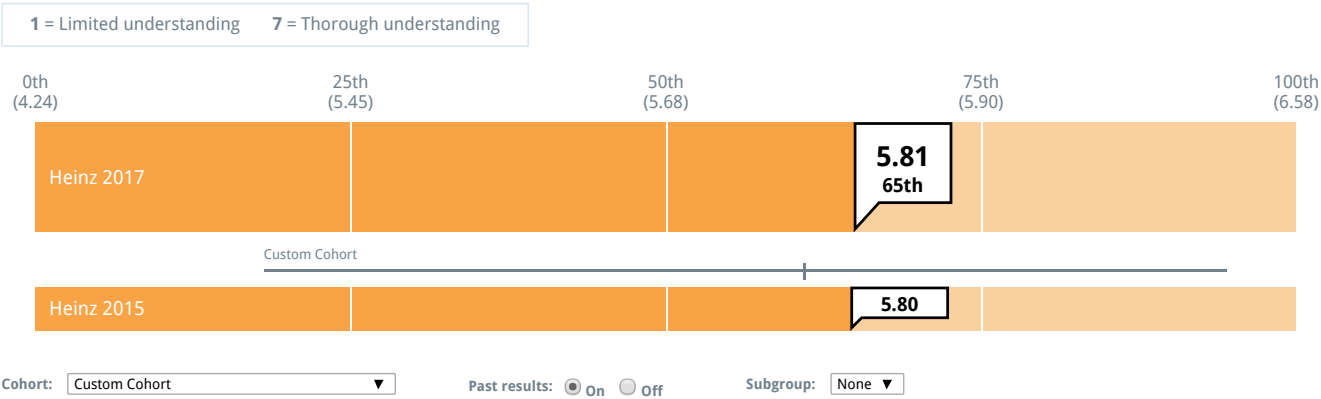


"To what extent is the Endowments open to ideas from grantees about its strategy?"



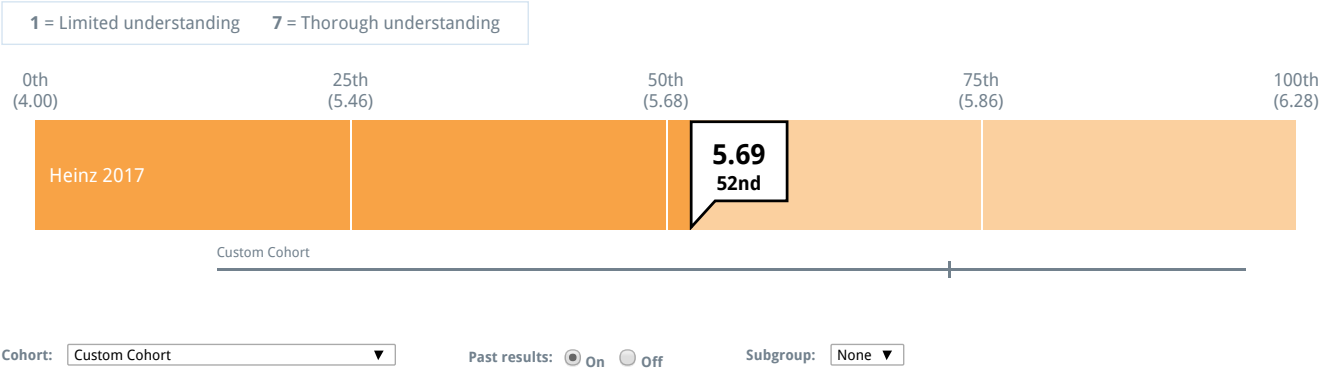
Beneficiary and Contextual Understanding

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

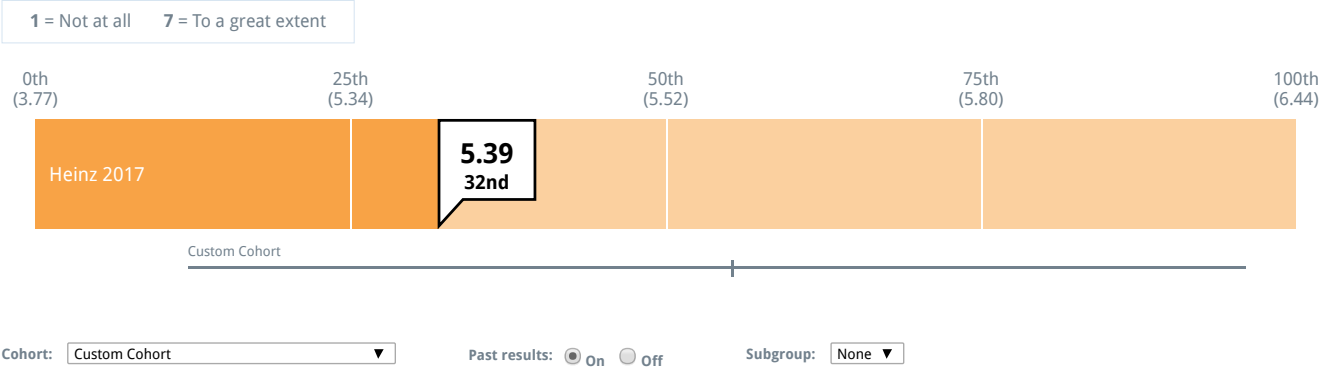


In the following questions, we use the term "beneficiaries" to refer to those your organization seeks to serve through the services and/or programs it provides. Beneficiaries are often called end users, clients, or participants.

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

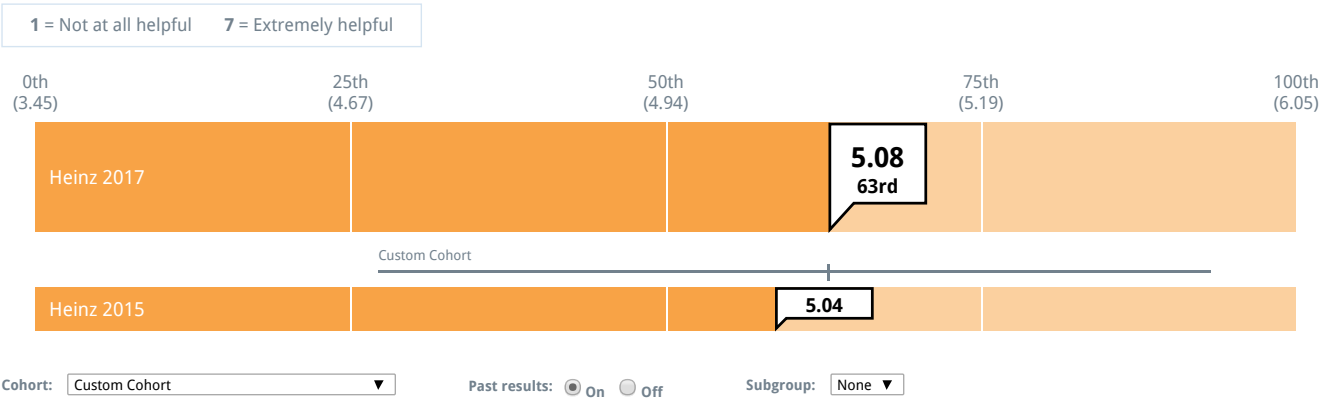


"To what extent do the Endowments's funding priorities reflect a deep understanding of your intended beneficiaries' needs?"



Grant Processes

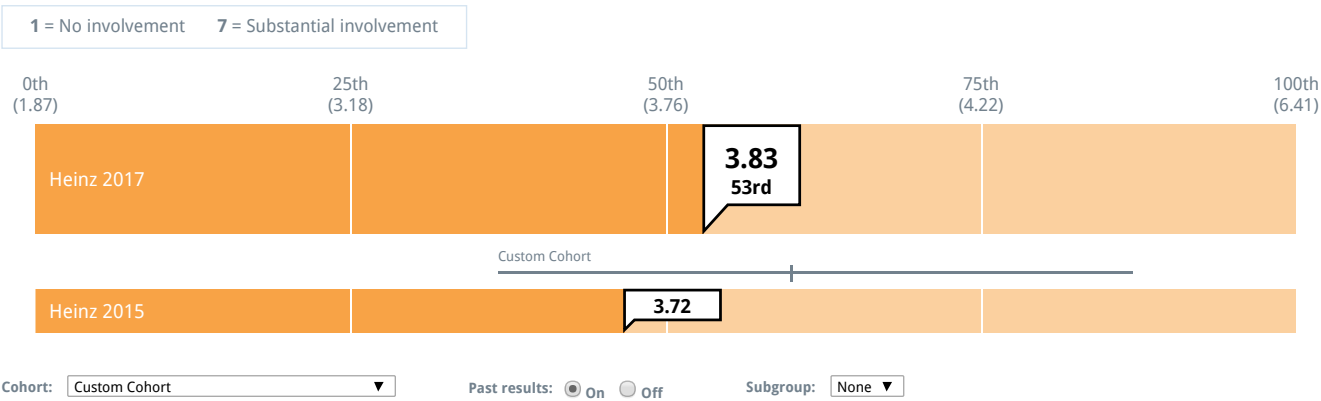
“How helpful was participating in the Endowments's selection process in strengthening the organization/program funded by the grant?”



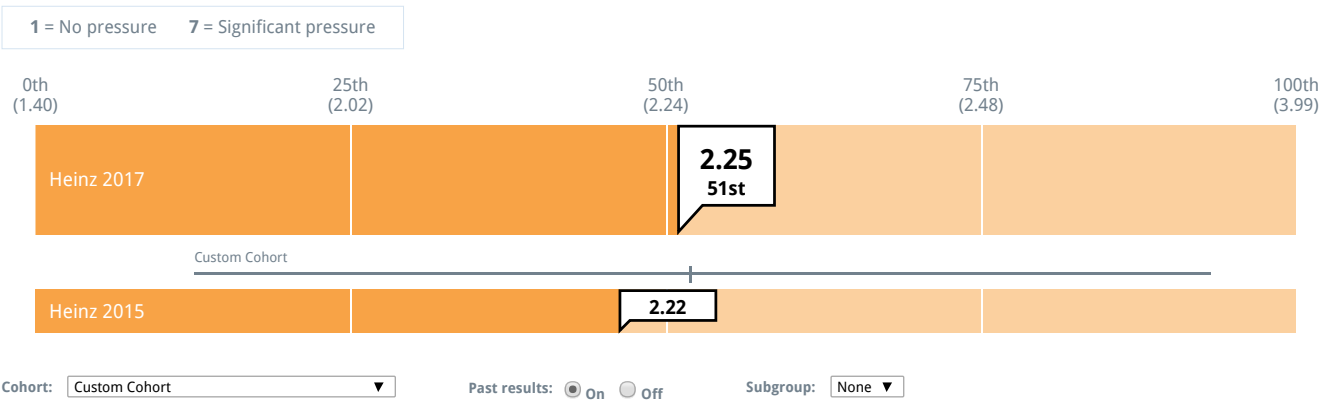
Selection Process

Did you submit a proposal for this grant?	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Submitted a Proposal	96%	98%	95%	97%
Did Not Submit a Proposal	4%	2%	5%	3%

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



“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?”



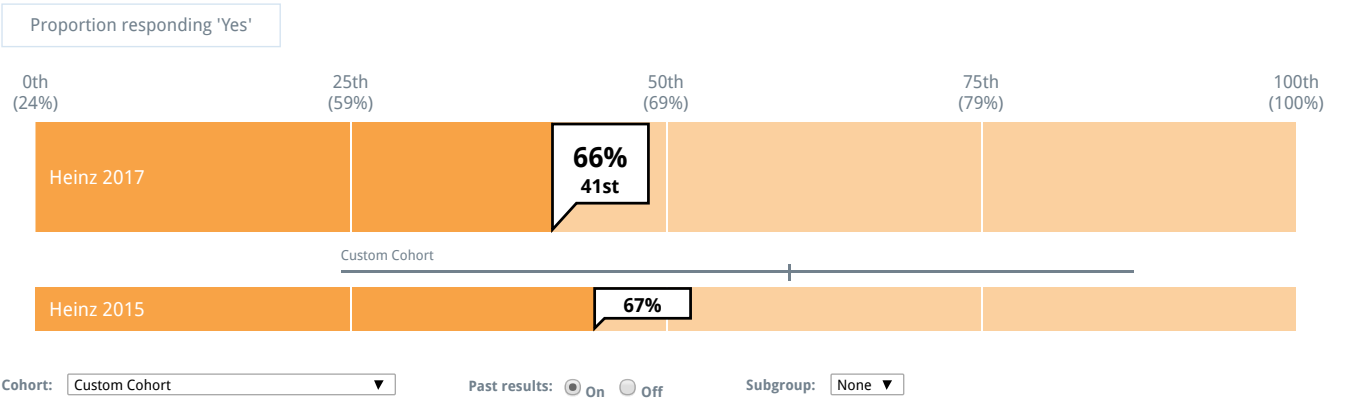
Time Between Submission and Clear Commitment

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

Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Less than 1 month	5%	4%	6%	5%
1 - 3 months	66%	61%	55%	51%
4 - 6 months	27%	30%	30%	35%
7 - 9 months	1%	4%	5%	6%
10 - 12 months	1%	0%	2%	2%
More than 12 months	0%	1%	2%	1%

Reporting and Evaluation Process

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



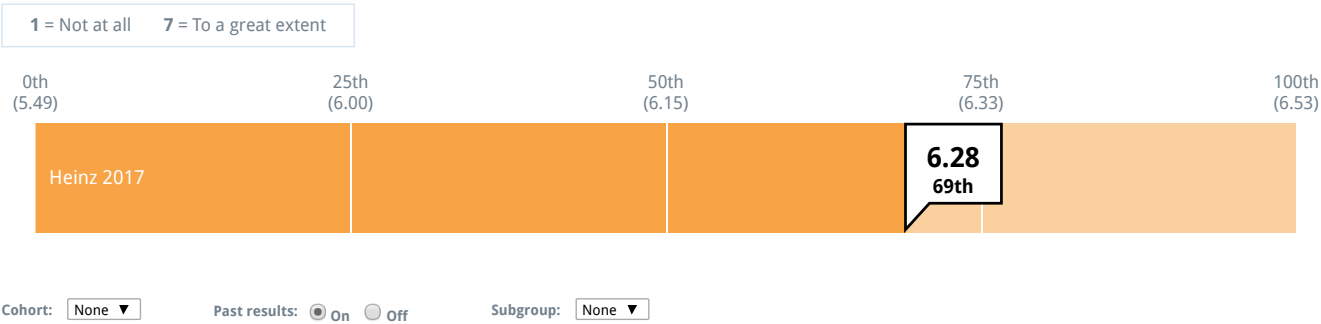
*The following questions were recently added to the grantee survey and depict comparative data from 37 funders in the dataset.

Participation in Reporting and/or Evaluation Processes	Heinz 2017	Average Funder
Participated in a reporting process only	62%	57%
Participated in an evaluation process only	1%	1%
Participated in both a reporting and an evaluation process	27%	31%
Participated in neither a reporting nor an evaluation process	11%	11%

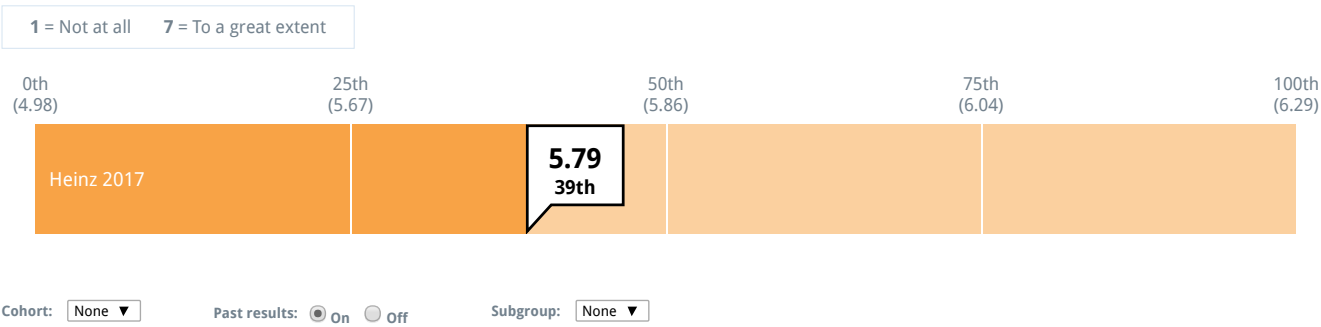
Reporting Process

*The following questions were recently added to the grantee survey and depict comparative data from 37 funders in the dataset.

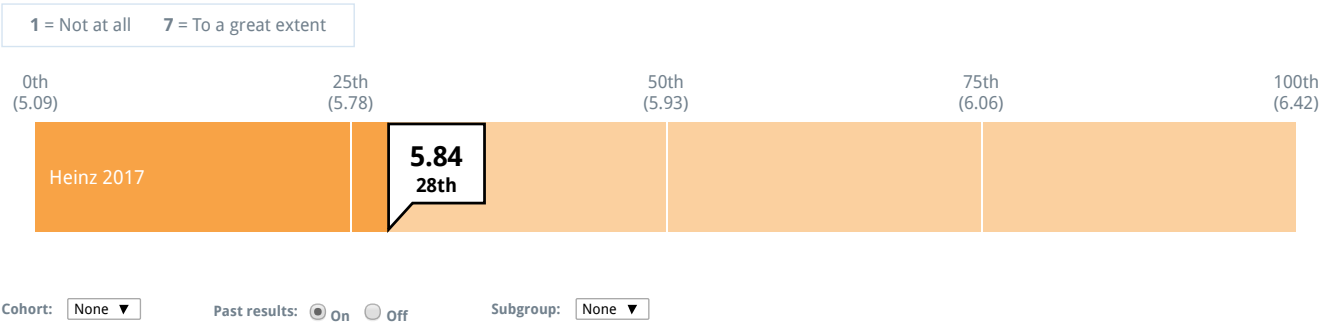
"To what extent was the Endowments's reporting process straightforward?"



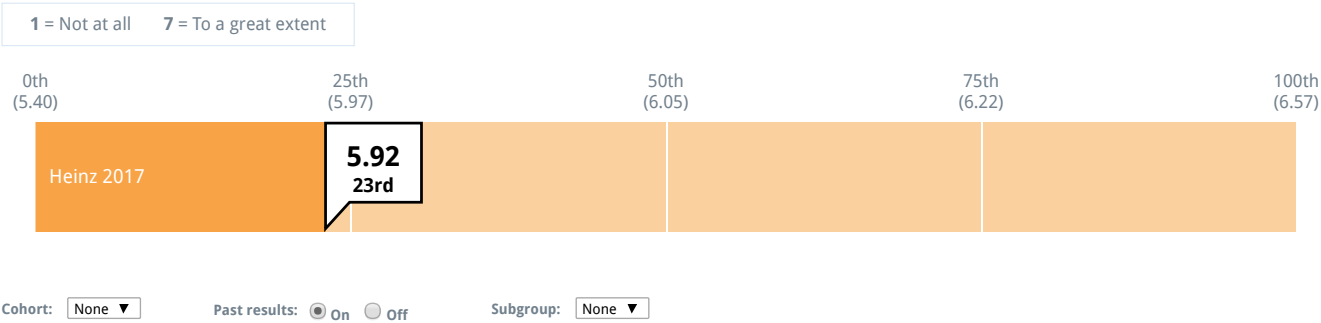
"To what extent was the Endowments's reporting process adaptable, if necessary, to fit your circumstances?"



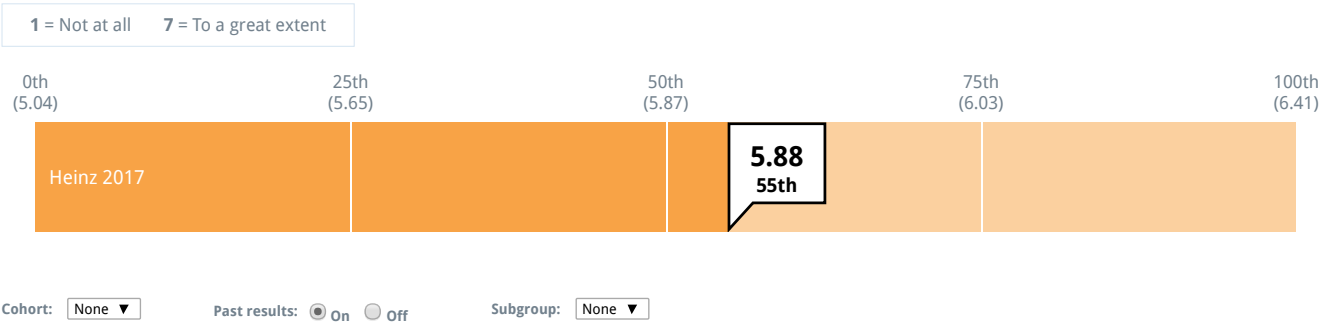
"To what extent was the Endowments's reporting process aligned appropriately to the timing of your work?"



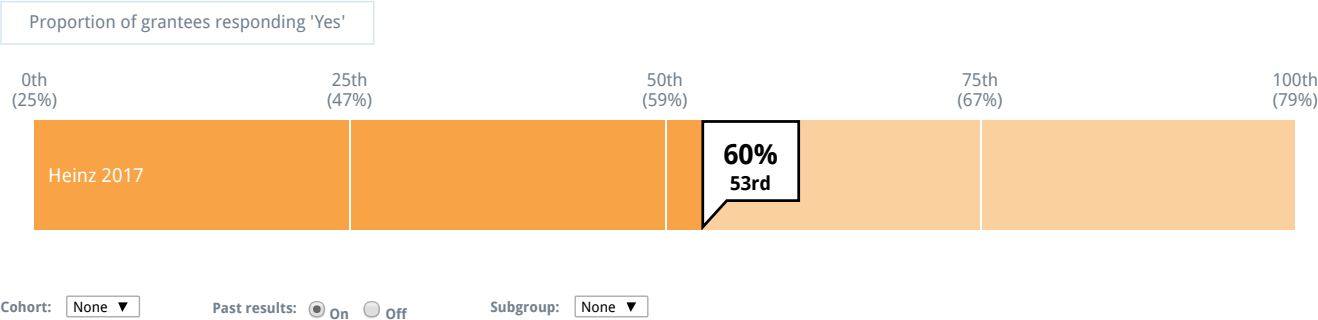
"To what extent was the the Endowments's reporting process relevant, with questions and measures pertinent to the work funded by this grant?"



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



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



Evaluation Process

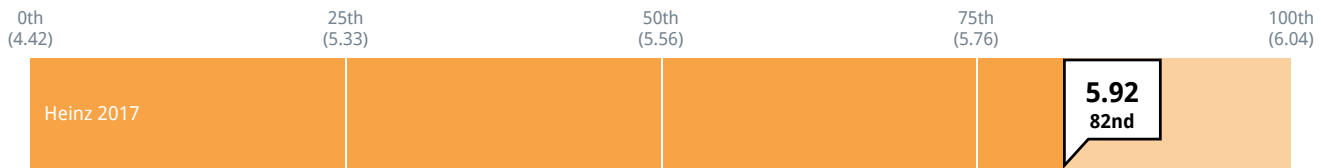
*The following questions were recently added to the grantee survey and depict comparative data from 37 funders in the dataset.

"Who was primarily responsible for carrying out the evaluation?"	Heinz 2017	Average Funder
Evaluation staff at the Foundation	17%	20%
Evaluation staff at your organization	52%	53%
External evaluator, chosen by the Foundation	13%	14%
External evaluator, chosen by your organization	18%	14%

"Did the Foundation provide financial support for the evaluation?"	Heinz 2017	Average Funder
Yes, the evaluation's costs were fully funded by the Foundation	26%	29%
Yes, the evaluation's costs were partially funded by the Foundation	29%	18%
No, the evaluation's costs were not funded by the Foundation	45%	54%

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

1 = Not at all 7 = To a great extent



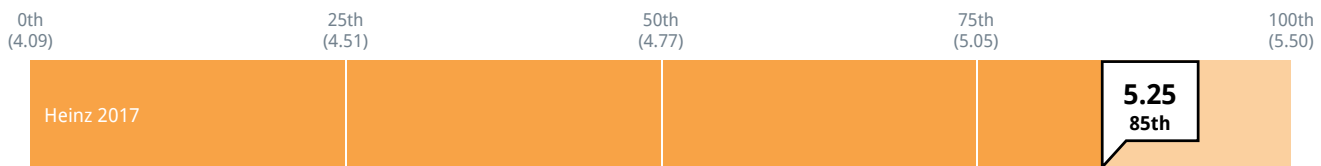
Cohort: None ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

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

1 = Not at all 7 = To a great extent



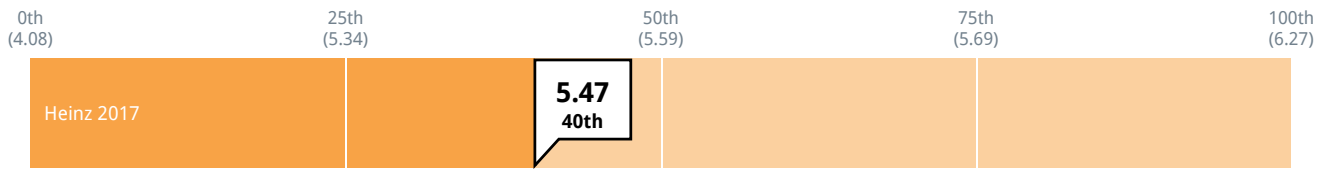
Cohort: None ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

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

1 = Not at all 7 = To a great extent



Cohort: None ▼

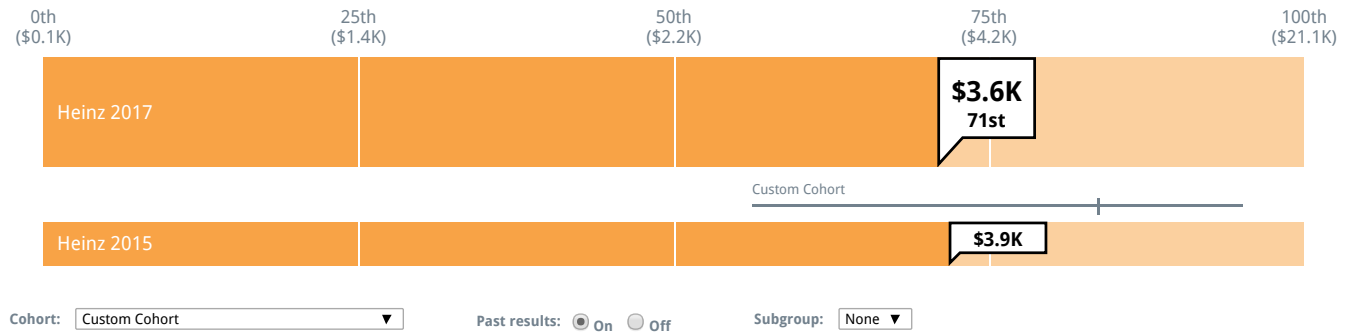
Past results: ☒ On ☐ Off

Subgroup: None ▼

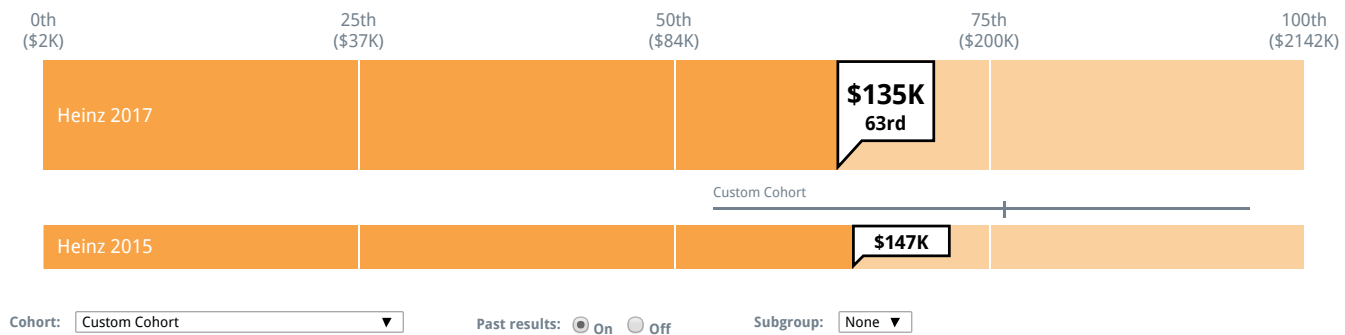
Dollar Return and Time Spent on Processes

Dollar Return: Median grant dollars awarded per process hour required

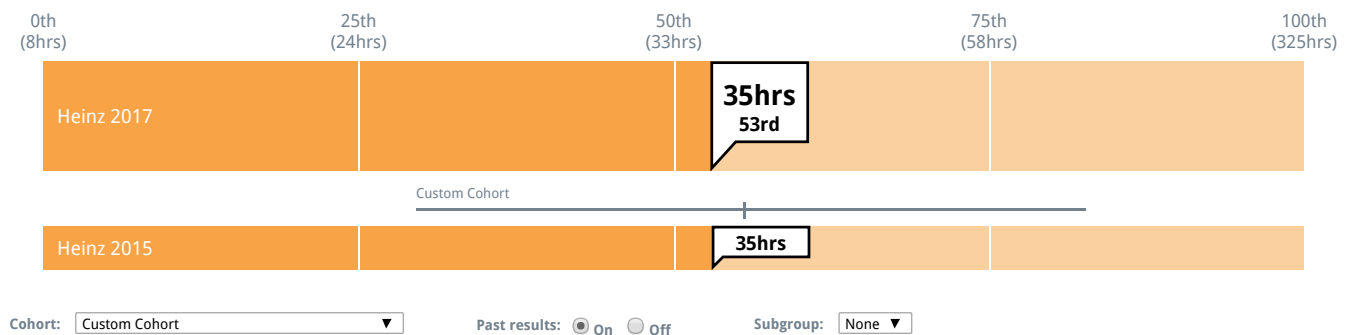
Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant



Median Grant Size

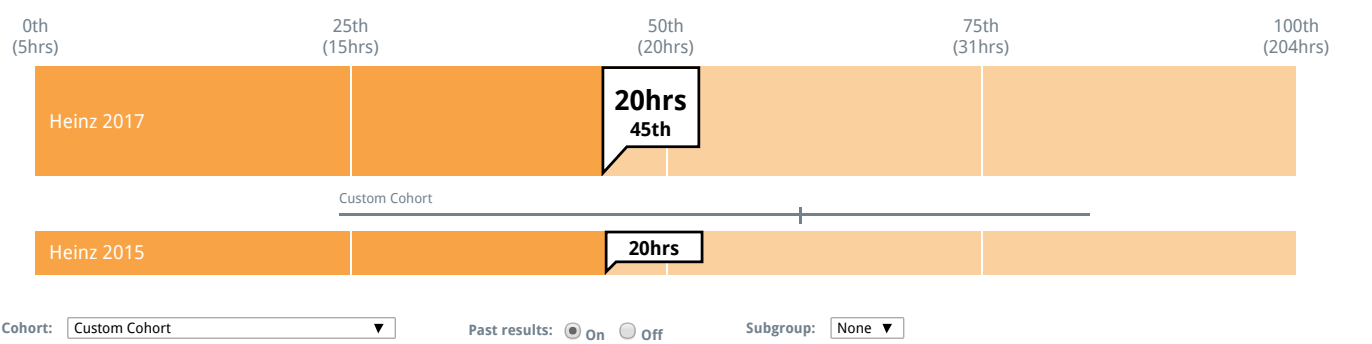


Median hours spent by grantees on funder requirements over grant lifetime



Time Spent on Selection Process

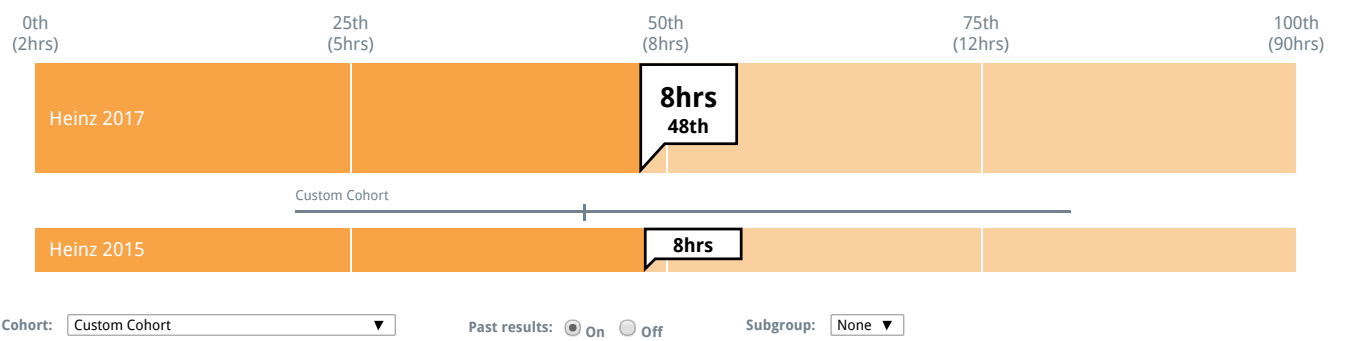
Median Hours Spent on Proposal and Selection Process



Time Spent On Proposal And Selection Process	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
1 to 9 hours	18%	18%	19%	13%
10 to 19 hours	22%	24%	21%	20%
20 to 29 hours	22%	20%	18%	20%
30 to 39 hours	10%	10%	8%	10%
40 to 49 hours	13%	15%	12%	15%
50 to 99 hours	11%	8%	12%	13%
100 to 199 hours	4%	3%	6%	6%
200+ hours	1%	1%	4%	2%

Time Spent on Reporting and Evaluation Process

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



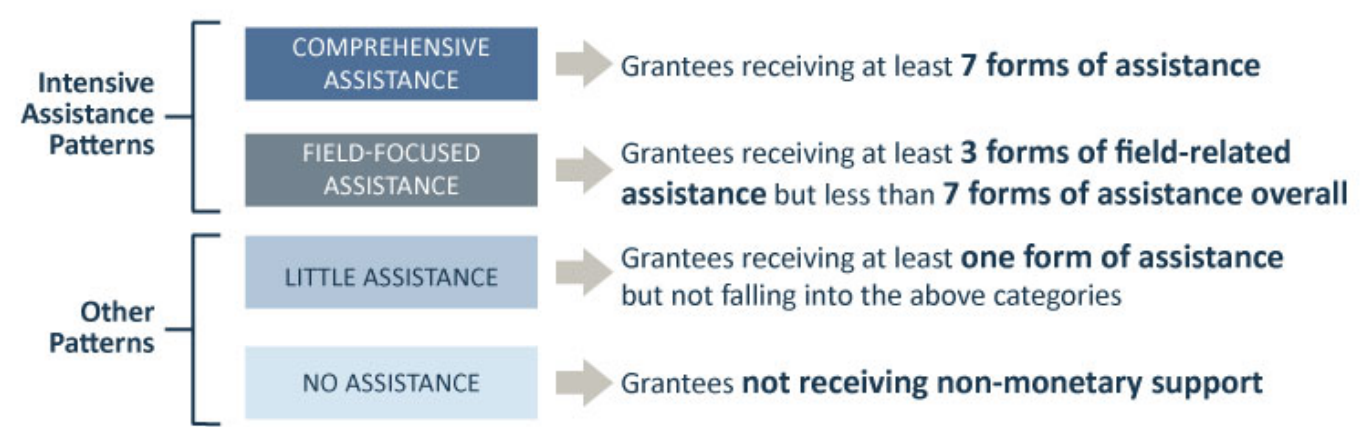
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
1 to 9 hours	55%	52%	52%	56%
10 to 19 hours	20%	24%	20%	21%
20 to 29 hours	13%	9%	11%	11%
30 to 39 hours	4%	4%	4%	2%
40 to 49 hours	3%	4%	4%	3%
50 to 99 hours	3%	3%	5%	5%
100+ hours	3%	2%	4%	3%

Non-Monetary Assistance

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

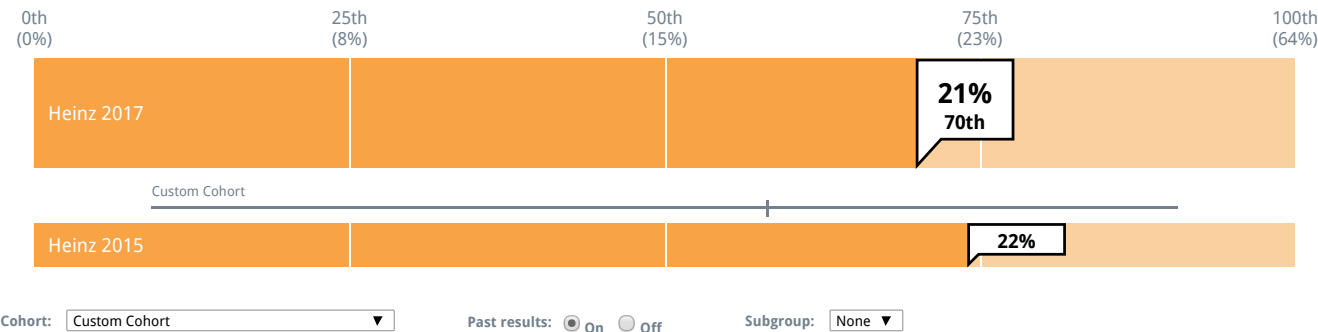
Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions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

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



Non-Monetary Assistance Patterns	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Comprehensive	6%	5%	7%	6%
Field-focused	15%	17%	11%	13%
Little	45%	42%	39%	41%
None	34%	36%	43%	40%

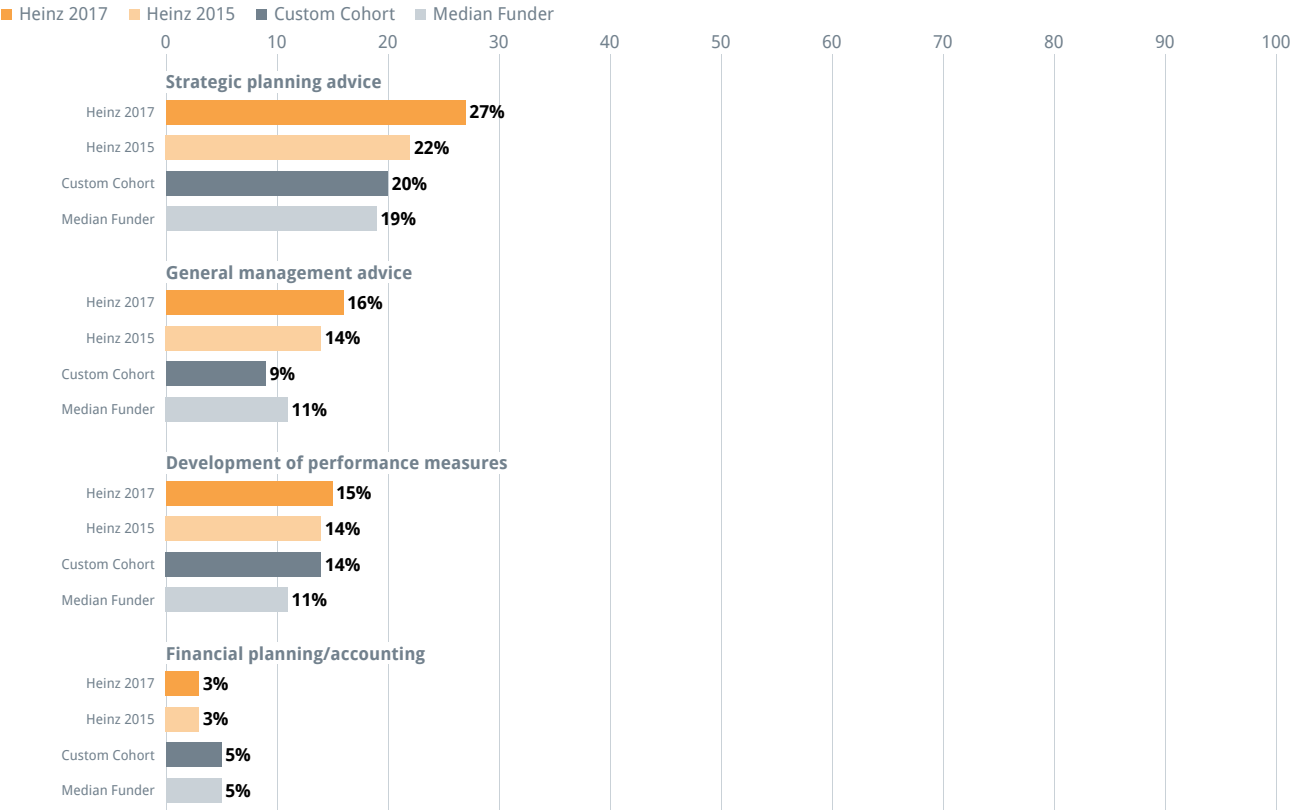
Proportion of grantees that received field-focused or comprehensive assistance



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 Endowments) associated with this funding."

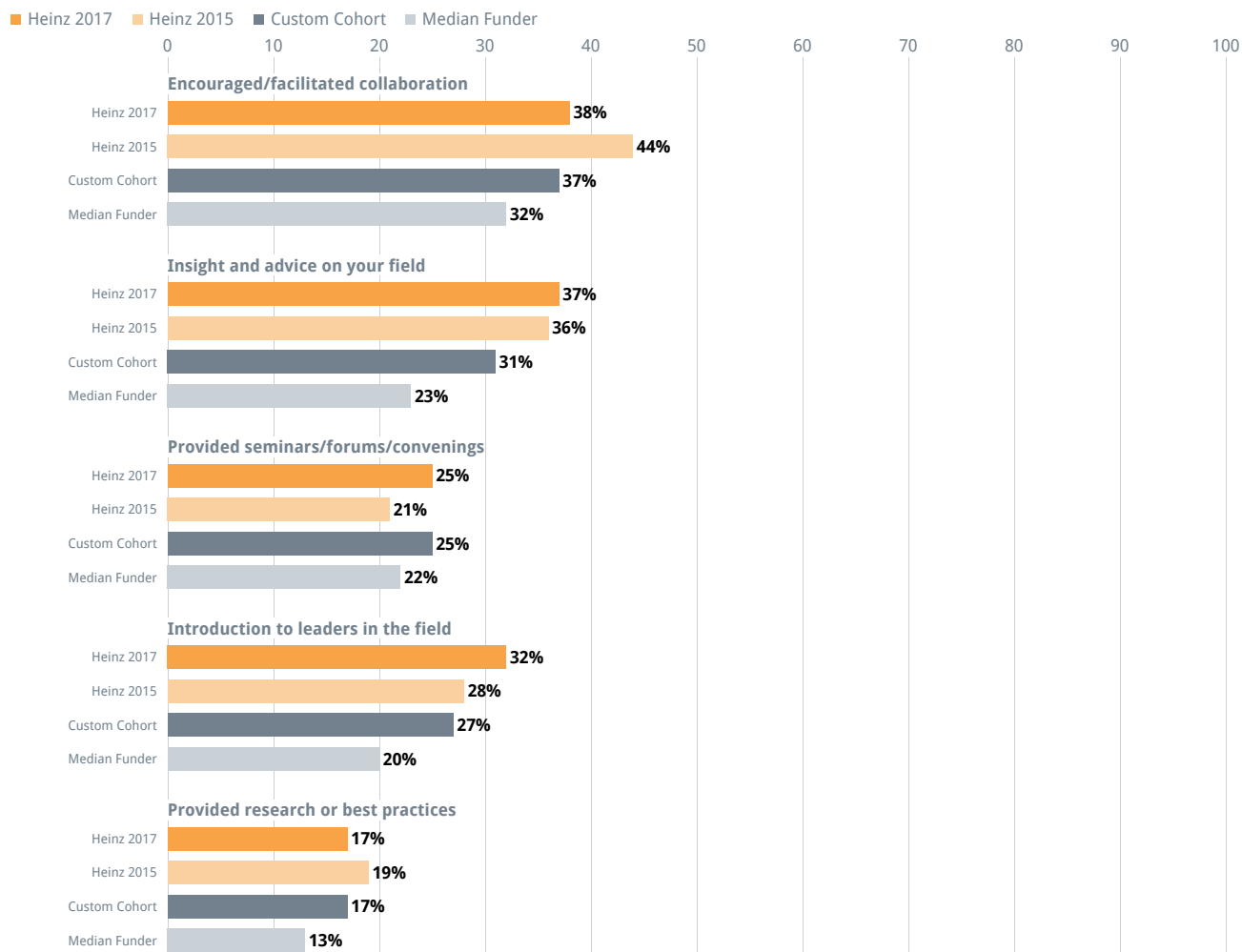
Percentage of Grantees that Received Management Assistance



Field-Related Assistance Activities

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

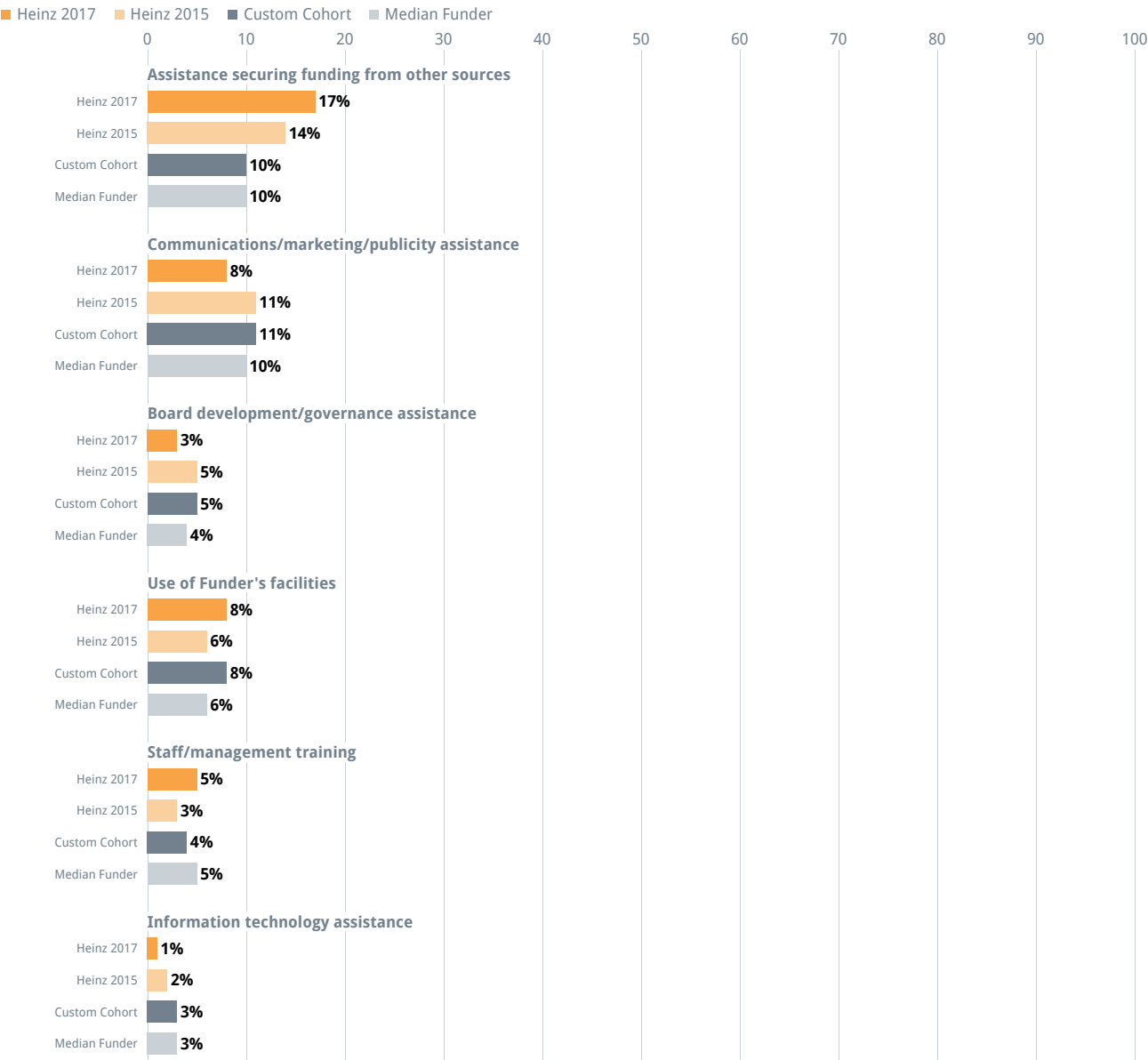
Percentage of Grantees that Received Field-Related Assistance



Other Assistance Activities

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

Percentage of Grantees that Received Other Assistance



Heinz-Specific Questions

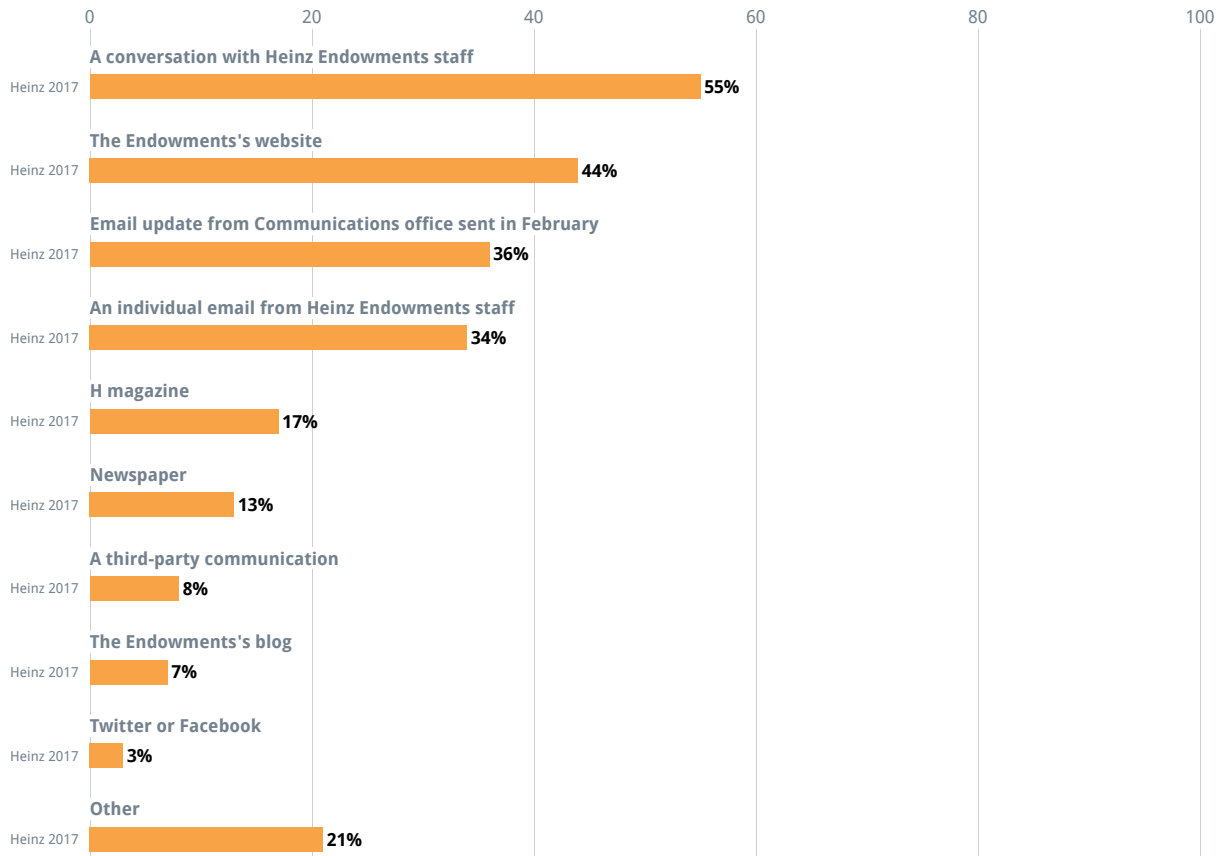
Earlier this year, the Heinz Endowments announced its new strategic plan that created three new strategic areas that help to drive its grantmaking priorities: Creativity, Learning and Sustainability. Together, these strategic areas incorporate the Endowments's five program areas: Arts & Culture; Children, Youth & Families; Community & Economic Development; Education; and Environment & Health. The Endowments's new grantmaking focus was created through the organization's strategic plan last year – which included broad community participation – and reaffirms the Endowments's commitment to supporting and safeguarding a healthy and vibrant community for all in our region.

"Were you aware of this new strategic plan?"

Were you aware of this new strategic plan?		Heinz 2017
Yes		83%
No		17%

"How did you learn about this new strategic plan?"

Heinz 2017



"Please rate your level of agreement or disagreement with each of the following statements regarding your perception of the Endowments's new strategic plan."

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

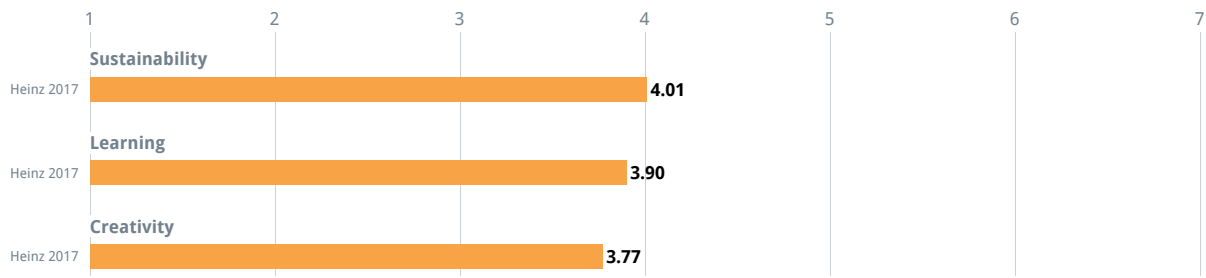
■ Heinz 2017



"How well do you understand the goals and strategies of each of the Endowments's new strategic priorities?"

1 = Limited understanding 7 = Thorough understanding

■ Heinz 2017



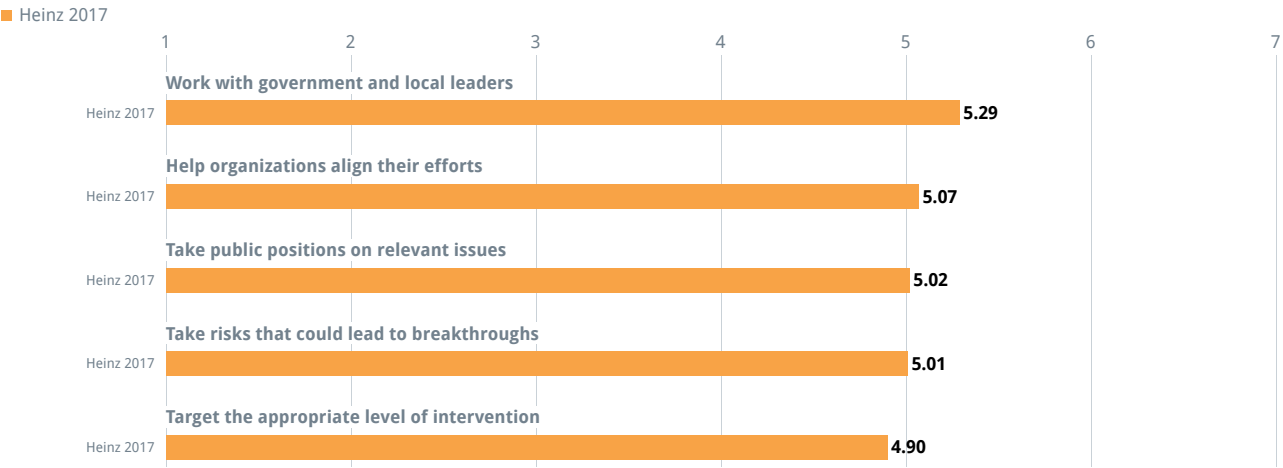
"Did you attend one of the Endowments's Art of Democracy Listening Sessions held during the development of the strategic plan?"

Did you attend one of the Endowments's Art of Democracy Listening Sessions held during the development of the strategic plan?	Heinz 2017
Yes	29%
No	71%

The Endowments's Work

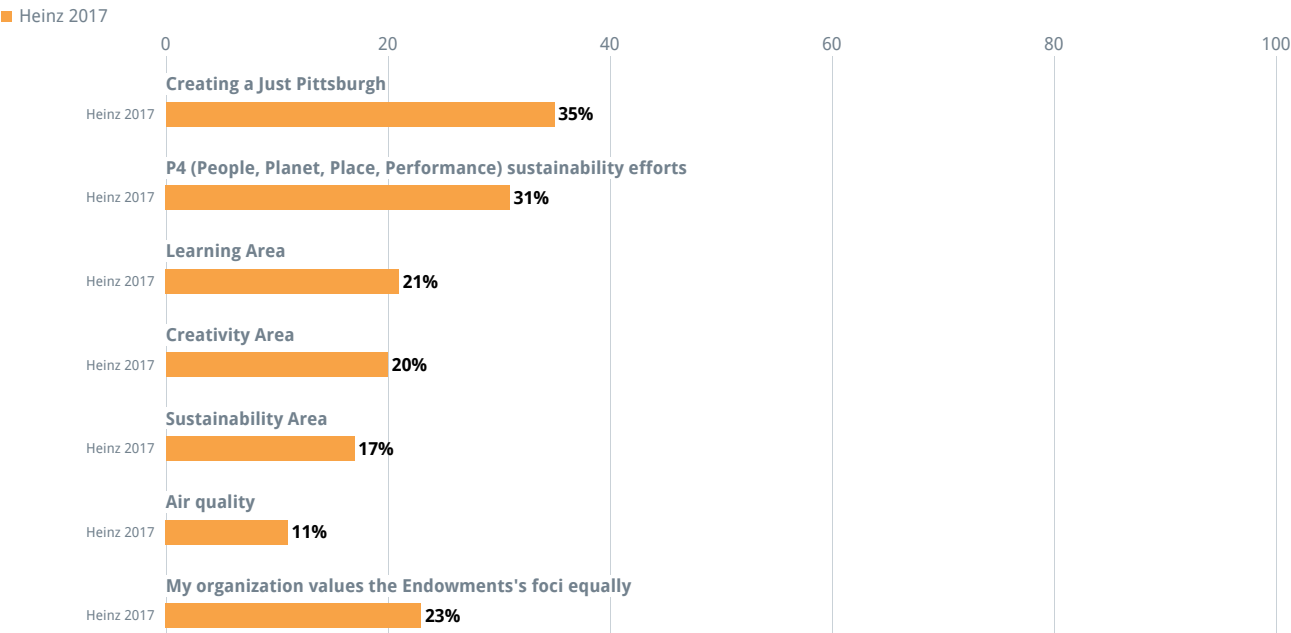
"To what extent does the Endowments effectively:"

1 = Not at all 7 = To a great extent



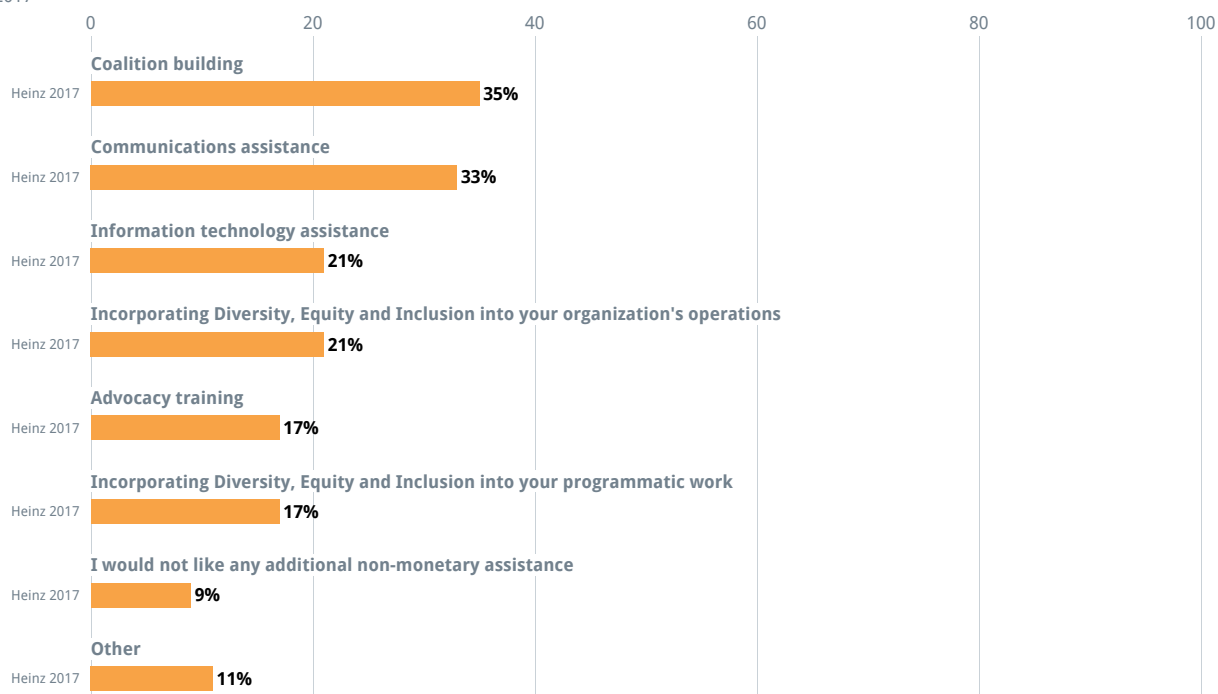
For the following question, grantees were prompted to select up to *two* answer options.

"Which of the Endowments's foci do you believe are most important to the community?"



"In this current volatile environment, what additional non-monetary assistance could the Endowments offer that would help your organization meet its goals? (Not including additional grant dollars.) "

Heinz 2017



Grantee Suggestions for the Endowments

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

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

Proportion of Grantee Suggestions by Topic

Topic of Grantee Suggestion	%
Grantmaking Characteristics & Requirements	26%
Nonmonetary Assistance	25%
Communication	13%
Interactions	13%
Selection, Reporting, & Evaluation Processes	10%
Field Impact	9%
Community Impact	3%
Other	1%

Selected Comments

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

GRANTMAKING CHARACTERISTICS & REQUIREMENTS (26%)

- **Type of Grant (N=12)**
 - "Consider operating grants to selected organizations, rather than restricted grants that can only be used for special projects."
 - "Please don't eliminate general operating support funding!"
 - "It would be terrific if the Endowments had a larger portfolio of general operating support grants."
 - "Perhaps a program-specific funding strategy that moves beyond a "one-size fits all" approach."
- **Length of Grant (N=9)**
 - "Consideration of longer funding period."
 - "Increase the length of funding."
 - "Make longer term grants."
- **Clarify Funding Decisions (N=7)**
 - "More clarity about the available of funding at any point in a calendar year."
 - "Gaps in communication for multiyear operating support gifts can cause a lot of difficulty for budgeting and planning programs."
 - "[Provide] a brief explanation on why specific funding levels were made would be helpful."
- **Size and Amount of Grant (N=6)**
 - "Increase the amount of funding."
 - "More available funding."
 - "Look more closely at the need for increasing specific grants."
- **Promote Collaboration through Grantmaking Requirements (N=2)**
 - "Partnership should be a requirement for most of the placed-based grants"
- **Other (N=4)**

NONMONETARY ASSISTANCE (25%)

- **Convene Grantee and Stakeholders (N=12)**
 - "I would encourage the Endowments to convene its grantees more frequently."
 - "Bring together all partners within funding areas to share and learn from each other."
 - "Convene an annual meeting of grantees."
 - "Opportunities for grantees to come together, particularly to strategize together, are good and should be increased."
- **Collaborate with Grantees and Stakeholders (N=10)**
 - "Encourage and facilitate greater collaboration."
 - "Be more proactive in engaging with key local universities."
 - "Encourage synergistic cooperation within the non-profit community,"
 - "The Heinz Endowments could be a better funder via encouraging programs to work and or collaborate more."
- **Build Grantee Capacity (N=9)**
 - "Help/training in the management of our organization"
 - "Additional communication/training."
 - "Help us hone in on better measures of success."
- **Help Secure Outside Funding (N=4)**
 - "I would appreciate more support from the Endowments."
 - "Network with other funders in the country to ensure programming is funded completely."
- **Provide Varying Types of Assistance (N=2)**
 - "Provide some of those other assistance mentioned in the survey."
- **Other (N=2)**

COMMUNICATION (13%)

- **Communicate and Clarify Strategy (N=13)**
 - "Be more proactive by informing organizations it has funded multiple times what its new emphases are."
 - "It would be helpful if priority shifts were communicated in a helpful and partnership manner"
 - "A clearer idea of the transitions that are happening at the Endowments"
 - "Better communication on the overall mission of the Endowments."
- **Increase Transparency (N=5)**
 - "Transparency. There are so many rumors going around the Heinz Endowments"
 - "[Provide] clear, thoughtful transparency and communication."
 - "Increase transparency"
- **Other (N=3)**

INTERACTIONS (13%)

- **Staff Responsiveness (N=6)**
 - "Emails should be answered in 24-48 hours."
 - "More responsive program staff."
 - "More timely communications."
- **More Frequent Interactions (N=4)**
 - "Even more interaction with grantees."
 - "If it is possible, given the staffing of the Endowments, for there to be quarterly sessions scheduled with grant recipients"
- **Increase and Diversify Staff (N=4)**
 - "The organization should make a concerted effort to engage and employ people from the communities that it intends to serve."
 - "Increase staff to specialize in various types of funding and assist program officers."
- **More Site Visits (N=3)**
 - "More face time, especially site visits."
 - "Attend some of our trainings and public policy discussions."
- **Other (N=3)**

SELECTION, REPORTING & EVALUATION PROCESSES (10%)

- **Streamline Processes (N=8)**
 - "Less time intensive grant application creation process."
 - "Make your on-line application forms and reporting forms more user friendly."
 - "Streamline the reporting process would be the most helpful to us as a grantee."
- **Provide Feedback on Declined Applications (N=2)**
 - "Better and more specific feedback from the panel would be helpful."
- **Adjust Assessment Criteria (N=2)**
 - "The assessment criteria used to determine funding doesn't capture our work."
- **Other (N=4)**

FIELD IMPACT (9%)

- **Advance Knowledge and Public Policy in Grantees' Fields (N=7)**
 - "Share the wealth (both with other funders and public charities) with respect to field-of-interest knowledge"
 - "Use your bully pulpit to be a more outward facing voice on economic and environmental justice issues."
 - "Use your influence to open doors to Government to make changes."
- **Field Focus (N=6)**
 - "Fund even more groups that are doing grassroots organizing and movement building."
 - "Focus on innovation economy."
 - "Engage more on moving the needle of policy"
- **Other (N=1)**

COMMUNITY IMPACT (3%)

- **Better Understand Grantee Communities (N=3)**
 - "Pay more attention to community needs"
 - "Be more intentional about working directly with impacted communities to effect the change that they want to see."
- **Create Community Advisory Committees (N=2)**
 - "I strongly encourage the Endowments to consider developing advisory committees in the knowledge areas they need help in."

OTHER (1%)

Contextual Data

Grantmaking Characteristics

Length of Grant Awarded	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Average grant length	2.2 years	2.5 years	2.1 years	2.7 years

Length of Grant Awarded	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
1 year	43%	38%	46%	25%
2 years	28%	30%	23%	37%
3 years	20%	24%	18%	29%
4 years	2%	2%	4%	3%
5 or more years	6%	7%	8%	6%

Type of Grant Awarded	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Program / Project Support	64%	66%	65%	59%
General Operating / Core Support	27%	28%	21%	32%
Capital Support: Building / Renovation / Endowment Support / Other	3%	4%	6%	4%
Technical Assistance / Capacity Building	3%	1%	4%	4%
Scholarship / Fellowship	2%	1%	2%	1%
Event / Sponsorship Funding	1%	1%	2%	0%

Grant Size

Grant Amount Awarded	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Median grant size	\$135K	\$146.5K	\$83.6K	\$205K

Grant Amount Awarded	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Less than \$10K	4%	5%	10%	1%
\$10K - \$24K	11%	10%	13%	5%
\$25K - \$49K	13%	10%	13%	7%
\$50K - \$99K	14%	16%	16%	14%
\$100K - \$149K	8%	8%	9%	10%
\$150K - \$299K	23%	20%	16%	24%
\$300K - \$499K	10%	14%	8%	14%
\$500K - \$999K	11%	11%	7%	13%
\$1MM and above	6%	5%	8%	11%

Median Percent of Budget Funded by Grant (Annualized)	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	8%	7%	4%	5%

Grantee Characteristics

Operating Budget of Grantee Organization	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Median Budget	\$0.9M	\$1.1M	\$1.5M	\$1.6M

Operating Budget of Grantee Organization	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
<\$100K	10%	9%	9%	4%
\$100K - \$499K	30%	25%	19%	18%
\$500K - \$999K	11%	13%	14%	14%
\$1MM - \$4.9MM	27%	25%	30%	33%
\$5MM - \$24MM	12%	15%	18%	18%
>=\$25MM	10%	14%	11%	12%

Funding Relationship

Pattern of Grantees' Funding Relationship with the Foundation	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
First grant received from the Foundation	18%	19%	29%	23%
Consistent funding in the past	65%	64%	53%	57%
Inconsistent funding in the past	17%	18%	19%	20%

Funding Status and Grantees Previously Declined Funding	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	85%	85%	81%	87%
Percent of grantees previously declined funding by the Foundation	40%	37%	31%	37%

Grantee Demographics

Job Title of Respondents	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Executive Director	54%	48%	47%	53%
Other Senior Management	13%	15%	15%	14%
Project Director	13%	13%	12%	11%
Development Director	6%	9%	8%	8%
Other Development Staff	4%	6%	7%	6%
Volunteer	1%	1%	1%	1%
Other	10%	7%	9%	7%

Gender of Respondents	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Female	58%	58%	64%	62%
Male	42%	42%	36%	38%

Race/Ethnicity of Respondents	Heinz 2017	Heinz 2015	Average Funder	Custom Cohort
Multi-racial	2%	1%	3%	3%
African-American/Black	20%	17%	7%	11%
Asian (incl. Indian subcontinent)	1%	1%	3%	3%
Hispanic/Latino	1%	1%	5%	6%
American Indian/Alaskan Native	0%	0%	1%	1%
Pacific Islander	0%	0%	0%	0%
Caucasian/White	74%	79%	80%	75%
Other	1%	1%	1%	1%

Funder Characteristics

Financial Information	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Total assets	\$1508.5M	\$1602M	\$228.2M	\$1708.8M
Total giving	\$63.3M	\$78M	\$15.4M	\$79.3M

Funder Staffing	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Total staff (FTEs)	32	31	15	35
Percent of staff who are program staff	47%	35%	40%	35%

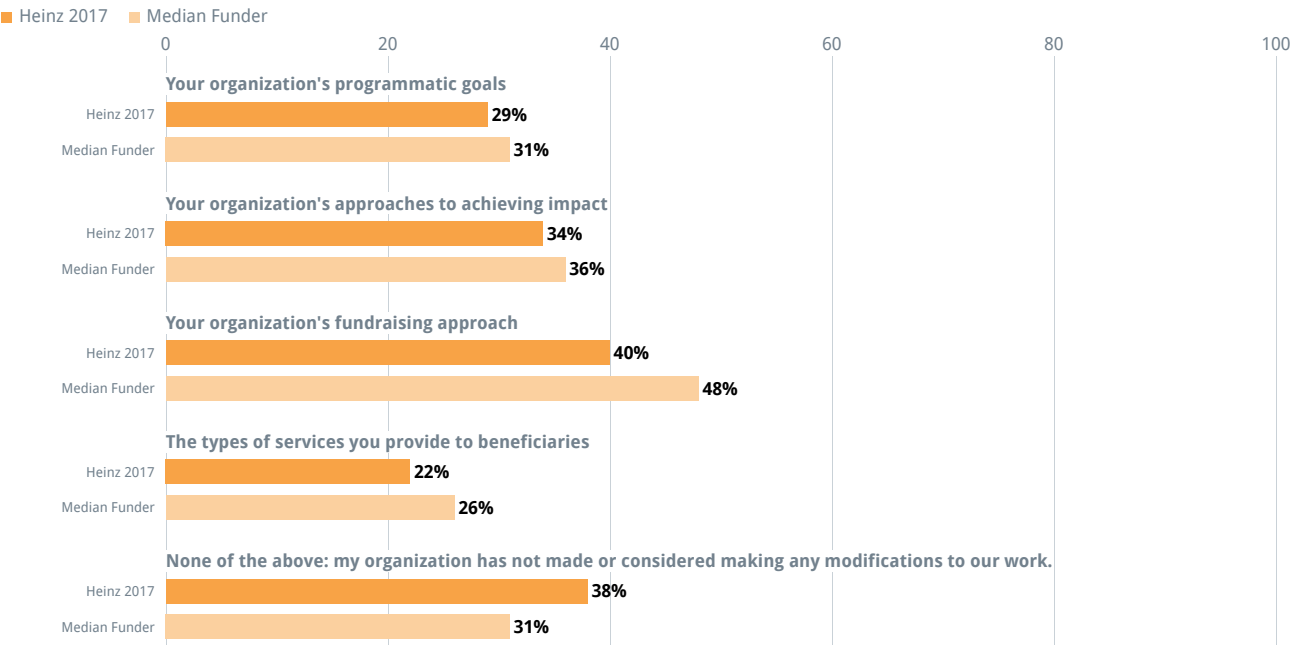
Grantmaking Processes	Heinz 2017	Heinz 2015	Median Funder	Custom Cohort
Proportion of grants that are proactive	75%	60%	44%	75%
Proportion of grantmaking dollars that are proactive	80%	80%	63%	80%

Response to 2016 Elections

*The following questions were recently added to the grantee survey and depict comparative data from 15 funders in the dataset.

"What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?"	Heinz 2017	Average Funder
Generally positive impact	6%	8%
No impact/Neutral	17%	14%
Generally negative impact	77%	78%

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



(If grantees indicated making at least one modification above)

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

Direct service work	Heinz 2017	Average Funder
Increasing emphasis	38%	39%
No change in emphasis	57%	59%
Decreasing emphasis	4%	2%

Policy/advocacy work	Heinz 2017	Average Funder
Increasing emphasis	69%	70%
No change in emphasis	29%	29%
Decreasing emphasis	2%	2%

Collaboration with other nonprofit organizations	Heinz 2017	Average Funder
Increasing emphasis	70%	73%
No change in emphasis	29%	27%
Decreasing emphasis	1%	0%

Collaboration with other sectors	Heinz 2017	Average Funder
Increasing emphasis	70%	68%
No change in emphasis	30%	32%
Decreasing emphasis	1%	0%

Local community engagement efforts	Heinz 2017	Average Funder
Increasing emphasis	75%	74%
No change in emphasis	23%	25%
Decreasing emphasis	2%	1%

Collecting input from your beneficiaries	Heinz 2017	Average Funder
Increasing emphasis	64%	60%
No change in emphasis	35%	40%
Decreasing emphasis	1%	1%

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

Ability to raise funds from foundations	Heinz 2017	Average Funder
Generally positive impact	9%	19%
No impact/Neutral	73%	62%
Generally negative impact	18%	20%

Ability to raise funds from other sources (e.g., public funders, individual donors)	Heinz 2017	Average Funder
Generally positive impact	18%	22%
No impact/Neutral	47%	49%
Generally negative impact	36%	29%

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

Public communication from the Foundation (e.g., blog post, mass email, newsletter)	Heinz 2017	Average Funder
Yes	45%	39%
No, and I would like to receive this communication	43%	46%
No, and I don't think this communication would be helpful	11%	15%

Communication with your program officer about your organization's work	Heinz 2017	Average Funder
Yes	29%	31%
No, and I would like to receive this communication	59%	52%
No, and I don't think this communication would be helpful	12%	16%

Communication with your program officer about the Foundation's work	Heinz 2017	Average Funder
Yes	24%	31%
No, and I would like to receive this communication	65%	57%
No, and I don't think this communication would be helpful	11%	12%

Additional Survey Information

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

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Heinz’s grantee survey was 293.

Question Text	Count of Responses
Overall, how would you rate the Endowments’s impact on your field?	283
How well does the Endowments understand the field in which you work?	269
To what extent has the Endowments advanced the state of knowledge in your field?	244
To what extent has the Endowments affected public policy in your field?	212
Overall, how would you rate the Endowments’s impact on your local community?	273
How well does the Endowments understand the local community in which you work?	269
How well does the Endowments understand the social, cultural, or socioeconomic factors that affect your work?	279
How much, if at all, did the Endowments improve your ability to sustain the work funded by this grant in the future?	273
How well does the Endowments understand your organization’s strategy and goals?	276
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Endowments?	281
Who most frequently initiated the contact you had with your program officer during this grant?	293
Did the Endowments conduct a site visit during the selection process or during the course of this grant?	265
Has your main contact at the Endowments changed in the past six months?	281
Did you submit a proposal to the Endowments for this grant?	292
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?	279
How involved was Endowments staff in the development of your grant proposal?	277
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	261
Have you ever been declined funding from the Endowments?	237
Are you currently receiving funding from the Endowments?	281
Which of the following best describes the pattern of your organization’s funding relationship with the Endowments?	286
How well does the Endowments understand your intended beneficiaries’ needs?	268
To what extent do the Endowments’s funding priorities reflect a deep understanding of your intended beneficiaries’ needs?	266
Have you participated in a reporting or evaluation process?	278
To what extent was the Endowments’s reporting process...Adaptable, if necessary, to fit your circumstances	219
To what extent was the Endowments’s reporting process...A helpful opportunity for you to reflect and learn	239
To what extent was the Endowments’s reporting process...Relevant, with questions and measures pertinent to the work funded by this grant	236
To what extent was the Endowments’s reporting process...Straightforward	232
To what extent was the Endowments’s reporting process...Aligned appropriately to the timing of your work	238
Did the Endowments provide financial support for the evaluation	62
To what extent did the evaluation...Result in you making changes to the work that was evaluated	71
To what extent did the evaluation...Incorporate your input in the design of the evaluation	72
To what extent did the evaluation...Generate information that you believe will be useful for other organizations	66
Were you aware of this new strategic plan?	277
The Endowments has clearly communicated what funding priorities remain the same and what will be changing under its new strategic plan	218
I understand what the Endowments seeks to accomplish under its new strategic plan	222
Overall, I think the Endowments’s new strategic plan better reflects the needs in the community	205

The new plan enables the Endowments to be more effective in a changing, volatile environment	196
The new plan better positions the Endowments to take advantage of unique opportunities in this moment in time	196
How well do you understand the goals and strategies of each of the Endowmentss new strategic priorities...Creativity	276
How well do you understand the goals and strategies of each of the Endowmentss new strategic priorities...Learning	267
How well do you understand the goals and strategies of each of the Endowmentss new strategic priorities...Sustainability	269
Take public positions on relevant issues	269
Take risks that could lead to breakthroughs	269
Help organizations align their efforts	270
Work with government and local leaders	266
Target the appropriate level of intervention	266
Did you attend one of the Endowments's Art of Democracy Listening Sessions held during the development of the strategic plan?	277

About CEP and Contact Information

Mission:

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

Vision:

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

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

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

About the GPR

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

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

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