



THE CENTER
FOR EFFECTIVE
PHILANTHROPY

Rogers Family Foundation September 2017 Grantee Survey

CEP Confidentiality Policy:

*The Center for Effective Philanthropy has surveyed more than 80,000 grantees of over 300 foundations and always treats responses as **completely confidential**:*

- *We **do not** report or share individual results or identifying characteristics with Rogers Family Foundation.*
- *We **will not** share the names of grantees that did or did not respond to the survey with Rogers Family Foundation.*
- *We only report average results to funders. Your response will be averaged with other responses to protect the identity of all individual respondents.*

If you'd like to learn more about how CEP shares results with funders and how funders use it to improve their work, watch this short video about CEP's Grantee Perception Report:

www.cep.org/gprvideo

Please respond online by October 13, 2017

Please respond to as many questions as possible. Previous respondents have found that this survey takes approximately 30 minutes to complete.

Your response is very important and will help the Foundation improve its ability to work with grantees.

Please feel free to contact Carly Marchioni at CEP with any questions:

Toll Free: 866-545-0800 ext. 255, or at 617-492-0800 ext. 255

Email: survey@cep.org

Thank you for your participation in this study.

www.cep.org



ROGERS FAMILY FOUNDATION – BACKGROUND QUESTIONS

Please choose a recent grant from Rogers Family Foundation (referred to as “the Foundation”) to keep in mind when answering the survey. Choose a grant you know well. If your organization received other grants from the Foundation for which you were not the main contact, other members of your organization may have been asked to fill out the survey for those separate grants.

A. From what Foundation program area did you receive this grant? *(please check only one)*

- Blended Learning
- Literacy
- Oakland Institutions
- Quality Schools
- Capital
- Other Education grantmaking area
- Other non-Education grantmaking area



1. At this point in time, what is one word that best describes the Foundation?

ABOUT YOUR ORGANIZATION

2. What is the name of your organization? *(Please note this question is optional. If you indicate your organization's name, your responses will remain confidential and your organization's name will not be shared with the Foundation.)*

3. What is the approximate annual operating budget of your organization (in U.S. dollars)?

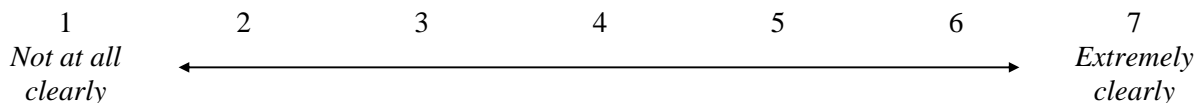
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4. Are you currently receiving funding from the Foundation? *(e.g., answer "No" if your grant(s) from the Foundation has ended and you are no longer receiving funding from the Foundation)*

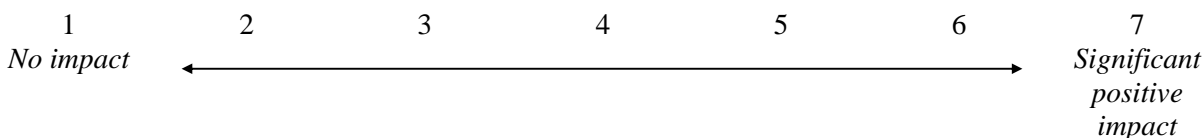
Yes No Don't know

GENERAL IMPRESSIONS OF THE FOUNDATION

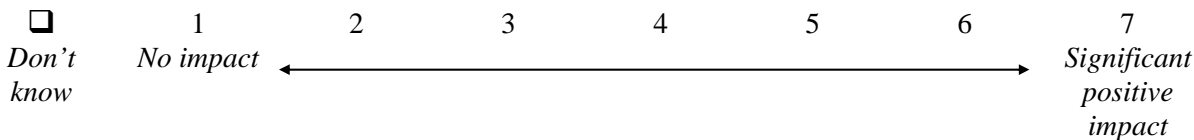
5. How clearly has the Foundation communicated its goals and strategy to you?



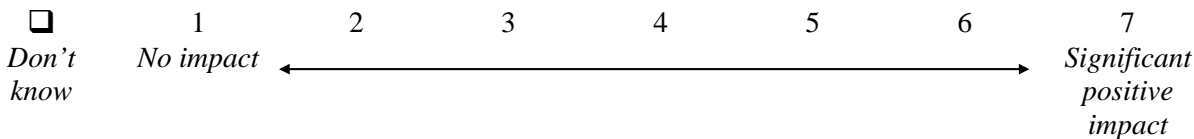
6. Overall, how would you rate the Foundation's impact on your organization?



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



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



ABOUT YOUR FUNDING

9. Describe the recent grant from the Foundation about which you are responding.

a. Type of funding: *(Please check only one category)*

- Program/project support
- General operating/core support
- Capital support: building/renovation/endowment support/other
- Scholarship or research fellowship
- Technical assistance/capacity building
- Event/sponsorship funding

b. Total number of years of approved funding for this grant: _____ years + _____ months

c. Total funding committed in U.S. dollars for this grant:
(Please include the full multi-year value committed for this grant)

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10. Which of the following best describes the pattern of your organization's funding relationship with the Foundation? *(Please check only one)*

- This is the first grant my organization has received from the Foundation
- My organization has received consistent funding from the Foundation in the past
- My organization has received inconsistent funding from the Foundation in the past
- Don't know

GRANT SELECTION

11. Did you submit a proposal to the Foundation for this grant?

- Yes
- No *(skip to question 15)*
- Don't know *(skip to question 15)*

12. 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?

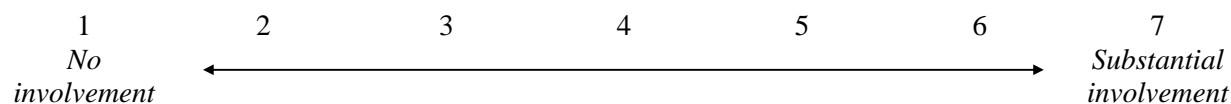
1 2 3 4 5 6 7
No ← → *Significant*
pressure *pressure*

13. How much time elapsed from the submission of the grant proposal to clear **commitment** of funding?

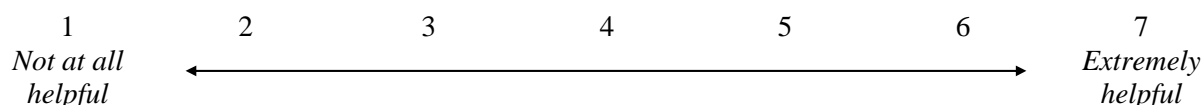
- Less than 1 month
- 1 month – 3 months
- 4 months – 6 months
- 7 months – 9 months
- 10 months – 12 months
- More than 12 months
- Don't know



14. How involved was Foundation staff in the development of your grant proposal?



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



GRANT REPORTING AND EVALUATION

16. Have you participated in a reporting or evaluation process?

When answering this question please consider the following definitions:

- “Reporting” – standard oversight, monitoring, and grant reporting.
- “Evaluation” – formal activities *beyond reporting* undertaken to assess or learn about the grant, the Foundation’s program, or other efforts.

Please **check only one**:

- We have participated in a **reporting** process only
- We have participated in an **evaluation** process only (*skip to question 19*)
- We have participated in **both** a reporting and an evaluation process
- We have participated in **neither** a reporting nor an evaluation process (*skip to question 22*)
- Don’t know (*skip to question 22*)

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

- Yes
- No
- Don't know

18. To what extent was the Foundation’s **reporting process**:

	Not at all							To a great extent	Don’t know/ Not applicable
	1	2	3	4	5	6	7		
Straightforward	1	2	3	4	5	6	7	<input type="checkbox"/>	
Adaptable, if necessary, to fit your circumstances	1	2	3	4	5	6	7	<input type="checkbox"/>	
Aligned appropriately to the timing of your work	1	2	3	4	5	6	7	<input type="checkbox"/>	



Relevant, with questions and measures pertinent to the work funded by this grant	1	2	3	4	5	6	7	<input type="checkbox"/>
A helpful opportunity for you to reflect and learn	1	2	3	4	5	6	7	<input type="checkbox"/>

Only for respondents that indicate participating in an evaluation process.

19. Who was **primarily** responsible for carrying out the **evaluation**? (*please check only one*)

- Evaluation staff at the Foundation
- Evaluation staff at your organization
- External evaluator, chosen by the Foundation
- External evaluator, chosen by your organization
- Don't know

20. To what extent did the **evaluation**:

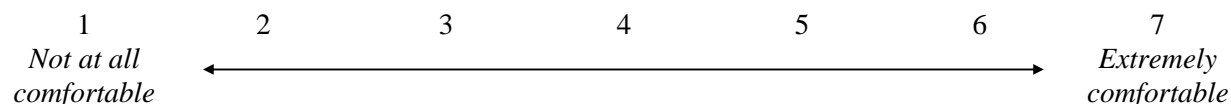
	Not at all							To a great extent	Don't know/ Not applicable
Incorporate input from your organization in the design of the evaluation	1	2	3	4	5	6	7	<input type="checkbox"/>	
Result in your organization making changes to the work that was evaluated	1	2	3	4	5	6	7	<input type="checkbox"/>	
Generate information that you believe will be useful for other organizations	1	2	3	4	5	6	7	<input type="checkbox"/>	

21. Did the Foundation provide financial support for the **evaluation**?

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

INTERACTIONS WITH THE FOUNDATION

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



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

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

24. Who most frequently initiated the contact you had with your program officer during this grant?

- Most frequently initiated by your program officer
- Most frequently initiated by you
- Initiated with equal frequency by your program officer and you
- Don't know

25. Did the Foundation conduct a site visit during the selection process or during the course of this grant?

- Yes
- No
- Don't know

26. Please estimate the total number of hours you and your staff spent on each of the following activities related to this grant from the Foundation.

a. Grant proposal creation and selection process: _____ hours

OR

Did not occur

b. Foundation-required grant monitoring, reporting, and evaluation: _____ hours

OR

Did not occur

27. Please indicate whether you used any of the following resources, and if so how helpful you found each. *(Please check all that apply and note that the Foundation may or may not offer each of the following resources.)*

	We used:	How helpful was it? <i>(1= Not at all helpful, 7= Extremely helpful)</i>
The Foundation's funding guidelines	<input type="checkbox"/>	_____
The Foundation's website	<input type="checkbox"/>	_____
Individual communication with Foundation staff	<input type="checkbox"/>	_____
None of the above	<input type="checkbox"/>	



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

1 2 3 4 5 6 7
Used one or no resources *Not at all consistent* ←————→ *Completely consistent*

29. Please comment on the quality of the Foundation's processes, interactions, and communications. Your answer will help us better understand what it is like to work with the Foundation. *(You are not limited in the length of your response.)*

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

Yes No Not applicable

YOUR FUNDER’S IMPACT ON YOUR ORGANIZATION AND YOUR FIELD

31. Please indicate all types of non-monetary assistance, if any, you received **(from staff or a third party paid for by the Foundation)** associated with this funding. **Please note the Foundation may or may not provide any of the following types of assistance.**

No other assistance was provided.

We received:

MANAGEMENT ASSISTANCE

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

FIELD-RELATED ASSISTANCE

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

OTHER ASSISTANCE

- Board development/governance assistance
- Information technology assistance
- Communications/marketing/publicity assistance
- Use of the Foundation’s facilities
- Staff/management training
- Assistance securing funding from other sources



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

<input type="checkbox"/>	1	2	3	4	5	6	7
<i>Don't know</i>	<i>Did not improve ability</i>						<i>Substantially improved ability</i>

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

<input type="checkbox"/>	1	2	3	4	5	6	7
<i>Don't know</i>	<i>Limited understanding</i>						<i>Thorough understanding</i>

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

<input type="checkbox"/>	1	2	3	4	5	6	7
<i>Don't know</i>	<i>Limited understanding of the field</i>						<i>Regarded as an expert in the field</i>

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

<input type="checkbox"/>	1	2	3	4	5	6	7
<i>Don't know</i>	<i>Limited understanding of the community</i>						<i>Regarded as an expert on the community</i>

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

<input type="checkbox"/>	1	2	3	4	5	6	7
<i>Don't know</i>	<i>Not at all</i>						<i>Leads the field to new thinking and practice</i>

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

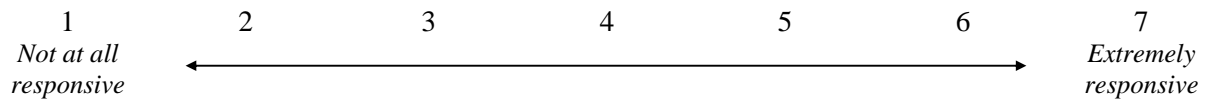
<input type="checkbox"/>	1	2	3	4	5	6	7
<i>Don't know</i>	<i>Not at all</i>						<i>Major influence on shaping public policy</i>

38. Please comment on the impact the Foundation is having on your field, community, or organization. Your answer will help us to better understand the nature of the Foundation's impact. *(You are not limited in the length of your response.)*

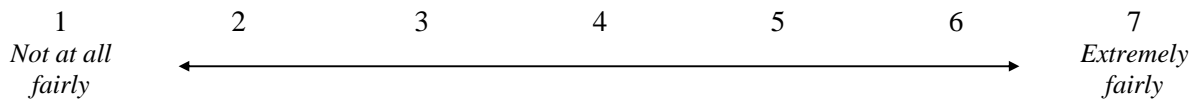


OTHER IMPRESSIONS

39. Overall, how responsive was Foundation staff?



40. Overall, how fairly did the Foundation treat you?

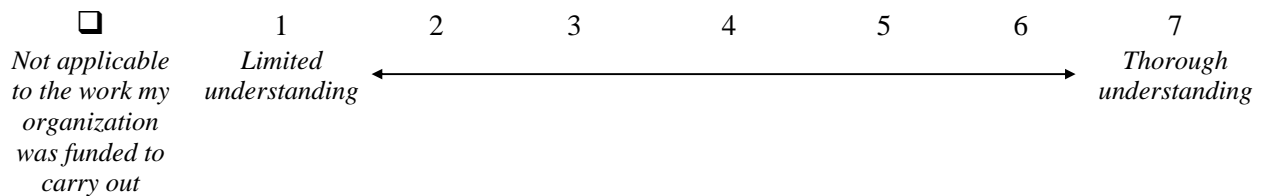


41. What specific improvements would you suggest that would make the Foundation a better funder?
(You are not limited in the length of your response.)

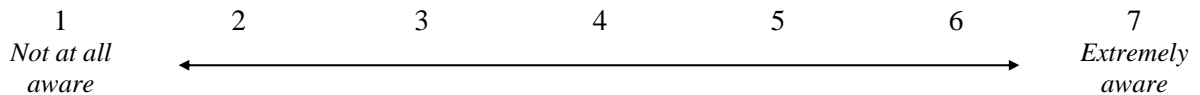
42. At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?

- Yes
- No
- Don't know

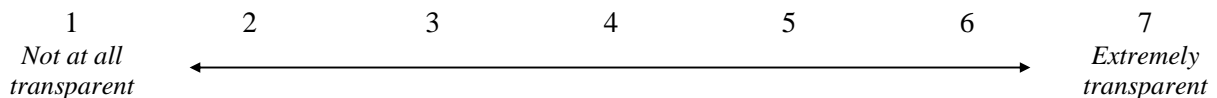
43. How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?



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



45. Overall, how transparent is the Foundation with your organization?



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

1 2 3 4 5 6 7
Not at all ←—————→ *To a great extent*

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

47. How well does the Foundation understand your intended beneficiaries’ needs?

 1 2 3 4 5 6 7
Don’t know *Limited understanding* ←—————→ *Thorough understanding*

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

 1 2 3 4 5 6 7
Don’t know *Not at all* ←—————→ *To a great extent*

RESPONSE TO THE 2016 ELECTIONS

In order to help funders best understand and support grantees in moments of change, CEP periodically adds questions to this survey that ask for reflections on current events. The following questions have been added to the survey to gather data on grantees’ experiences with the changing U.S. political landscape as a result of the November 2016 United States elections.

49. What impact do you anticipate the changing U.S. political landscape will have on your organization’s ability to carry out its mission? *(Please check only one)*

- Generally positive impact
- No impact/Neutral
- Generally negative impact
- Don’t know

50. (i) Has your organization modified or made plans to modify its work in any of the following areas as a result of the changing U.S. political landscape? *(Please check all that apply)*

- Your organization’s approaches to achieving impact
- Your organization’s programmatic goals
- Your organization’s fundraising approach
- The types of services you provide to beneficiaries
- None of the above: my organization has not made or considered making any modifications to our work.



(ii) *(If grantees indicated making at least one modification above)* In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas?

	Not applicable to my organization's work	Increasing emphasis	No change in emphasis	Decreasing emphasis
Direct service work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy/advocacy work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration with other nonprofit organizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration with other sectors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local community engagement efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collecting input from your beneficiaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

	Generally positive impact	No impact/ Neutral	Generally negative impact	Don't know
Ability to raise funds from foundations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to raise funds from other sources (e.g., public funders, individual donors)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

	Yes	No, and I would like to receive this communication	No, and I don't think this communication would be helpful	Don't know
Public communication from the Foundation (e.g., blog post, mass email, newsletter)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication with your program officer about your organization's work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication with your program officer about the Foundation's work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



53. *(Optional)* What advice would you give to the Foundation as it seeks to be as effective as possible in this changing U.S. political landscape?

Please think about opportunities beyond the funding the Foundation provides to you. For example, you could consider opportunities related to the way the Foundation conducts its work or could support grantees' capacity to be effective in the coming months. *(You are not limited in the length of your response.)*

DEMOGRAPHICS

54. Have you ever been declined funding from the Foundation?

- Yes No Don't know

55. What is your position? *(Please check only one)*

- Executive Director/CEO
 Other Senior Management
 Project Director
 Development Director
 Other Development Staff
 Volunteer
 Other *(please specify)*: _____

56. What is your gender? *(Please check only one)*

- Female Prefer to self-identify *(optional, please describe)*: _____
 Male Prefer not to say

57. What is your race/ethnicity? *(Please check all that apply)*

- African-American/Black Pacific Islander/Native Hawaiian
 American Indian or Alaska Native White
 Asian (including the Indian subcontinent) Race/ethnicity not included above
 Hispanic/Latino Prefer not to say

Thank you for participating in this important survey. Your time and candid feedback are appreciated.

