Heinz Endowments 2024 Grantee Perception Report

Generated on November 21, 2025

THE CENTER FOR
EFFECTIVE PHILANTHROPY

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

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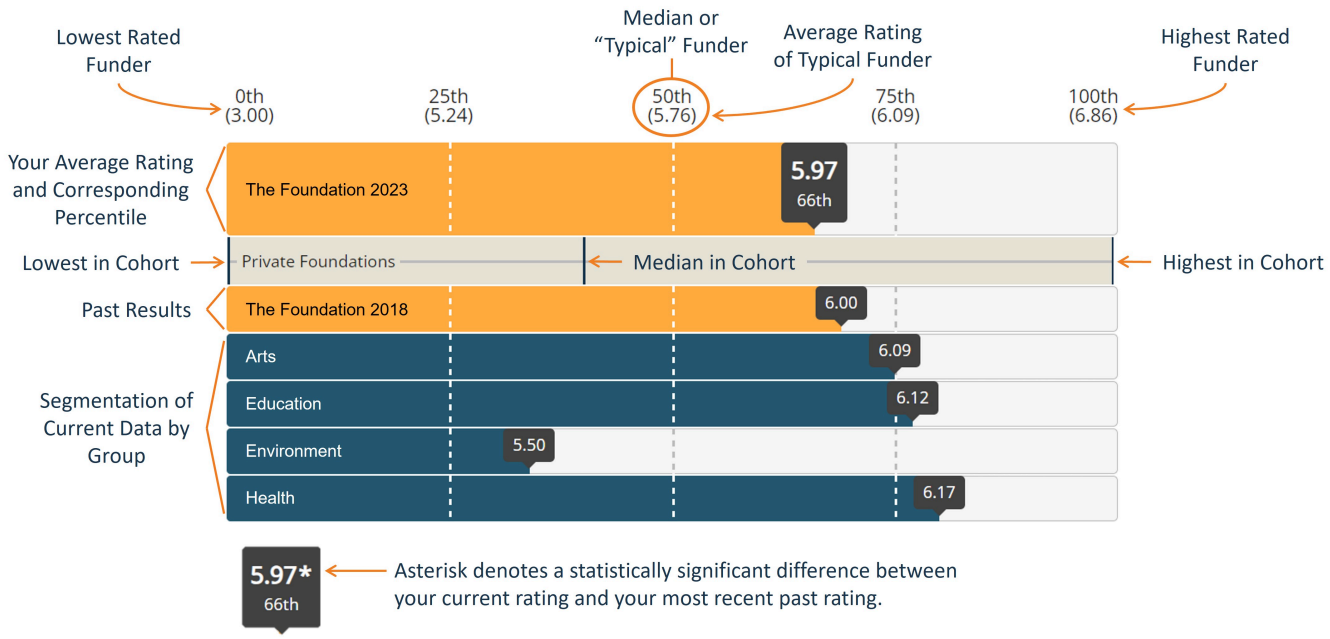
Survey Information

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 ten responses.

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Heinz 2024	October and November 2024	560	356	64%
Heinz 2019	May and June 2019	436	285	65%
Heinz 2017	May and June 2017	419	293	70%
Heinz 2015	February and March 2015	490	318	65%
Heinz 2007	September and October 2007	268	178	66%
Heinz 2005	September and October 2005	278	214	77%

Throughout this report, The Heinz Endowments's survey results are compared to CEP's broader dataset of more than 60,000 grantee responses from over 350 funders built up over more than a decade of grantee surveys. A list of some funders who have recently participated in the GPR can be found at https://cep.org/gpr-participants/.

Subgroups

In addition to showing Heinz's overall ratings, this report shows ratings segmented by Program Area. The online version of this report also shows ratings segmented by Geography/City, Body of Work, Annual Operating Budget, Respondent Gender Identity, and Respondent Person of Color Identity.

Program Area	Number of Responses
Creativity	87
Learning	126
Sustainability	143

Geography/City	Number of Responses
Pittsburgh	170
Allegheny County	69
Outside Allegheny County	56
Outside PA	61

Body of Work	Number of Responses
Cultural Organizations	42
Individual Artists	10
Creative Learning	21
Other Creativity Bodies of Work	15
Family and Child Well-Being	11
Restoration Project	15
Democracy & Civic Participation	28
Learning-Other	33
Climate, Environment & Health	68
Community & Economic Development	50
Sustainability-Other	13
Prenatal-to-Age-Three	20
Other Bodies of Work	22

Annual Operating Budget	Number of Responses
Under $100k	19
$100k - $499k	66
$500k - $999k	53
$1M - $4.9M	122
$5M - $24.9M	48
$25M or More	31

Respondent Gender Identity	Number of Responses
Identifies as a Man	114
Identifies as a Woman	208
Prefer not to say	14

Respondent Person of Color Identity	Number of Responses
Does not identify as a Person of Color	240
Identifies as a Person of Color	84
Prefer not to say	19

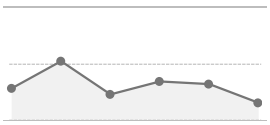
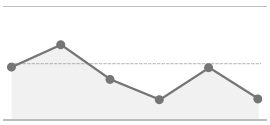
Customized Cohort

Heinz selected a set of 14 funders to create a smaller comparison group that more closely resembles Heinz in scale and scope.

Peer Funder Cohort
Barr Foundation
Claude Worthington Benedum Foundation
Crown Family Philanthropies
Daniels Fund
Ewing Marion Kauffman Foundation
Houston Endowment
John S. and James L. Knight Foundation
M.J. Murdock Charitable Trust
The Heinz Endowments
The James Irvine Foundation
The McKnight Foundation
The Pittsburgh Foundation
The William Penn Foundation
William Davidson Foundation

Key Ratings Summary

The following chart highlights a selection of the Heinz Endowments' 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.

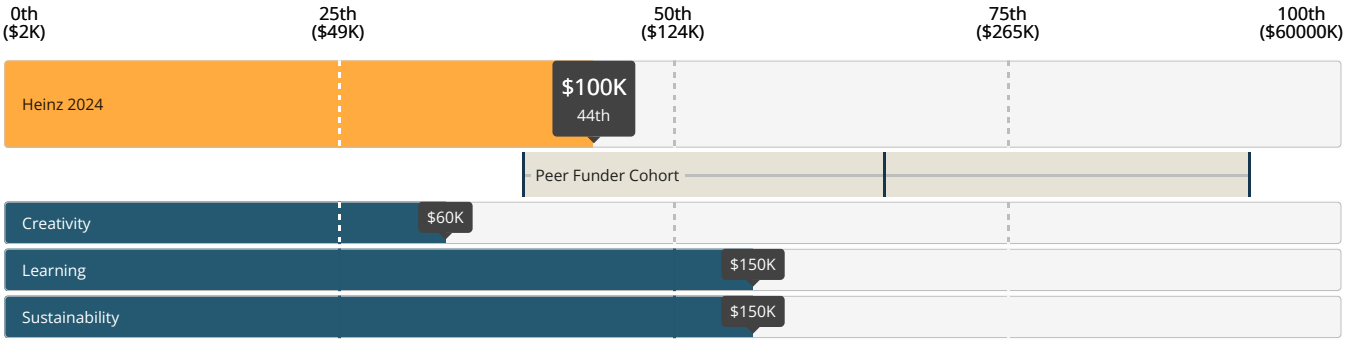
Key Measure	Average	Percentile Rank	Trend Data
Community Impact Impact on Grantees' Communities	6.15	75th Peer Funder Cohort	
Organizational Impact Impact on Grantees' Organizations	6.25	52nd Peer Funder Cohort	
Approachability Comfort Approaching the Foundation	6.05	15th Peer Funder Cohort	
Communications Clarity of Communications	5.47	18th Peer Funder Cohort	
Reporting Process Straightforwardness of the Reporting Process	6.45	71st Peer Funder Cohort	
Median Process Hours Total Hours Spent on Grantmaking Processes	22.50	40th Peer Funder Cohort	

Grantmaking Characteristics

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

Median Grant Size

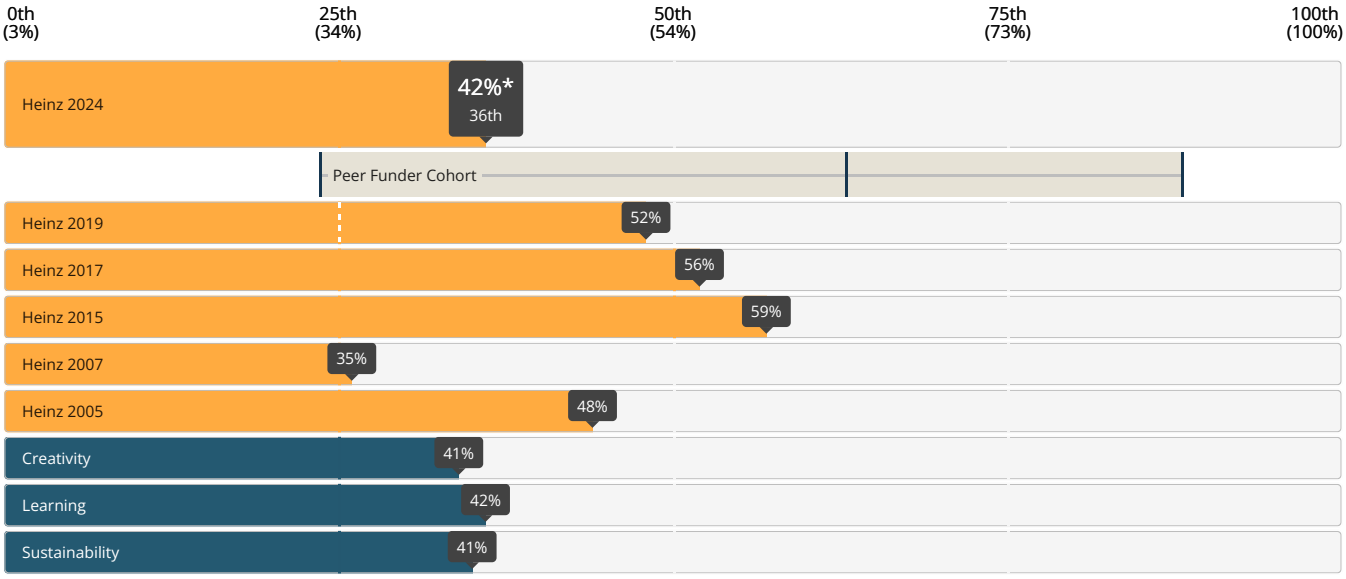
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: Off



Proportion of Multi-year Grants

Proportion of grantees that report receiving grants for two years or longer

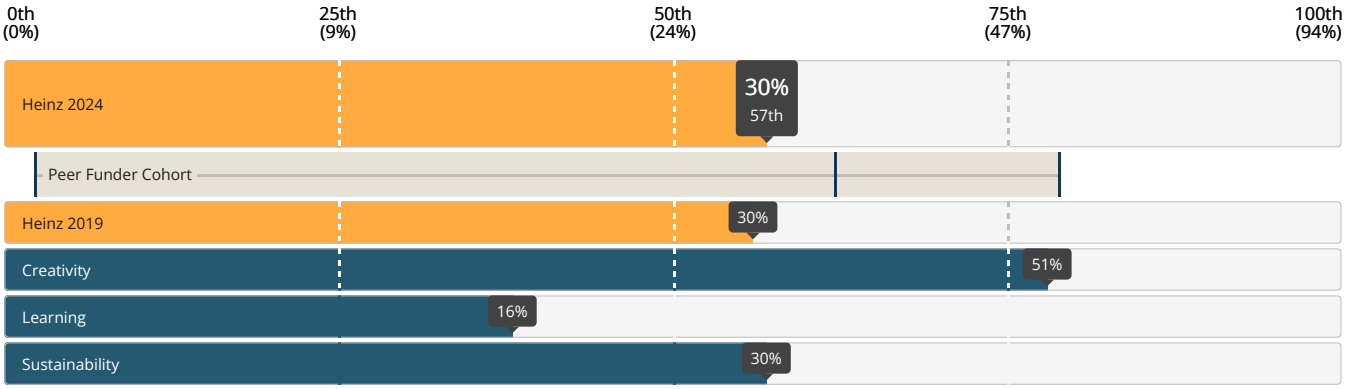
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Proportion of Unrestricted Funding

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

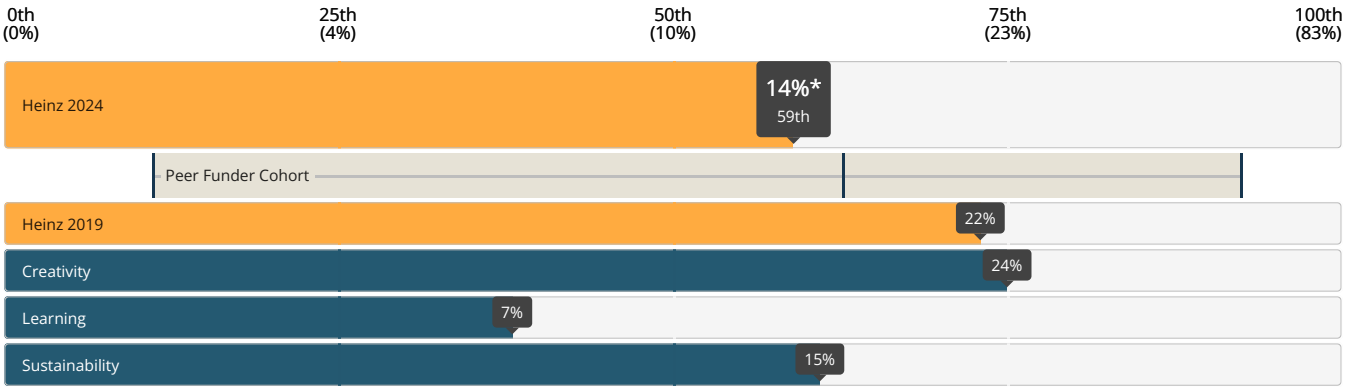
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Proportion of Multi-year Unrestricted Grants

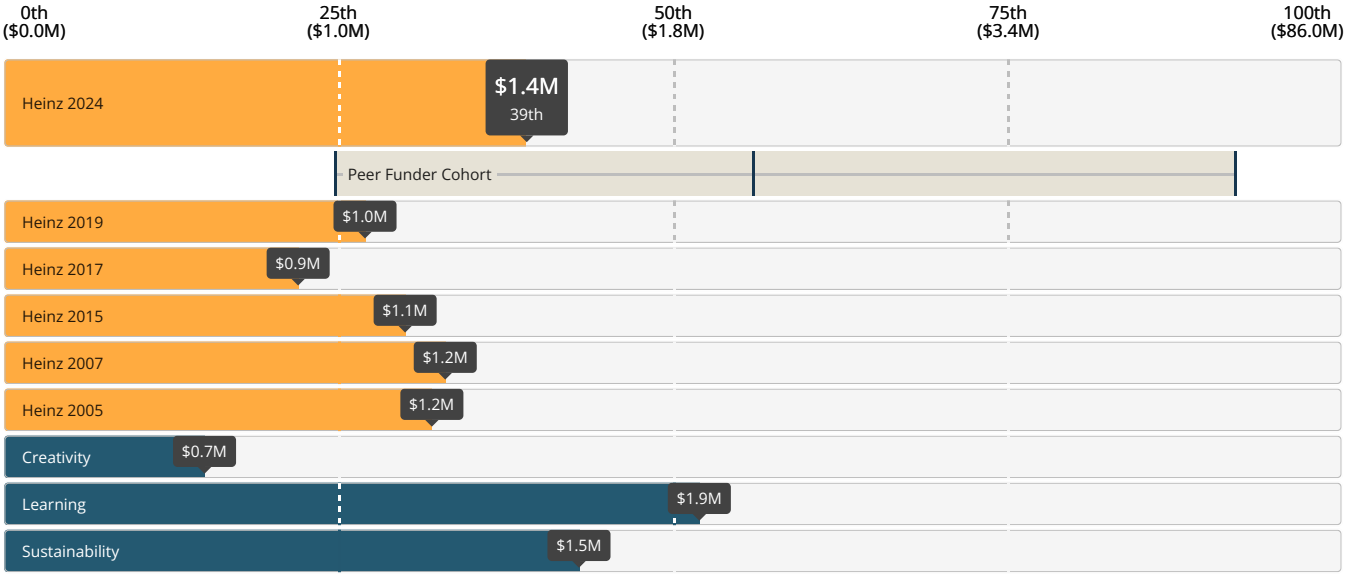
Proportion of grantees that report receiving grants for two years or longer and who report receiving general operating support funding that was not restricted to a specific use.

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Median Organizational Budget

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Cohort: Peer Funder Cohort Past Results: On

Grant History

	Percentage of first-time grants
Heinz 2024	18%
Heinz 2019	17%
Heinz 2017	18%
Heinz 2015	19%
Average Funder	30%
Peer Funder Cohort	27%

Cohort: Peer Funder Cohort Past Results: On

Program Staff Load

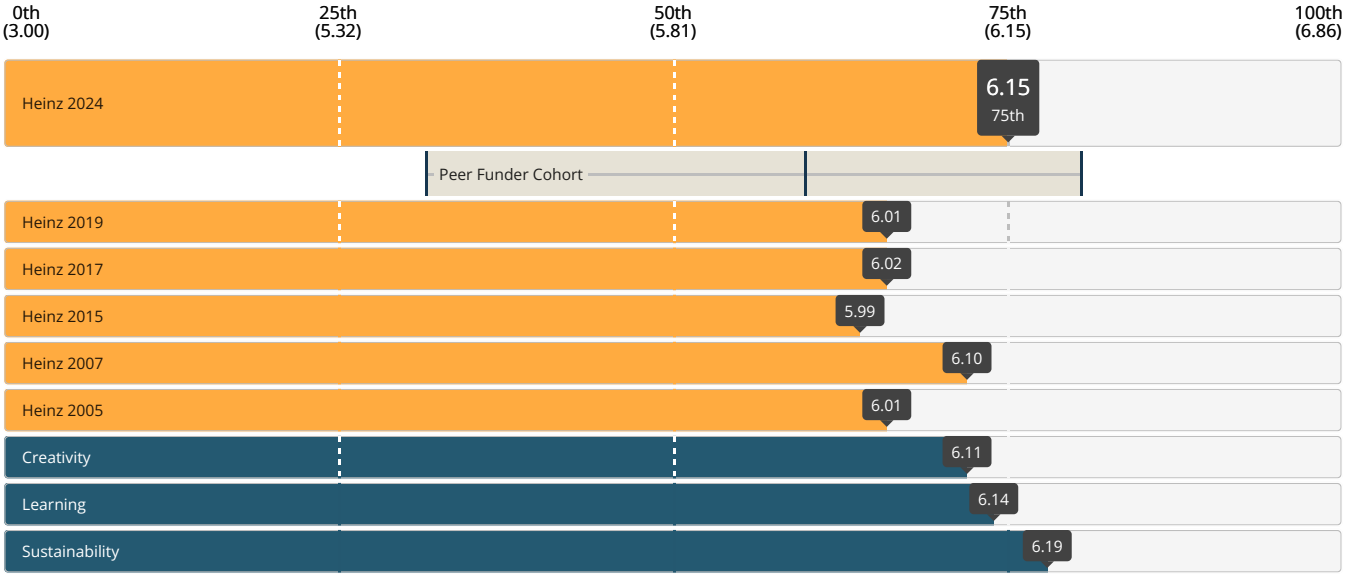
	Dollars awarded per program full-time employee	Applications per program full-time employee	Active grants per program full-time employee
Heinz 2024	$7.8M	58	62
Heinz 2019	$3.2M	36	36
Heinz 2017	$4.2M	36	39
Heinz 2015	$7.1M	56	57
Heinz 2007	$3.3M	42	34
Heinz 2005	$3.4M	53	35
Median Funder	$2.8M	21	30
Peer Funder Cohort	$5.4M	29	39

Overall Impact

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

1 = No impact **7** = Significant positive impact

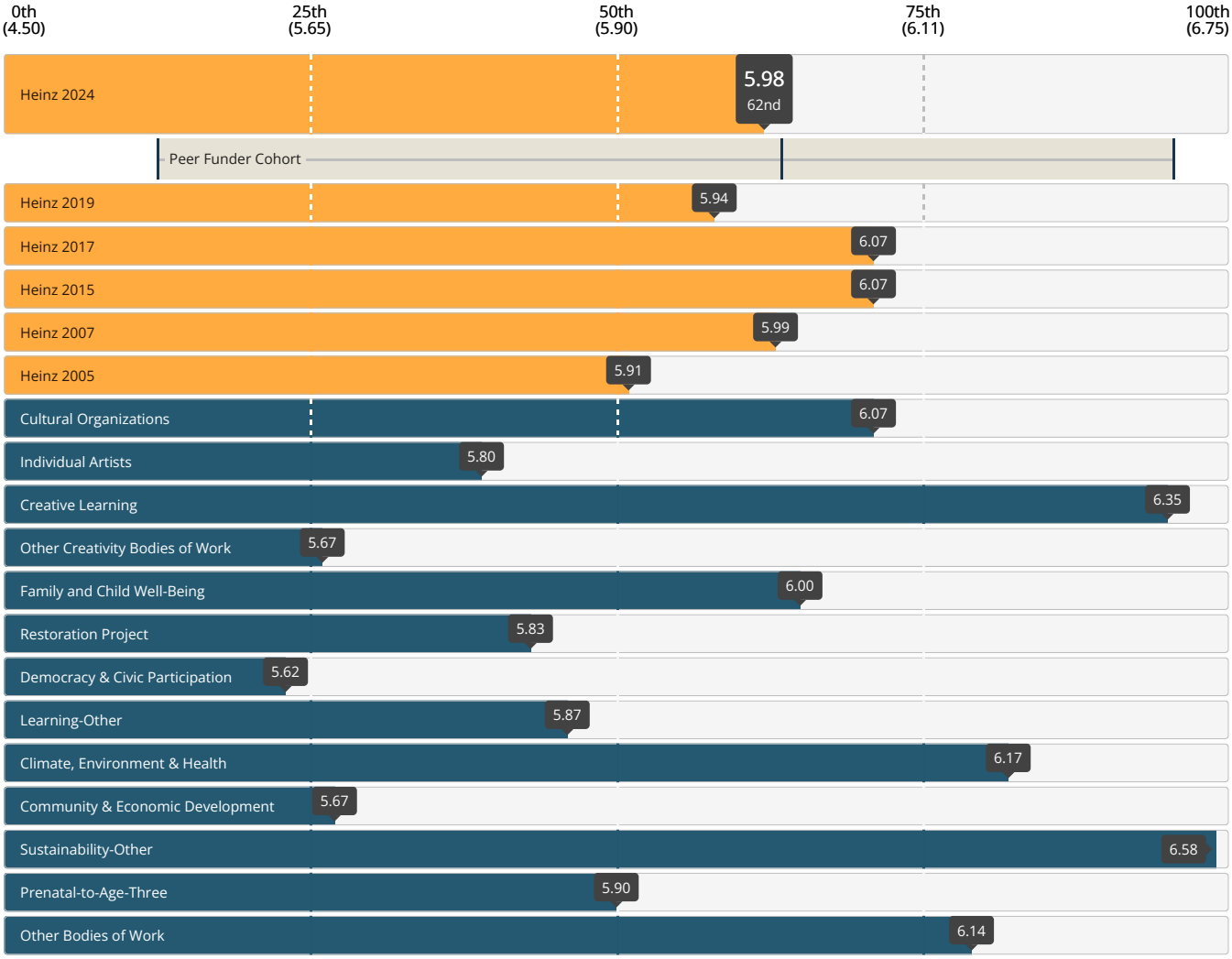
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

1 = No impact 7 = Significant positive impact

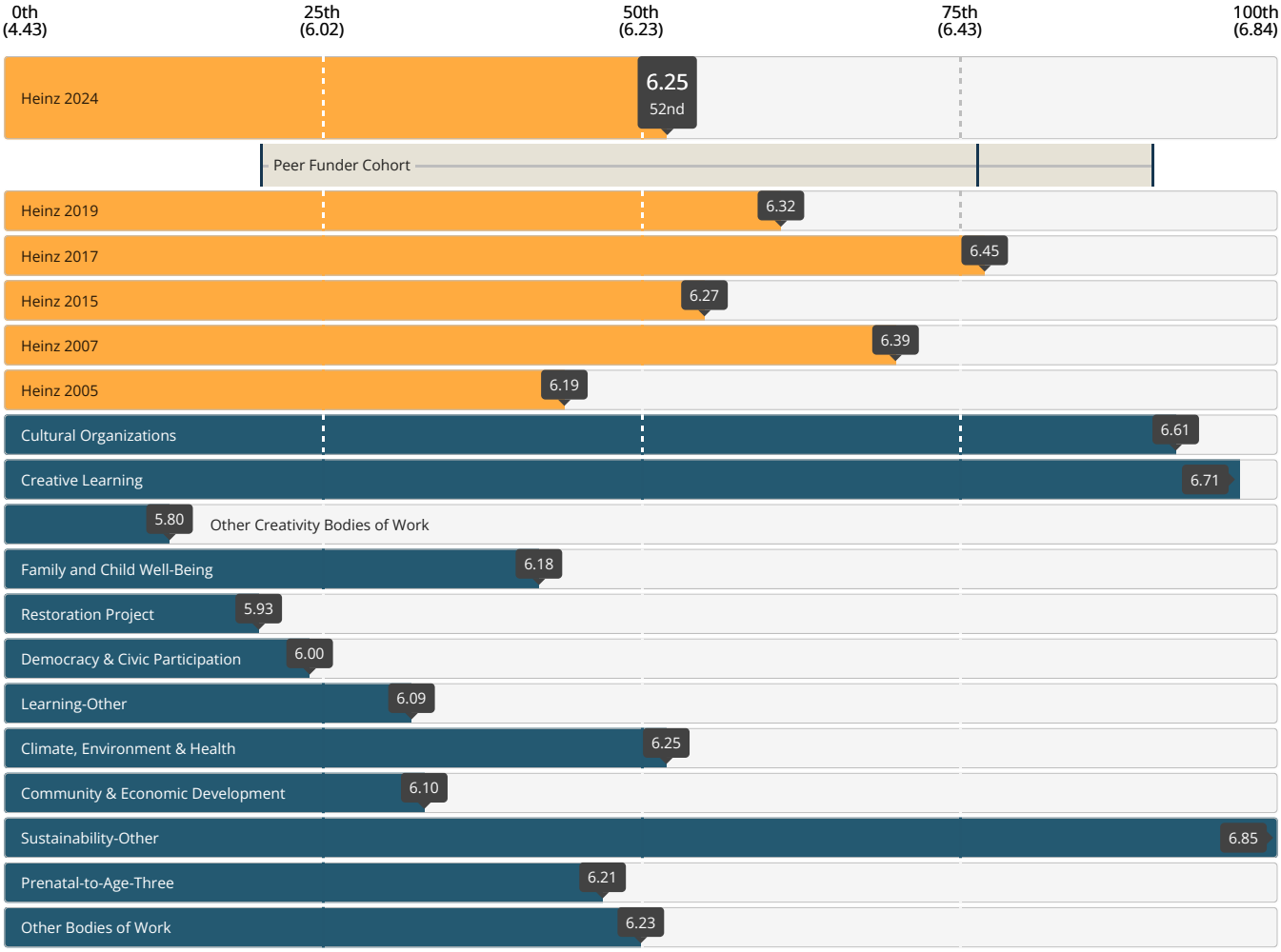
Cohort: Peer Funder Cohort Subgroup: Body of Work Past Results: On



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

1 = No impact 7 = Significant positive impact

Cohort: Peer Funder Cohort Subgroup: Body of Work Past Results: On

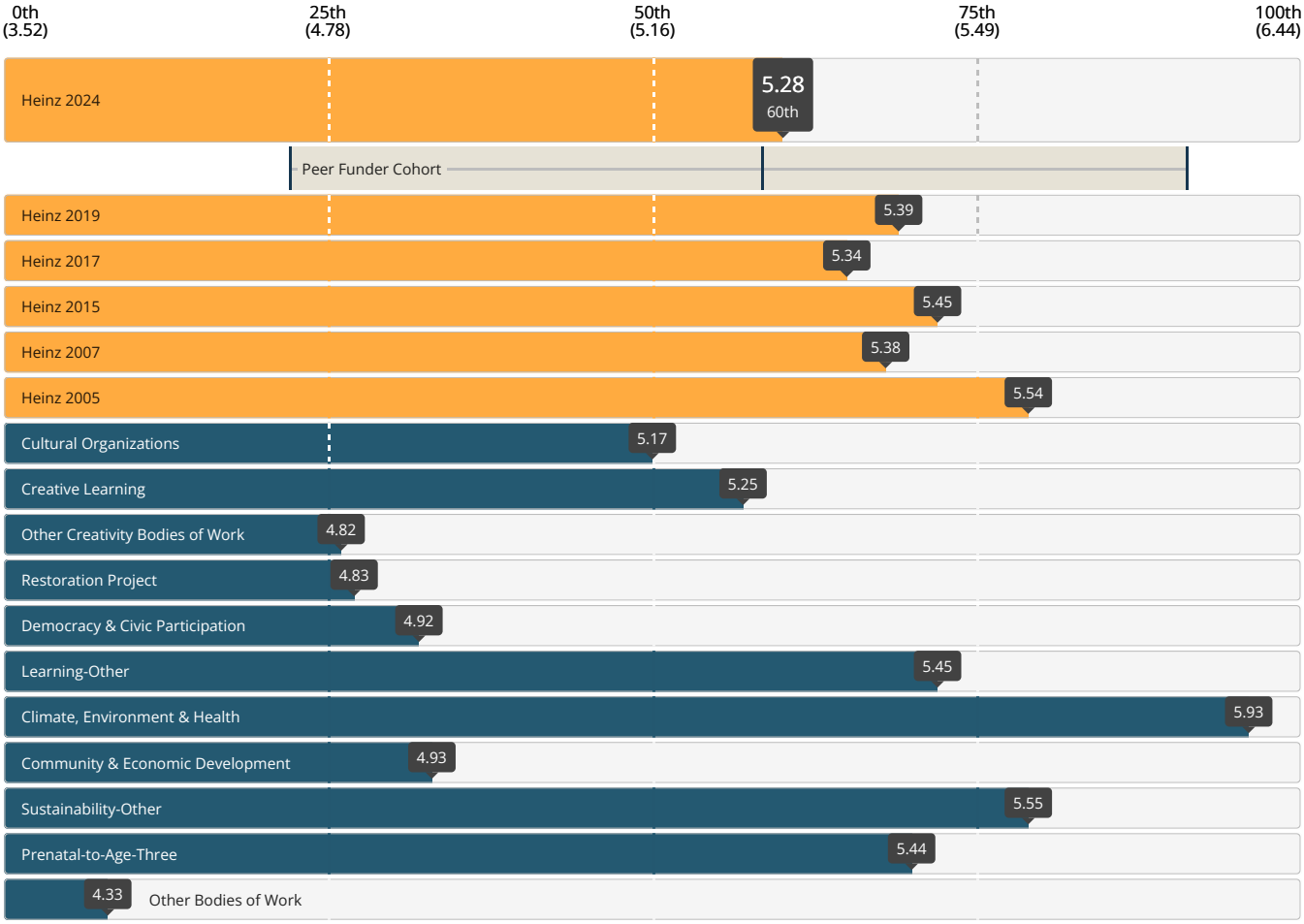


Advancing Knowledge and Public Policy

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

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

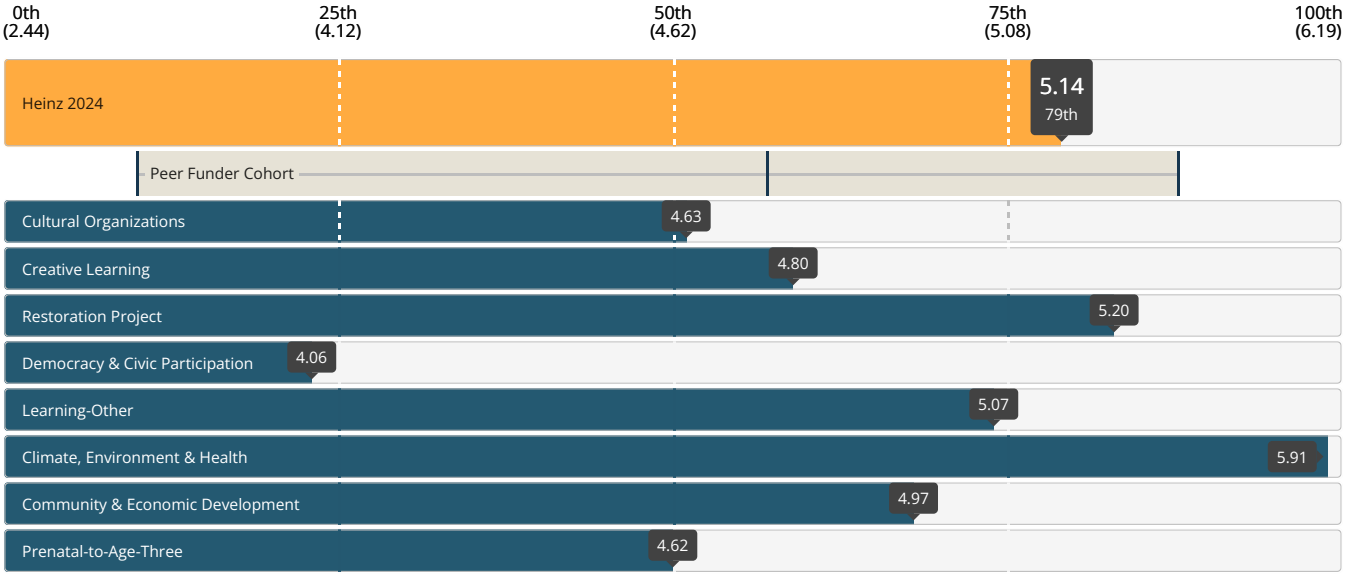
Cohort: Peer Funder Cohort Subgroup: Body of Work Past Results: On



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

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

Cohort: Peer Funder Cohort Subgroup: Body of Work Past Results: Off

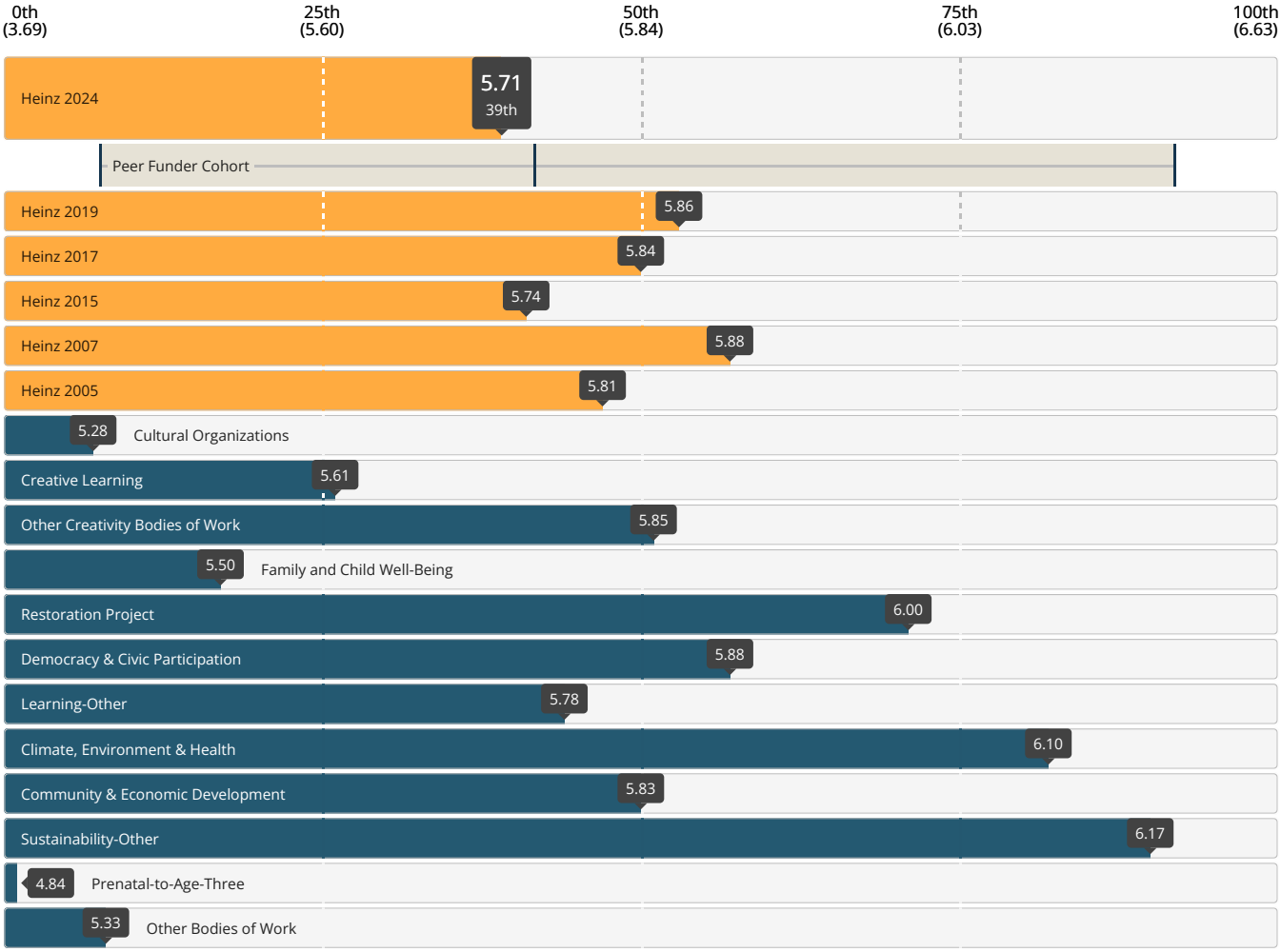


Overall Understanding

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

1 = Limited understanding **7** = Thorough understanding

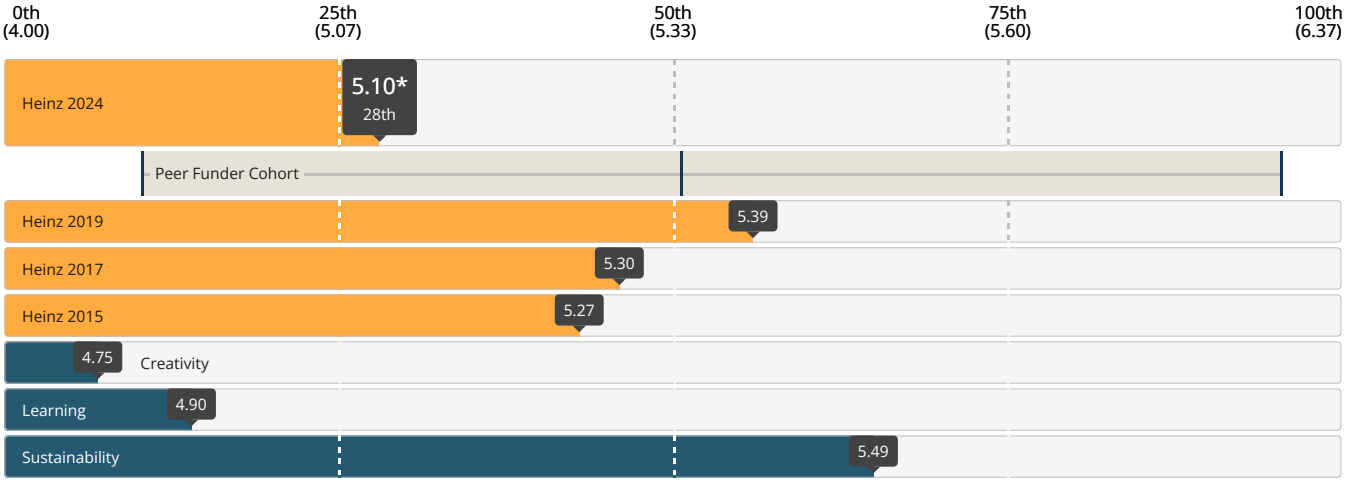
Cohort: Peer Funder Cohort Subgroup: Body of Work Past Results: On



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

1 = Not at all aware 7 = Extremely aware

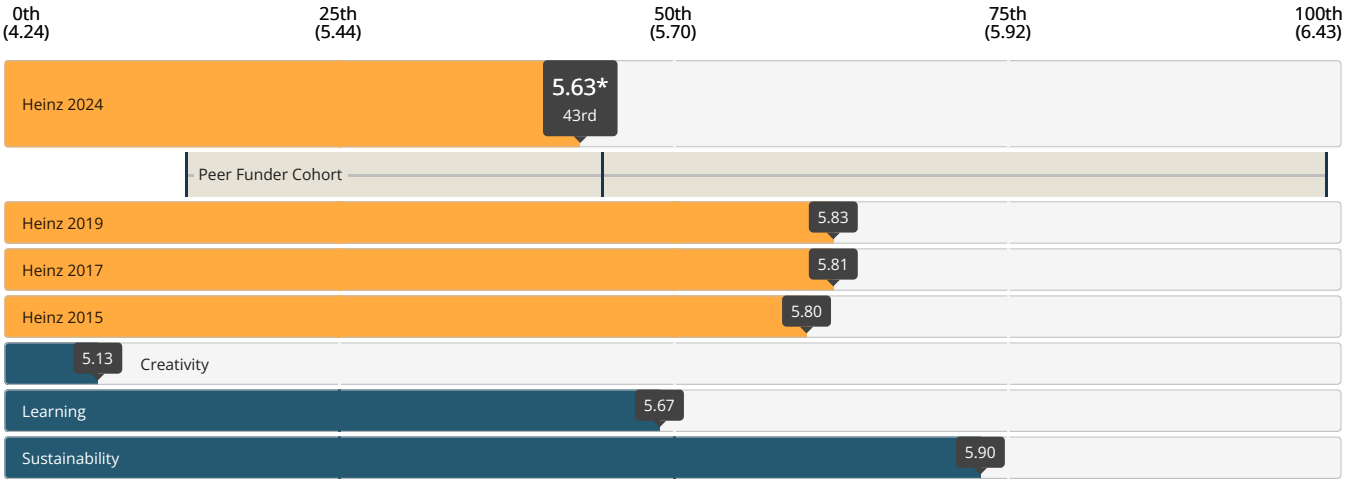
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

1 = Limited understanding 7 = Thorough understanding

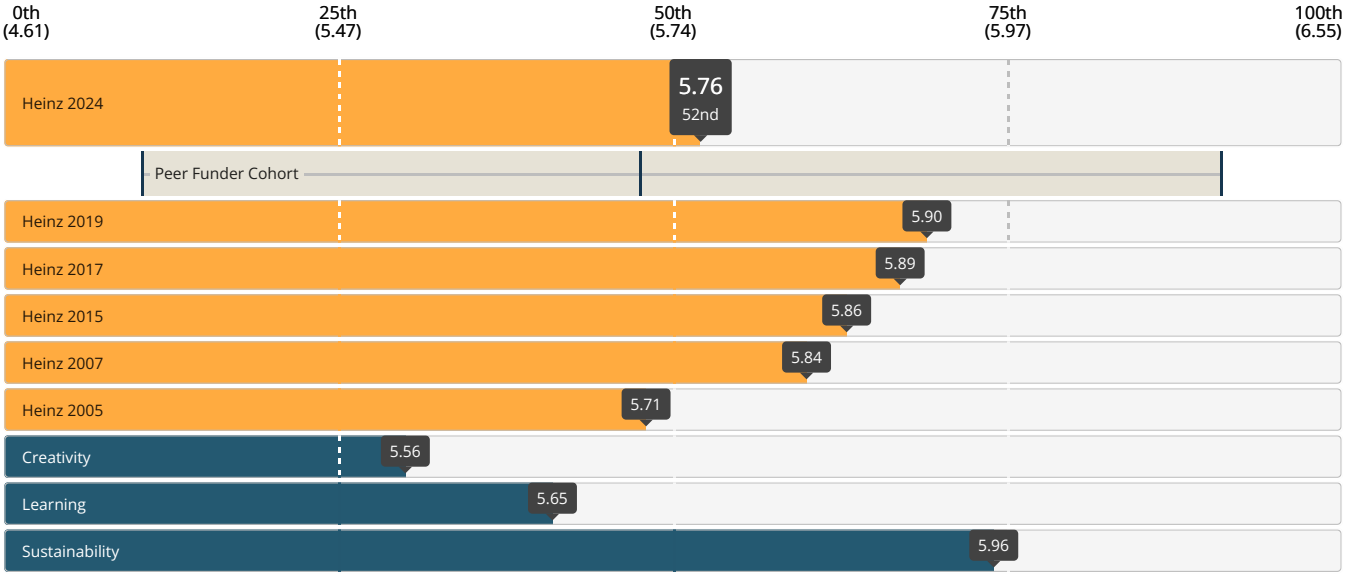
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

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

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On

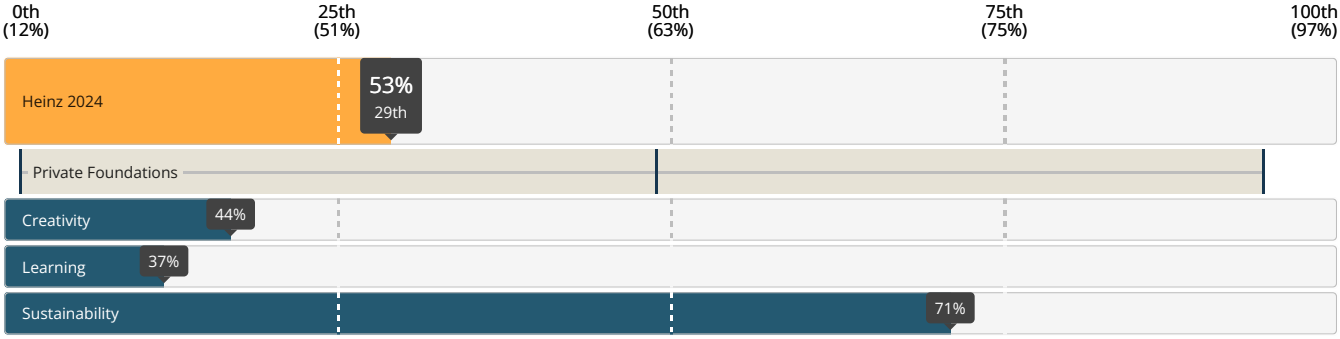


Assistance Beyond the Grant

Proportion of Grantees Receiving Assistance Beyond the Grant

Proportion of grantees who indicate receiving at least one form of assistance beyond the grant

Cohort: Private Foundations Subgroup: Program Area



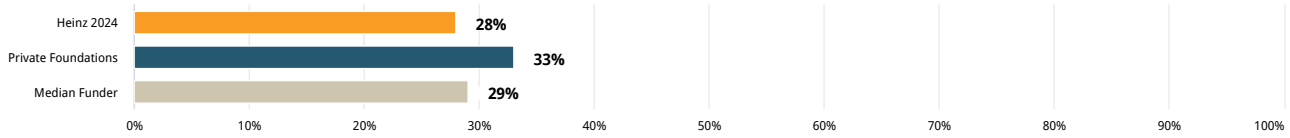
In the survey, respondents were asked about the assistance beyond the grant they received in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous assistance beyond the grant question.

Please note that "Communications Assistance" and "Other assistance not listed above" were added as options to this question in 2024, and these options depict comparative data from fewer than 80 funders in the dataset.

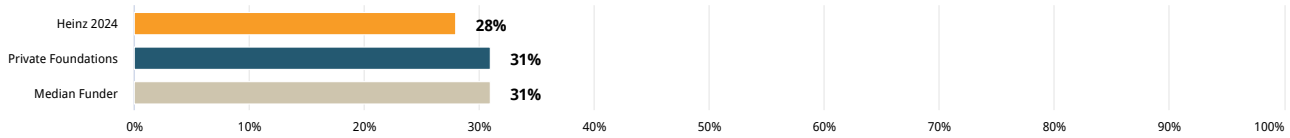
Please indicate any types of assistance beyond the grant that were a component of what you received from the Endowments (from staff or a third party paid for by the Endowments).

Cohort: Private Foundations

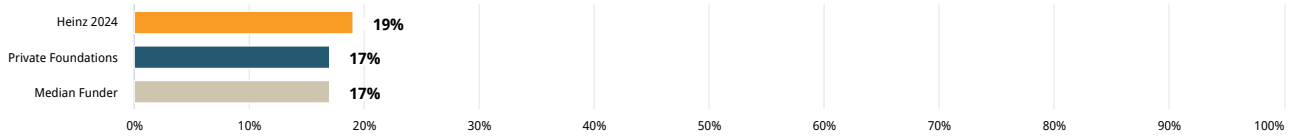
Field-Building Assistance (e.g., insight or advice about your field, fostering collaboration, grantee convenings, introductions to field leaders, etc.)



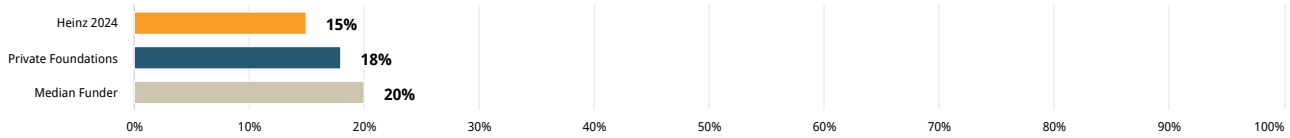
Program-Related Assistance (e.g., advice on your program approach or efforts, program assessment or evaluation assistance, etc.)



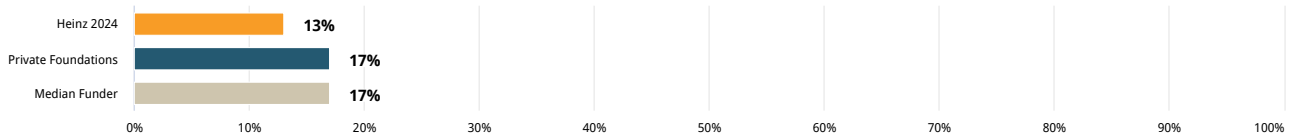
Fundraising and Development Assistance (e.g., introductions to other funders or donors, development consulting, fundraising review, etc.)



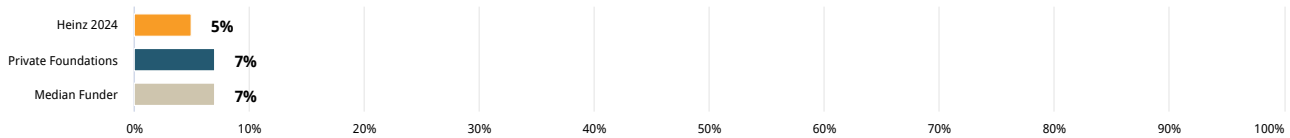
Communications Assistance (e.g., promoting your organization's work on the Endowments' social media, website, or other communication channels, drafting press releases, support for your organization's communications strategy, etc.)



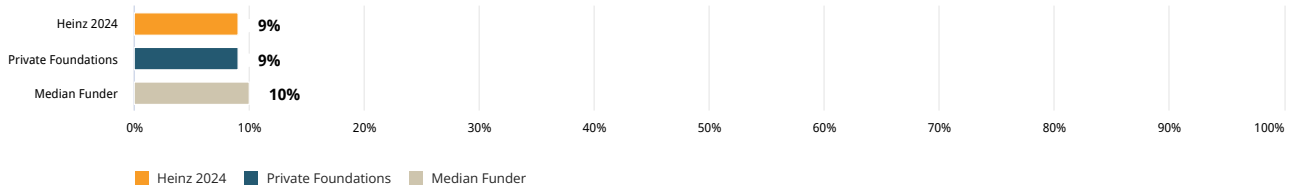
Organizational Capacity Building Assistance (e.g., advice on your organizational capacity, board development, etc.)



Diversity, Equity, and Inclusion Assistance (e.g., provide training or facilitation related to DEI, DEI assessment processes, expertise to add a DEI lens to your work, etc.)



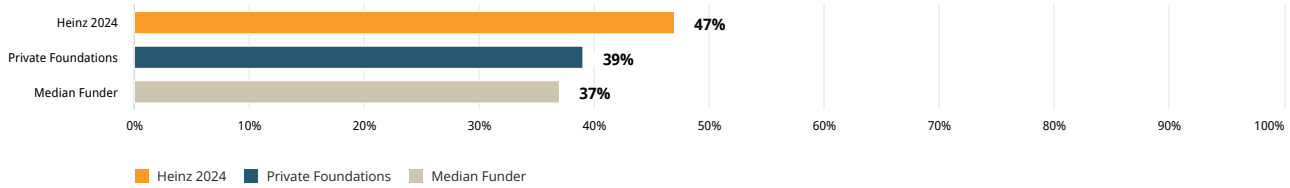
Other assistance not listed above



Please indicate any types of assistance beyond the grant that were a component of what you received from the Endowments (from staff or a third party paid for by the Endowments).

Cohort: Private Foundations

Did not receive any assistance beyond the grant



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Subgroup: Program Area

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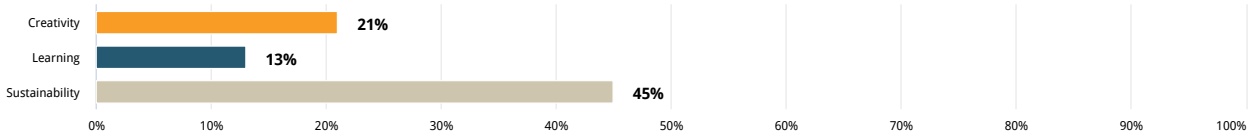

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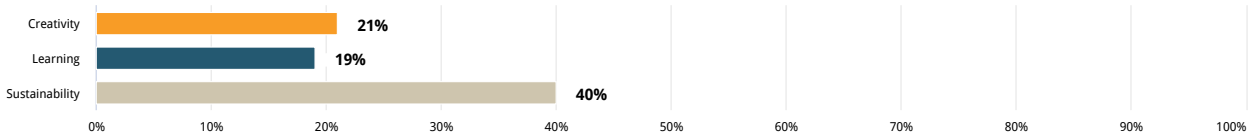

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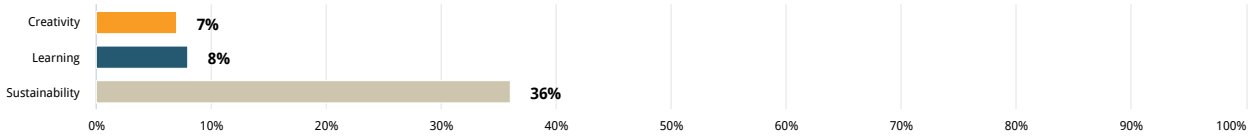

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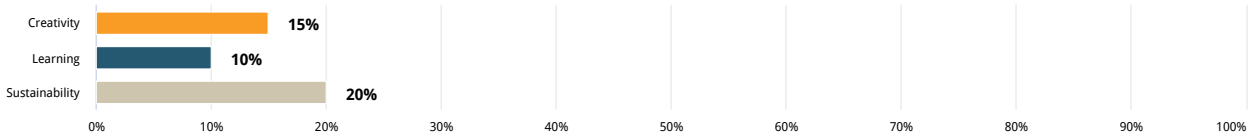

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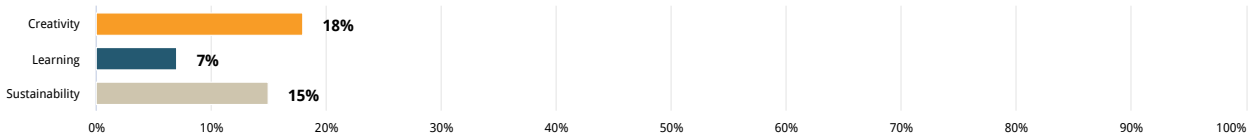

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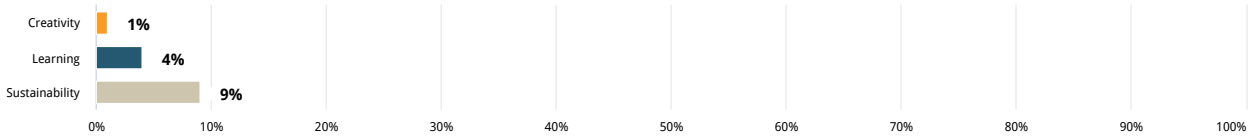
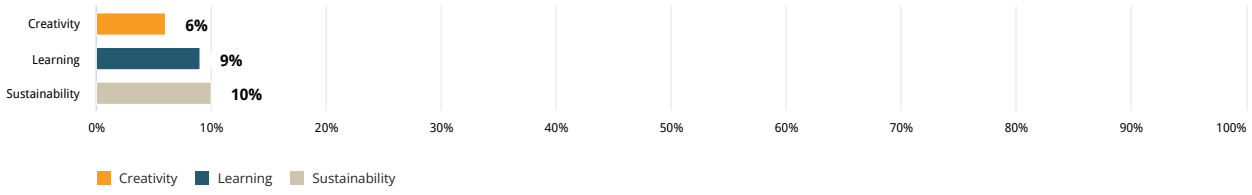


Other assistance not listed above



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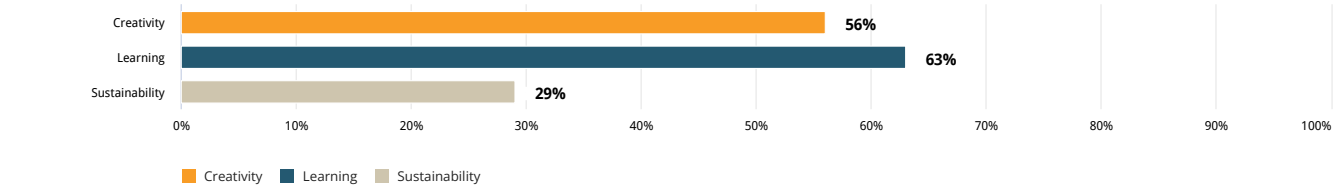
Subgroup: Program Area

Did not receive any assistance beyond the grant



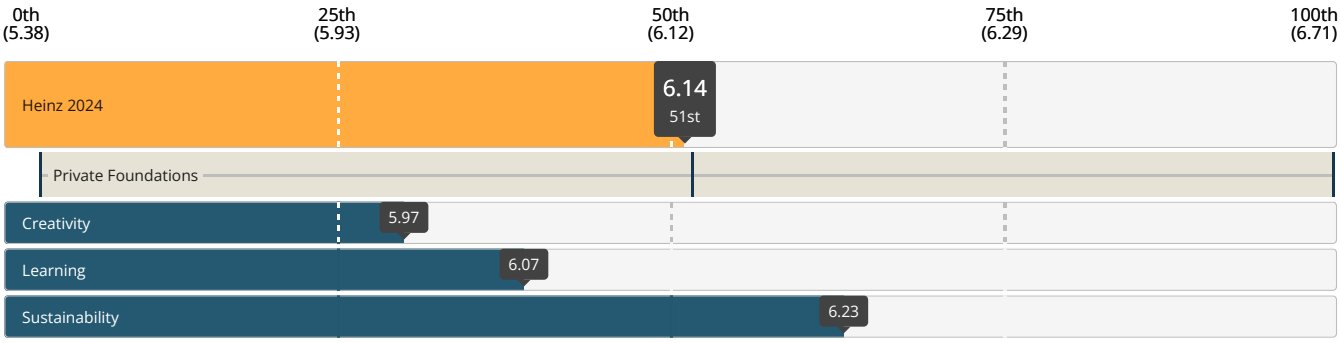
Note: The following questions were asked only of grantees who indicated receiving at least one form of assistance beyond the grant in the previous question.

Please rate the extent to which you agree with the following statements about the assistance beyond the grant you received from the Endowments.

The support I received met an important need for my organization and/or program

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

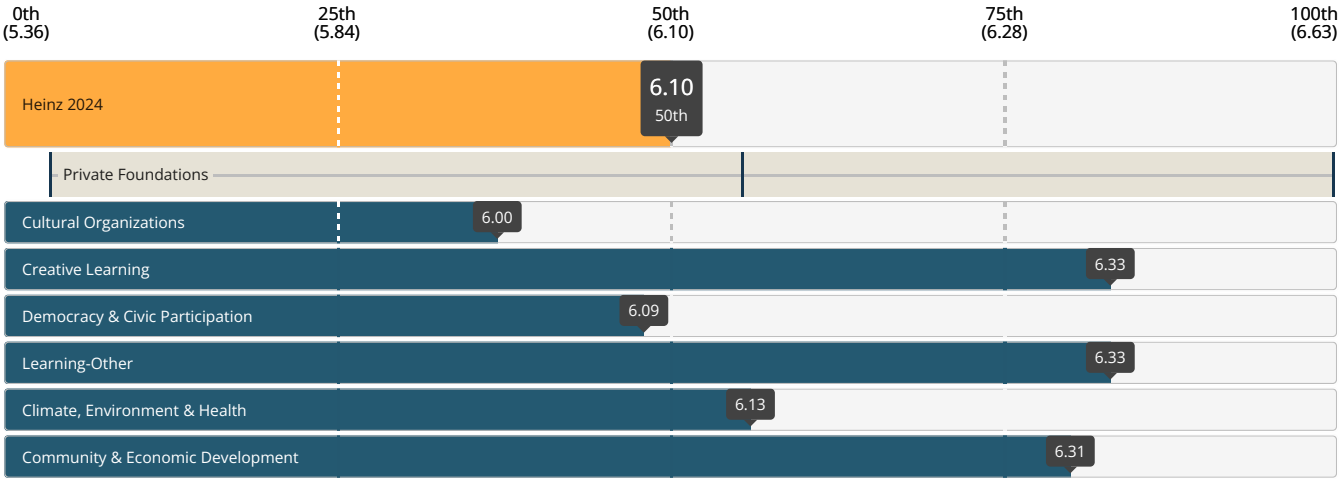
Cohort: Private Foundations Subgroup: Program Area



The support I received strengthened my organization and/or program

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

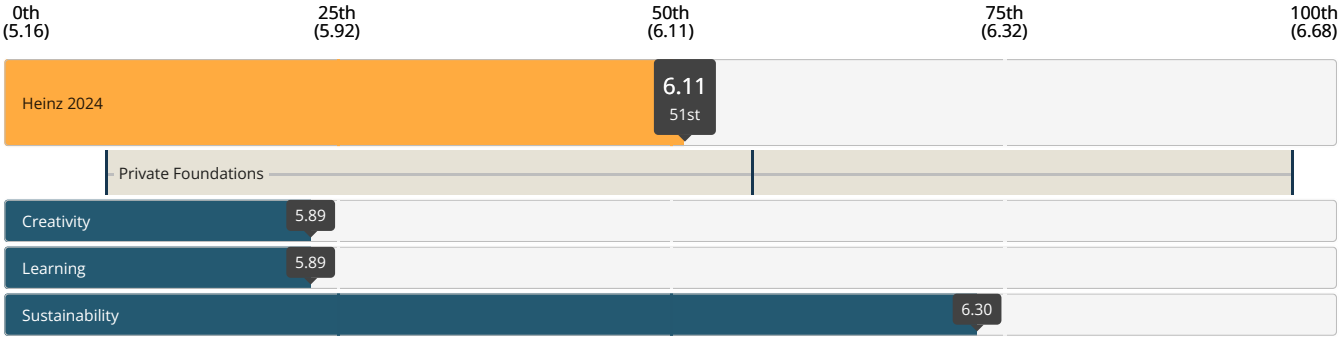
Cohort: Private Foundations Subgroup: Body of Work



The Endowments' assistance beyond the grant was a worthwhile use of the time required of us

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

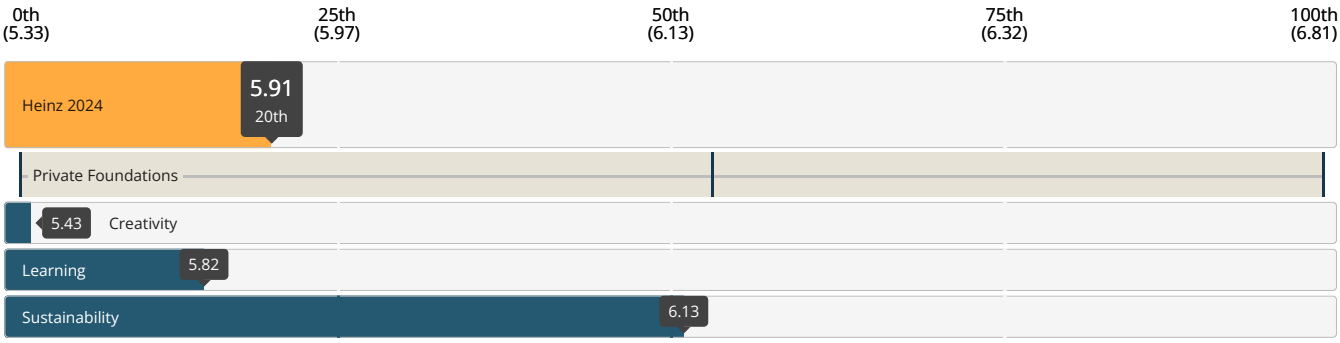
Cohort: Private Foundations Subgroup: Program Area



I felt the Endowments would be open to feedback about the assistance beyond the grant it provided

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

Cohort: Private Foundations Subgroup: Program Area



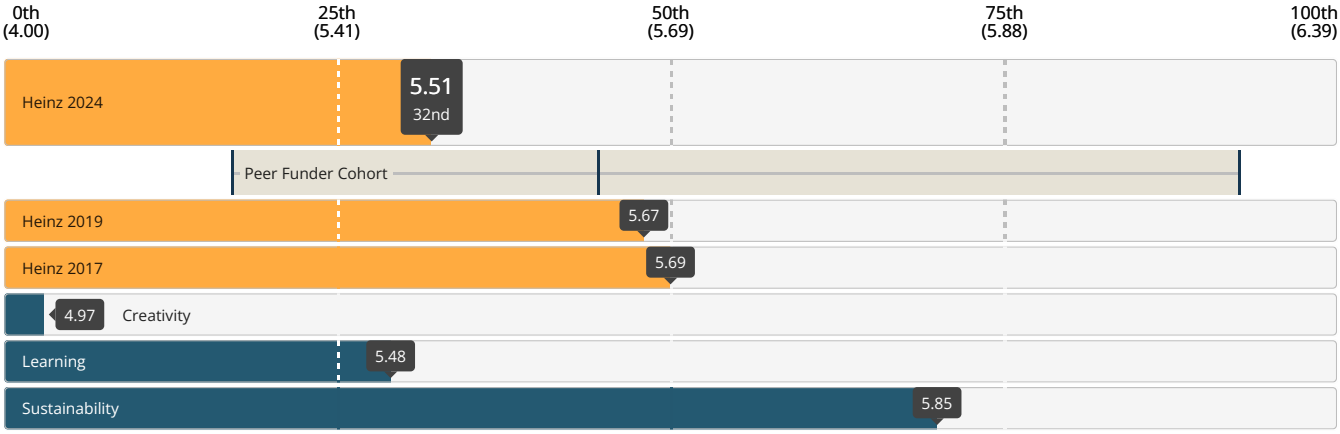
People and Communities Served

In the following question, we use the phrase "the people and communities that you serve" to refer to those your organization seeks to serve through the services and/or programs it provides.

How well does the Endowments understand the needs of the people and communities that you serve?

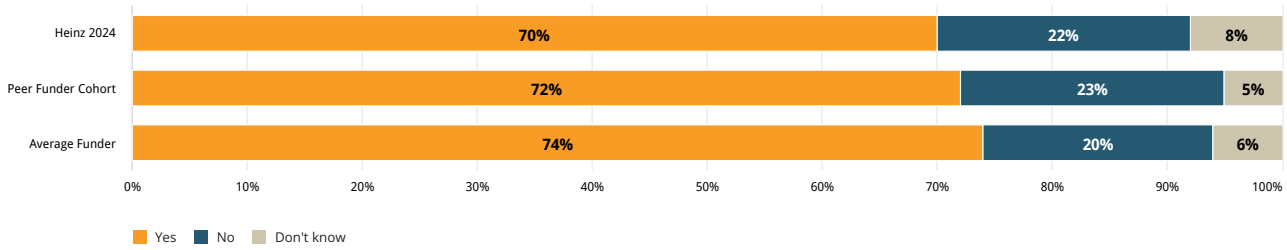
1 = Limited understanding 7 = Thorough understanding

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



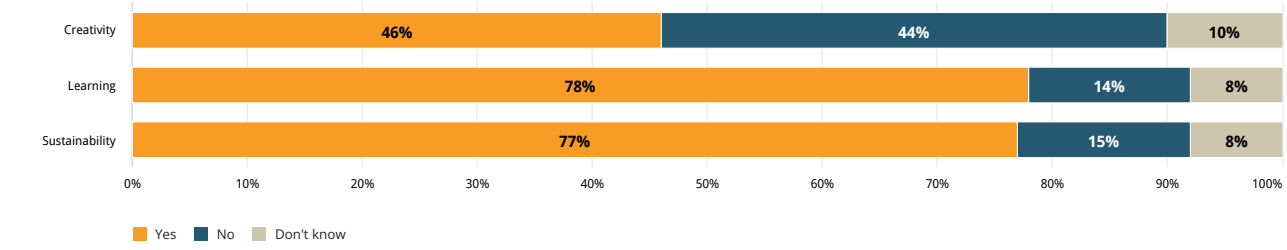
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?

Cohort: Peer Funder Cohort Past Results: On



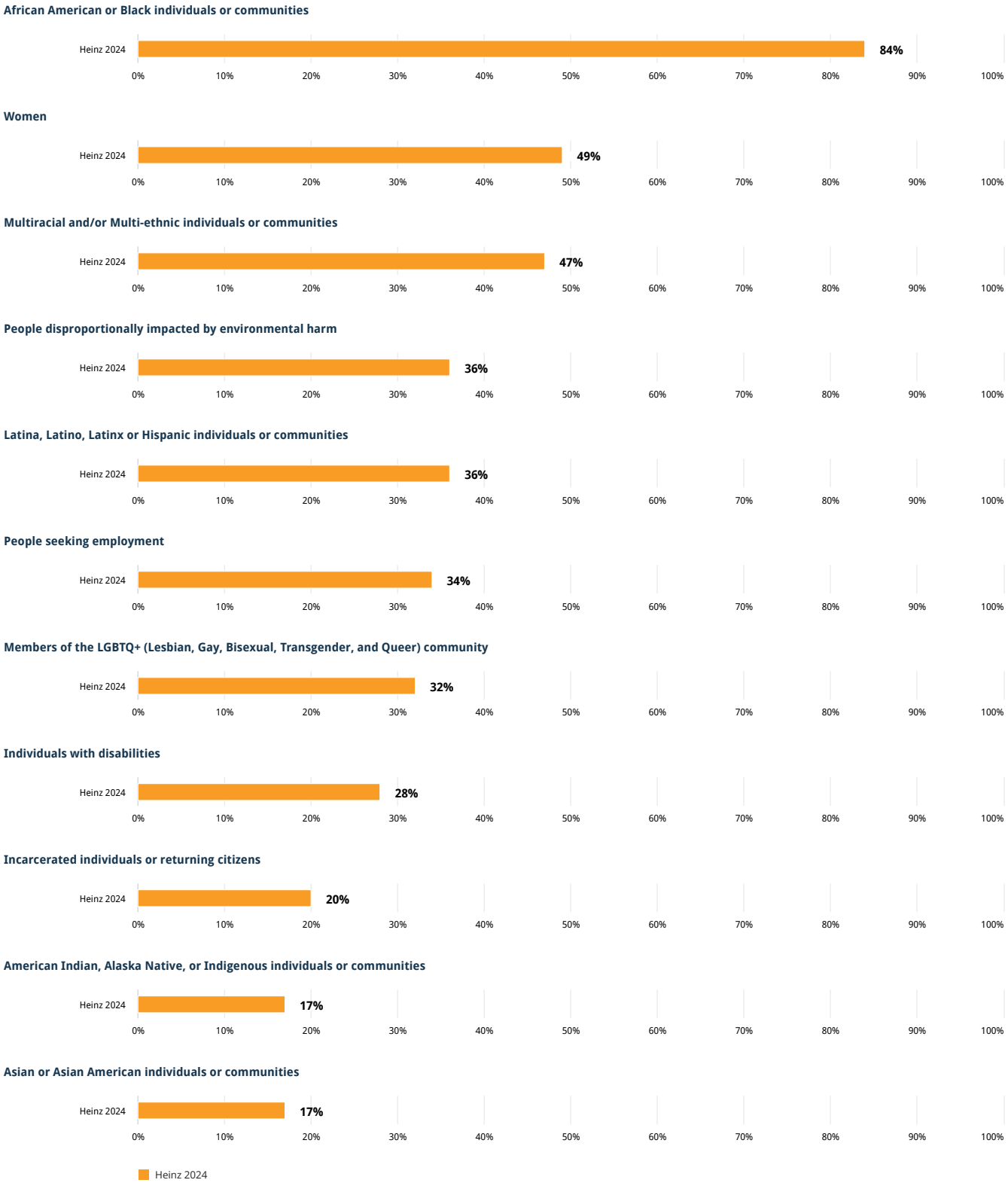
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups? - By Subgroup

Subgroup: Program Area

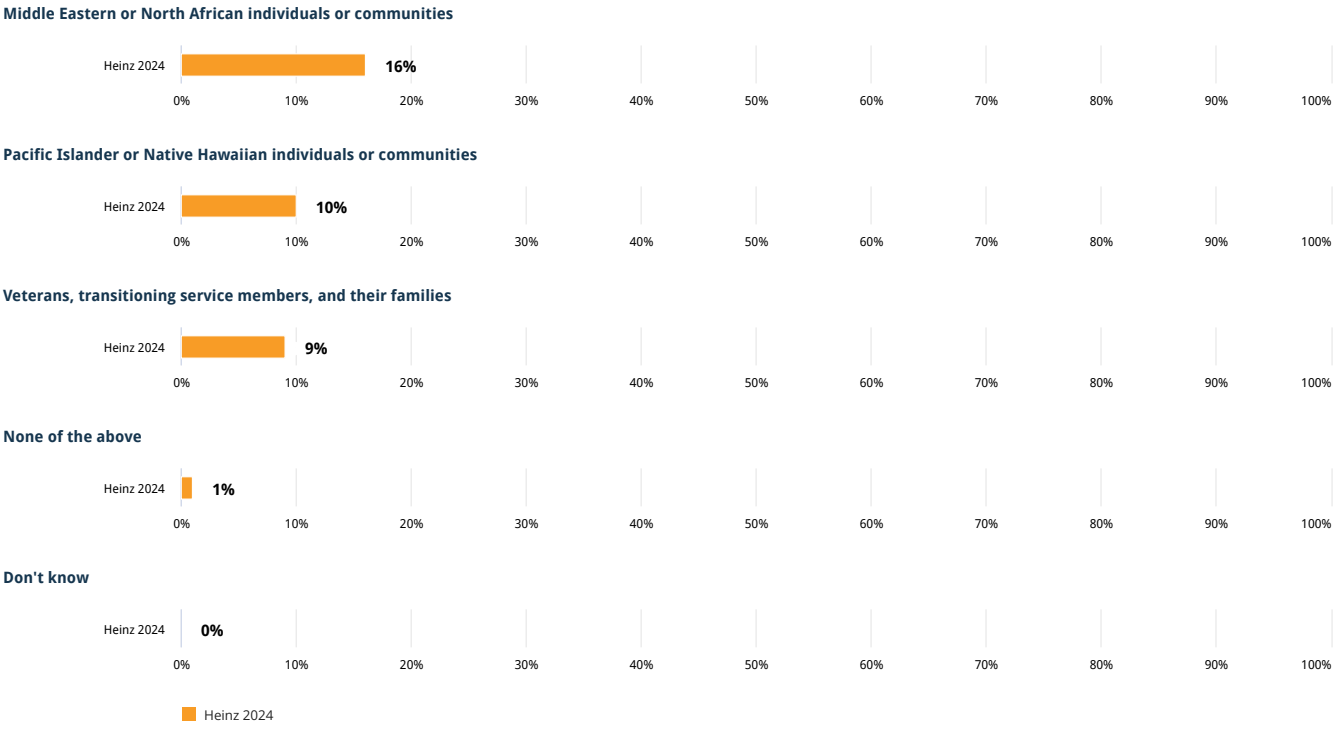


The following question is asked only of U.S.-based grantees who answered "yes" to the question "Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?"

Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant?



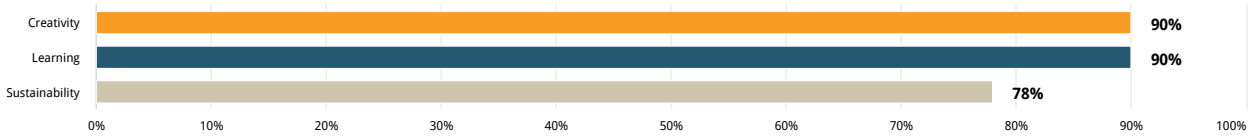
Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant?



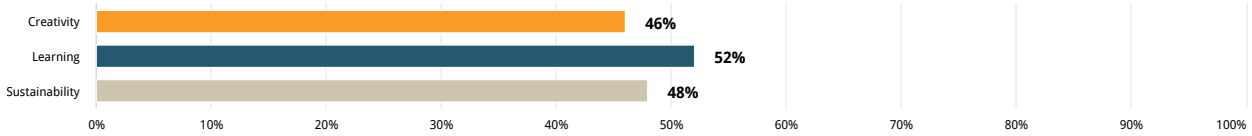
Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant? - By Subgroup

Subgroup: Program Area

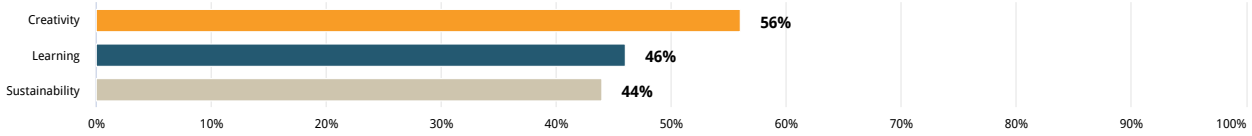
African American or Black individuals or communities



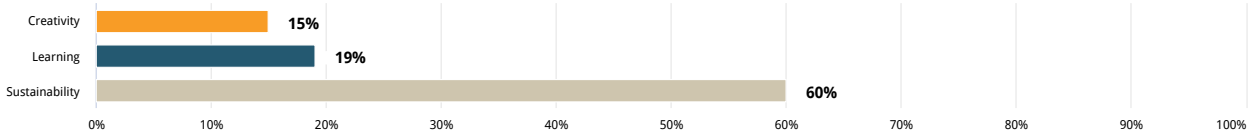
Women



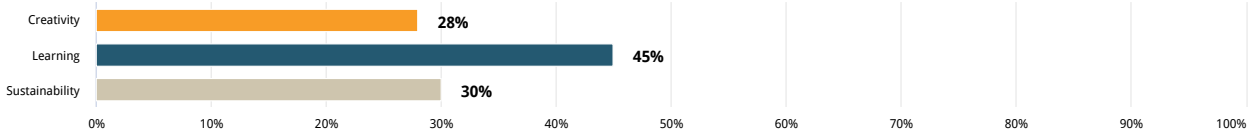
Multiracial and/or Multi-ethnic individuals or communities



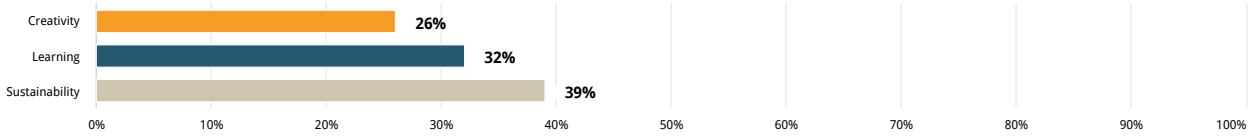
People disproportionally impacted by environmental harm



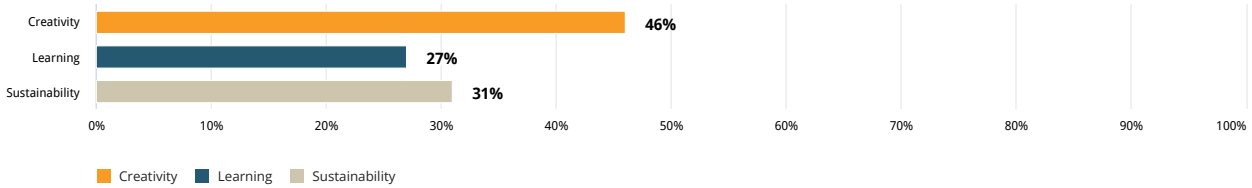
Latina, Latino, Latinx or Hispanic individuals or communities



People seeking employment



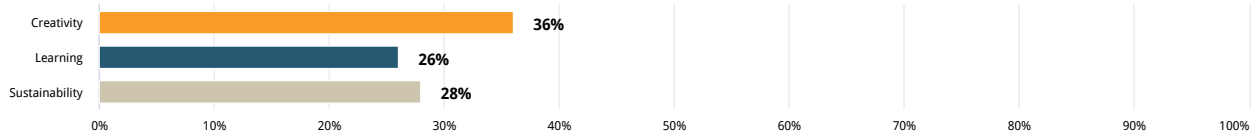
Members of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community



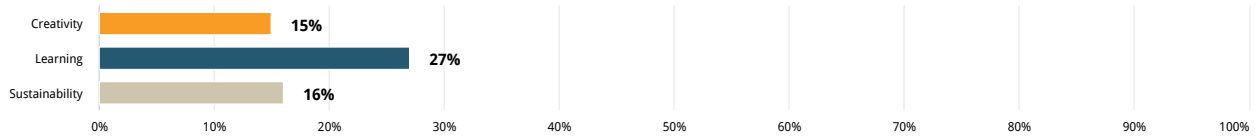
Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant? - By Subgroup

Subgroup: Program Area

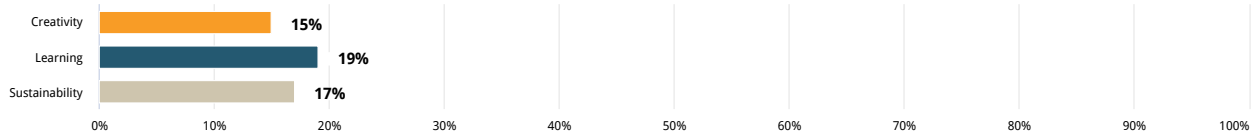
Individuals with disabilities



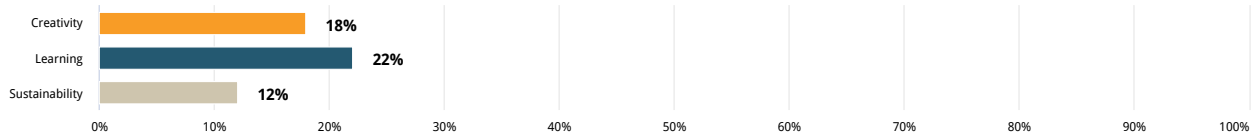
Incarcerated individuals or returning citizens



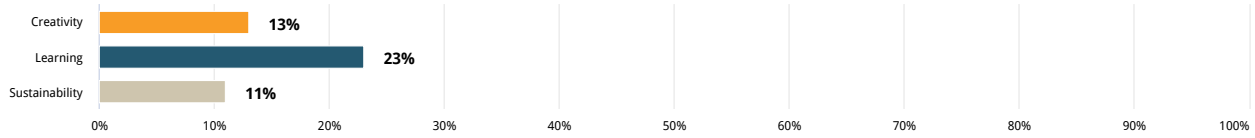
American Indian, Alaska Native, or Indigenous individuals or communities



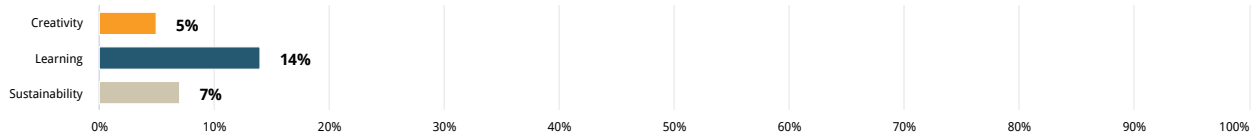
Asian or Asian American individuals or communities



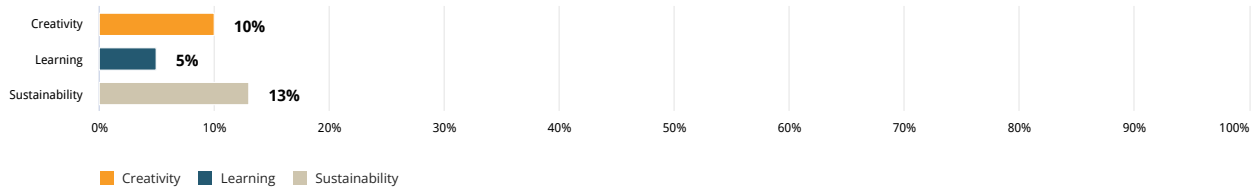
Middle Eastern or North African individuals or communities



Pacific Islander or Native Hawaiian individuals or communities



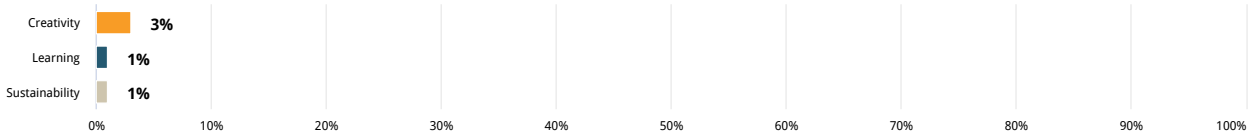
Veterans, transitioning service members, and their families



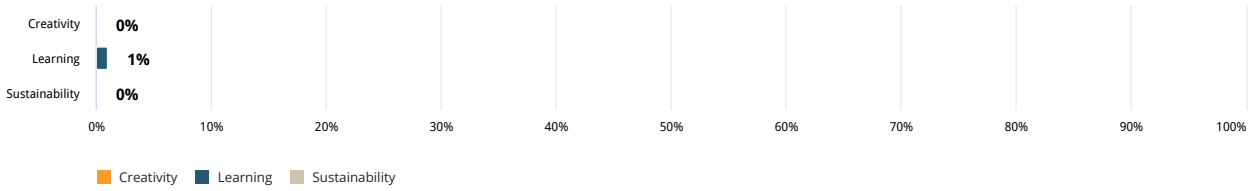
Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant? - By Subgroup

Subgroup: Program Area

None of the above



Don't know

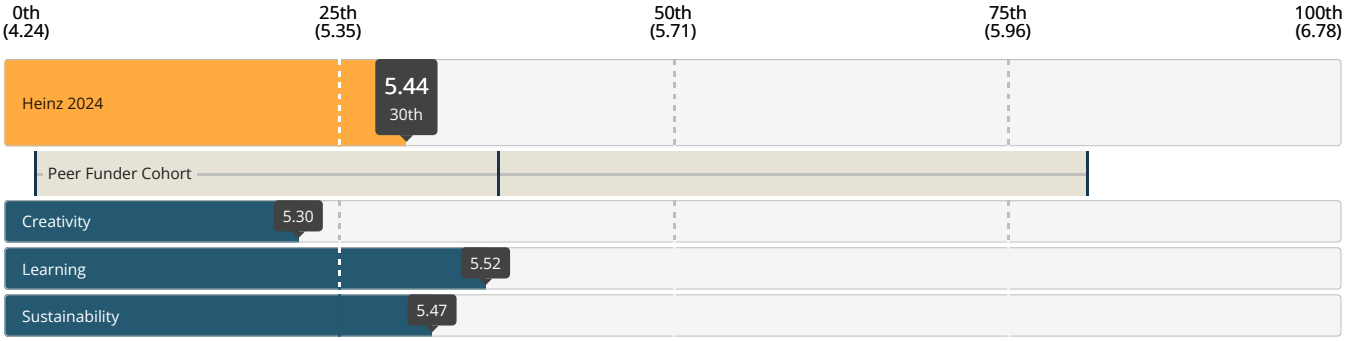


Diversity, Equity, and Inclusion

To what extent do you agree or disagree that the Endowments has clearly communicated what diversity, equity, and inclusion means for its work?

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

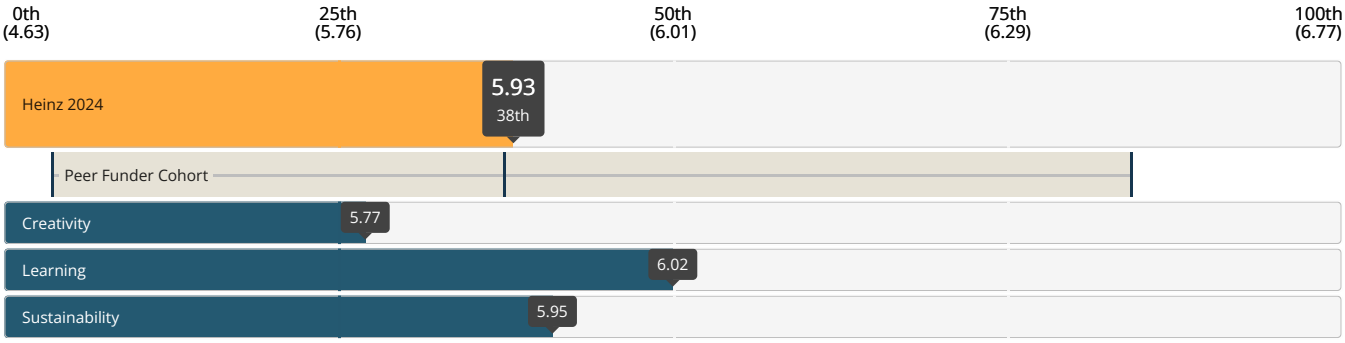
Cohort: Peer Funder Cohort Subgroup: Program Area



To what extent do you agree or disagree that the Endowments demonstrates an explicit commitment to diversity, equity, and inclusion in its work?

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

Cohort: Peer Funder Cohort Subgroup: Program Area

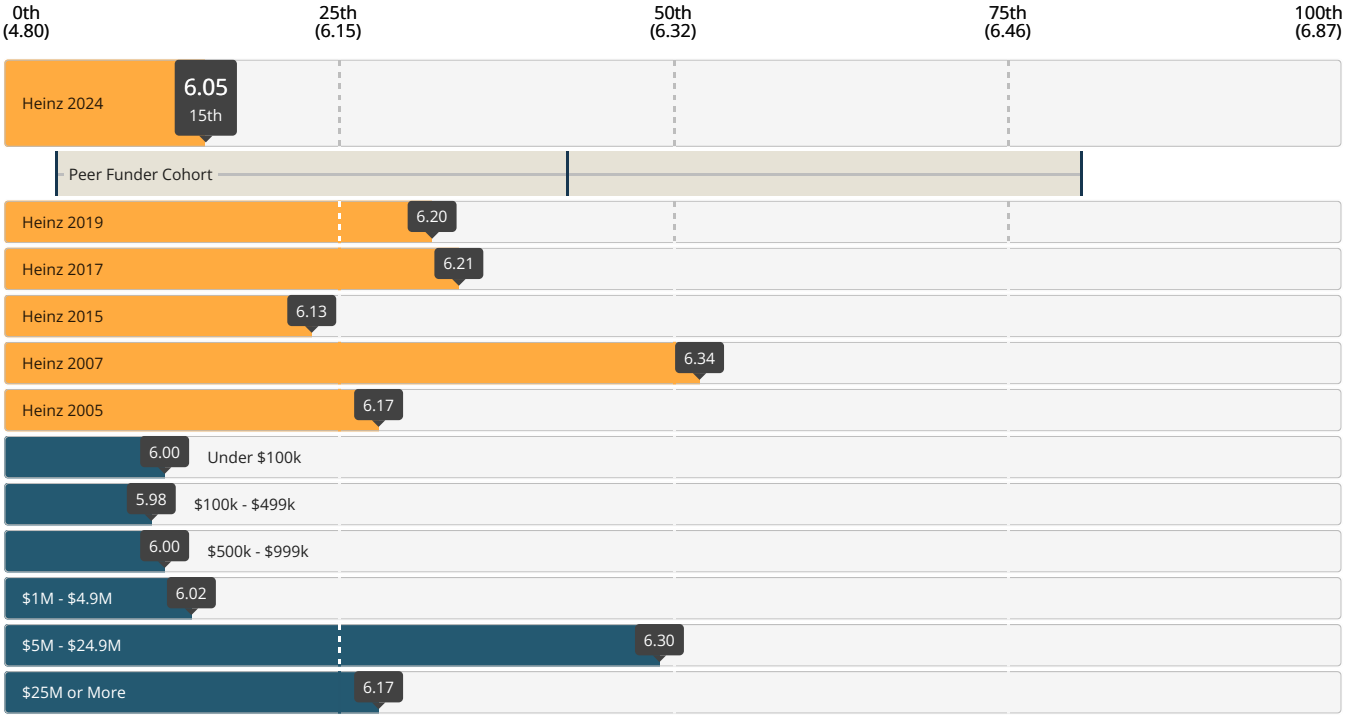


Funder-Grantee Relationships

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

1 = Not at all comfortable **7** = Extremely comfortable

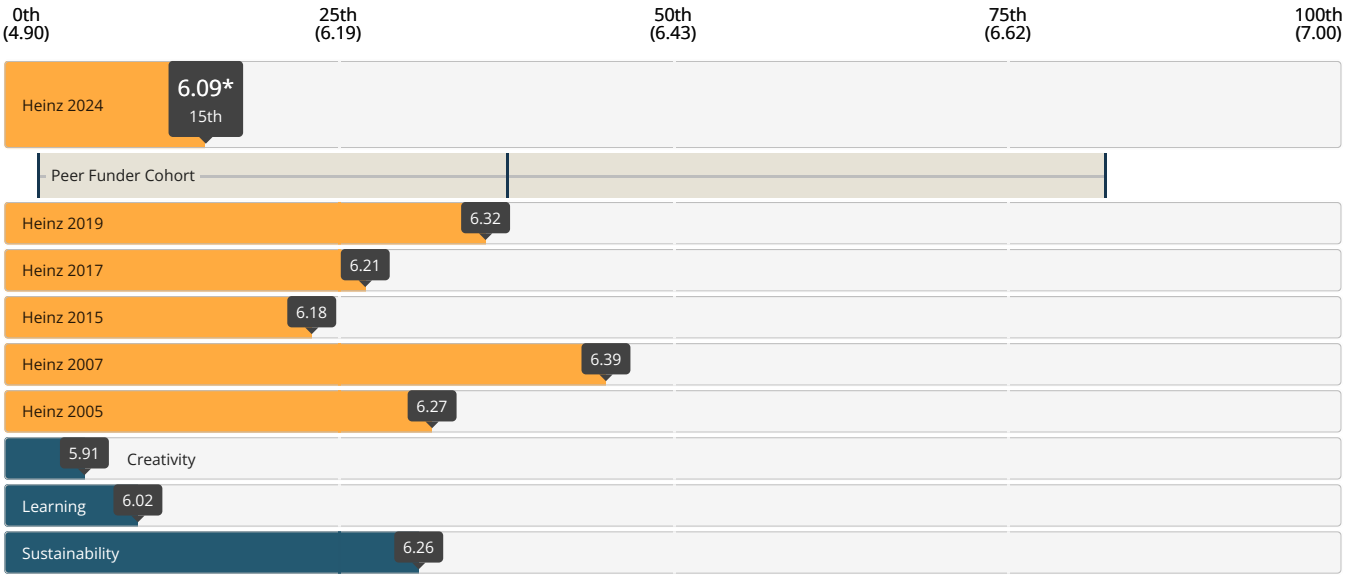
Cohort: Peer Funder Cohort Subgroup: Annual Operating Budget Past Results: On



Overall, how responsive was Endowments staff?

1 = Not at all responsive **7** = Extremely responsive

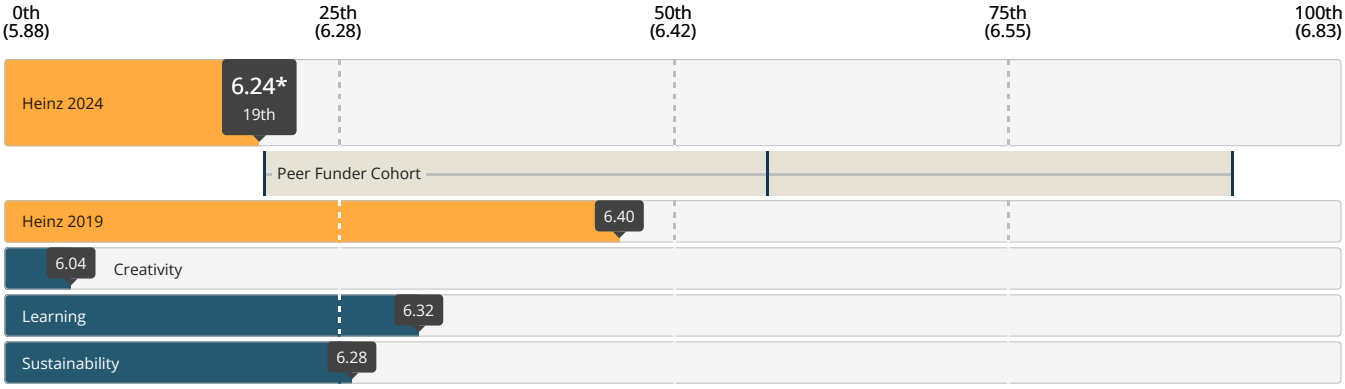
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

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

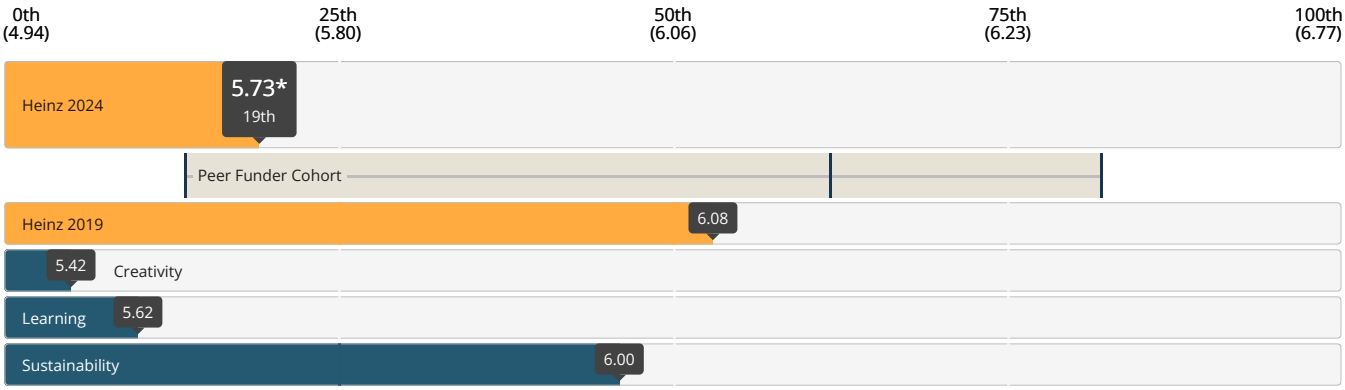
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

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

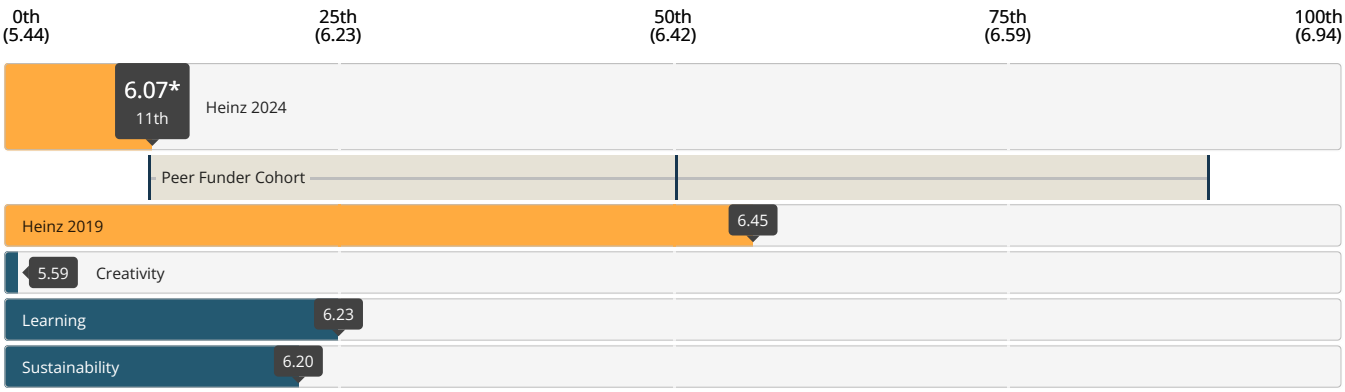
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

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

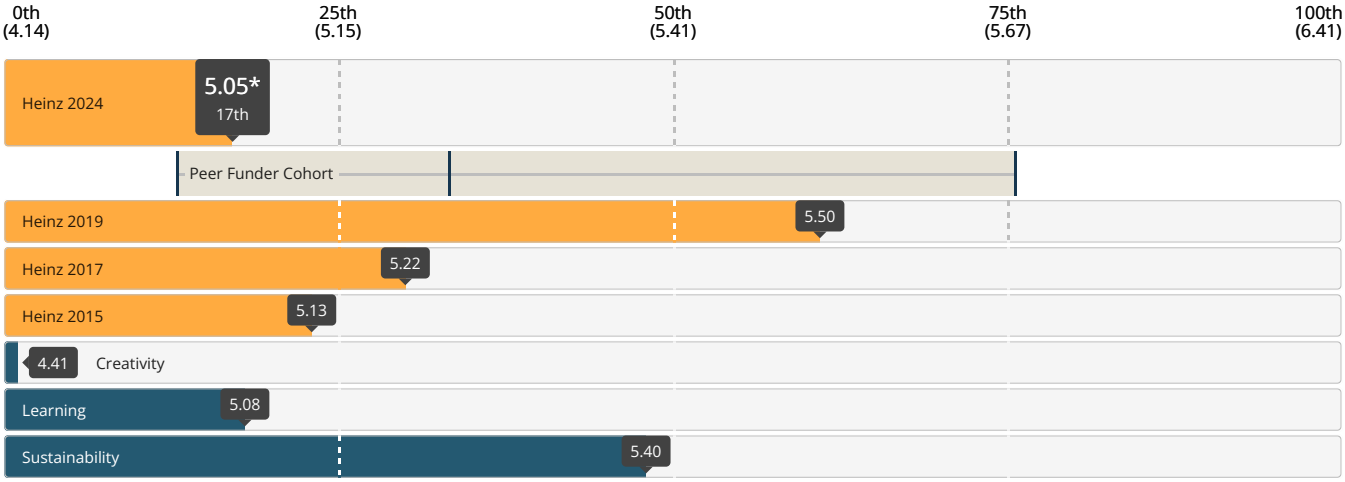
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

1 = Not at all 7 = To a great extent

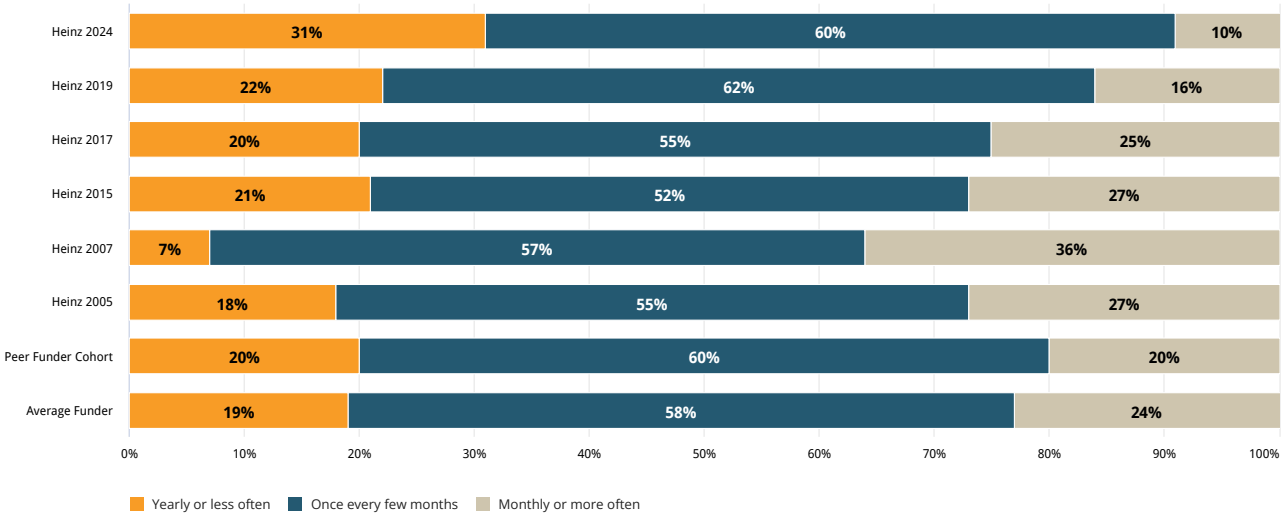
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Interaction Patterns

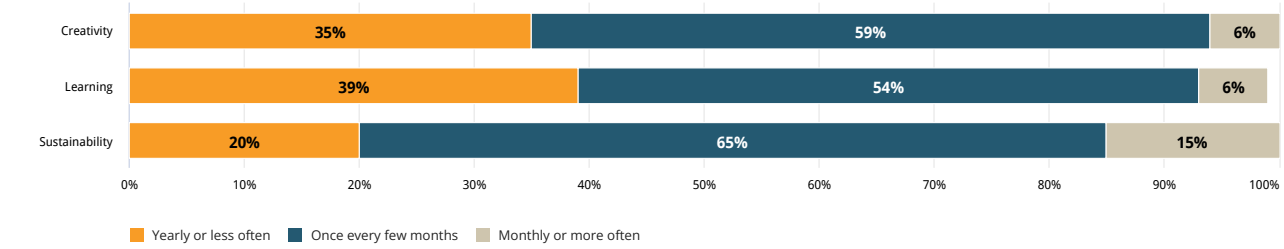
How often do/did you have contact with your program officer during this grant?

Cohort: Peer Funder Cohort Past Results: On



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

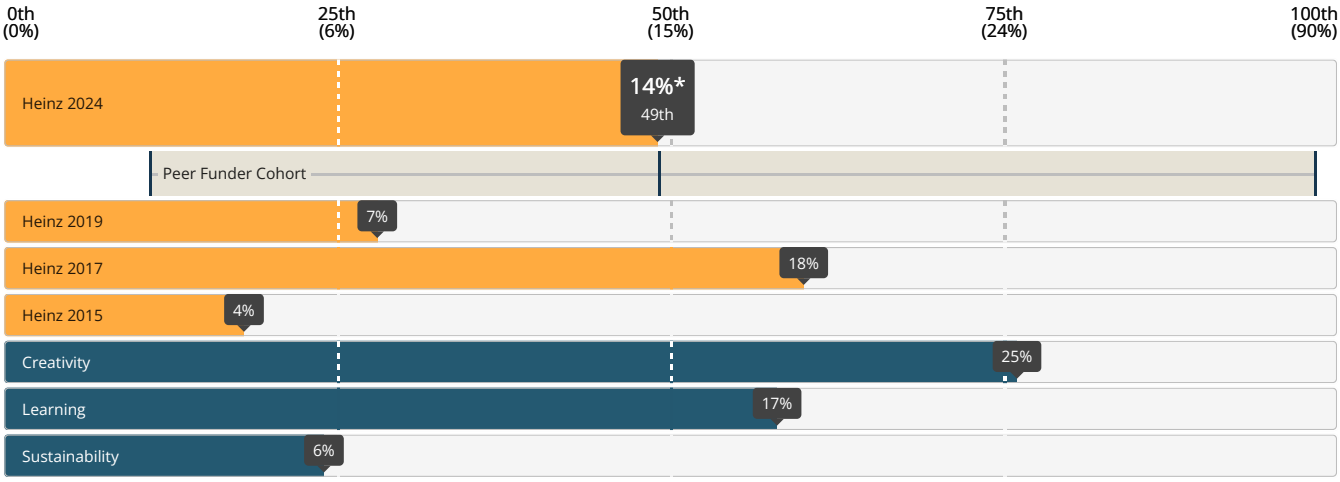
Subgroup: Program Area



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

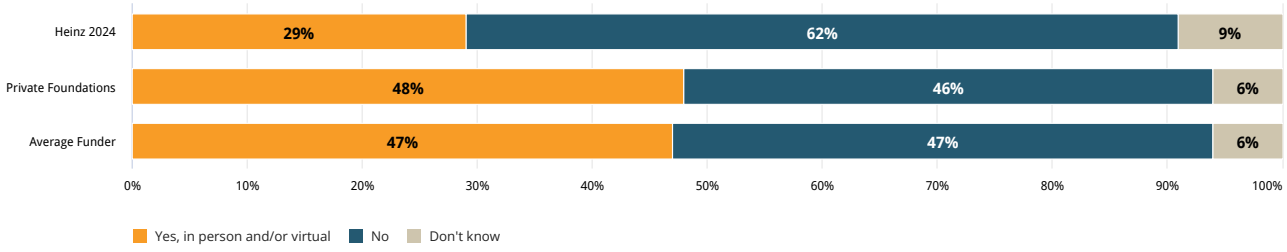
Proportion of grantees responding 'Yes'

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



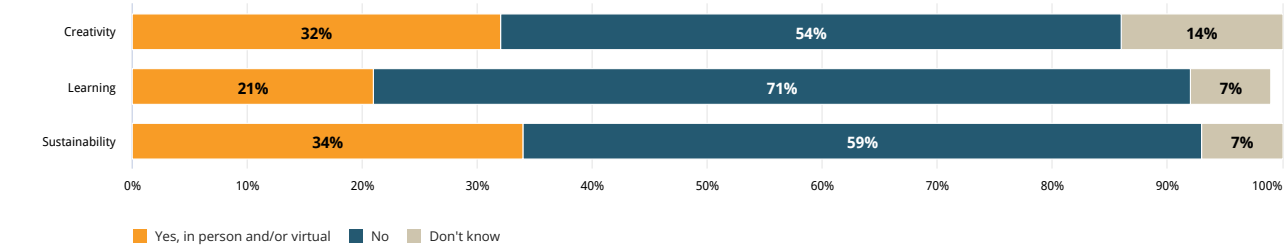
At any point during this grant, including the selection process, did Endowments staff conduct a site visit?

Cohort: Private Foundations Past Results: On



At any point during this grant, including the selection process, did Endowments staff conduct a site visit? - By Subgroup

Subgroup: Program Area

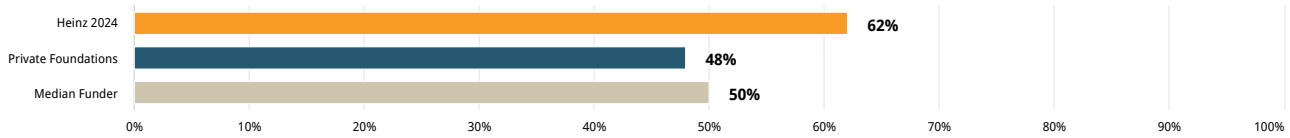


In the survey, respondents were asked the site visit question in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous site visit question.

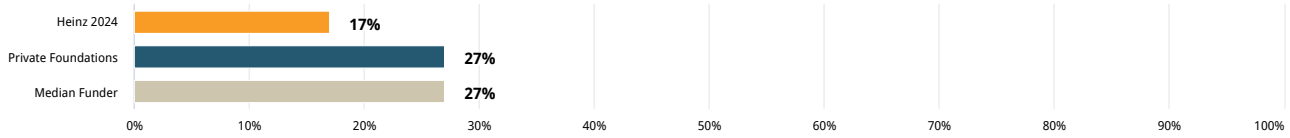
At any point during this grant, including the selection process, did Endowments staff conduct a site visit?

Cohort: Private Foundations

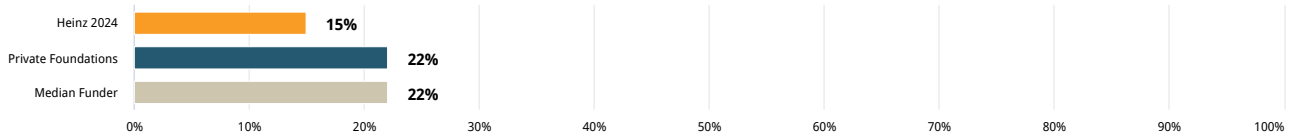
No



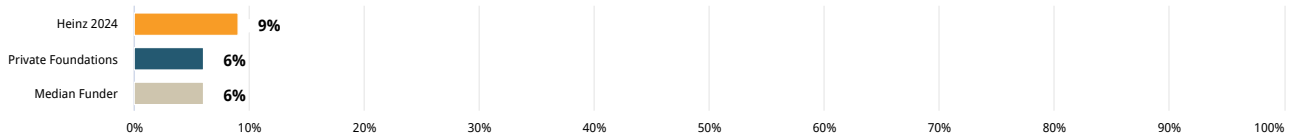
Yes, in person



Yes, virtually



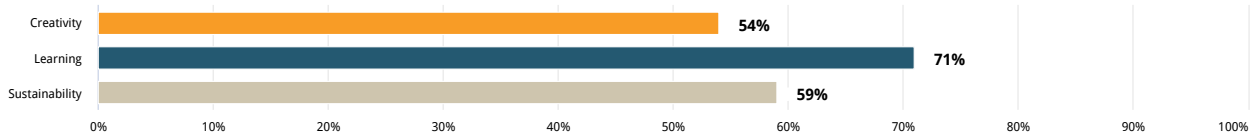
Don't know



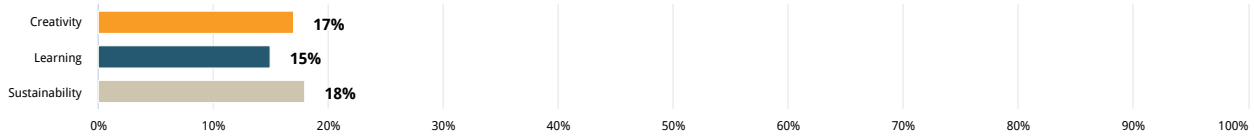
At any point during this grant, including the selection process, did Endowments staff conduct a site visit? - By Subgroup

Subgroup: Program Area

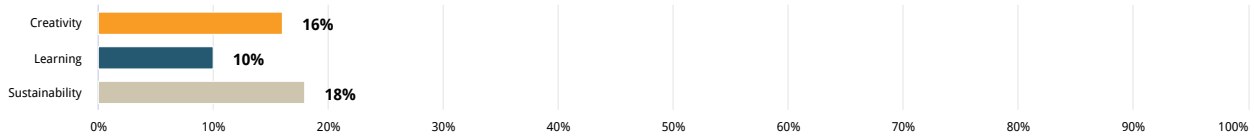
No



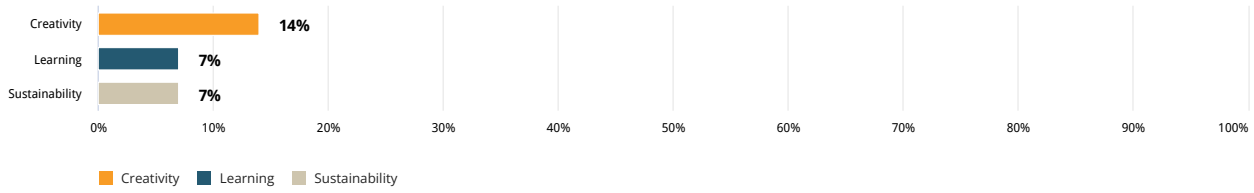
Yes, in person



Yes, virtually



Don't know

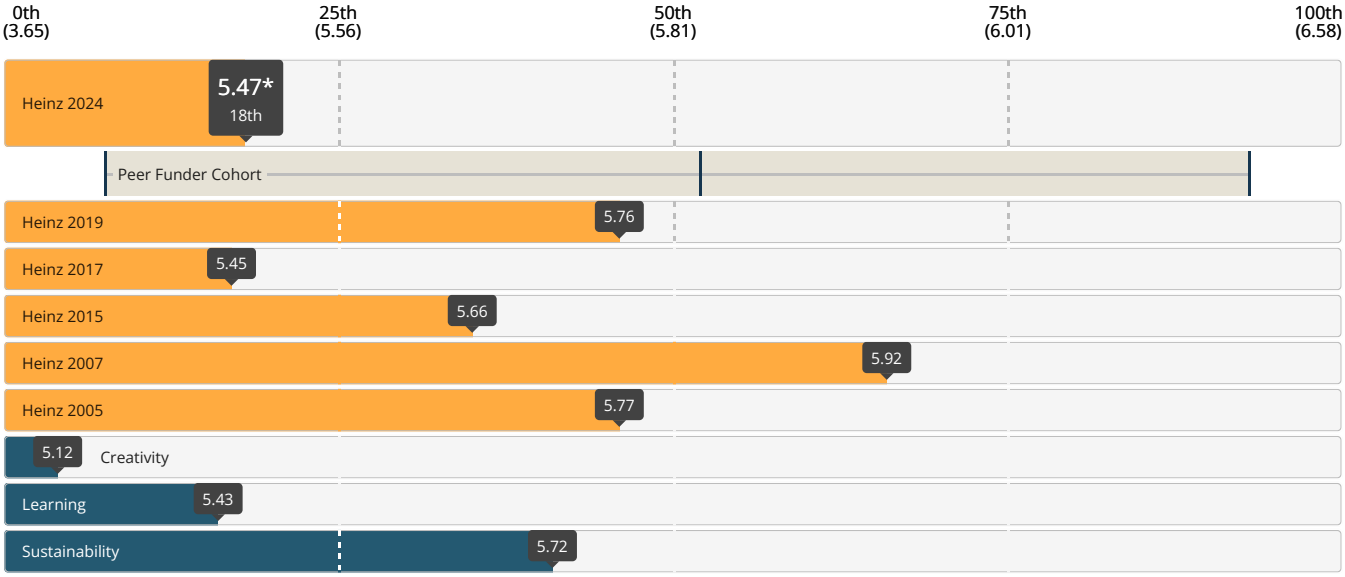


Communication

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

1 = Not at all clearly **7** = Extremely clearly

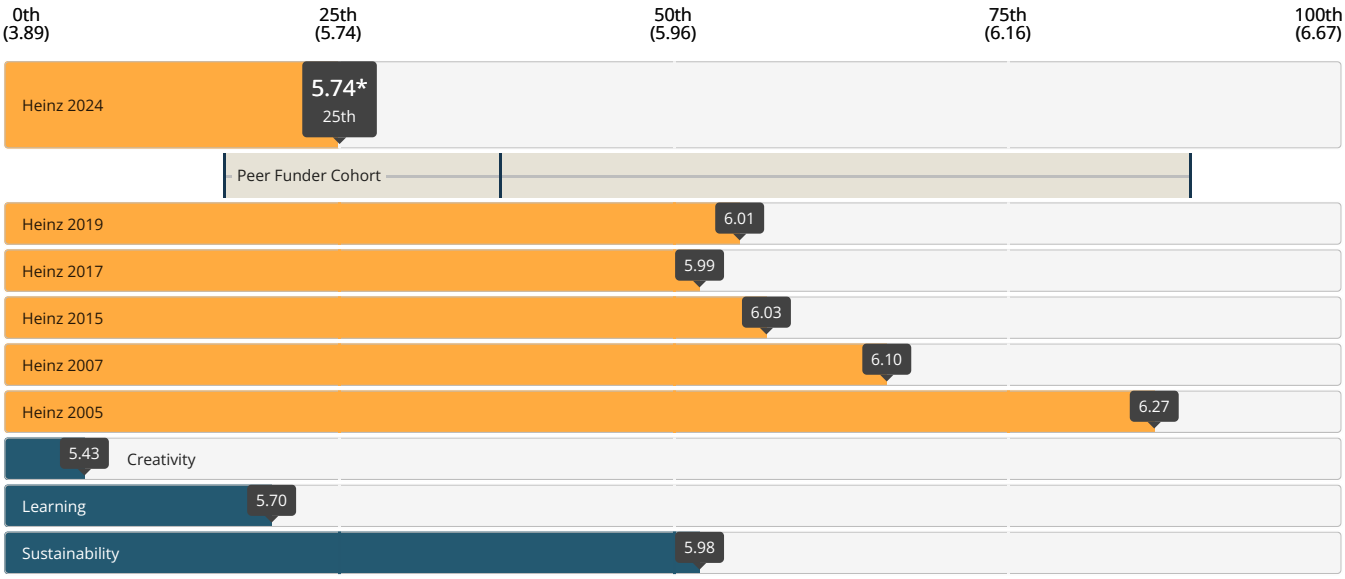
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

1 = Not at all consistent **7** = Completely consistent

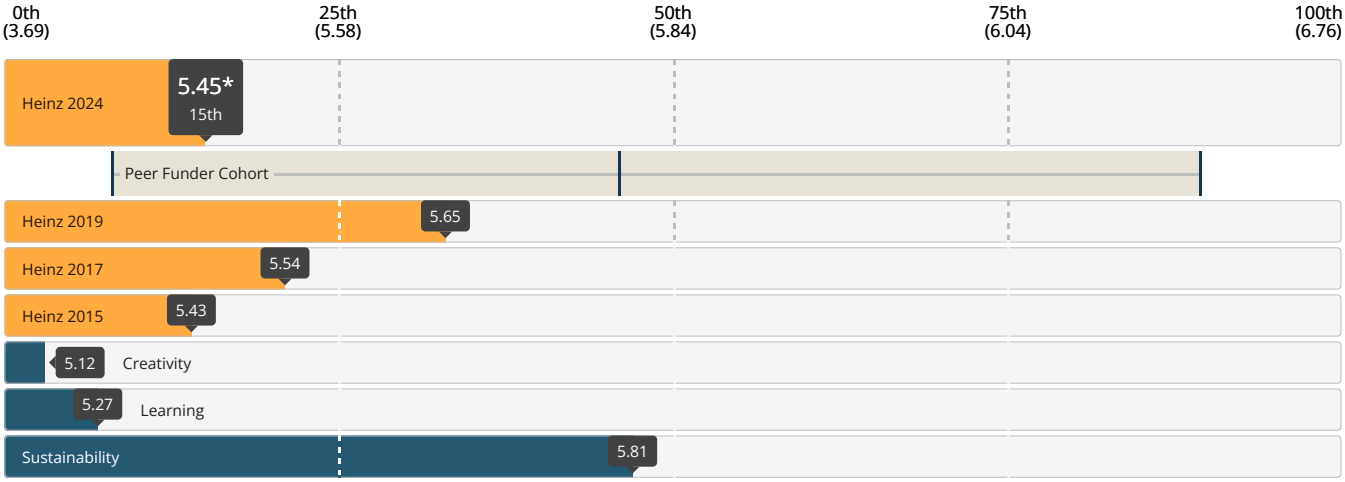
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Overall, how transparent is the Endowments with your organization?

1 = Not at all transparent 7 = Extremely transparent

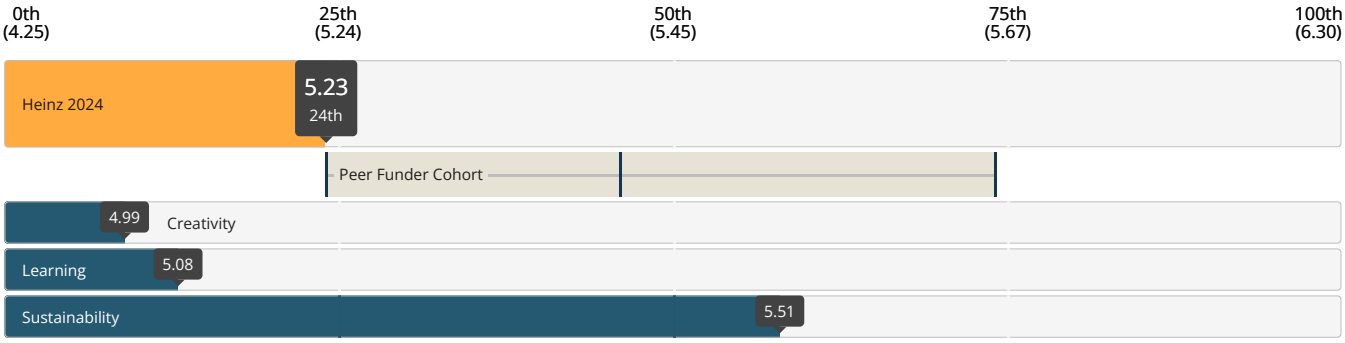
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

1 = Limited understanding 7 = Thorough understanding

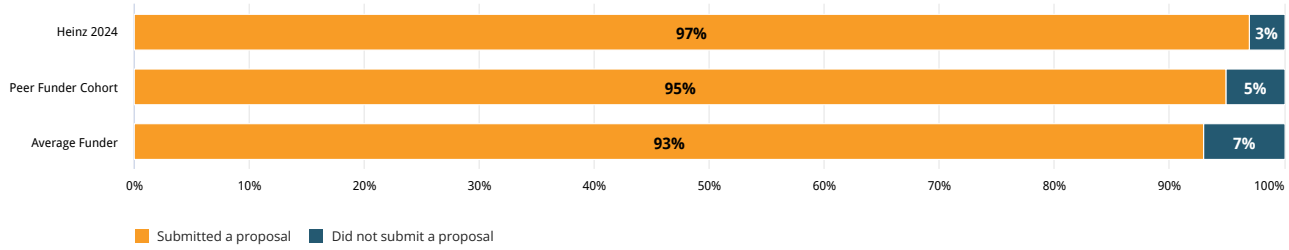
Cohort: Peer Funder Cohort Subgroup: Program Area



Grant Processes

Did you submit a proposal to the Endowments for this grant?

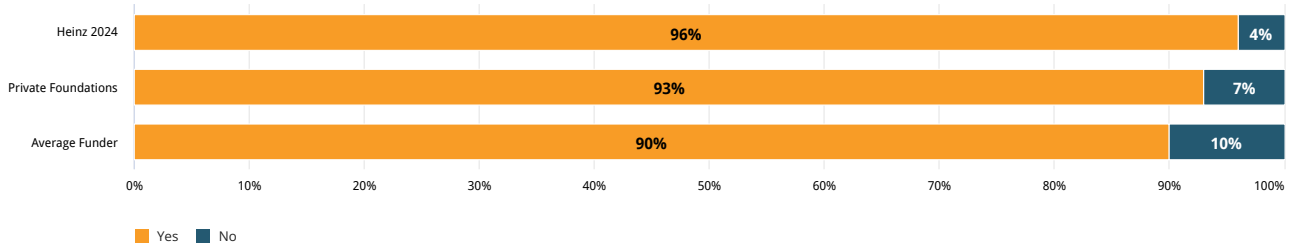
Cohort: Peer Funder Cohort Past Results: Off



The following question was only asked of grantees that indicated submitting a proposal for their grant. This question was recently added to the grantee survey and depicts comparative data from fewer than 80 funders in the dataset.

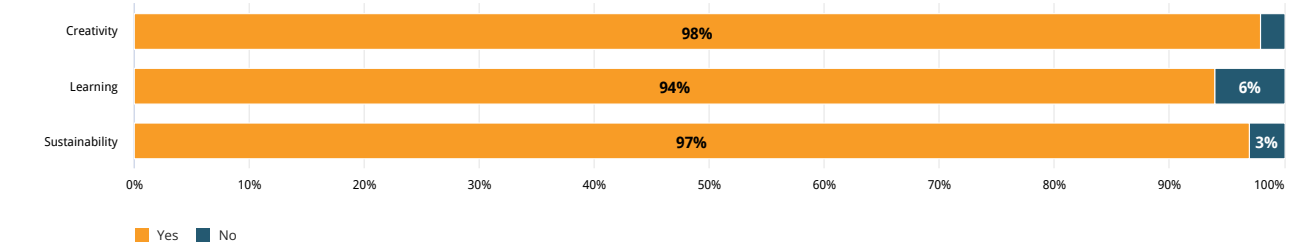
Did you have contact with an Endowments staff member via phone, email, or in-person/video before you applied?

Cohort: Private Foundations Past Results: Off



Did you have contact with an Endowments staff member via phone, email, or in-person/video before you applied? - By Subgroup

Subgroup: Program Area

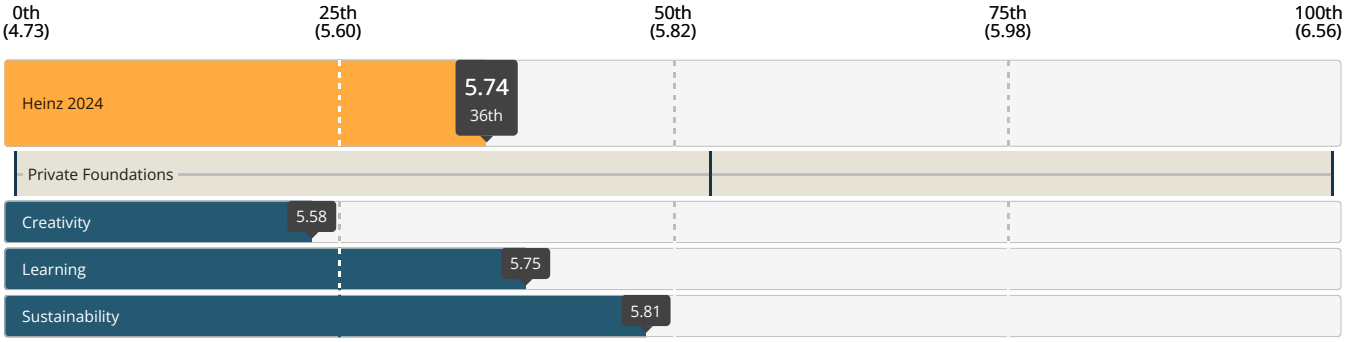


Selection Process

To what extent was the Endowments' selection process a helpful opportunity to strengthen the efforts funded by the grant?

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

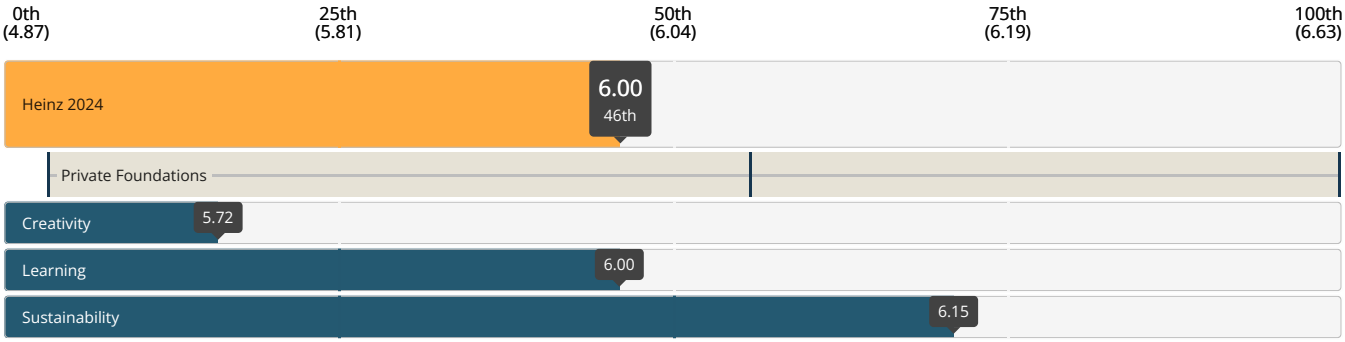
Cohort: Private Foundations Subgroup: Program Area



To what extent was the Endowments' selection process an appropriate level of effort given the amount of funding received?

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

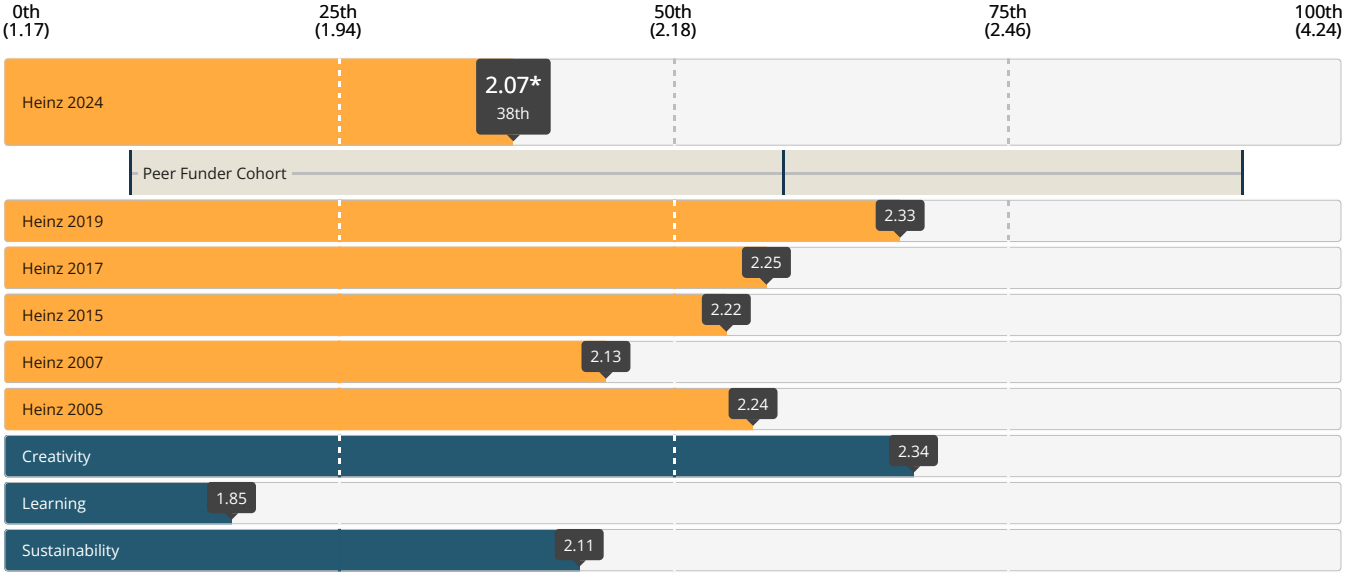
Cohort: Private Foundations Subgroup: Program Area



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

1 = No pressure 7 = Significant pressure

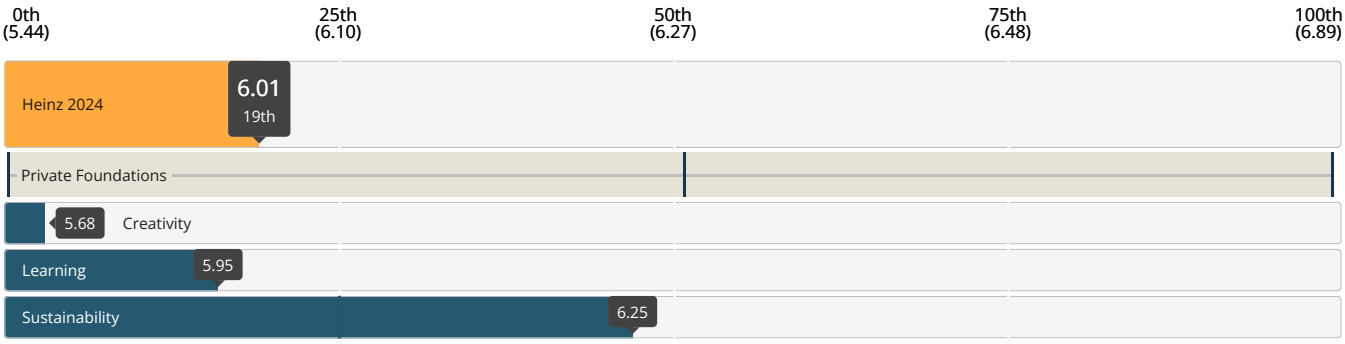
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



To what extent was the Endowments clear and transparent about the selection process requirements and timelines?

1 = Not at all 7 = To a great extent

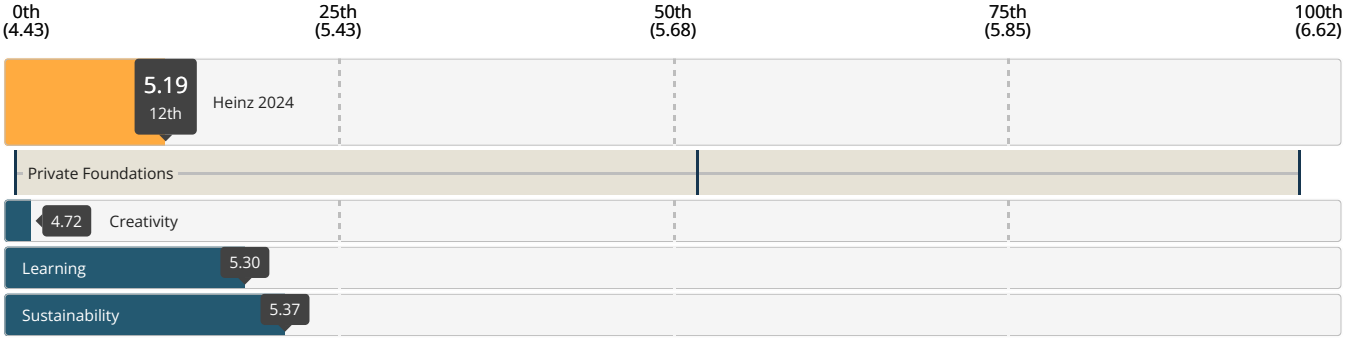
Cohort: Private Foundations Subgroup: Program Area



To what extent was the Endowments clear and transparent about the criteria the Endowments uses to decide whether a proposal would be funded or declined?

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

Cohort: Private Foundations Subgroup: Program Area



Reporting and Evaluation Process

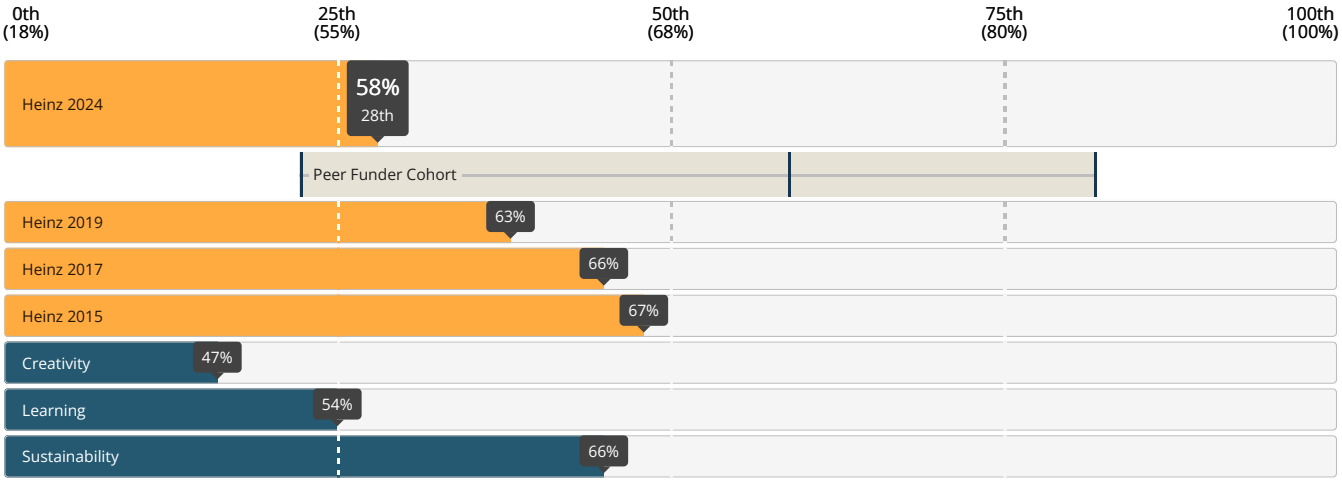
Definition of Reporting and Evaluation

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

At any point during the proposal 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?

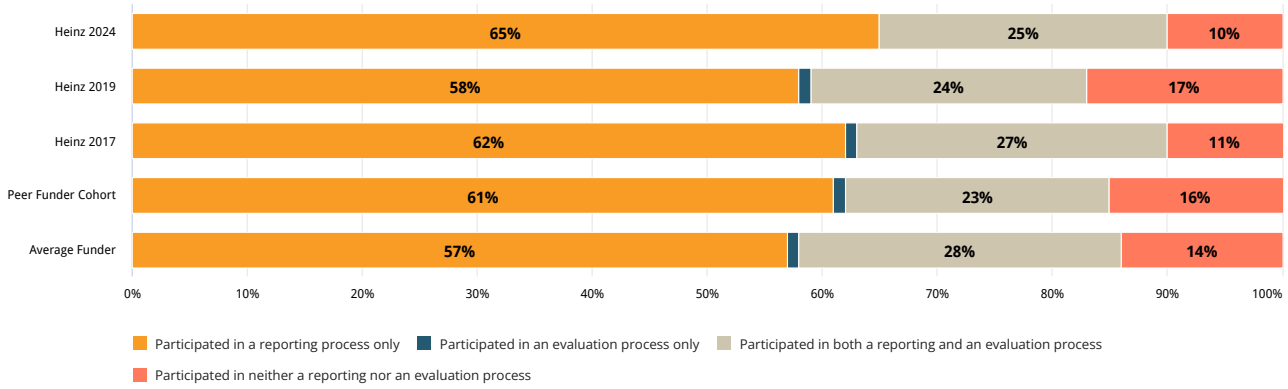
Proportion of grantees responding 'Yes'

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



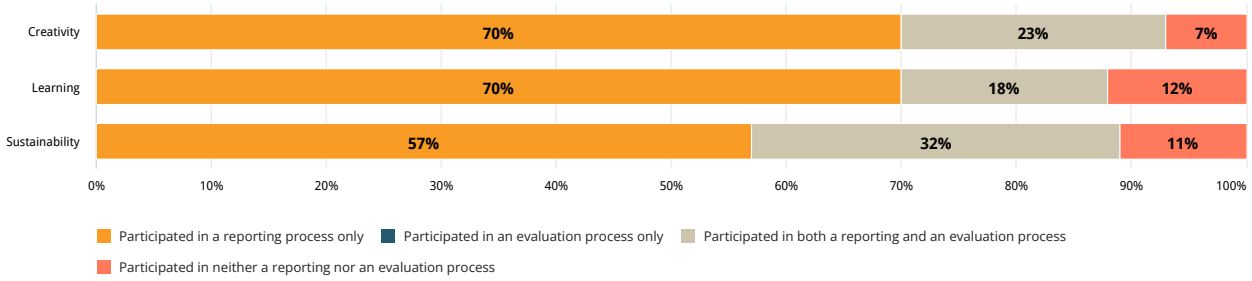
Participation in Reporting and/or Evaluation Processes

Cohort: Peer Funder Cohort Past Results: On



Participation in Reporting and/or Evaluation Processes - By Subgroup

Subgroup: Program Area



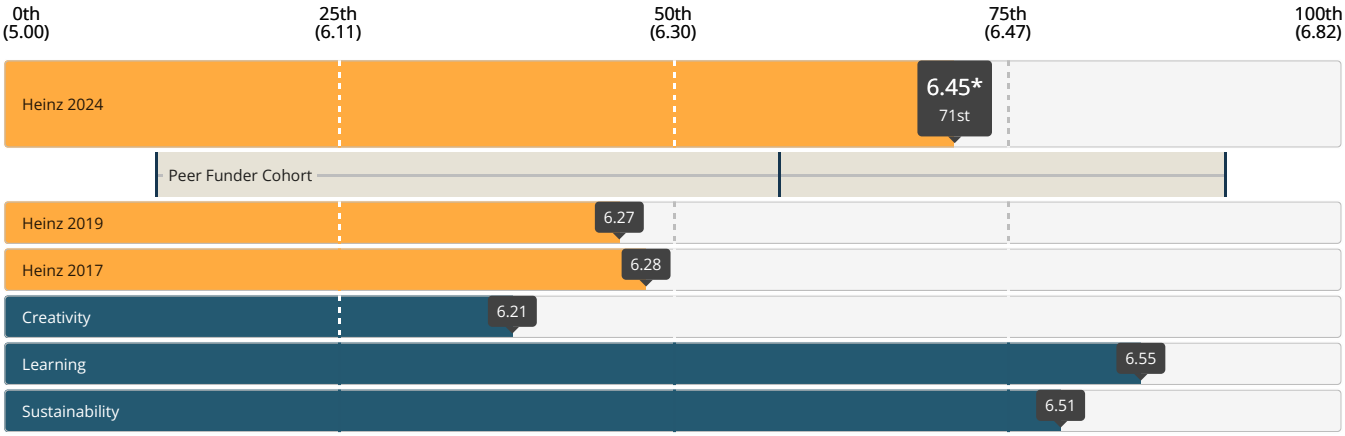
Reporting Process

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

To what extent was the Endowments' reporting process straightforward?

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

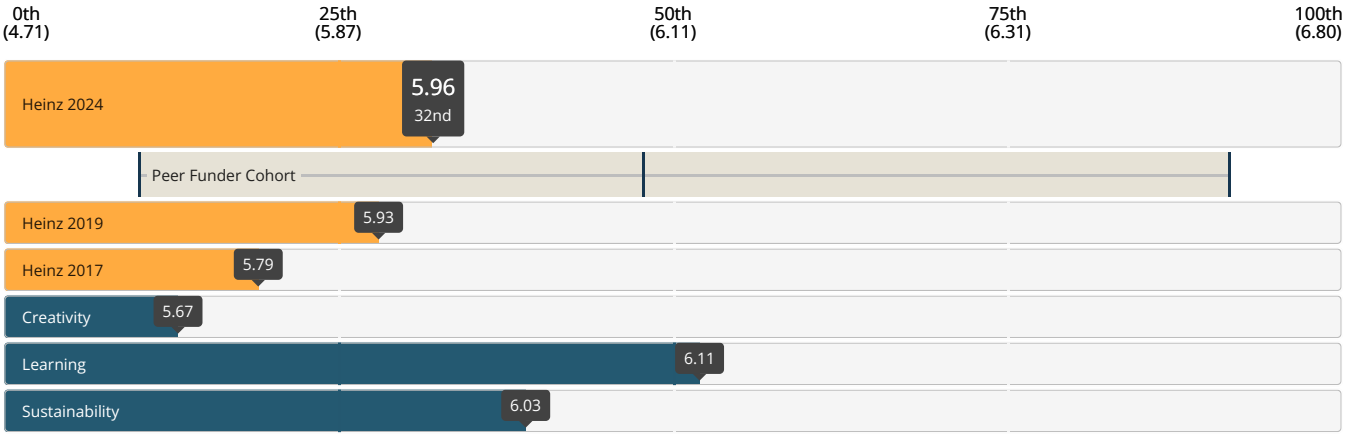
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

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

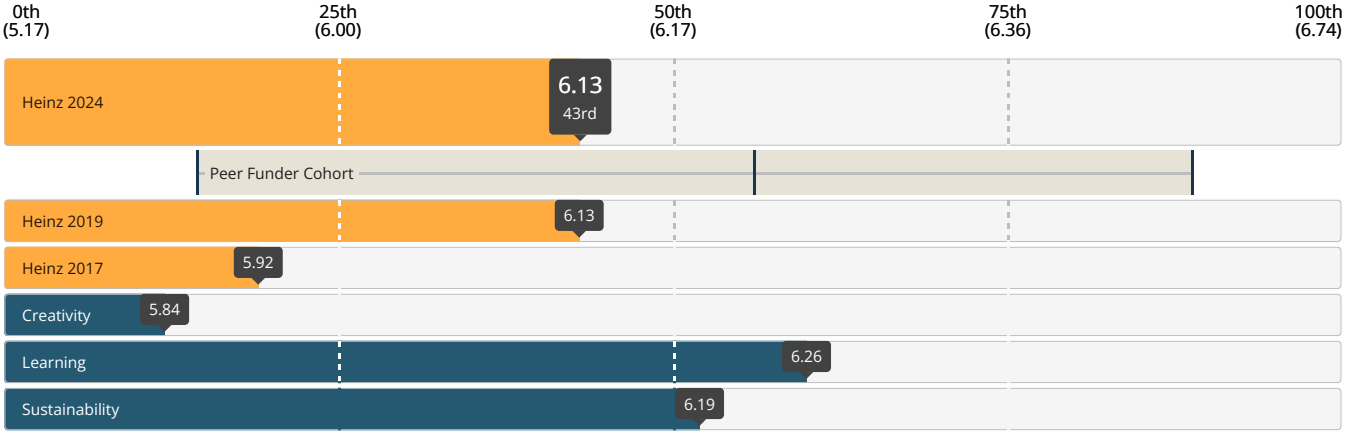
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

1 = Not at all 7 = To a great extent

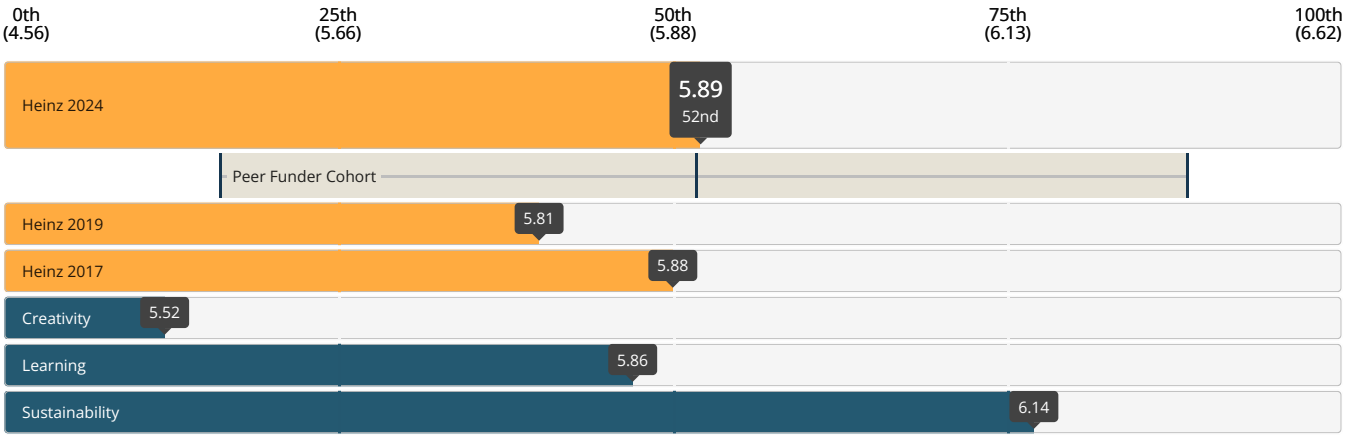
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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

1 = Not at all 7 = To a great extent

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



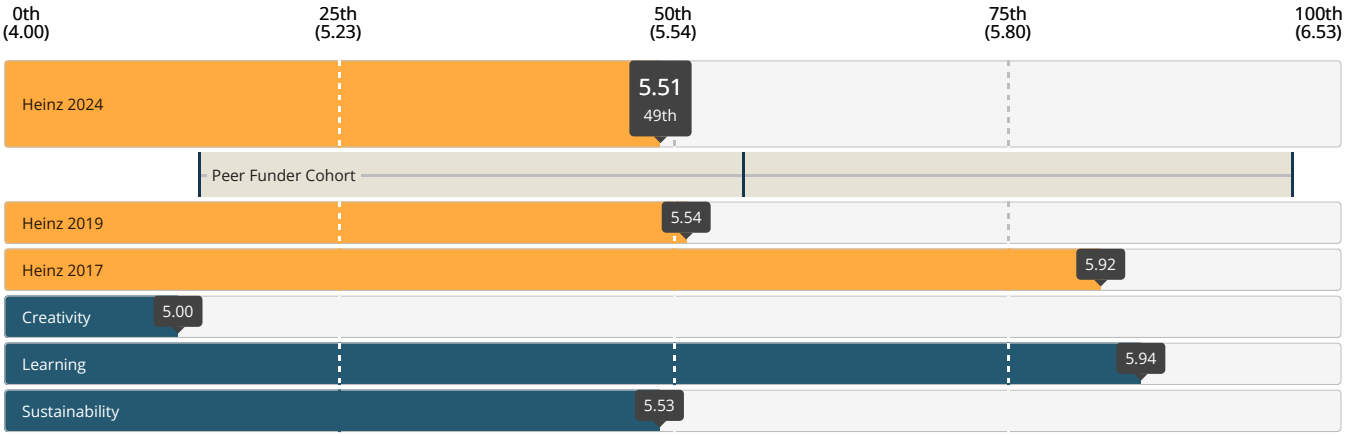
Evaluation Process

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

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

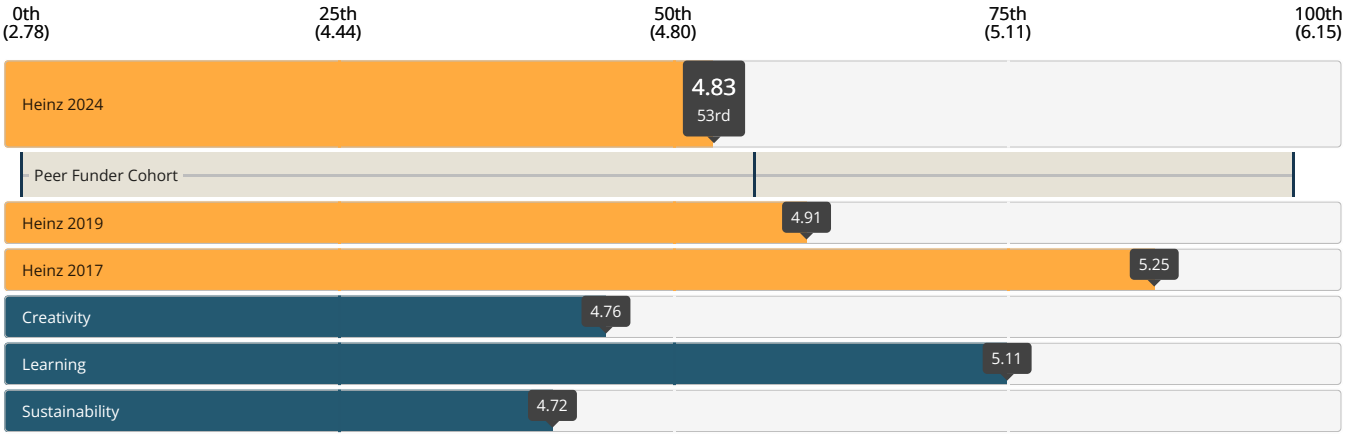
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



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: Peer Funder Cohort Subgroup: Program Area Past Results: On

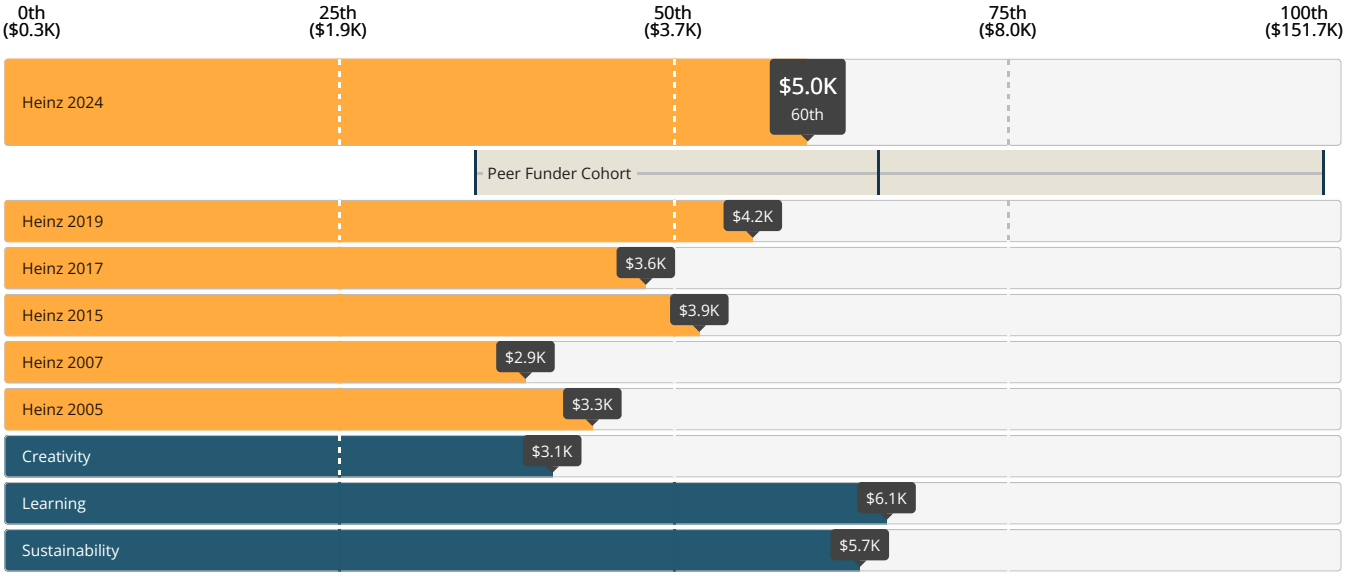


Dollar Return and Time Spent on Processes

Dollar Return: Median grant dollars awarded per process hour required

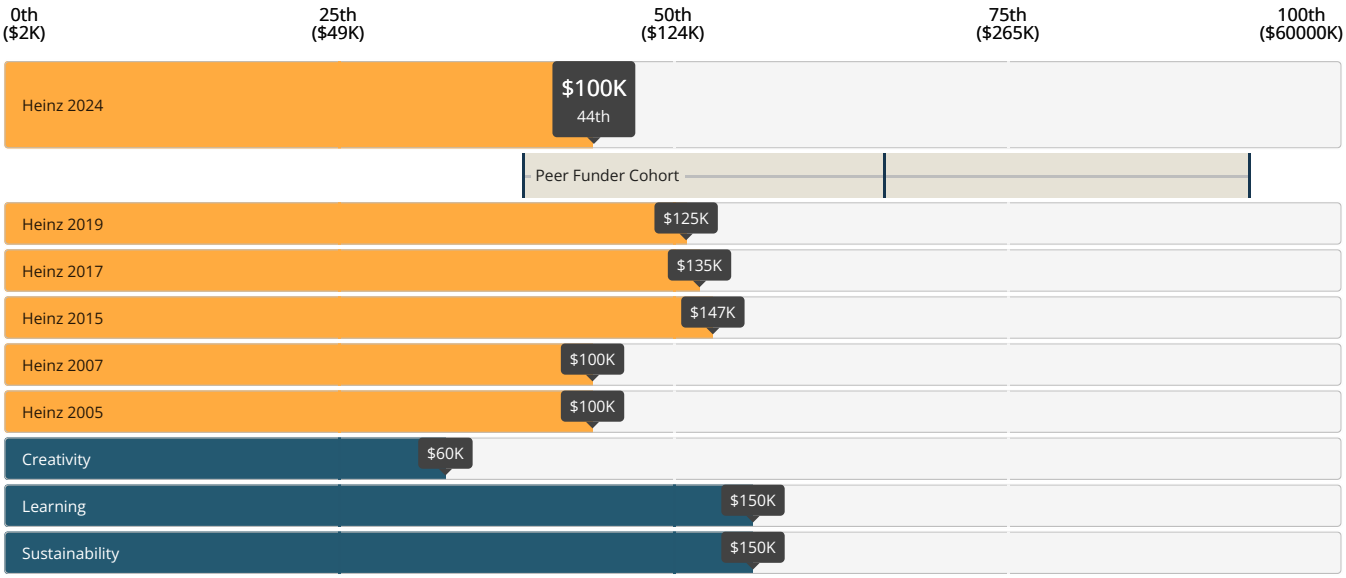
Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



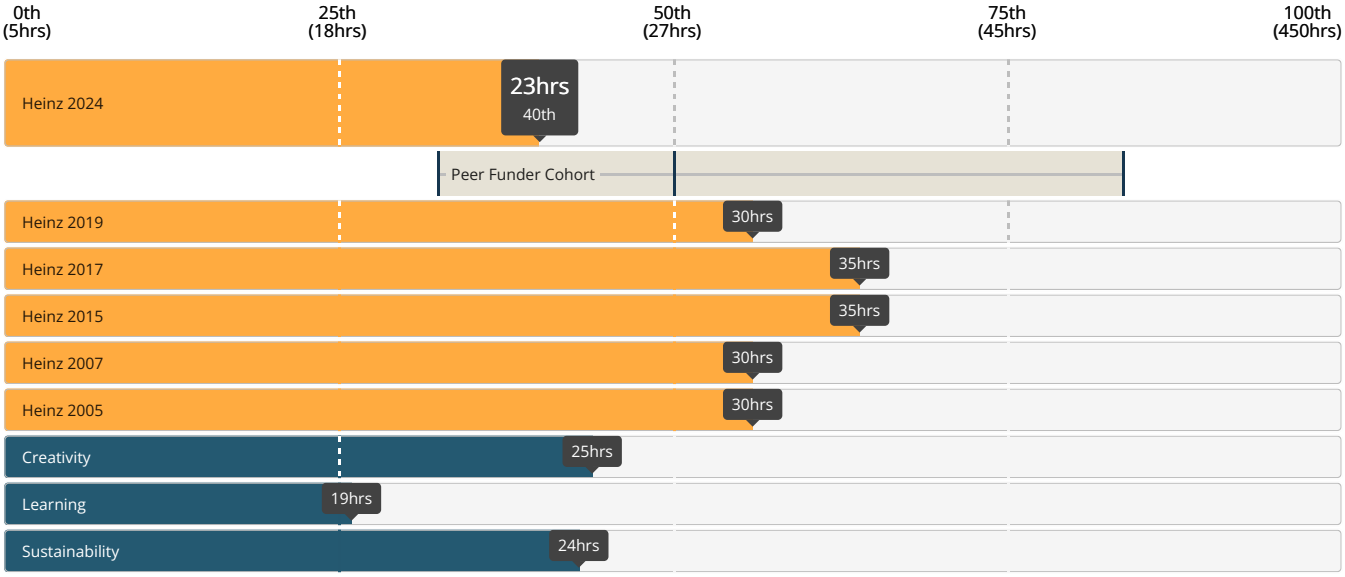
Median Grant Size

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Median hours spent by grantees on funder requirements over grant lifetime

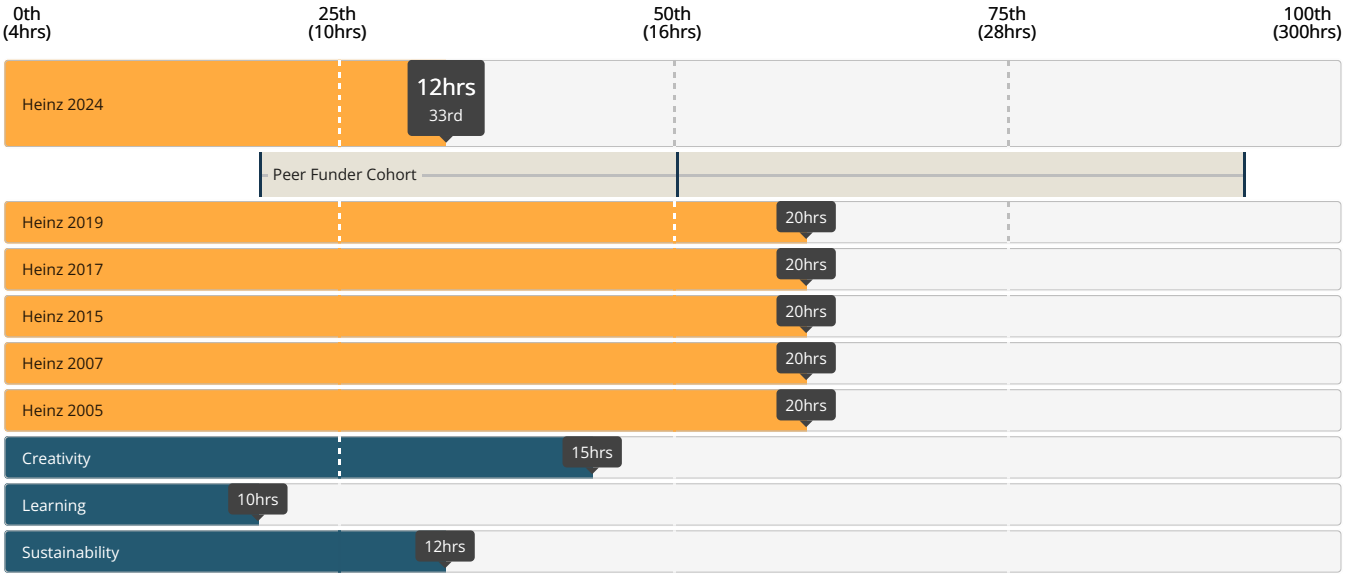
Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Cohort: Peer Funder Cohort Past Results: On

Time Spent On Proposal and Selection Process

	1 to 9 hours	10 to 19 hours	20 to 29 hours	30 to 39 hours	40 to 49 hours	50 to 99 hours	100 to 199 hours	200+ hours
Heinz 2024	34%	27%	19%	5%	9%	4%	1%	0%
Heinz 2019	17%	28%	22%	9%	13%	9%	1%	1%
Heinz 2017	18%	22%	22%	10%	13%	11%	4%	1%
Heinz 2015	18%	24%	20%	10%	15%	8%	3%	1%
Heinz 2007	20%	28%	16%	6%	15%	10%	5%	0%
Heinz 2005	21%	27%	18%	7%	12%	11%	4%	1%
Average Funder	27%	22%	16%	6%	10%	10%	5%	3%
Peer Funder Cohort	21%	25%	21%	7%	11%	10%	4%	1%

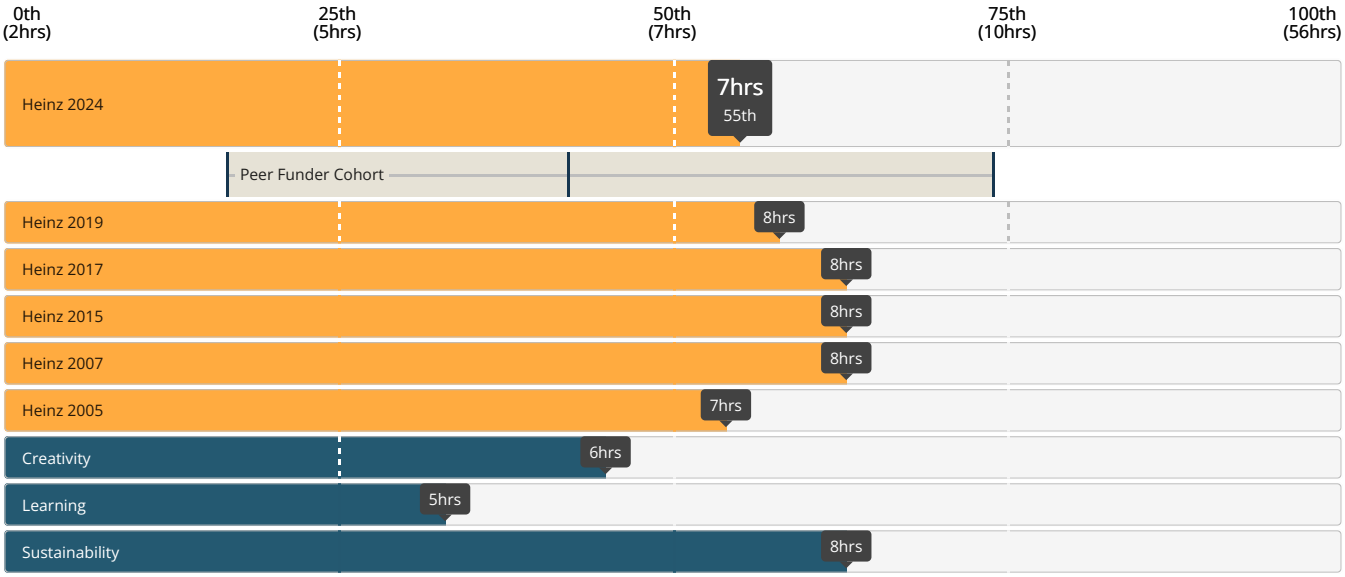
Subgroup: Program Area

Time Spent On Proposal and Selection Process (By Subgroup)	Creativity	Learning	Sustainability
1 to 9 hours	23%	40%	36%
10 to 19 hours	30%	27%	26%
20 to 29 hours	28%	17%	16%
30 to 39 hours	5%	4%	6%
40 to 49 hours	10%	7%	9%
50 to 99 hours	4%	3%	5%
100 to 199 hours	0%	2%	1%
200+ hours	0%	0%	1%

Time Spent on Reporting and Evaluation Process

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

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Cohort: Peer Funder Cohort Past Results: On

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

	1 to 9 hours	10 to 19 hours	20 to 29 hours	30 to 39 hours	40 to 49 hours	50 to 99 hours	100+ hours
Heinz 2024	60%	22%	8%	3%	2%	2%	3%
Heinz 2019	57%	20%	13%	4%	3%	2%	1%
Heinz 2017	55%	20%	13%	4%	3%	3%	3%
Heinz 2015	52%	24%	9%	4%	4%	3%	2%
Heinz 2007	53%	21%	9%	7%	5%	4%	1%
Heinz 2005	61%	18%	9%	5%	4%	1%	2%
Average Funder	58%	18%	9%	3%	3%	4%	4%
Peer Funder Cohort	63%	19%	8%	2%	3%	3%	1%

Subgroup: Program Area

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Creativity	Learning	Sustainability
1 to 9 hours	63%	65%	55%
10 to 19 hours	17%	21%	26%
20 to 29 hours	8%	7%	8%
30 to 39 hours	3%	3%	2%
40 to 49 hours	3%	0%	2%
50 to 99 hours	1%	1%	4%
100+ hours	4%	4%	2%

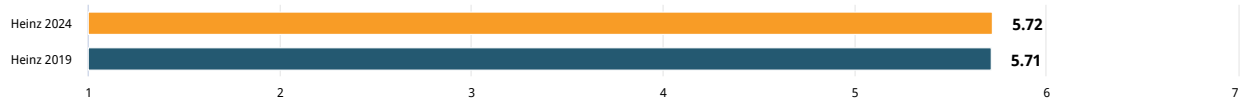
Customized Questions

To what extent does the Endowments effectively:

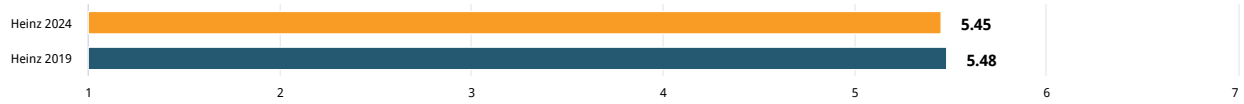
1 = Not at all 7 = To a great extent

Past Results: On

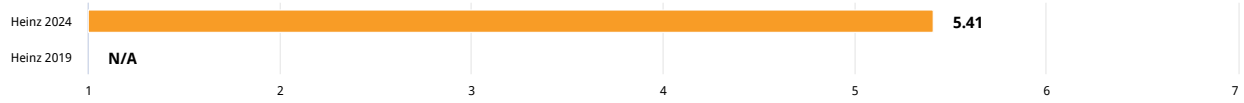
Work with government and local leaders



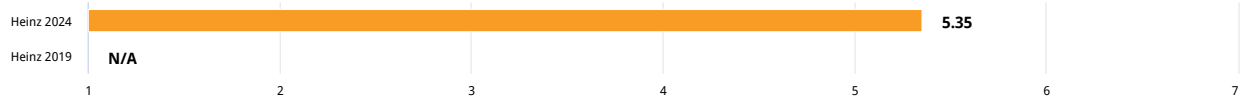
Help organizations align their efforts



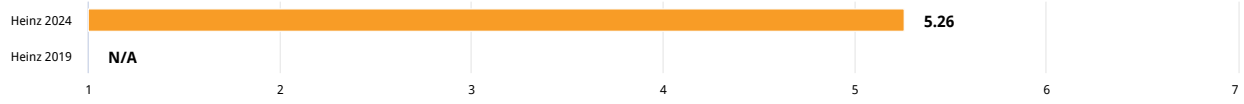
Bring domain expertise that advances us toward our shared goals



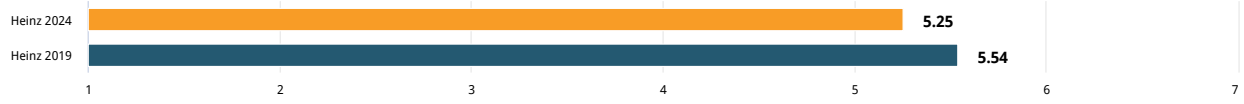
Convene to facilitate new and/or stronger partnerships



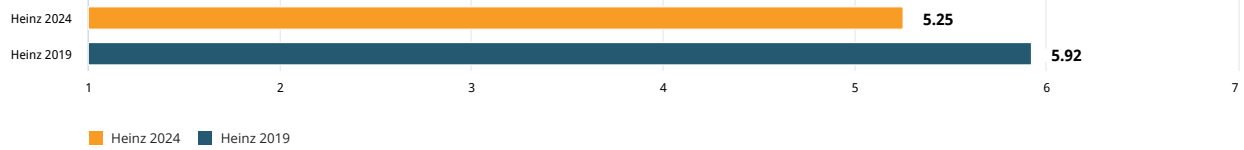
Elevate grantee work to wider audiences



Take risks that could lead to breakthroughs



Take public positions on relevant issues

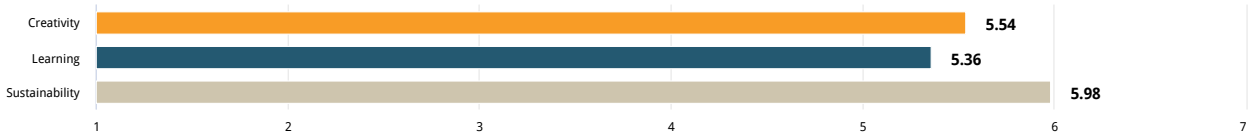


To what extent does the Endowments effectively: - By Subgroup

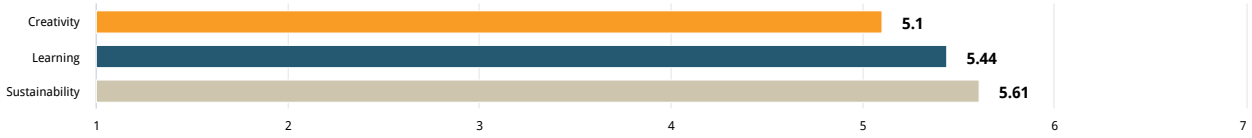
1 = Not at all 7 = To a great extent

Subgroup: Program Area

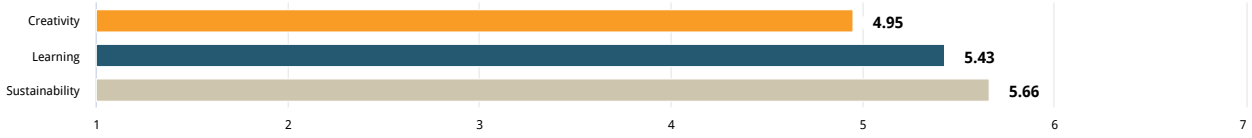
Work with government and local leaders



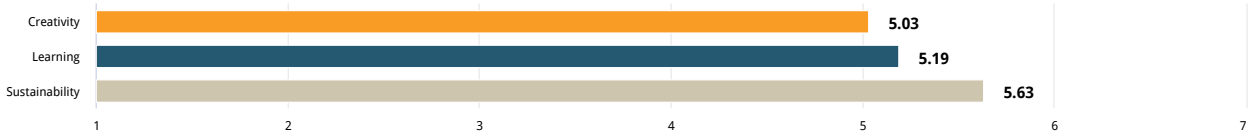
Help organizations align their efforts



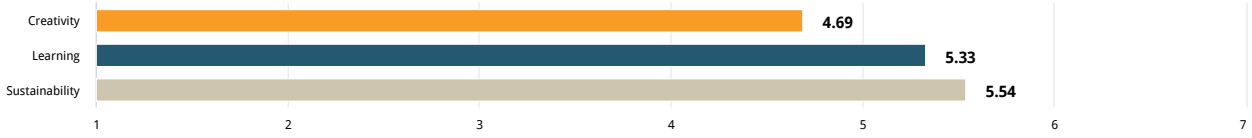
Bring domain expertise that advances us toward our shared goals



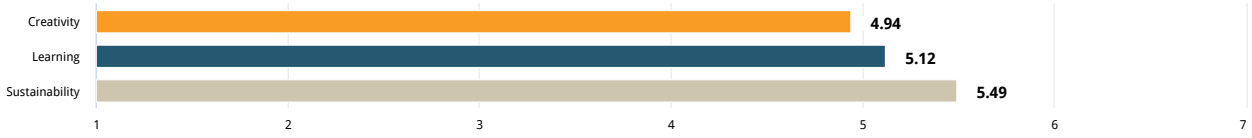
Convene to facilitate new and/or stronger partnerships



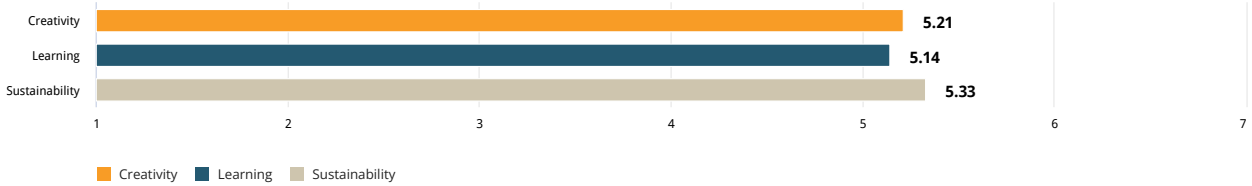
Elevate grantee work to wider audiences



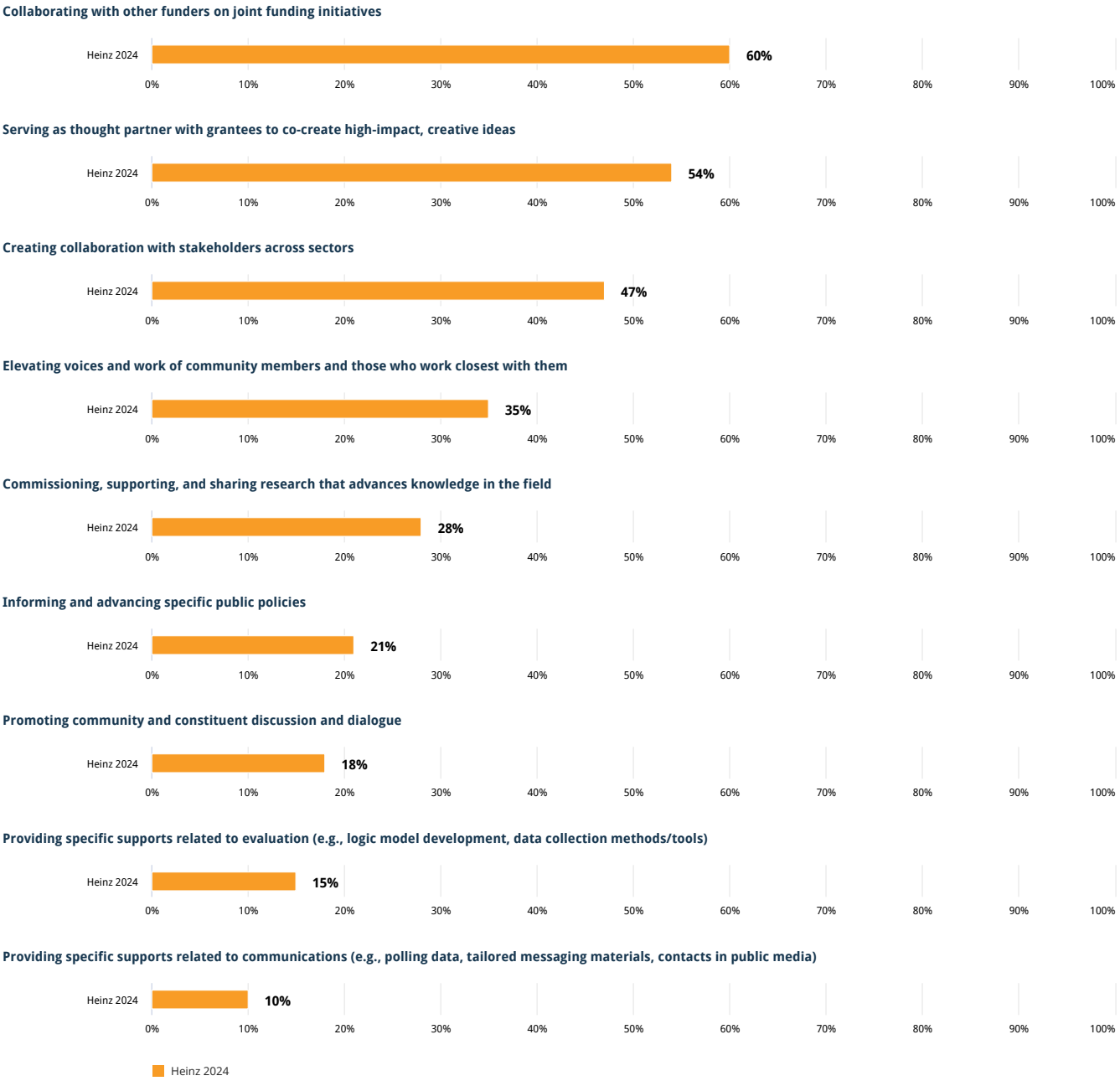
Take risks that could lead to breakthroughs



Take public positions on relevant issues



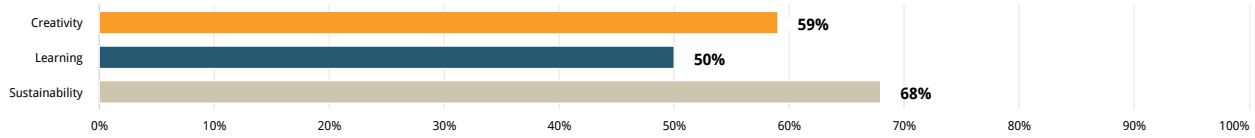
Thinking about the roles the Endowments plays beyond grantmaking, which role(s) is most important for the Endowments to play in the future?



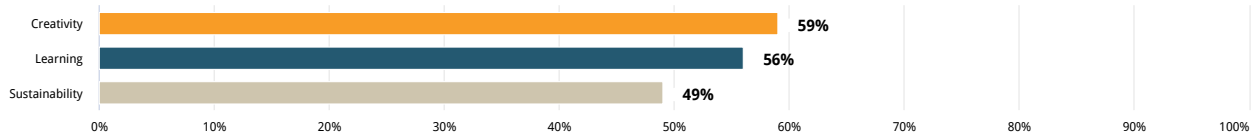
Thinking about the roles the Endowments plays beyond grantmaking, which role(s) is most important for the Endowments to play in the future? - By Subgroup

Subgroup: Program Area

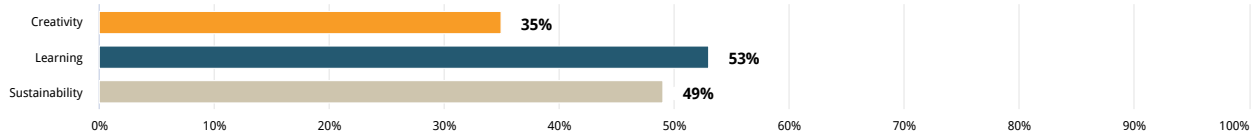
Collaborating with other funders on joint funding initiatives



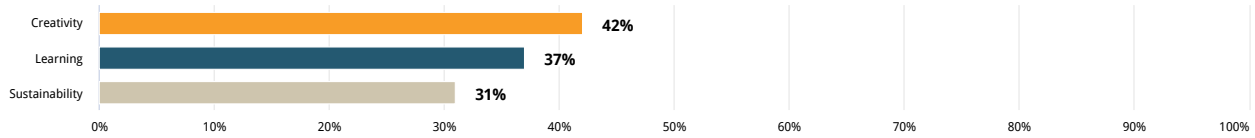
Serving as thought partner with grantees to co-create high-impact, creative ideas



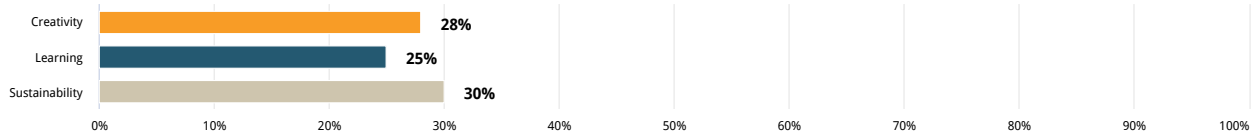
Creating collaboration with stakeholders across sectors



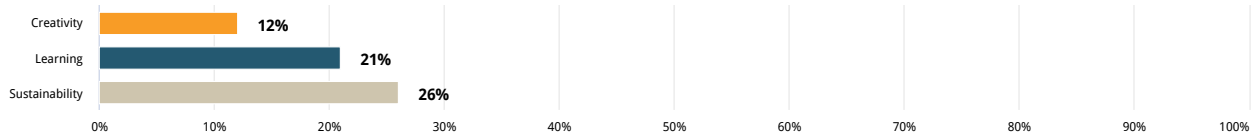
Elevating voices and work of community members and those who work closest with them



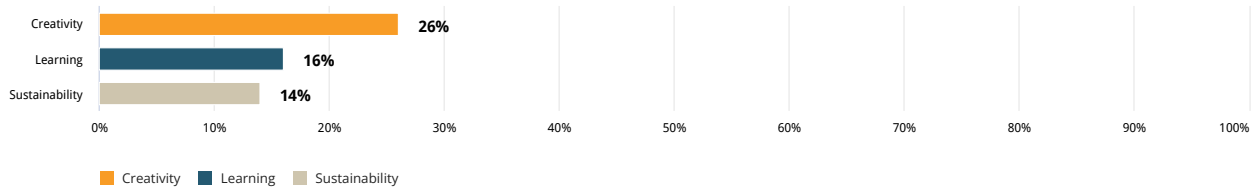
Commissioning, supporting, and sharing research that advances knowledge in the field



Informing and advancing specific public policies



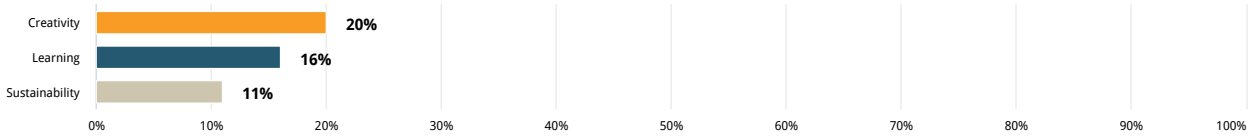
Promoting community and constituent discussion and dialogue



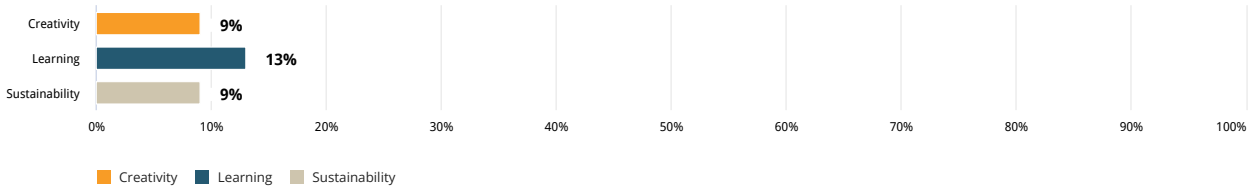
Thinking about the roles the Endowments plays beyond grantmaking, which role(s) is most important for the Endowments to play in the future? - By Subgroup

Subgroup: Program Area

Providing specific supports related to evaluation (e.g., logic model development, data collection methods/tools)



Providing specific supports related to communications (e.g., polling data, tailored messaging materials, contacts in public media)



Customized Questions on the Learning Strategic Transition

Questions on the following pages were only shown to grantees impacted by the Learning Strategic Area transition. Responses to these questions had been previously shared with the Endowments as part of the Exit Early Deliverable.

Transition Communications

To what extent do you agree or disagree with the following statements regarding the Endowments' communications about its strategic transition?

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

The Endowments communicated clearly regarding its intentions to transition its work for the Learning Strategic Area

I understand what the Endowments seeks to accomplish under its new strategic plan for the Learning Strategic Area

The Endowments provided a clear timeline for the transition in the Learning Strategic Area to occur

The Endowments was transparent about the implications of its transition for my organization

To what extent do you agree or disagree with the following statements regarding the Endowments' communications about its strategic transition? - By Subgroup

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

Subgroup: Program Area

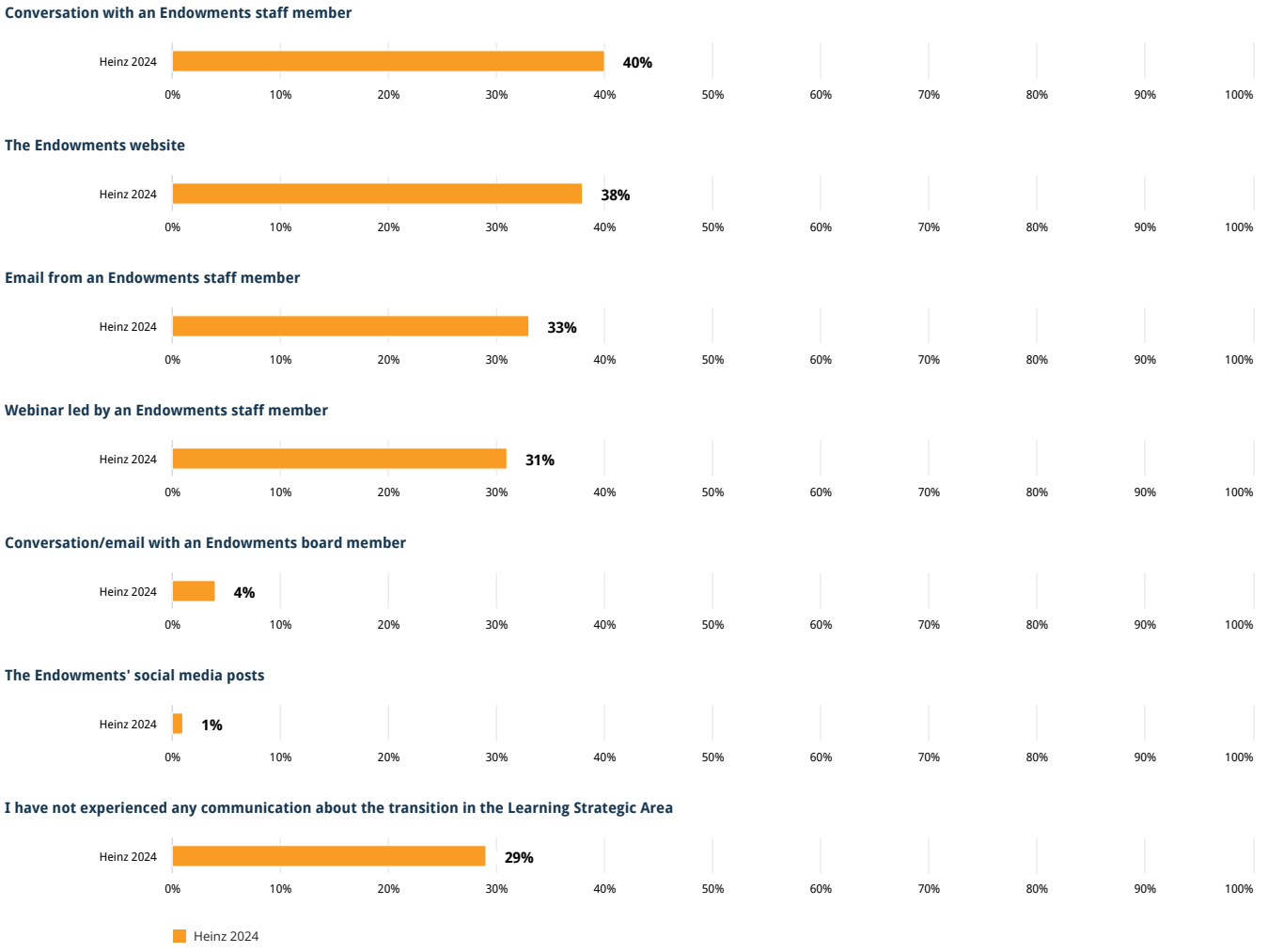
The Endowments communicated clearly regarding its intentions to transition its work for the Learning Strategic Area

I understand what the Endowments seeks to accomplish under its new strategic plan for the Learning Strategic Area

The Endowments provided a clear timeline for the transition in the Learning Strategic Area to occur

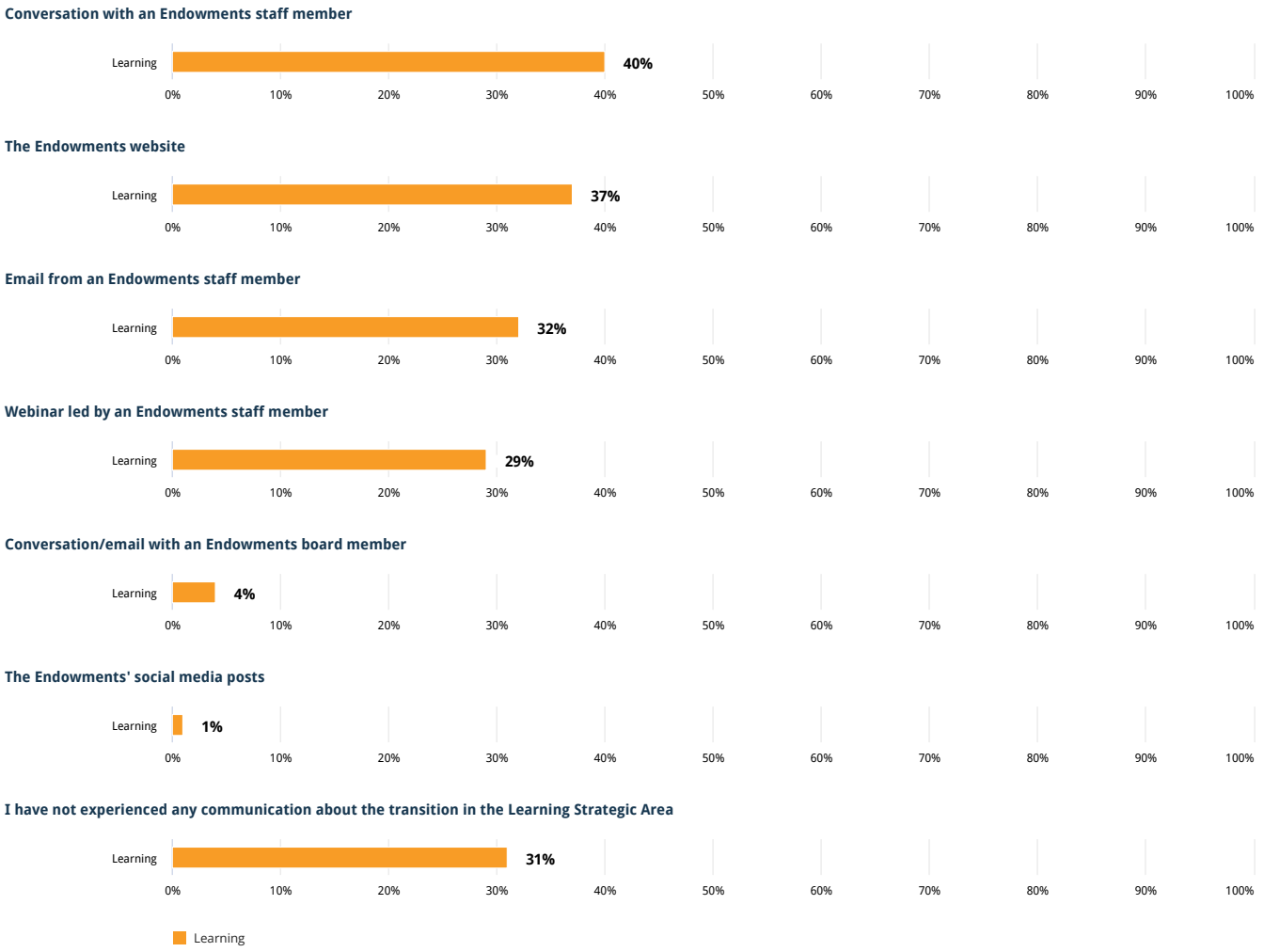
The Endowments was transparent about the implications of its transition for my organization

Among these possible contact options with the Endowments, which did you utilize to understand what the strategic transition in the Learning Strategic Area meant for your organization?



Among these possible contact options with the Endowments, which did you utilize to understand what the strategic transition in the Learning Strategic Area meant for your organization? - By Subgroup

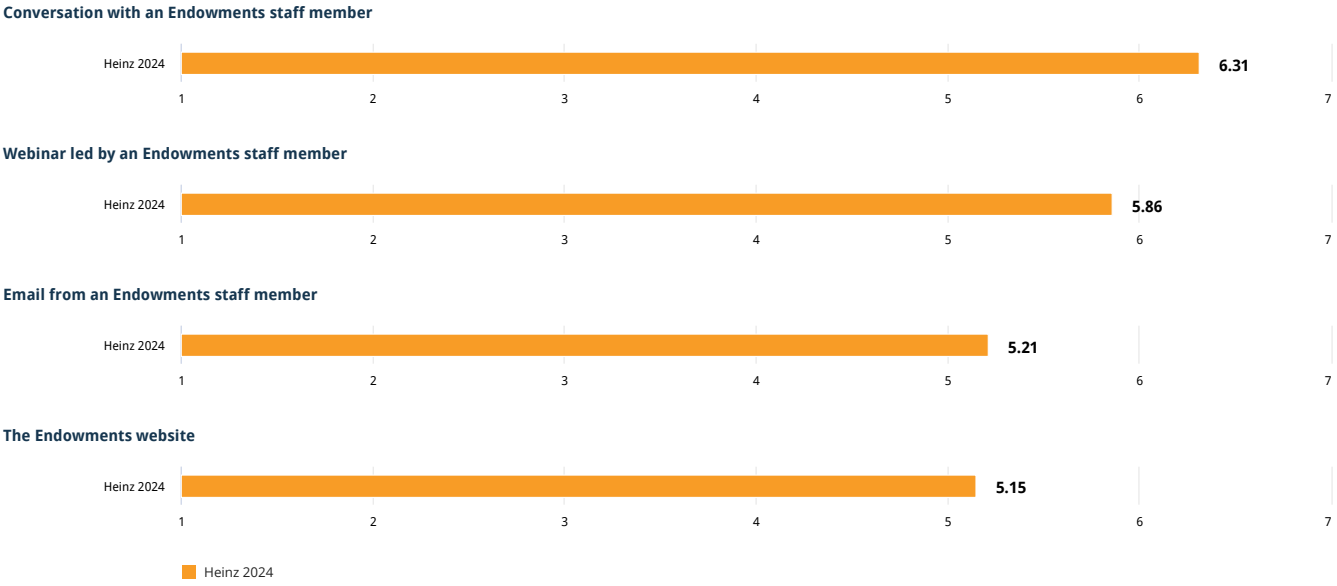
Subgroup: Program Area



Grantees were shown the following question for the resources they report using above. Resource helpfulness is only shown where at least ten grantees indicated using that resource.

Please rate the helpfulness of the resources you utilized:

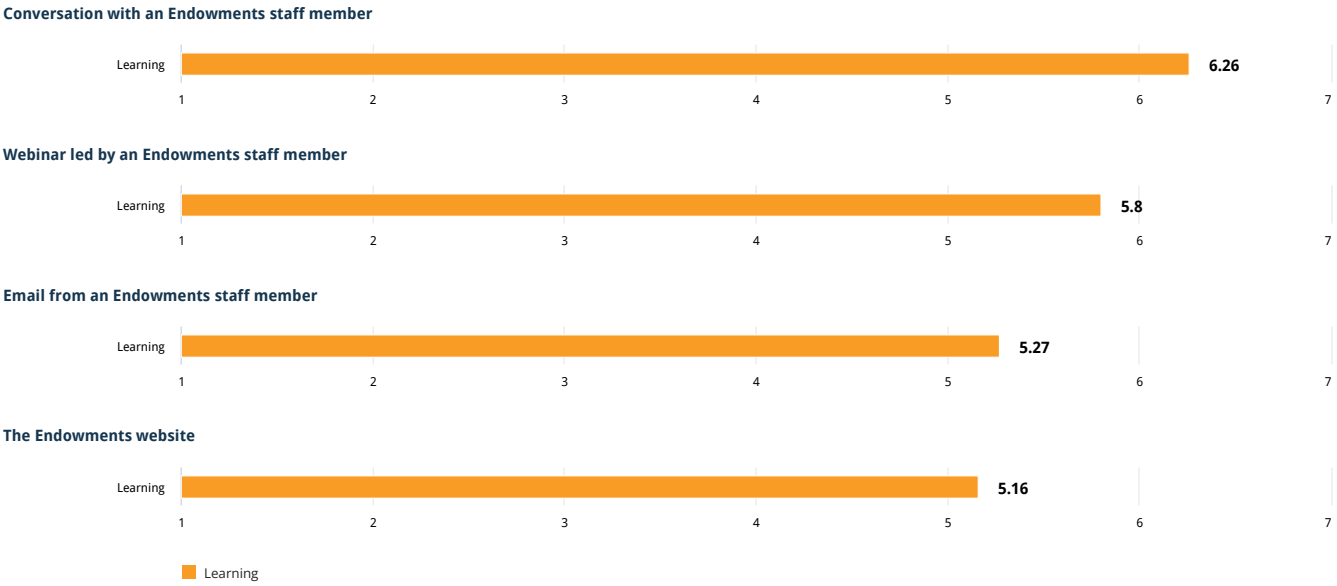
1 = Not at all helpful 7 = Extremely helpful



Please rate the helpfulness of the resources you utilized: - By Subgroup

1 = Not at all helpful 7 = Extremely helpful

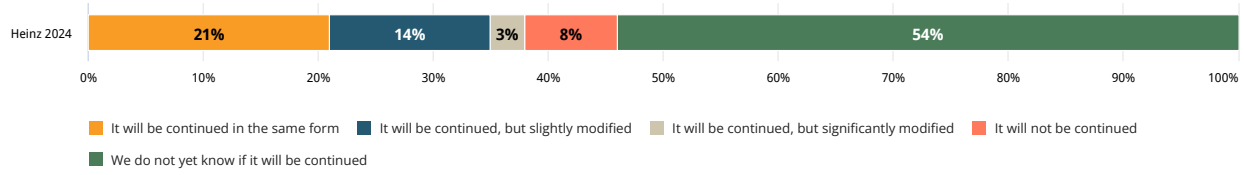
Subgroup: Program Area



Program and/or Organization Sustainability

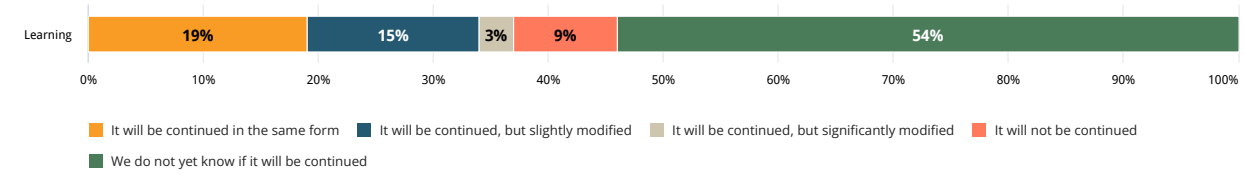
Considering your current understanding of how the strategic transition will impact your funding from the Endowments, which of the following best describes the likely effect on the work currently funded by the Endowments' grant?

Past Results: On



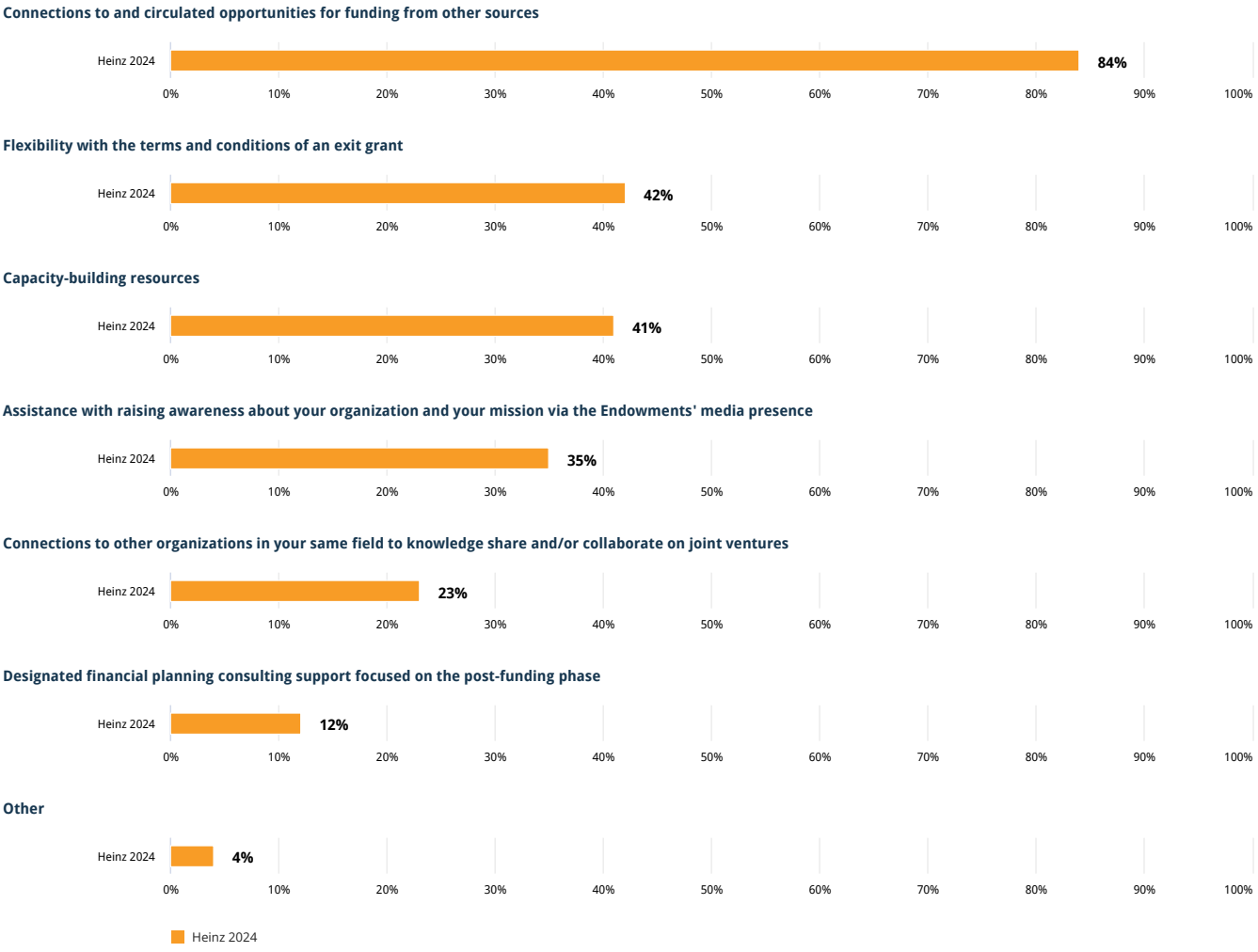
Considering your current understanding of how the strategic transition will impact your funding from the Endowments, which of the following best describes the likely effect on the work currently funded by the Endowments' grant? - By Subgroup

Subgroup: Program Area



Grantees were able to select up to three options in the following question.

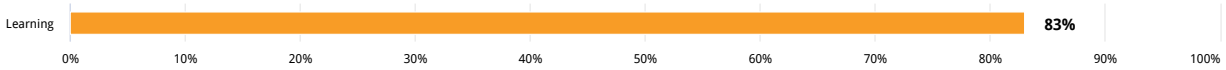
During the final phase of the Endowments' funding under its current approach for the Learning Strategic Area, what would be most helpful to your organization to facilitate a smoother adjustment to the Endowments' transition and maximize the long-term impact of the work the Endowments has supported?



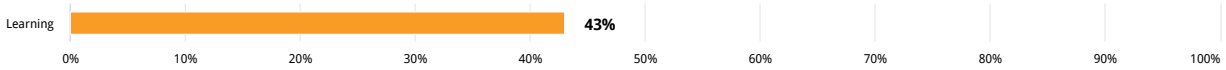
During the final phase of the Endowments' funding under its current approach for the Learning Strategic Area, what would be most helpful to your organization to facilitate a smoother adjustment to the Endowments' transition and maximize the long-term impact of the work the Endowments has supported? - By Subgroup

Subgroup: Program Area

Connections to and circulated opportunities for funding from other sources



Flexibility with the terms and conditions of an exit grant



Capacity-building resources

Assistance with raising awareness about your organization and your mission via the Endowments' media presence

Connections to other organizations in your same field to knowledge share and/or collaborate on joint ventures

Designated financial planning consulting support focused on the post-funding phase

Other

Grantees' Written Comments

In the Endowments' Grantee Perception Report survey, CEP asks five written questions:

1. "Please comment on the quality of the Endowments' processes, interactions, and communications."
2. "Thinking beyond the grant you received, please comment on how the Endowments influences your field, community, or organization."
3. "What specific improvements would you suggest that would make the Endowments a better funder?"
4. "Recognizing the impact that any change in strategy can have for grantees, the Endowments hopes to use this moment to understand how it can best communicate with and support grantees at moments in which it is making a strategic change. What has it done well and should continue as it works with grantees during this, or future, periods of transition?"
5. "What has it done less well and should change as it works with grantees during this, or future, periods of transition?"

To download the full set of grantee comments and suggestions, please refer to the Attachments in the "Report Overview" section of your report. Please note that some comments may be redacted or removed to protect the confidentiality of respondents.

CEP's Qualitative Analysis

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

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

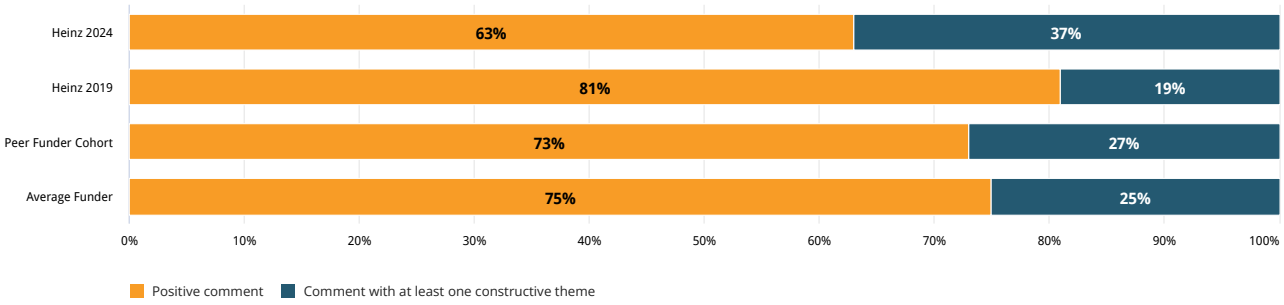
Quality of Processes, Interactions and Communications

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

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

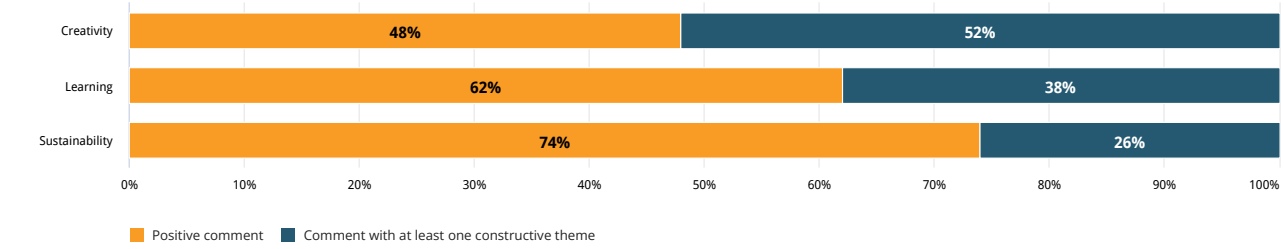
Positivity of Comments about the Quality of the Endowments' Processes, Interactions, and Communications

Cohort: Peer Funder Cohort Past Results: On



Positivity of Comments about the Quality of the Endowments' Processes, Interactions, and Communications - By Subgroup

Subgroup: Program Area



Suggestion Topics

Grantees were asked to provide any suggestions for how the Endowments could improve. The 356 grantees that responded to the survey provided 263 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Relationships With Grantees	22%
Assistance Beyond the Grant	17%
The Endowments' Grantmaking Characteristics	16%
Changes in Strategy	12%
Application Process	10%
Endowments Communications	8%
Reporting Process	5%
Diversity, Equity, and Inclusion	4%
Endowments Expertise	4%
Other Suggestion Themes	2%

Selected Suggestions

Grantees were asked to provide any suggestions for how the Endowments could improve. The 356 grantees that responded to the survey provided a total of 263 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Relationships With Grantees (22% N=58)

- Interact With Grantees More Frequently (N = 23)
    - "Establishing regular check-ins or collaborative meetings to align on long-term goals would improve transparency and keep both parties informed on expectations."
    - "The Endowments could improve by implementing regular check-ins or touchpoints with grantees, not for micromanagement purposes, but to provide valuable insight and demonstrate support."
    - "I wish I did more regular, open ended check-ins with my grant officer about our work and the work Heinz is doing."
- Offer More Site Visits (N = 15)
    - "More in-person visits and direct interactions with staff at events could deepen the relationship between the Endowments and the communities it serves."
    - "The Endowments would be a better funder, if board members had a chance to get into the community with some of the grantees to better appreciate their impact."
    - "I do think an occasional site visit would be beneficial. The successes and challenges we face are often hard to fully capture in writing. I always believe seeing the conditions we work in helps to provide contact and to tell our story."
- Increase Responsiveness (N = 7)
    - "THE would be a better funder if they were approachable for questions, conversations, feedback; and responded to emails sent."
- Model Trust in Grantees (N = 6)
    - "Build relationships that deepen understanding about the power dynamics that influence the sector's ability to be authentic and vulnerable."
- Increase Consistency Across Contact Changes (N = 3)
    - "Staff turnover and shifting strategic goals have made it somewhat difficult to navigate the grant opportunities at the Endowments. I still do not feel that there is a single program officer who understands or appreciates our organization."
- Other Suggestions (N = 4)

Assistance Beyond the Grant (17% N=44)

- Facilitate Introductions to Other Funders (N = 15)
    - "Connecting us with other potential funding opportunities, especially if they see change winds coming or opportunities for integration or expansion."
    - "Engage us in aligning other foundation funders to grow the community interventions. Consider how to challenge other funders to bring matching grants and PRI support to meet shared community and environmental goals."
    - "It's always helpful when a funder helps to make connections for us to other funders, important players in the field, business leaders, etc."
- Organize More Grantee Convenings (N = 15)
    - "Prior to COVID, the Endowments seemed to convene the nonprofit sector frequently. It could be perception, but I'm not sure I see the Endowments playing as much of a role as region-wide policy influencers."
    - "Convening around fields tends to focus on innovations, it would be valuable for those events/conferences to offer discussions about mitigating challenges."
    - "Standing monthly group discussions amongst similar grantees."
- Assist with Capacity-Building (N = 7)
    - "Offering mentorship or advisory sessions for program leaders and providing support for sustainability planning and capacity building would further strengthen long-term program impact."
- Facilitate Grantee Collaboration (N = 6)
    - "It may be interesting for them to facilitate more partnership opportunities between grantees."
- Other Suggestions (N = 1)

The Endowments' Grantmaking Characteristics (16% N=42)

- Increase Grant Length (N = 21)
    - "We would encourage the Endowments to consider multi-year funding, which allows us to better plan for and execute our work effectively, as coalition building and the nature of our work require time."
    - "Multi-year funding is extremely helpful as we plan for our future and as we ensure that staff time is focused on mission based work."
    - "Multiyear grants would help leverage the foundation's support to attract more funders."

- Increase Provision of General Operating Support (N = 12)
    - "Allowing organizations to lead in what the funds are used for."
    - "Provide general operating support so providers can do what it takes to run effective programs."
- Increase Grant Size (N = 8)
    - "Funding for our organization from the Endowments has remained at the same level for over a decade or more, despite the significant increases in the cost of our operations caused by creeping and, in the last several years, spiraling, post-pandemic inflation."
    - "Larger funding amounts are needed. The costs of the project being funded far exceed the amount of funding we receive from the Endowments."
- Other Suggestions (N = 1)

Changes in Strategy (12% N=32)

- Clarify Changes in Strategy (N = 13)
    - "I would suggest the Endowments provide more insight into how their priorities are evolving under new leadership and in the context of the post-pandemic world."
    - "They have been through so much transition these past 18 months and I'm not as clear about their current work and priorities."
- Further Adjust Funded Topics and Organizations (N = 9)
    - "I would love to see more than just environmental funding flowing into rural southwestern PA."
    - "Adding the funding of housing (new construction & rehabilitation) back into the budget."
- Be Open to Ideas From Grantees (N = 6)
    - "While I understand the need to set a clear strategy and carry that out, we would have welcomed an opportunity to provide feedback on the strategy before it was set in stone."
- Further Adjust Endowments Strategy (N = 2)
    - "Increase the payout percentage of its endowment."
- Provide Bridge Funding (N = 2)
    - "If there are entities who can't be funded in the future, who were historically, provide transition funds to ensure they have time to figure out how to fill the gap."

Application Process (10% N=27)

- Clarify the Application Process (N = 12)
    - "If they offered a grant application workshop to work with small community-based orgs and help them complete a grant it could be very effective."
    - "Clarity regarding funding opportunities in the future (i.e., the year following an existing grant)."
- Streamline the Application Process (N = 10)
    - "Reduce the timeframe between the application and the funding decisions."
    - "Consider introducing a more streamlined application process, especially for smaller grants or returning grantees."
- Improve the Application Portal (N = 3)
    - "The Endowments needs to invest in a better online application system. It compares unfavorably to other online systems used by other local funders and is not user-friendly."
- Provide Feedback on Grant Applications (N = 2)
    - "Preliminarily review our applications with us, and make suggestions for our making improvements, thereby the likelihood of funding becoming a greater possibility."

Endowments Communications (8% N=20)

- Clarify Endowment Priorities (N = 20)
    - "Better, clearer, and more transparent communication of priorities and opportunities."
    - "It is difficult to understand which staff member to work with and how our work might fit into the three strategic funding areas."
    - "I would love to know more about all these components of the Endowments' efforts, and how our grant fit with other projects and efforts."

Reporting Process (5% N=12)

- Streamline the Reporting Process (N = 8)

    - "Shorten the grant reporting requirements; provide more flexibility in reporting timelines."
    - "Simplifying paperwork or offering a more flexible reporting structure would reduce administrative burdens, allowing organizations to focus more on program delivery."

- Provide Feedback on Submitted Reports (N = 4)
    - "We would welcome more feedback on our progress."

Diversity, Equity, and Inclusion (4% N=11)

- Diversify Endowments Staff (N = 4)
    - "I would like to work with more people of color during the process."
- Ensure Equitable Processes (N = 4)
    - "Every grantee should be treated the same, be able to access the same resources."
- Deepen Focus on DEI (N = 3)
    - "Investing more of the foundation's annual grant making in organizations and projects directly benefiting low-income people and marginalized communities."

Endowments Expertise (4% N=11)

- Increase Understanding of Funded Organizations (N = 6)
    - "Understand the growth of the organization, understanding the structure of programming and the extent of programs offered to community."
- Incrase Understanding of Funded Communities and Fields (N = 5)
    - "Better understanding the needs of the community and building relationships with the organizations that are working in the community."

Other Suggestion Themes (2% N=6)

- Increase Staff Capacity (N = 4)
    - "Provide more staff. Assign a supportable amount of grantees so that a Program Officer has the time and bandwidth to interact with the grantees."
- Other Suggestions (N = 2)

Transition Approach Strengths

Grantees were asked to write about aspects of the Endowments' strategic transitions that the Endowments has done well and should continue during this, or future, periods or transition. These suggestions were thematically categorized by CEP and grouped into the topics below. Of the 73 grantees who responded to the survey, 29 grantees provided 34 related comments.

Proportion of Grantee Comments by Topic

Topic of Comment	Proportion	Representative Comment
Communication Clarity	24% (N=8)	"Communication has been great."
Helpfulness of Staff	21% (N=7)	"Learning program staff have been very communicative and willing to meet to explore options and ideas."
Webinar	18% (N=6)	"The webinar was incredibly helpful."
Bridge Funding and Grant Flexibility	18% (N=6)	"I appreciate the flexibility in terms of modifying the original grant proposal."
Openness to Feedback	12% (N=4)	"The Heinz Endowments listens to the organizations it funds."
Transition Strategy	9% (N=3)	"Taken a chance on a new idea."

Transition Approach Opportunities

Grantees were asked to write about aspects of the Endowments' strategic transitions that the Endowments has done less well and should change as it continues to work with grantees during this, or future, periods or transition. These suggestions were thematically categorized by CEP and grouped into the topics below. Of the 73 grantees who responded to the survey, 34 grantees provided 44 related suggestions.

Proportion of Grantee Comments by Topic

Topic of Comment	Proportion	Representative Comment
Clarity of Grantee Fit into New Strategy	27% (N=12)	"Provide information about how the change will affect my organization, specifically."
Interactions with Grantees	23% (N=10)	"More communication between grantees and program officers."
Clarity of New Strategy	20% (N=9)	"I need more information regarding the change in strategy/focus."
Bridge Funding and Grant Flexibility	11% (N=5)	"There should be longer continuation grants ... for those who will no longer be funded in the future so they have time to plan for the impact."
Transition Strategy	7% (N=3)	"The shift felt very narrow, especially around developmental ages."
Staff Responsiveness	7% (N=3)	"Multiple months of calling and emails finally got us clear info about grant possibilities and future funding."
Assistance Beyond the Grant	5% (N=2)	"Connections with other grantees in the same field or with similar work interests."

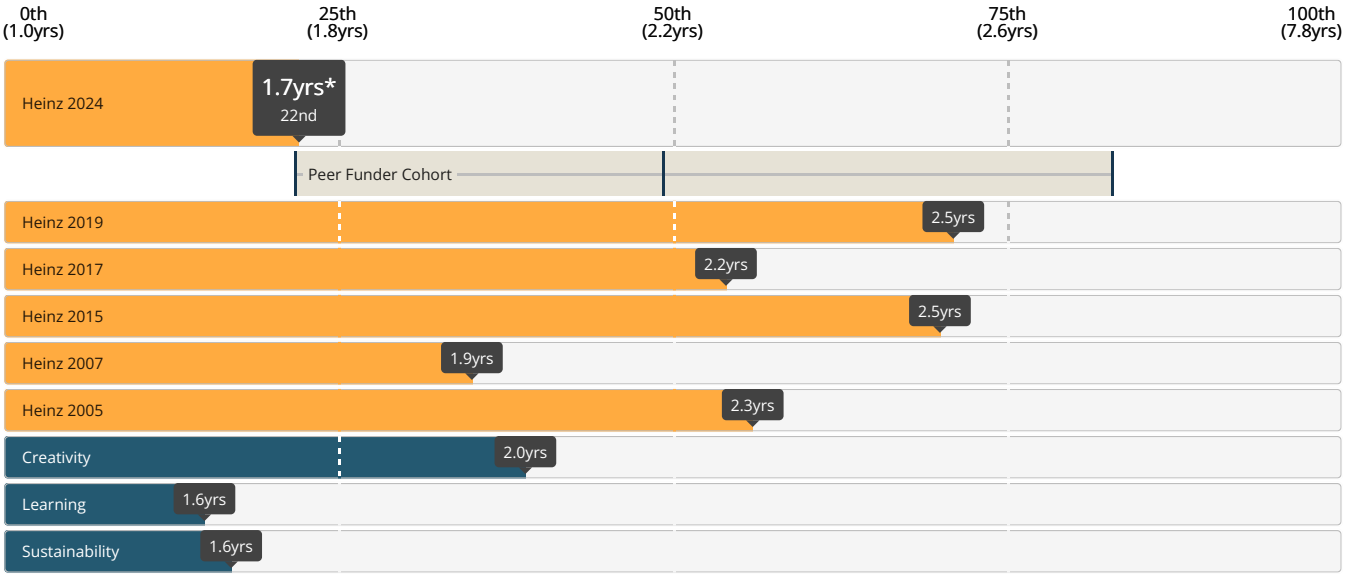
Contextual Data

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

Grantmaking Characteristics

Average Grant Length

Cohort: Peer Funder Cohort Subgroup: Program Area Past Results: On



Cohort: Peer Funder Cohort Past Results: On

Length of Grant Awarded

	Average grant length
Heinz 2024	1.7 years
Heinz 2019	2.5 years
Heinz 2017	2.2 years
Heinz 2015	2.5 years
Heinz 2007	1.9 years
Heinz 2005	2.3 years
Median Funder	2.2 years
Peer Funder Cohort	2.1 years

Cohort: Peer Funder Cohort Past Results: On

Length of Grant Awarded

	0 - 1.99 years	2 - 2.99 years	3 - 3.99 years	4 - 4.99 years	5 - 50 years
Heinz 2024	58%	32%	6%	1%	2%
Heinz 2019	48%	34%	8%	2%	7%
Heinz 2017	44%	28%	19%	2%	6%
Heinz 2015	41%	28%	23%	2%	7%
Heinz 2007	65%	19%	10%	1%	4%
Heinz 2005	52%	19%	21%	3%	5%
Average Funder	47%	23%	19%	4%	8%
Peer Funder Cohort	38%	34%	21%	2%	5%

Cohort: Peer Funder Cohort Past Results: On

Proportion of Unrestricted Funding	Heinz 2024	Heinz 2019	Average Funder	Peer Funder Cohort
No, this funding was not restricted to a specific use (e.g., general operating, core support)	30%	30%	30%	32%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	70%	70%	70%	68%

Grantmaking Characteristics - By Subgroup

Subgroup: Program Area

Length of Grant Awarded (By Subgroup)	Creativity	Learning	Sustainability
Average grant length	2 years	1.6 years	1.6 years

Subgroup: Program Area

Length of Grant Awarded (By Subgroup)	Creativity	Learning	Sustainability
0 - 1.99 years	59%	58%	59%
2 - 2.99 years	33%	28%	36%
3 - 3.99 years	2%	12%	4%
4 - 4.99 years	1%	2%	0%
5 - 50 years	5%	1%	1%

Subgroup: Program Area

Proportion of Unrestricted Funding (By Subgroup)	Creativity	Learning	Sustainability
No, this funding was not restricted to a specific use (e.g., general operating, core support)	51%	16%	30%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	49%	84%	70%

Grant Size

Cohort: Peer Funder Cohort Past Results: On

Grant Amount Awarded

	Median grant size
Heinz 2024	$100K
Heinz 2019	$125K
Heinz 2017	$135K
Heinz 2015	$146.5K
Heinz 2007	$100K
Heinz 2005	$100K
Median Funder	$123.8K
Peer Funder Cohort	$212.5K

Cohort: Peer Funder Cohort Past Results: On

Grant Amount Awarded

	Less than $10K	$10K - $24K	$25K - $49K	$50K - $99K	$100K - $149K	$150K - $299K	$300K - $499K	$500K - $999K	$1MM and above
Heinz 2024	2%	6%	10%	23%	14%	21%	12%	8%	3%
Heinz 2019	3%	10%	15%	17%	9%	22%	15%	9%	1%
Heinz 2017	4%	11%	13%	14%	8%	23%	10%	11%	6%
Heinz 2015	5%	10%	10%	16%	8%	20%	14%	11%	5%
Heinz 2007	5%	14%	10%	16%	15%	25%	8%	4%	4%
Heinz 2005	6%	16%	5%	16%	12%	18%	11%	8%	7%
Average Funder	8%	10%	11%	15%	10%	17%	10%	9%	11%
Peer Funder Cohort	1%	3%	6%	14%	13%	25%	15%	11%	12%

Cohort: Peer Funder Cohort Past Results: On

Median Percent of Budget Funded by Grant (Annualized)

	Size of grant relative to size of grantee budget
Heinz 2024	7%
Heinz 2019	9%
Heinz 2017	8%
Heinz 2015	7%
Heinz 2007	5%
Heinz 2005	7%
Median Funder	4%
Peer Funder Cohort	6%

Grant Size - By Subgroup

Subgroup: Program Area

Grant Amount Awarded (By Subgroup)	Creativity	Learning	Sustainability
Median grant size	$60K	$150K	$150K

Subgroup: Program Area

Grant Amount Awarded (By Subgroup)	Creativity	Learning	Sustainability
Less than $10K	2%	3%	1%
$10K - $24K	9%	7%	4%
$25K - $49K	14%	7%	11%
$50K - $99K	38%	20%	17%
$100K - $149K	13%	12%	16%
$150K - $299K	11%	26%	22%
$300K - $499K	6%	11%	16%
$500K - $999K	5%	9%	9%
$1MM and above	2%	4%	4%

Subgroup: Program Area

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Creativity	Learning	Sustainability
Size of grant relative to size of grantee budget	8%	5%	10%

Grantee Characteristics

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

Cohort: Peer Funder Cohort Past Results: On

Operating Budget of Grantee Organization

	Median Budget
Heinz 2024	$1.4M
Heinz 2019	$1M
Heinz 2017	$0.9M
Heinz 2015	$1.1M
Heinz 2007	$1.2M
Heinz 2005	$1.2M
Median Funder	$1.8M
Peer Funder Cohort	$2M

Cohort: Peer Funder Cohort Past Results: On

Operating Budget of Grantee Organization

	<$100K	$100K - $499K	$500K - $999K	$1MM - $4.9MM	$5MM - $24MM	>=$25MM
Heinz 2024	6%	19%	16%	36%	14%	9%
Heinz 2019	12%	24%	14%	28%	12%	11%
Heinz 2017	10%	30%	11%	27%	12%	10%
Heinz 2015	9%	25%	13%	25%	15%	14%
Heinz 2007	9%	22%	14%	25%	15%	15%
Heinz 2005	8%	23%	11%	31%	16%	11%
Average Funder	8%	17%	13%	30%	19%	13%
Peer Funder Cohort	4%	14%	12%	34%	23%	13%

Grantee Characteristics - By Subgroup

Subgroup: Program Area

Operating Budget of Grantee Organization (By Subgroup)	Creativity	Learning	Sustainability
Median Budget	$0.7M	$1.9M	$1.5M

Subgroup: Program Area

Operating Budget of Grantee Organization (By Subgroup)	Creativity	Learning	Sustainability
<$100K	6%	4%	7%
$100K - $499K	34%	15%	15%
$500K - $999K	21%	12%	15%
$1MM - $4.9MM	20%	37%	45%
$5MM - $24MM	13%	21%	9%
>=$25MM	6%	11%	9%

Funding Relationship

Cohort: Peer Funder Cohort Past Results: On

Funding Status

	Percent of grantees currently receiving funding from the Endowments
Heinz 2024	76%
Heinz 2019	86%
Heinz 2017	85%
Heinz 2015	85%
Heinz 2007	87%
Heinz 2005	75%
Median Funder	82%
Peer Funder Cohort	85%

Cohort: Peer Funder Cohort Past Results: On

Pattern of Grantees' Funding Relationship with the Endowments

	First grant received from the Endowments	Consistent funding in the past	Inconsistent funding in the past
Heinz 2024	18%	61%	21%
Heinz 2019	17%	64%	19%
Heinz 2017	18%	65%	17%
Heinz 2015	19%	64%	18%
Average Funder	30%	53%	18%
Peer Funder Cohort	27%	54%	18%

Funding Relationship - by Subgroup

Subgroup: Program Area

Funding Status (By Subgroup)	Creativity	Learning	Sustainability
Percent of grantees currently receiving funding from the Endowments	69%	70%	85%

Subgroup: Program Area

Pattern of Grantees' Funding Relationship with the Endowments (By Subgroup)	Creativity	Learning	Sustainability
First grant received from the Endowments	13%	22%	17%
Consistent funding in the past	71%	51%	64%
Inconsistent funding in the past	16%	27%	20%

Funder Characteristics

Please note that all information below is based on self-reported data from The Heinz Endowments.

Cohort: Peer Funder Cohort Past Results: On

Financial Information

	Total assets	Total giving
Heinz 2024	$2100M	$70M
Heinz 2019	$1682.8M	$57.2M
Heinz 2017	$1508.5M	$63.3M
Heinz 2015	$1602M	$78M
Heinz 2007	$1566.4M	$55.7M
Heinz 2005	$1344.7M	$53.2M
Median Funder	$314.8M	$20.8M
Peer Funder Cohort	$2193.5M	$100M

Cohort: Peer Funder Cohort Past Results: On

Funder Staffing

	Total staff (FTEs)	Percent of staff who are program staff
Heinz 2024	35	26%
Heinz 2019	36	50%
Heinz 2017	32	47%
Heinz 2015	31	35%
Heinz 2007	34	51%
Heinz 2005	32	48%
Median Funder	18	44%
Peer Funder Cohort	40	38%

Cohort: Peer Funder Cohort Past Results: On

Grantmaking Processes

	Proportion of grants that are invitation-only	Proportion of grantmaking dollars that are invitation-only
Heinz 2024	0%	0%
Heinz 2019	0%	0%
Heinz 2017	75%	80%
Heinz 2015	60%	80%
Median Funder	60%	77%
Peer Funder Cohort	81%	94%

Methodology, Analysis, and Respondent Demographics

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Heinz 2024	October and November 2024	560	356	64%
Heinz 2019	May and June 2019	436	285	65%
Heinz 2017	May and June 2017	419	293	70%
Heinz 2015	February and March 2015	490	318	65%
Heinz 2007	September and October 2007	268	178	66%
Heinz 2005	September and October 2005	278	214	77%

Survey Year	Year of Active Grants
Heinz 2024	2023 - 2024
Heinz 2019	2018
Heinz 2017	2016
Heinz 2015	2014
Heinz 2007	2006

Standard Comparative Cohorts

CEP included 18 standard cohorts to allow for comparisons to a variety of different types of funders.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	34	Funders with median grant size of $20K or less
Large Grant Providers	126	Funders with median grant size of $200K or more
High Touch Funders	33	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Proactive Grantmakers	121	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	110	Funders that make at most 10% of grants by invitation only
Intermediary Funders	25	Funders that primarily regrant philanthropic dollars
International Funders	62	Funders that fund outside of their own country

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than $5 Million	57	Funders with annual giving of less than $5 million
Funders Giving $50 Million or More	96	Funders with annual giving of $50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	181	All private foundations in the GPR dataset
Family Foundations	93	All family foundations in the GPR dataset
Community Foundations	41	All community foundations in the GPR dataset
Health Conversion Foundations	31	All health conversion foundations in the GPR dataset
Corporate Foundations	26	All corporate foundations in the GPR dataset

Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	45	Funders that are primarily based outside the United States
Recently Established Foundations	63	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	146	Funders who surveyed grantees during COVID-19 (2020 - 2022)
European Funders	27	Funders that are headquartered in Europe

Subgroup Methodology and Differences

The following page outlines the methodology used to determine the subgroups that are displayed in the report, along with any differences in grantee perceptions. Differences should be interpreted in the context of the Endowments' goals and strategy.

CEP conducts statistical analysis on groups of 10 or larger. Ratings described as "significantly" higher or lower reflect statistically significant differences at a P-value less than or equal to 0.1. Ratings described as "trending" higher or lower reflect a 0.3-point difference larger or smaller than the overall average rating.

Subgroup Methodology

Program Area: Using the grantee list provided by the Endowments, CEP tagged grantees based on their Program Area.

Geography/City: Using the grantee list, CEP tagged grantees based on their Geography/City.

Body of Work: Using the grantee list provided by the Endowments, CEP tagged grantees based on their Body of Work. To protect grantee confidentiality, CEP and the Endowments collaborated to combine several Bodies of Work in the following way:

- Other Creativity Bodies of Work includes responses from grantees working in Creative Places and Creativity-Other
- Other Bodies of Work includes responses from grantees working in Holistic Education, Hazelwood/Neighborhood Initiative, K-12 Policy, and Workforce Readiness.
- Responses from grantees working in the Veterans Body of Work are excluded from this level of disaggregation. Their responses are still part of other subgroups and the overall Heinz average ratings.

Annual Operating Budget: Using data grantees provided in the survey, CEP tagged grantees based on their annual operating budget.

Respondent Gender Identity: Using data grantees provided in the survey, CEP tagged grantees based on their gender identity. Those segmented as "Identifies as a Man" selected "Man" only, and those segmented as "Identifies as a Woman" selected "Woman" only.

Respondent Person of Color Identity: Using data grantees provided in the survey, CEP tagged grantees based on their person of color identity.

Subgroup Differences

Program Area: Statistically significant differences exist across Program Areas on many measures in the survey. Generally, ratings from Sustainability grantees are highest among the Program Areas, and ratings from Creativity grantees are lowest among the Program Areas.

Geography/City: Ratings from grantees Outside Allegheny County trend higher than the overall average rating on many measures in the survey. Ratings from grantees in Allegheny County trend *lower* than the overall average rating on some measures, particularly measures related to the Endowments' understanding, interactions with grantees, and selection process.

Body of Work: While there are trends in differences in ratings and experiences when results are segmented by Body of Work, the direction of these differences is not consistent, and most don't rise to the level of statistical significance.

Annual Operating Budget: No group rates statistically higher or lower when grantees are segmented by annual operating budget. Ratings from grantees with an annual operating budget between $500k and $999k trend *higher* on measures related to the Endowments' assistance beyond the grant.

Respondent Gender Identity: Grantees who identify as men rate significantly *higher* on most measures in the survey than grantees who identify as women. Grantees who identify as men as also significantly *more likely* to report receiving assistance beyond the grant or a site visit from the Endowments. They are *less likely* to report receiving multi-year general operating support.

Grantees who prefer not to report their gender identity rate significantly *lower* on most measures related to the Endowments' impact, understanding, and relationships with grantees.

Respondent Person of Color Identity: No group consistently rates higher or lower when grantees are segmented by person of color identity. Grantees who prefer not to report their person of color identity rate significantly *lower* on many measures across the survey.

For more information on respondents' demographic characteristics, please see the "Respondent Demographics" section.

Respondent Demographics

Respondents in the United States are asked questions related to their gender identity, transgender identity, racial/ethnic identity, identity as a person of color, disability identity, and identity as a member of the LGBTQ+ community.

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

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

Survey respondents are asked to share their gender identities in a check-all-that-apply question. Each chart has the option of showing the average ratings of respondents who selected only "man," only "woman," multiple gender identities, "gender non-conforming or non-binary," "prefer to self-identify," and "prefer not to say" - as long as that response option had at least 10 respondents.

All demographic survey questions are optional.

Differences in Ratings by Respondent Demographics

It is CEP's standard practice to analyze responses for differences by the following demographics characteristics:

Person of Color Identity

Ratings from grantees who identify as a person of color are significantly *higher* than grantees who identify as not a person of color for the following

- The helpfulness of the selection process and the clarity and transparency of the proposal criteria

Ratings from grantees who identify as a person of color are significantly *lower* than grantees who identify as not a person of color for the following

- Effect on public policy in grantees' fields
- Understanding of the needs of the people and communities served
- Grantees' agreement that the Endowments demonstrates an explicit commitment to diversity, equity, and inclusion in its work
- Feeling un-pressured to modify grantees' priorities to create a request that was likely to receive funding

Grantees who identify as a person of color are also *more* likely to work at organizations with a budget under $1M and are *more* likely to report receiving general operating support.

Gender Identity

Ratings from grantees who identify exclusively as women are significantly *lower* than grantees who identify exclusively as men for the following:

- Impact on grantee organizations and fields, and the extent to which the Endowments advance knowledge and impact public policy
- Grantee agreement that the Endowments takes public positions on relevant issues and risks that could lead to breakthroughs, works with government and local leaders, and brings domain expertise that advances grantees toward shared goals
- Grantee agreement that the Endowments helps organizations align their efforts and elevates grantee work to wider audiences
- Awareness of challenges facing grantee organizations, understanding of the contextual factors affecting grantees' work, fields, and the needs of the people and communities grantees serve
- Grantees' agreement that the Endowments is explicitly committed to and clearly communicated what diversity, equity, and inclusion means for its work
- Grantee comfort approaching Heinz if a problem arises and the responsiveness of Endowments staff
- The extent to which Heinz demonstrates candor and compassion about the its perspectives on grantees' work
- The extent to which the Endowments is open to ideas from grantees
- The clarity, consistency, and transparency of the Endowments' communications
- Grantees' understanding of how their funded work fits into Heinz's broader efforts
- The helpfulness of the selection process, and the clarity and transparency of proposal criteria
- The extent to which the reporting process is straightforward
- The extent to which the evaluation process results in grantees' organizations making changes to the work that was evaluated

Grantees who identify as women as also significantly *less* likely to report receiving assistance beyond the grant or a site visit from the Endowments. They are *more* likely to report receiving multi-year general operating support.

Transgender Identity

There are too few respondents to analyze results by Transgender Identity

LGBTQ+ Identity

Ratings from respondents who identify as LGBTQ+ are significantly *lower* than respondents who do not identify as LGBTQ+ for the following

- Impact on grantees' local communities and the extent to which the Endowments advances knowledge in grantee fields
- Understanding of the needs of the people and communities served
- Clarity of Heinz's communication of its goals and strategy, and communication of what diversity, equity, and inclusion means for its work
- Grantees' understanding of how their funded work fits into the Endowments' broader efforts
- Clarity and transparency of the proposal criteria, and adaptability of the reporting process

Grantees who identify as LGBTQ+ are also significantly *more* likely to report receiving general operating support.

Disability Status

Ratings from respondents who have a disability are significantly *higher* than respondents who do not have a disability for the following:

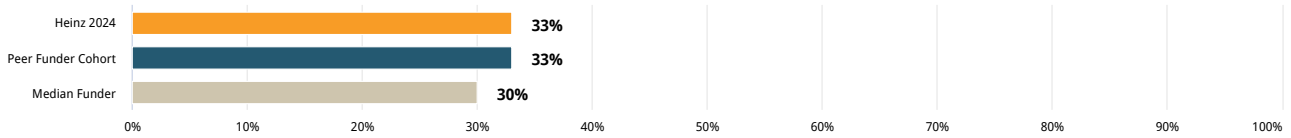
- Impact on grantee organizations
- The extent to which Heinz demonstrates candor about its perspectives on grantees' work
- The Endowments' transparency

Grantees who have a disability are *less* likely to report having a conversation with the Endowments on how the work funded by their grant would be assessed.

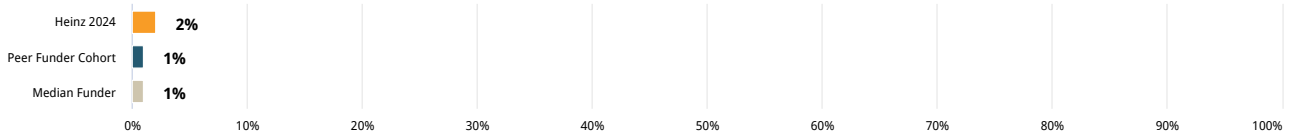
Please select the option that represents how you describe yourself:

Cohort: Peer Funder Cohort

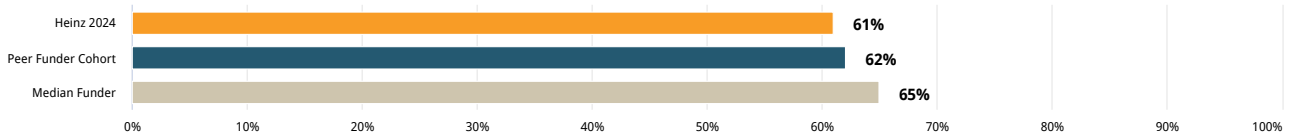
Man



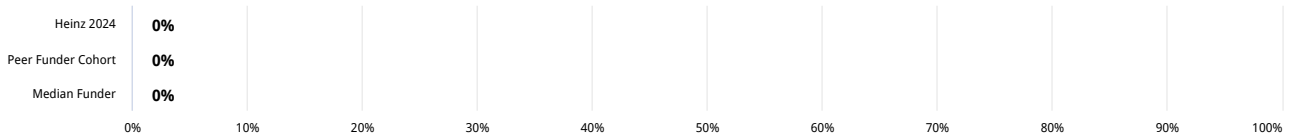
Non-binary or gender non-conforming



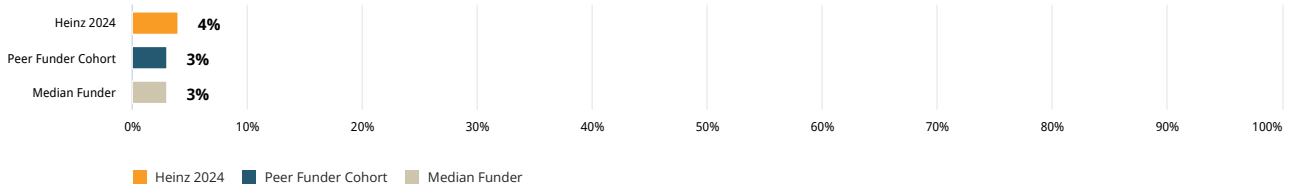
Woman



Prefer to self-identify



Prefer not to say



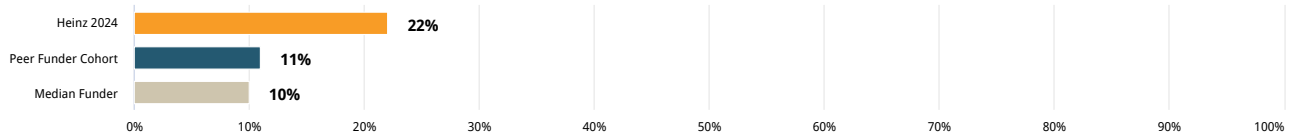
Cohort: Peer Funder Cohort Past Results: On

Are you transgender?	Heinz 2024	Average Funder	Peer Funder Cohort
Yes	1%	1%	0%
No	96%	96%	96%
Prefer not to say	4%	4%	4%

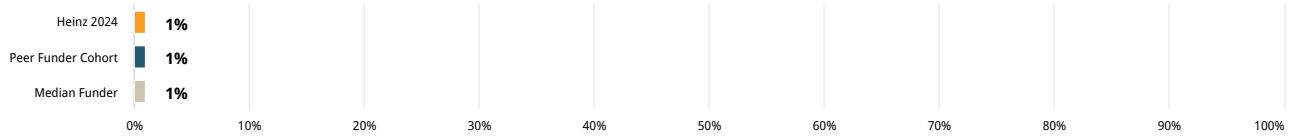
How would you describe your race and/or ethnicity?

Cohort: Peer Funder Cohort

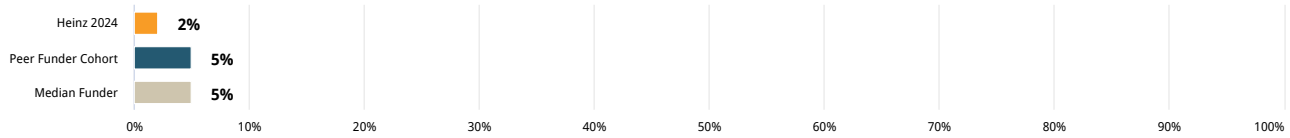
African American or Black



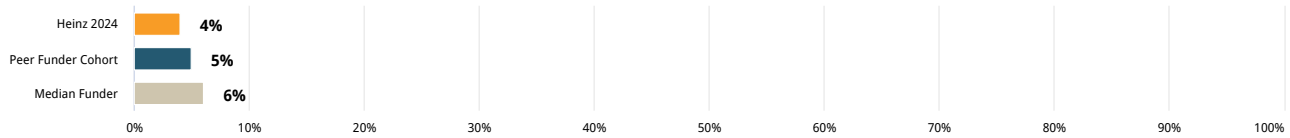
American Indian, Alaska Native, or Indigenous



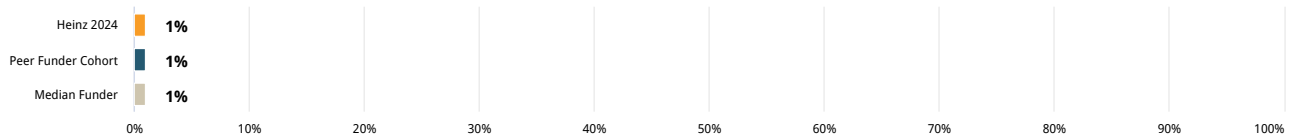
Asian or Asian American



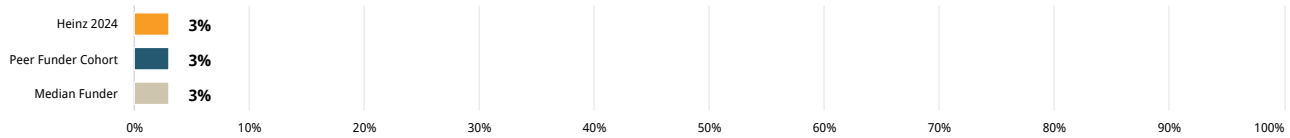
Latina, Latino, Latinx or Hispanic



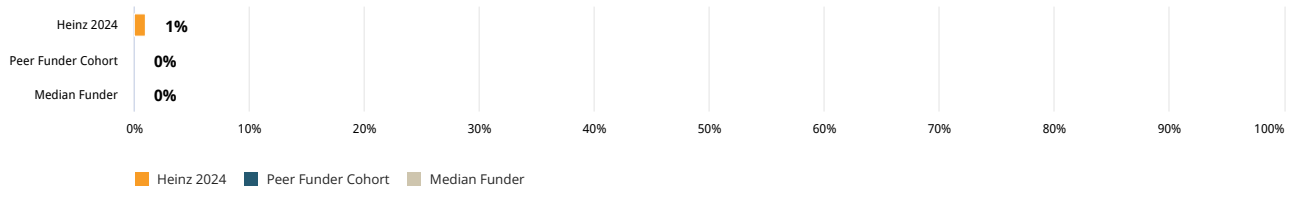
Middle Eastern or North African



Multiracial and/or Multi-ethnic



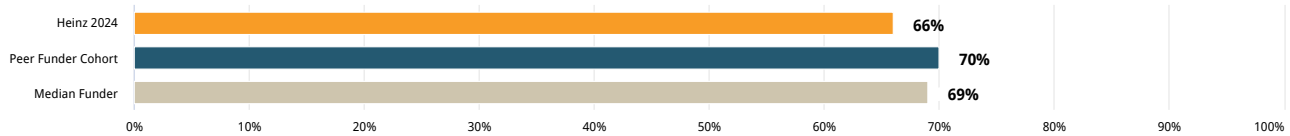
Pacific Islander or Native Hawaiian



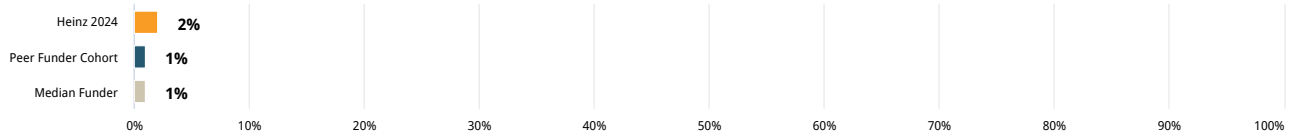
How would you describe your race and/or ethnicity?

Cohort: Peer Funder Cohort

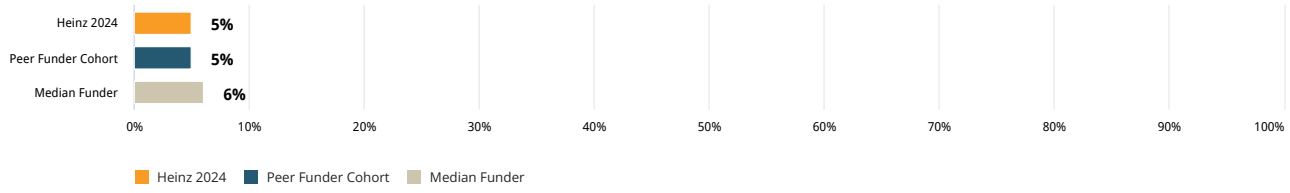
White



Race and/or ethnicity not included above



Prefer not to say



Cohort: Peer Funder Cohort Past Results: On

Do you identify as a person of color?	Heinz 2024	Average Funder	Peer Funder Cohort
Yes	24%	26%	26%
No	70%	68%	69%
Prefer not to say	6%	6%	5%

Cohort: Peer Funder Cohort Past Results: On

Do you have a disability?	Heinz 2024	Average Funder	Peer Funder Cohort
Yes	10%	7%	7%
No	83%	88%	88%
Prefer not to say	7%	5%	5%

Cohort: Peer Funder Cohort Past Results: On

Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community?	Heinz 2024	Average Funder	Peer Funder Cohort
Yes	13%	11%	11%
No	81%	84%	84%
Prefer not to say	6%	5%	5%

Respondent Job Title

Cohort: Peer Funder Cohort Past Results: On

Job Title of Respondents

	Executive Director/CEO	Other Senior Team (i.e., reporting to Executive Director/CEO)	Project Director	Development Staff	Volunteer	Other
Heinz 2024	58%	22%	6%	10%	1%	3%
Heinz 2019	57%	15%	15%	12%	1%	0%
Heinz 2017	54%	13%	13%	10%	1%	10%
Heinz 2015	48%	15%	13%	15%	1%	7%
Heinz 2007	61%	11%	6%	14%	0%	7%
Heinz 2005	60%	14%	6%	13%	0%	7%
Average Funder	47%	20%	11%	15%	1%	5%
Peer Funder Cohort	52%	19%	8%	17%	0%	3%

Additional Survey Information

Grantees may decide not to answer any question in the grantee survey. On many questions in the 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 in each of the survey measures. The total number of respondents to Heinz’s grantee survey was 356.

Question Text	Number of Responses
Overall, how would you rate the Endowments' impact on your organization?	351
Overall, how would you rate the Endowments' impact on your local community?	319
Overall, how would you rate the Endowments' impact on your field?	340
To what extent has the Endowments advanced the state of knowledge in your field?	283
To what extent has the Endowments affected public policy in your field?	214
How well does the Endowments understand your organization's strategy and goals?	321
How aware is the Endowments of the challenges that your organization is facing?	348
How well does the Endowments understand the social, cultural, or socioeconomic factors that affect your work?	343
How well does the Endowments understand the field in which you work?	327
Please indicate any types of assistance beyond the grant that were a component of what you received from the Endowments.	350
Please rate the extent to which you agree with the following statements about the assistance beyond the grant you received from the Endowments:	
The assistance beyond the grant I received met an important need for my organization and/or program	184
The assistance beyond the grant I received strengthened my organization and/or program	184
The Endowments' assistance beyond the grant was a worthwhile use of the time required of us	184
I felt the Endowments would be open to feedback about the assistance beyond the grant it provided	183
How well does the Endowments understand the needs of the people and communities that you serve?	323
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	350
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant?	244
To what extent do you agree or disagree that the Endowments has clearly communicated what diversity, equity, and inclusion means for its work?	321
To what extent do you agree or disagree that the Endowments demonstrates an explicit commitment to diversity, equity, and inclusion in its work?	328
How comfortable do you feel approaching the Endowments if a problem arises?	351
Overall, how responsive was the Endowments staff?	353
To what extent did the Endowments exhibit trust in your organization's staff during this grant?	346
To what extent did the Endowments exhibit candor about the Endowments' perspectives on your work during this grant?	344
To what extent did the Endowments exhibit compassion for those affected by your work during this grant?	343
To what extent is the Endowments open to ideas from grantees about its strategy?	341
How often do/did you have contact with your program officer during this grant?	354
Has your main contact at the Endowments changed in the past six months?	345
At any point during this grant, including the selection process, did Endowments staff conduct a site visit?	355
How clearly has the Endowments communicated its goals and strategy to you?	353
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Endowments?	308
Overall, how transparent is the Endowments with your organization?	343
How well do you understand the way in which the work funded by this grant fits into the Endowments' broader efforts?	332
Did you submit a proposal to the Endowments for this grant?	351
Did you have contact with a Endowments staff member via phone, email, or in-person/video before you applied?	333
To what extent was the Endowments' selection process a helpful opportunity to strengthen the efforts funded by the grant?	307
To what extent was the Endowments' selection process an appropriate level of effort given the amount of funding received?	318
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?	336
To what extent was the Endowments clear and transparent about the selection process requirements and timelines?	339
To what extent was the Endowments clear and transparent about the criteria the Endowments uses to decide whether a proposal would be funded or declined?	309
At any point during the proposal 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?	316

Question Text	Number of Responses
Have you participated in a reporting or evaluation process?	345
To what extent was the Endowments' reporting process straightforward?	284
To what extent was the Endowments' reporting process adaptable, if necessary, to fit your circumstances?	269
To what extent was the Endowments' reporting process relevant, with questions and measures pertinent to the work funded by this grant?	302
To what extent was the Endowments' reporting process a helpful opportunity for you to reflect and learn?	304
To what extent did the evaluation incorporate your input in the design of the evaluation?	74
To what extent did the evaluation result in you making changes to the work that was evaluated?	75
Total funding committed for this grant	350
Total number of years of approved funding for this grant	342
Was the funding you received restricted to a specific use?	355
What is the approximate annual operating budget of your organization?	339
Are you currently receiving funding from the Endowments?	350
Which of the following best describes the pattern of your organization's funding relationship with the Endowments?	345
Custom Questions	
To what extent does the Endowments effectively:	
Take public positions on relevant issues	218
Take risks that could lead to breakthroughs	216
Help organizations align their efforts	265
Work with government and local leaders	212
Convene to facilitate new and/or stronger partnerships	256
Elevate grantee work to wider audiences	259
Bring domain expertise that advances us toward our shared goals	243
Thinking about the roles the Endowments plays beyond grantmaking, which role(s) is most important for the Endowments to play in the future?	341
To what extent do you agree or disagree with the following statements regarding the Endowments' communications about its strategic transition?	
I understand what the Endowments seeks to accomplish under its new strategic plan for the Learning Strategic Area	62
The Endowments communicated clearly regarding its intentions to transition its work for the Learning Strategic Area	60
The Endowments provided a clear timeline for the transition in the Learning Strategic Area to occur	54
The Endowments was transparent about the implications of its transition for my organization	59
Among these possible contact options with the Endowments, which did you utilize to understand what the strategic transition in the Learning Strategic Area meant for your organization?	72
Please rate the helpfulness of the resources you utilized:	
Email from an Endowments staff member	24
Webinar led by an Endowments staff member	22
Conversation with an Endowments staff member	29
Conversation/email with an Endowments board member	3
The Endowments website	27
The Endowments' social media posts	1
Considering your current understanding of how the strategic transition will impact your funding from the Endowments, which of the following best describes the likely effect on the work currently funded by the Endowments' grant?	72
During the final phase of the Endowments' funding under its current approach for the Learning Strategic Area, what would be most helpful to your organization to facilitate a smoother adjustment to the Endowments' transition and maximize the long-term impact of the work the Endowments has supported?	69

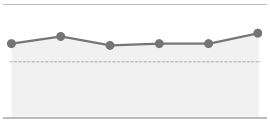
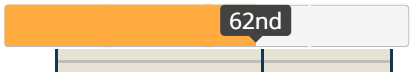
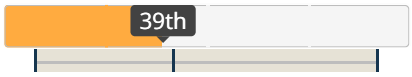
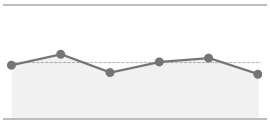
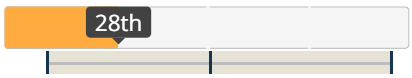
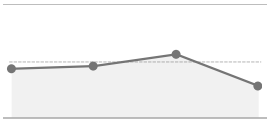
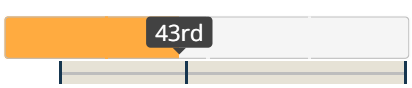
Summary of Perceptual Survey Measure Rankings

The following chart displays The Heinz Endowments's percentile rankings for all perceptual survey measures in the report. Each row shows the question asked with the scale points shown to grantees in the survey, The Heinz Endowments's average rating, its corresponding percentile ranking relative to CEP's dataset, and the trend of The Heinz Endowments's results over time (where applicable).

This chart can be sorted largest to smallest, or smallest to largest, by *Average* or by *Percentile Rank* using the arrows next to their respective labels. If you'd like to view this chart for a specific subgroup, you can do so using the "Subgroup" dropdown and selecting the group that you'd like to view.

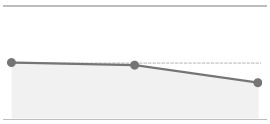
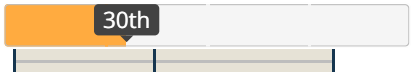
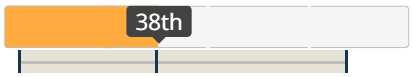
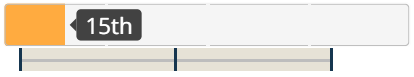
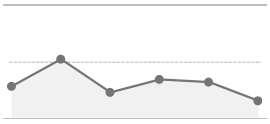
Summary of Perceptual Survey Measure Rankings

Cohort: Peer Funder Cohort Subgroup: None

Key Measure	Average	Percentile Rank	Trend Data
Impact on grantees' organizations 1 = No impact, 7 = Significant positive impact	6.25		
Impact on grantees' local communities 1 = No impact, 7 = Significant positive impact	6.15		
Impact on grantees' fields 1 = No impact, 7 = Significant positive impact	5.98		
Advancing the state of knowledge in grantees' fields 1 = Not at all, 7 = Leads the field to new thinking and practice	5.28		
Effect on public policy in grantees' fields 1 = Not at all, 7 = Major influence on shaping public policy	5.14		
Understanding of grantees' organizations 1 = Limited understanding, 7 = Thorough understanding	5.71		
Awareness of challenges facing grantees 1 = Not at all aware, 7 = Extremely aware	5.10		
Understanding of the contextual factors affecting grantees' work 1 = Limited understanding, 7 = Thorough understanding	5.63		

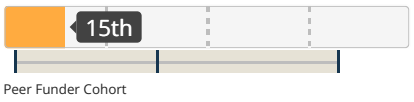
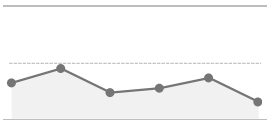
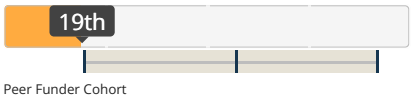
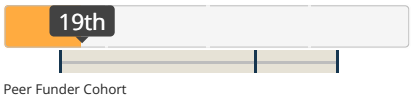
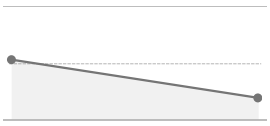
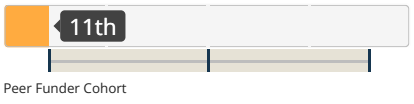
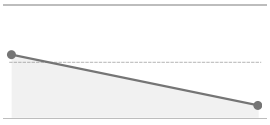
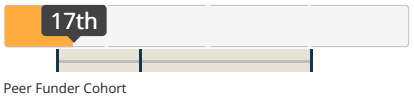
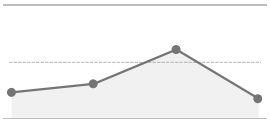
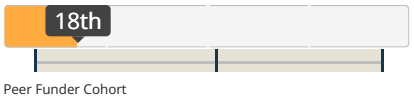
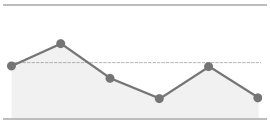
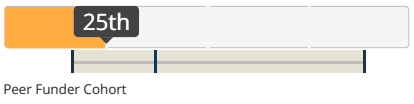
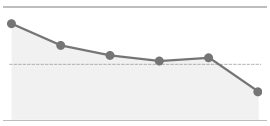
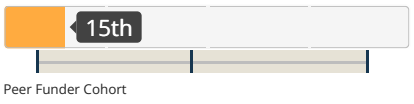
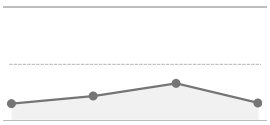
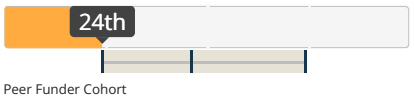
Summary of Perceptual Survey Measure Rankings

Cohort: Peer Funder Cohort Subgroup: None

Key Measure	Average	Percentile Rank	Trend Data
Understanding of grantees' fields 1 = Limited understanding of the field, 7 = Regarded as an expert in the field	5.76		
Assistance beyond the grant met an important need for grantees 1 = Not at all, 4 = Somewhat, 7 = To a great extent	6.14		N/A
Assistance beyond the grant strengthened organization or program 1 = Not at all, 4 = Somewhat, 7 = To a great extent	6.10		N/A
Assistance beyond the grant was a worthwhile use of time 1 = Not at all, 4 = Somewhat, 7 = To a great extent	6.11		N/A
Funder would be open to feedback about its assistance beyond the grant 1 = Not at all, 4 = Somewhat, 7 = To a great extent	5.91		N/A
Funder's understanding of the needs of the people and communities grantees serve 1 = Limited understanding, 7 = Thorough understanding	5.51		
Funder has clearly communicated what DEI means for its work 1 = Strongly disagree, 4 = Neither agree nor disagree, 7 = Strongly agree	5.44		N/A
Funder demonstrates an explicit commitment to DEI in its work 1 = Strongly disagree, 4 = Neither agree nor disagree, 7 = Strongly agree	5.93		N/A
Comfort approaching the funder if a problem arises 1 = Not at all comfortable, 7 = Extremely comfortable	6.05		

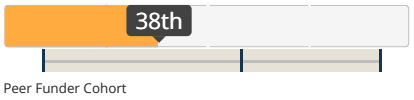
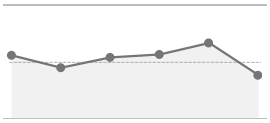
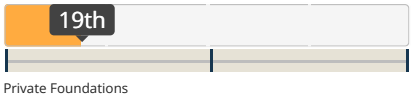
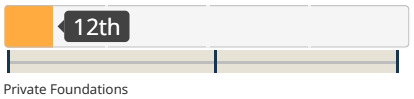
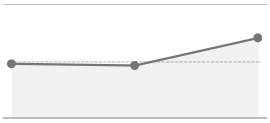
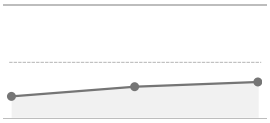
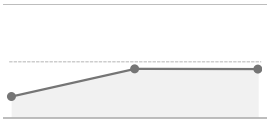
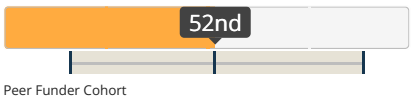
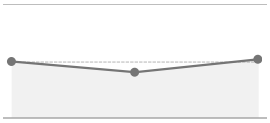
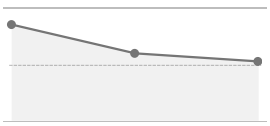
Summary of Perceptual Survey Measure Rankings

Cohort: Peer Funder Cohort Subgroup: None

Key Measure	Average	Percentile Rank	Trend Data
Responsiveness of funder staff 1 = Not at all responsive, 7 = Extremely responsive	6.09		
Funder exhibits trust in grantees' staff 1 = Not at all, 4 = Somewhat, 7 = To a great extent	6.24		
Funder exhibits candor about its perspectives on grantees' work 1 = Not at all, 4 = Somewhat, 7 = To a great extent	5.73		
Funder exhibits compassion for those affected by grantees' work 1 = Not at all, 4 = Somewhat, 7 = To a great extent	6.07		
Openness to grantees' ideas about funder's strategy 1 = Not at all, 7 = To a great extent	5.05		
Clarity of funder's communications about its goals and strategy 1 = Not at all clearly, 7 = Extremely clearly	5.47		
Consistency of communications across different resources 1 = Not at all consistent, 7 = Completely consistent	5.74		
Funder's transparency with grantees 1 = Not at all transparent, 7 = Extremely transparent	5.45		
Grantees' understanding of how funded work fits into funder's broader efforts 1 = Limited understanding, 7 = Thorough understanding	5.23		N/A
Helpfulness of selection process in strengthening funded work 1 = Not at all, 7 = To a great extent	5.74		N/A

Summary of Perceptual Survey Measure Rankings

Cohort: Peer Funder Cohort Subgroup: None

Key Measure	Average	Percentile Rank	Trend Data
Selection process was an appropriate level of effort given funding received 1 = Not at all, 7 = To a great extent	6.00		N/A
Pressure to modify grantees' priorities to receive funding 1 = No pressure, 7 = Significant pressure	2.07		
Clarity and transparency of selection process requirements and timelines 1 = Not at all, 7 = To a great extent	6.01		N/A
Clarity and transparency of criteria used to fund or decline proposals 1 = Not at all, 7 = To a great extent	5.19		N/A
Reporting process: Straightforwardness 1 = Not at all, 7 = To a great extent	6.45		
Reporting process: Adaptability 1 = Not at all, 7 = To a great extent	5.96		
Reporting process: Relevance 1 = Not at all, 7 = To a great extent	6.13		
Reporting process: Helpful opportunity to reflect and learn 1 = Not at all, 7 = To a great extent	5.89		
Evaluation process: Incorporated grantees' input in design 1 = Not at all, 7 = To a great extent	5.51		
Evaluation process: Resulted in change to evaluated work 1 = Not at all, 7 = To a great extent	4.83		

About CEP and Contact Information

The Center for Effective Philanthropy's mission is to provide data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness. We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.

CEP pursues this mission through several core activities:

Assessment and Advisory Services: Our assessments provide actionable insights on funders' work with and influence on key stakeholders through comparative benchmarking. Our assessments include the Grantee and Declined Applicant Perception Reports (GPR/APR), Donor Perception Report (DPR) for community foundations, and Staff Perception Report (SPR) for foundation staff. Our customized advisory projects offer data-driven services to help funders answer pressing questions about their work.

CEP Learning Institute: The CEP Learning Institute draws on CEP's rigorous research and decades of experience advising foundations to offer learning cohorts, trainings, and custom workshops for individuals and groups looking to improve philanthropic practice.

Programming and External Relations: CEP works to promote philanthropic effectiveness through resources such as our website, blog, podcast, newsletter, speaking engagements, social media, free webinars, and biennial national conferences.

Research: CEP's research provides data-based insights about effective foundation practices and trends in the philanthropic sector. All of CEP's research reports can be downloaded for free at our online resource library.

YouthTruth: The YouthTruth initiative partners with schools, districts, states, educational organizations, and education funders to enhance learning for all young people through validated survey instruments for students, families, and staff, as well as tailored advisory services.

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