

Center for Effective Philanthropy 2018 Resource and Assessment Survey

Analysis Summary

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Prepared For

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Learning for Action enhances the impact and sustainability of social sector organizations through highly customized research, strategy development, and evaluation services.



Table of Contents

I.	Survey Response Rates	1
II.	All Responses Analysis 2016 & 2018 Summary	2
	General Impressions of CEP	2
	General Impressions of Your Most Recent CEP Engagement	4
	About Your Most Recent Report and Services	5
	Creating Change with Results	6
	Background and the Overall Experience	8
III.	Client vs. Stakeholder Analysis Summary	9
	General Impressions of CEP	9
IV.	Tool/Service Analysis Summary	12
	General Impressions of CEP	12
	General Impressions of Your Most Recent CEP Engagement	15
	About Your Most Recent Report and Services	16
	Creating Change with Results	19
	Background and the Overall Experience	22
V.	All Tool Users 2016 vs. 2018 Analysis Summary	24
	General Impressions of CEP	24
	General Impressions of Your Most Recent CEP Engagement	25
	About Your Most Recent Report and Services	26
	Creating Change with Results	28
	Background and the Overall Experience	29
VI.	Stakeholders 2016 vs. 2018 Analysis Summary	31
	General Impressions of CEP	31

Notes:

- This report displays frequencies, means, and counts of the data in each analysis cut. Statistical significance and data trends for additional cuts of data are detailed in the companion report, Statistical Significance and Trend Data for Select Analysis Cuts.
- Percentages may sum to greater or less than 100% due to rounding.



Survey Response Rates

Type of Survey	Response Rate	Percent
GPR	56/88	64%
DPR	12/16	75%
SPR	6/12	50%
Advisory Services	11/17	65%
Stakeholders	219/1,374	16%
Total	304/1,507	20%



All Responses Analysis 2016 & 2018 Summary II.

Dashes within the tables indicate questions that were not asked in the 2016 Resource and Assessment Survey.

General Impressions of CEP

Exhibit 1. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
2016	2%	12%	38%	49%	277
2016	(n=5)	(n=32)	(n=104)	(n=136)	211
2010	0.3%	8%	45%	46%	204
2018	(n=1)	(n=24)	(n=138)	(n=141)	304

Exhibit 2. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

		CEP has a somewhat	CEP has a somewhat	CEP has an			
	CEP has a poor	negative	positive	excellent			
	reputation among	reputation among	reputation among	reputation among			
	leaders of	leaders of	leaders of	leaders of			
	grantmaking	grantmaking	grantmaking	grantmaking	Don't		
	organizations	organizations	organizations	organizations	know	Mean ¹	n
2016	0%	1%	32%	58%	10%	3.6	238
2010	(n=0)	(n=1)	(n=76)	(n=137)	(n=24)	(n=214)	230
2018	0%	1%	24%	61%	14%	3.7	272
2010	(n=0)	(n=2)	(n=66)	(n=165)	(n=39)	(n=233)	212

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

Exhibit 3. In the past year, have you or has someone in your organization read a CEP research publication (e.g. Staying Connected: How Five Foundations Understand Those they Seek to Help; Relationships Matter: Program Officers, Grantees, and the Keys to Success; Benchmarking Program Officer Roles and Responsibilities; A Date Certain: Lessons from Limited Life Foundations; The Future of Foundation Philanthropy: The CEO Perspective; Benchmarking Foundation Evaluation Practices, etc.)?

	Yes	No	Don't know	n
2016	84%	5%	11%	240
2016	(n=202)	(n=11)	(n=27)	240
2010	82%	8%	10%	272
2018	(n=223)	(n=22)	(n=27)	272



Exhibit 4. In the past year, how useful have you found CEP's research publication(s) for reflecting on your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0%	1%	49%	42%	8%	3.6	201
2010	(n=0)	(n=2)	(n=99)	(n=85)	(n=15)	3.6	201
2010	0%	3%	43%	46%	8%	2.6	221
2018	(n=0)	(n=7)	(n=95)	(n=102)	(n=17)	3.6	221

Exhibit 5. In the past year, how useful have you found CEP's research publication(s) for improving your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0%	8%	62%	24%	6%	3.3	202
2010	(n=0)	(n=16)	(n=125)	(n=49)	(n=12)	3.3	202
2010	1%	8%	57%	29%	6%	2.2	219
2018	(n=1)	(n=17)	(n=125)	(n=64)	(n=12)	3.3	219

Exhibit 6. In the past year, have you used any of CEP's writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?

	Yes	No	Don't know/ Not applicable	n
2016	31%	60%	9%	230
2010	(n=72) (n=138) (n=20)		(n=20)	230
2010	34%	58%	9%	222
2018	(n=75)	(n=128)	(n=19)	222

Exhibit 7. How strongly do you associate CEP with the following statements? CEP is...

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ¹	Total n
	2016	-	-	-	-	-	-	-	-	-	-
Engaged in rigorous work	2018	0.4% (n=1)	2% (n=5)	1% (n=3)	4% (n=12)	15% (n=42)	35% (n=94)	29% (n=79)	13% (n=36)	5.9 (n=236)	272
An expert in the field of	2016	-	-	-	-	-	-	-	-	-	-
philanthropy	2018	0% (n=0)	2% (n=6)	2% (n=6)	3% (n=7)	13% (n=33)	36% (n=95)	39% (n=103)	5% (n=14)	6.1 (n=250)	264
Focused on the most	2016	-	-	-	-	-	-	-	-	-	-
important issues in philanthropy	2018	0% (n=0)	3% (n=8)	2% (n=6)	7% (n=18)	21% (n=58)	36% (n=97)	18% (n=50)	13% (n=35)	5.6 (n=237)	272

Table continues on next page.



		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ¹	Total n
	2016	-	-	-	-	-	-	-	-	-	-
Trusted	2018	0% (n=0)	2% (n=5)	2% (n=5)	3% (n=9)	9% (n=23)	35% (n=96)	40% (n=107)	10% (n=26)	6.1 (n=245)	271
Influential on foundation	2016	-	-	-	-	-	-	-	-	-	-
practice and effectiveness	2018	0% (n=0)	2% (n=5)	1% (n=3)	7% (n=19)	24% (n=64)	29% (n=76)	27% (n=71)	10% (n=25)	5.8 (n=238)	263
	2016	-	-	-	-	-	-	-	-	-	-
Innovative	2018	0% (n=0)	2% (n=6)	4% (n=11)	10% (n=26)	28% (n=75)	27% (n=73)	11% (n=31)	18% (n=50)	5.3 (n=222)	272

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

General Impressions of Your Most Recent CEP Engagement

Exhibit 8. How satisfied were you with your recent GPR, DPR, SPR, or Advisory experience overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0%	0%	0%	4%	11%	30%	54%	6.4	46
2016	(n=0)	(n=0)	(n=0)	(n=2)	(n=5)	(n=14)	(n=25)	6.4	40
2018	0%	1%	2%	1%	7%	35%	53%	6.2	0.7
	(n=0)	(n=1)	(n=2)	(n=1)	(n=6)	(n=29)	(n=44)	6.3	83

Exhibit 9. How responsive was staff from CEP to questions your foundation had during your recent GPR, DPR, SPR, or Advisory process?

	Not at all responsive						Very responsive		
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	Mean	n
2016	0%	0%	0%	0%	0%	20%	80%	6.8	46
2010	(n=0)	(n=0)	(n=0)	(n=0)	(n=0)	(n=9)	(n=37)	0.0	40
2010	0%	0%	0%	1%	4%	10%	85%	6.0	02
2018	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=8)	(n=70)	6.8	82



About Your Most Recent Report and Services

Exhibit 10. How satisfied are you with the extent to which the CEP staff's interpretation of the results of your recent GPR, DPR, or SPR was meaningful for guiding reflection on your foundation's performance overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0%	0%	0%	5%	19%	48%	29%	6.0	
2016	(n=0)	(n=0)	(n=0)	(n=2)	(n=8)	(n=20)	(n=12)	6.0	42
2010	0%	0%	0%	4%	15%	38%	43%	6.2	72
2018	(n=0)	(n=0)	(n=0)	(n=3)	(n=11)	(n=27)	(n=31)	0.2	72

Exhibit 11. Please indicate which of the following services/features you used as part of your recent GPR, DPR, or SPR engagement. For each service/feature that was part of your engagement, please rate its helpfulness in deepening your foundation's ability to use the GPR, DPR, or SPR to reflect on its performance.

CEP Service		Not at all helpful (1)	(2)	(3)	(4)	(5)	(6)	Very helpful (7)	Not applicable/Did not use	Mean ¹	Total n
CLI SCIVICE		0%	2%	2%	5%	14%	21%	52%	2%	6.1	
Memorandum of Key Findings	2016	(n=0)	(n=1)	(n=1)	(n=2)	(n=6)	(n=9)	(n=22)	(n=1)	(n=41)	42
and Recommendations/ Executive Summary	2018	0%	1%	0%	7%	12%	24%	53%	3%	6.2	74
	2010	(n=0)	(n=1)	(n=0)	(n=5)	(n=9)	(n=18)	(n=39)	(n=2)	(n=72)	/4
	2016	0%	0%	7%	0%	12%	31%	50%	0%	6.2	42
Interactive online	2010	(n=0)	(n=0)	(n=3)	(n=0)	(n=5)	(n=13)	(n=21)	(n=0)	(n=42)	42
report	2018	0%	0%	1%	3%	16%	24%	39%	16%	6.2	74
	2010	(n=0)	(n=0)	(n=1)	(n=2)	(n=12)	(n=18)	(n=29)	(n=12)	(n=62)	, ¬
Segmentation of the data by	2016	0%	0%	7%	5%	10%	26%	48%	5%	6.1	42
subgroup (e.g., program area,		(n=0)	(n=0)	(n=3)	(n=2)	(n=4)	(n=11)	(n=20)	(n=2)	(n=40)	
department)	2018	0%	0%	0%	4%	16%	23%	49%	8%	6.3	74
·		(n=0)	(n=0)	(n=0)	(n=3)	(n=12)	(n=17)	(n=36)	(n=6)	(n=68)	
	2016	0%	0%	0%	5%	7%	24%	62%	2%	6.5	42
Open-ended respondent		(n=0)	(n=0)	(n=0)	(n=2)	(n=3)	(n=10)	(n=26)	(n=1)	(n=41)	
comments and suggestions ²	2018	0%	0%	0%	7%	14%	31%	46%	3%	6.2	74
	2010	(n=0)	(n=0)	(n=0)	(n=5)	(n=10)	(n=23)	(n=34)	(n=2)	(n=72)	, ,
An initial call with CEP staff to	2016	-	-	-	-	-	-	-	-	-	
discuss your draft report	2018	0%	0%	0%	8%	11%	26%	50%	5%	6.2	74
	2010	(n=0)	(n=0)	(n=0)	(n=6)	(n=8)	(n=19)	(n=37)	(n=4)	(n=70)	
Additional analyses after	2016	-	-	-	-	-	-	-	-	-	-
receiving your draft report	2018	0%	0%	0%	0%	9%	24%	39%	27%	6.4	74
	2010	(n=0) $(n=0)$ $(n=0)$ $(n=0)$ $(n=7)$ $(n=18)$ $(n=29)$ $(n=20)$ $(n=54)$		(n=54)	, ,						
CEP research publications	2016	-	-	-	-	-	-	-	-	-	
relevant to your results	2018	0%	0%	0%	12%	15%	12%	11%	50%	5.4	74
1	2010	(n=0)	(n=0)	(n=0)	(n=9)	(n=11)	(n=9)	(n=8)	(n=37)	(n=37)	

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

 $^{^2}$ The 2016 survey question language is comparable to the 2018 language. 2016 language reads as: "Downloadable PDF of all respondent comments and suggestions"



Exhibit 12. How well did CEP's work reflect a clear understanding of the specific organizational context of your foundation?

	Not at all well (1)	(2)	(3)	(4)	(5)	(6)	Extremely well (7)	Mean	n
2016	0%	0%	2%	7%	33%	31%	26%	г 7	42
2016	(n=0)	(n=0)	(n=1)	(n=3)	(n=14)	(n=13)	(n=11)	5.7	42
2010	0%	3%	0%	7%	19%	35%	36%	Γ0	72
2018	(n=0)	(n=2)	(n=0)	(n=5)	(n=14)	(n=25)	(n=26)	5.9	72

Exhibit 13. In general, how would you rate the quality of CEP's in-person presentation?

	Poor (1)	(2)	(3)	(4)	(5)	(6)	Excellent (7)	Not applicable	Mean ¹	Total n
2016	0%	0%	0%	5%	5%	17%	46%	29%	6.4	41
2016	(n=0)	(n=0)	(n=0)	(n=2)	(n=2)	(n=7)	(n=19)	(n=11)	(n=30)	41
2018	0%	0%	0%	3%	7%	14%	56%	21%	6.5	72
2010	(n=0)	(n=0)	(n=0)	(n=2)	(n=5)	(n=10)	(n=40)	(n=15)	(n=57)	12

 $^{^{}m 1}$ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1through 7.

Creating Change with Results

Exhibit 14. Considering the aspects of your work identified in the table below, please indicate the degree to which use of GPR, DPR, or SPR results affected change in your foundation's decisionmaking or practices. (Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)

Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)		Evaluation of Previous Change		Mean ¹	Total n
Communications with grantees, donors,	2016	33%	7%	29%	26%	2%	2%	2.3	42
and/or staff (e.g., clarity, methods of		(n=14) 15%	(n=3) 7%	(n=12) 50%	(n=11) 25%	(n=1) 3%	(n=1) 0%	(n=26)	
communication)	2018	(n=11)	7% (n=5)	(n=36)	25% (n=18)	5% (n=2)	(n=0)	2.2 (n=59)	72
	201.6	43%	14%	21%	10%	0%	12%	1.9	42
Grantmaking processes (e.g., selection,	2016	(n=18)	(n=6)	(n=9)	(n=4)	(n=0)	(n=5)	(n=19)	42
reporting and evaluation processes)	2018	25%	14%	42%	6%	1%	13%	1.9	72
		(n=18)	(n=10)	(n=30)	(n=4)	(n=1)	(n=9)	(n=44)	12
	2016	31%	41%	7%	7%	2%	12%	1.4	42
Grantmaking patterns (e.g., size and length of	2010	(n=13)	(n=17)	(n=3)	(n=3)	(n=1)	(n=5)	(n=23)	42
grants)	2018	25%	38%	19%	3%	0%	15%	1.4	72
	2010	(n=18)	(n=27)	(n=14)	(n=2)	(n=0)	(n=11)	(n=43)	12
	2016	31%	44%	10%	5%	5%	5%	1.4	39
Foundation strategy (e.g., what it is you're	2010	(n=12)	(n=17)	(n=4)	(n=2)	(n=2)	(n=2)	(n=59) 1.9 (n=19) 1.9 (n=44) 1.4 (n=23) 1.4 (n=43) 1.4 (n=23) 1.5	39
trying to do, focus)	2018	22%	42%	22%	4%	3%	7%	1.5	72
	2010	(n=16)	(n=30)	(n=16)	(n=3)	(n=2)	(n=5)	(n=49)	12

Table continues on next page.



Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ¹	Total n
Provision of assistance to grantees beyond "the check" (e.g., management assistance,	2016	33% (n=14)	26% (n=11)	21% (n=9)	12% (n=5)	2% (n=1)	5% (n=2)	1.8 (n=25)	42
field-related assistance, assistance securing funding from other sources)	2018	19% (n=14)	17% (n=12)	43% (n=31)	6% (n=4)	4% (n=3)	11% (n=8)	1.8 (n=47)	72
5. 6	2016	29% (n=12)	57% (n=24)	7% (n=3)	2% (n=1)	0% (n=0)	5% (n=2)	1.2 (n=28)	42
Staffing levels	2018	13% (n=9)	60% (n=43)	19% (n=14)	3% (n=2)	3% (n=2)	3% (n=2)	1.3 (n=59)	72
	2016	35% (n=14)	18% (n=7)	33% (n=13)	10% (n=4)	0% (n=0)	5% (n=2)	1.9 (n=24)	40
Attitudes toward work with grantees	2018	23% (n=16)	16% (n=11)	41% (n=29)	6% (n=4)	1% (n=1)	14% (n=10)	1.8 (n=44)	71
A	2016	31% (n=13)	17% (n=7)	2% (n=1)	2% (n=1)	2% (n=1)	45% (n=19)	1.3 (n=9)	42
Attitudes toward work with donors	2018	10% (n=7)	19% (n=14)	13% (n=9)	6% (n=4)	1% (n=1)	51% (n=37)	1.6 (n=27)	72
Allocation of resources for a particular	2016	29% (n=12)	50% (n=21)	7% (n=3)	5% (n=2)	0% (n=0)	10% (n=4)	1.3 (n=26)	42
program area or department	2018	21% (n=15)	43% (n=31)	19% (n=14)	1% (n=1)	1% (n=1)	14% (n=10)	1.4 (n=46)	72
Addressing performance of a particular	2016	31% (n=13)	31% (n=13)	17% (n=7)	7% (n=3)	0% (n=0)	14% (n=6)	1.6 (n=23)	42
program officer/other staff member	2018	22% (n=16)	22% (n=16)	18% (n=13)	6% (n=4)	1% (n=1)	31% (n=22)	1.6 (n=33)	72
Addressing performance of or approach to a	2016	33% (n=14)	29% (n=12)	21% (n=9)	10% (n=4)	0% (n=0)	7% (n=3)	1.7 (n=25)	42
particular program area or department	2018	21% (n=15)	26% (n=19)	29% (n=21)	8% (n=6)	0% (n=0)	15% (n=11)	1.7 (n=46)	72
	2016	-	-	-	-	-	-	-	-
Other	2018	12% (n=3)	4% (n=1)	36% (n=9)	16% (n=4)	8% (n=2)	24% (n=6)	2.2 (n=14)	25

¹The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.



Background and the Overall Experience

Exhibit 15. Relative to other processes your foundation has undertaken to assess its overall effectiveness as a grantmaking organization, how useful was your recent GPR, DPR, or SPR?

	Much less useful (1)	(2)	(3)	(4)	(5)	(6)	Much more useful (7)	Don't know	Not applicable (no other assessment processes undertaken)	Mean ¹	Total n
2016	0%	0%	2%	5%	27%	24%	29%	2%	10%	5.8	41
2010	(n=0)	(n=0)	(n=1)	(n=2)	(n=11)	(n=10)	(n=12)	(n=1)	(n=4)	(n=36)	41
2010	0%	0%	3%	3%	17%	27%	19%	0%	31%	5.8	70
2018	(n=0)	(n=0)	(n=2)	(n=2)	(n=12)	(n=19)	(n=13)	(n=0)	(n=22)	(n=48)	70

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 16. Does your foundation intend to commission the GPR, DPR, or SPR again in the future?

	Yes	No	Don't know	n
2016	69%	0%	31%	42
2010	(n=29)	(n=0)	(n=13)	42
2010	72%	1%	26%	70
2018	(n=52)	(n=1)	(n=19)	72

Exhibit 17. Would you recommend the GPR, DPR, SPR, or CEP's Advisory Services to a colleague foundation?

	Yes	No	n
2016	100%	0%	46
2016	(n=46)	(n=0)	40
2010	98%	3%	01
2018	(n=79)	(n=2)	81

Exhibit 18. How valuable was your recent GPR, DPR, SPR, or Advisory Service relative to its cost?

	Very poor value for the cost (1)	(2)	(3)	(4)	(5)	(6)	Excellent value for the cost (7)	Mean	n
2016	0%	2%	2%	4%	35%	35%	22%	5.6	16
2010	(n=0)	(n=1)	(n=1)	(n=2)	(n=16)	(n=16)	(n=10)	5.0	46
2010	0%	0%	3%	15%	17%	36%	30%	го	01
2018	(n=0)	(n=0)	(n=2)	(n=12)	(n=14)	(n=29)	(n=24)	5.8	81



III. Client vs. Stakeholder Analysis Summary

Dashes within the tables indicate questions that were not asked within the specific tool/service survey.

General Impressions of CEP

Exhibit 19. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
Client	0%	0%	37%	64%	85
Client	(n=0)	(n=0)	(n=31)	(n=54)	03
Ctalcabaldar	1%	11%	49%	40%	210
Stakeholder	(n=1)	(n=24)	(n=107)	(n=87)	219

Exhibit 20. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

		CEP has a somewhat	CEP has a somewhat				
	CEP has a poor	negative reputation	positive reputation	CEP has an excellent			
	reputation among	among leaders of	among leaders of	reputation among			
	leaders of grantmaking	grantmaking	grantmaking	leaders of grantmaking	Don't		
	organizations	organizations	organizations	organizations	know	Mean ¹	n
Client	0%	0%	17%	74%	10%	3.8**	84
Client	(n=0)	(n=0)	(n=14)	(n=62)	(n=8)	(n=76)	04
Stakeholder	0%	1%	28%	55%	17%	3.6	188
Stakenoluei	(n=0)	(n=2)	(n=52)	(n=103)	(n=31)	(n=157)	100

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

Exhibit 21. In the past year, have you or has someone in your organization read a CEP research publication (e.g. Staying Connected: How Five Foundations Understand Those they Seek to Help; Relationships Matter: Program Officers, Grantees, and the Keys to Success; Benchmarking Program Officer Roles and Responsibilities; A Date Certain: Lessons from Limited Life Foundations; The Future of Foundation Philanthropy: The CEO Perspective; Benchmarking Foundation Evaluation Practices, etc.)?

	Yes	No	Don't know	n
Client	88%	7%	5%	0.4
Client	(n=74)	(n=6)	(n=4)	84
Chalcala al al au	79%	9%	12%	100
Stakeholder	(n=149)	(n=16)	(n=23)	188

^{**}Statistically significant difference p < 0.01



Exhibit 22. In the past year, how useful have you found CEP's research publication(s) for reflecting on your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
Cliant	0%	0%	37%	50%	14%	2.0**	74
Client	(n=0)	(n=0)	(n=27)	(n=37)	(n=10)	3.8**	74
Ctalcabaldar	0%	5%	46%	44%	5%	2.5	147
Stakeholder	(n=0)	(n=7)	(n=68)	(n=65)	(n=7)	3.5	14/

^{*}Statistically significant difference p < 0.01

Exhibit 23. In the past year, how useful have you found CEP's research publication(s) for improving your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
Client	1%	0%	52%	36%	11%	3.6***	73
Cilent	(n=1)	(n=0)	(n=38)	(n=26)	(n=8)	3.0	/3
Ctalcabaldar	1%	11%	60%	26%	3%	2.2	1.46
Stakeholder	(n=1)	(n=16)	(n=87)	(n=38)	(n=4)	3.2	146

*Statistically significant difference p < 0.001

Exhibit 24. In the past year, have you used any of CEP's writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?

	Yes	No	Don't know/ Not applicable	n
Client	38%	53%	10%	74
Client	(n=28)	(n=39)	(n=7)	/4
Ctalcabaldar	32%	60%	8%	1.40
Stakeholder	(n=47)	(n=89)	(n=12)	148



Exhibit 25. How strongly do you associate CEP with the following statements? CEP is...

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ¹	Total n
	Cli	0%	1%	1%	4%	14%	32%	45%	2%	6.2*	0.4
Engaged in rigorous	Client	(n=0)	(n=1)	(n=1)	(n=3)	(n=12)	(n=27)	(n=38)	(n=2)	(n=82)	84
work	Stakeholder	1%	2%	1%	5%	16%	36%	22%	18%	5.8	188
	Stakenoider	(n=1)	(n=4)	(n=2)	(n=9)	(n=30)	(n=67)	(n=41)	(n=34)	(n=154)	100
	Client	0%	1%	0%	1%	7%	33%	55%	2%	6.4***	84
An expert in the field	Client	(n=0)	(n=1)	(n=0)	(n=1)	(n=6)	(n=28)	(n=46)	(n=2)	(n=82)	04
of philanthropy	Stakeholder	0%	3%	3%	3%	15%	37%	32%	7%	5.9	180
	Stakenoider	(n=0)	(n=5)	(n=6)	(n=6)	(n=27)	(n=67)	(n=57)	(n=12)	(n=168)	100
	Client	0%	1%	1%	1%	14%	49%	26%	7%	6.0***	84
Focused on the most	Client	(n=0)	(n=1)	(n=1)	(n=1)	(n=12)	(n=41)	(n=22)	(n=6)	(n=78)	04
important issues in philanthropy	Stakeholder	0%	4%	3%	9%	25%	30%	15%	15%	5.4	100
ришининору	Stakerioluei	(n=0)	(n=7)	(n=5)	(n=17)	(n=46)	(n=56)	(n=28)	(n=29)	(n=159)	188
	Client	0%	1%	1%	0%	5%	39%	52%	2%	6.4**	83
Trusted	Client	(n=0)	(n=1)	(n=1)	(n=0)	(n=4)	(n=32)	(n=43)	(n=2)	(n=81)	03
rrusteu	Stakeholder	0%	2%	2%	5%	10%	34%	34%	13%	6.0	188
	Stakerioluei	(n=0)	(n=4)	(n=4)	(n=9)	(n=19)	(n=64)	(n=64)	(n=24)	(n=164)	100
T (1)	Client	0%	0%	1%	5%	20%	32%	36%	6%	6.0**	84
Influential on	Client	(n=0)	(n=0)	(n=1)	(n=4)	(n=17)	(n=27)	(n=30)	(n=5)	(n=79)	04
foundation practice and effectiveness	Stakeholder	0%	3%	1%	8%	26%	27%	23%	11%	5.6	179
and effectiveness	Stakeriolder	(n=0)	(n=5)	(n=2)	(n=15)	(n=47)	(n=49)	(n=41)	(n=20)	(n=159)	1/9
	Client	0%	2%	1%	8%	29%	35%	14%	11%	5.5 [†]	0.4
Innovative	Client	(n=0)	(n=2)	(n=1)	(n=7)	(n=24)	(n=29)	(n=12)	(n=9)	(n=75)	84
	Chalaball	0%	2%	5%	10%	27%	23%	10%	22%	5.2	100
1-1	Stakeholder	(n=0)	(n=4)	(n=10)	(n=19)	(n=51)	(n=44)	(n=19)	(n=41)	(n=147)	188

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

[†]Approaches statistical significance p < 0.10

^{*}Statistically significant difference p < 0.05

^{**} Statistically significant difference p < 0.01

^{***} Statistically significant difference p < 0.001



IV. Tool/Service Analysis Summary

Dashes within the tables indicate questions that were not asked within the specific tool/service survey.

General Impressions of CEP

Exhibit 26. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
GPR	0%	0%	38%	63%	56
GFK	(n=0)	(n=0)	(n=21)	(n=35)	
DPR	0%	0%	42%	58%	12
DPR	(n=0)	(n=0)	(n=5)	(n=7)	12
CDD	0%	0%	33%	67%	6
SPR	(n=0)	(n=0)	(n=2)	(n=4)	0
Advison	0%	0%	27%	73%	11
Advisory	(n=0)	(n=0)	(n=3)	(n=8)	TT

Exhibit 27. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

	CEP has a poor reputation among leaders of grantmaking organizations	CEP has a somewhat negative reputation among leaders of grantmaking organizations	CEP has a somewhat positive reputation among leaders of grantmaking organizations	CEP has an excellent reputation among leaders of grantmaking organizations	Don't know	Mean ¹	n
GPR	0% (n=0)	0% (n=0)	18% (n=10)	68% (n=38)	14% (n=8)	3.8 (n=48)	56
DPR	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=12)	0% (n=0)	4.0*** [†] (n=12)	12
SPR	0% (n=0)	0% (n=0)	17% (n=1)	83% (n=5)	0% (n=0)	3.8 (n=6)	6
Advisory	0% (n=0)	0% (n=0)	30% (n=3)	70% (n=7)	0% (n=0)	3.7 (n=10)	10

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

^{***} DPR statistically significantly higher than GPR $\,p < 0.001\,$

[†]DPR approaches statistical significant over Advisory p < 0.10



Exhibit 28. In the past year, have you or has someone in your organization read a CEP research publication (e.g. Staying Connected: How Five Foundations Understand Those they Seek to Help; Relationships Matter: Program Officers, Grantees, and the Keys to Success; Benchmarking Program Officer Roles and Responsibilities; A Date Certain: Lessons from Limited Life Foundations; The Future of Foundation Philanthropy: The CEO Perspective; Benchmarking Foundation Evaluation Practices, etc.)?

	Yes	No	Don't know	n
GPR	89%	5%	5%	56
GPK	(n=50)	(n=3)	(n=3)	30
DPR	75%	17%	8%	12
DPK	(n=9)	(n=2)	(n=1)	12
CDD	100%	0%	0%	
SPR	(n=6)	(n=0)	(n=0)	6
A duicent	90%	10%	0%	10
Advisory	(n=9)	(n=1)	(n=0)	10

Exhibit 29. In the past year, how useful have you found CEP's research publication(s) for reflecting on your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
GPR	0%	0%	44%	44%	12%	2.7	ΕO
GPK	(n=0)	(n=0)	(n=22)	(n=22)	(n=6)	3.7 50	
DPR	0%	0%	22%	78%	0%	3.8	9
DPK	(n=0)	(n=0)	(n=2)	(n=7)	(n=0)	5.0	9
SPR	0%	0%	33%	50%	17%	3.8	6
SPK	(n=0)	(n=0)	(n=2)	(n=3)	(n=1)	5.0	0
Advison	0%	0%	11%	56%	33%	4.2 [‡]	9
Advisory	(n=0)	(n=0)	(n=1)	(n=5)	(n=3)	4.2	9

[†]Indicates notable trend. Statistical significance testing was not conducted due to insufficient response rates.

Exhibit 30. In the past year, how useful have you found CEP's research publication(s) for improving your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
CDD	0%	2%	59%	29%	10%	2 5	40
GPR	(n=0)	(n=1)	(n=29)	(n=14)	(n=5)	3.5	5 49
DDD	0%	0%	33%	67%	0%	3.7	0
DPR	(n=0)	(n=0)	(n=3)	(n=6)	(n=0)	5.7	9
CDD	0%	0%	50%	50%	0%	2.5	
SPR	(n=0)	(n=0)	(n=3)	(n=3)	(n=0)	3.5	6
A duisom	0%	0%	33%	33%	33%	4.0	0
Advisory	(n=0)	(n=0)	(n=3)	(n=3)	(n=3)	4.0	9



Exhibit 31. In the past year, have you used any of CEP's writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?

	Yes	No	Don't know/ Not applicable	n
GPR	40%	54%	6%	50
GPK	(n=20)	(n=27)	(n=3)	30
DPR	44%	44%	11%	9
DPK	(n=4)	(n=4)	(n=1)	9
SPR	17%	83%	0%	6
3PK	(n=1)	(n=5)	(n=0)	0
Advison	33%	33%	33%	9
Advisory	(n=3)	(n=3)	(n=3)	9

Exhibit 32. How strongly do you associate CEP with the following statements? CEP is...

GPR 0% 0% 0% 4% 18% 36% 39% 4% 6.2 56 (n=0) (n=0) (n=0) (n=0) (n=10) (n=20) (n=20) (n=22) (n=2) (n=54) 56 (n=0) 0% 8% 0% 0% 8% 42% 42% 0% 6.0 1.6	
(n=0) (n=0) (n=2) (n=10) (n=20) (n=22) (n=2) (n=54)	
0% 8% 0% 0% 8% 42% 42% 0% 6.0	
DPR 12	
Engaged in (n=0) (n=1) (n=0) (n=1) (n=5) (n=5) (n=0) (n=12)	ngaged in
rigorous work	gorous work
(n=0) $(n=0)$ $(n=0)$ $(n=1)$ $(n=0)$ $(n=0)$ $(n=5)$ $(n=0)$	
Advisory (2) (3) (4) (4) (6) (7) (6) (7) (6) (7)	
Advisory $(n=0)$ $(n=1)$ $(n=0)$ $(n=1)$ $(n=2)$ $(n=6)$ $(n=0)$ $(n=10)$	
GPR 0% 0% 0% 2% 9% 43% 43% 4% 6.3	
(n=0) $(n=0)$ $(n=1)$ $(n=5)$ $(n=24)$ $(n=24)$ $(n=2)$ $(n=54)$	
An expert in the DPR 0% 8% 0% 0% 0% 8% 83% 0% 6.5	
(n=0) $(n=0)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=1)$ $(n=10)$ $(n=10)$	•
field of philanthropy SPR 0% 0% 0% 0% 0% 17% 83% 0% 6.8 6	
philanthropy SPR $(n=0)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=1)$ $(n=5)$ $(n=0)$ $(n=6)$	шанинору
0% 0% 0% 10% 20% 70% 0% 6.6	
Advisory $(n=0)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=1)$ $(n=2)$ $(n=7)$ $(n=0)$ $(n=10)$	
GBB 0% 0% 2% 2% 16% 50% 21% 9% 6.0 _{5.0}	
GPR $(n=0)$ $(n=1)$ $(n=1)$ $(n=9)$ $(n=28)$ $(n=12)$ $(n=5)$ $(n=51)$	
Focused on the DDD 0% 8% 0% 0% 0% 58% 25% 8% 5.9	ocused on the
most important $(n=0)$ $(n=1)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=7)$ $(n=3)$ $(n=1)$ $(n=11)$	
issues in 0% 0% 0% 0% 17% 33% 50% 0% 63	•
philanthropy SPR $(n=0)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=1)$ $(n=2)$ $(n=3)$ $(n=0)$ $(n=6)$	nilanthropy
0% 0% 0% 0% 30% 40% 40% 0% 6.2	
Advisory $(n=0)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=0)$ $(n=2)$ $(n=4)$ $(n=4)$ $(n=0)$ $(n=10)$	



		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ¹	Total n
	CDD	0%	0%	0%	0%	6%	46%	46%	4%	6.4	
	GPR	(n=0)	(n=0)	(n=0)	(n=0)	(n=3)	(n=25)	(n=25)	(n=2)	(n=53)	55
	DDD	0%	8%	0%	0%	0%	33%	58%	0%	6.3	10
Twisted	DPR	(n=0)	(n=1)	(n=0)	(n=0)	(n=0)	(n=4)	(n=7)	(n=0)	(n=12)	12
Trusted	SPR	0%	0%	0%	0%	17%	0%	83%	0%	6.7	6
	SPK	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=0)	(n=5)	(n=0)	(n=6)	6
	Advison	0%	0%	10%	0%	0%	30%	60%	0%	6.3	10
	Advisory	(n=0)	(n=0)	(n=1)	(n=0)	(n=0)	(n=3)	(n=6)	(n=0)	(n=10)	10
	GPR	0%	0%	0%	7%	20%	36%	29%	9%	5.9	56
	GFK	(n=0)	(n=0)	(n=0)	(n=4)	(n=11)	(n=20)	(n=16)	(n=5)	(n=51)	
Influential on	DPR	0%	0%	8%	0%	17%	33%	42%	0%	6.0	12
foundation	DFK	(n=0)	(n=0)	(n=1)	(n=0)	(n=2)	(n=4)	(n=5)	(n=0)	(n=12)	
practice and	SPR	0%	0%	0%	0%	33%	17%	50%	0%	6.2	6
effectiveness	JF IX	(n=0)	(n=0)	(n=0)	(n=0)	(n=2)	(n=1)	(n=3)	(n=0)	(n=6)	
	Advisory	0%	0%	0%	0%	20%	20%	60%	0%	6.4	10
	Advisory	(n=0)	(n=0)	(n=0)	(n=0)	(n=2)	(n=2)	(n=6)	(n=0)	(n=10)	10
	GPR	0%	2%	0%	7%	30%	39%	9%	13%	5.5	56
	GFK	(n=0)	(n=1)	(n=0)	(n=4)	(n=17)	(n=22)	(n=5)	(n=7)	(n=49)	30
	DPR	0%	8%	0%	0%	33%	25%	25%	8%	5.6	12
Innovativo	DFN	(n=0)	(n=1)	(n=0)	(n=0)	(n=4)	(n=3)	(n=3)	(n=1)	(n=11)	12
Imovative	Innovative SPR	0%	0%	17%	17%	17%	17%	33%	0%	5.3	6
		(n=0)	(n=0)	(n=1)	(n=1)	(n=1)	(n=1)	(n=2)	(n=0)	(n=6)	U
	Advisor	0%	0%	0%	20%	20%	30%	20%	10%	5.6	10
	Advisory	(n=0)	(n=0)	(n=0)	(n=2)	(n=2)	(n=3)	(n=2)	(n=1)	(n=9)	10

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

General Impressions of Your Most Recent CEP Engagement

Exhibit 33. How satisfied were you with your recent GPR, DPR, SPR, or Advisory experience overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
GPR	0%	0%	2%	2%	7%	36%	53%	6.4	55
GPK	(n=0)	(n=0)	(n=1)	(n=1)	(n=4)	(n=20)	(n=29)	0.4	55
DPR	0%	0%	0%	0%	8%	25%	67%	6.6	12
DPK	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=8)	0.0	12
CDD	0%	0%	17%	0%	0%	33%	50%	6.0	-
SPR	(n=0)	(n=0)	(n=1)	(n=0)	(n=0)	(n=2)	(n=3)	6.0	6
Advison	0%	10%	0%	0%	10%	40%	40%	ΕO	10
Advisory	(n=0)	(n=1)	(n=0)	(n=0)	(n=1)	(n=4)	(n=4)	5.9	10



Exhibit 34. How responsive was staff from CEP to questions your foundation had during your recent GPR, DPR, SPR, or Advisory process?

	Not at all responsive (1)	(2)	(3)	(4)	(5)	(6)	Very responsive (7)	Mean	n
CDD	0%	0%	0%	2%	0%	11%	87%	6.0	- Γ1
GPR	(n=0)	(n=0)	(n=0)	(n=1)	(n=0)	(n=6)	(n=47)	6.8	54
DDD	0%	0%	0%	0%	8%	0%	92%	6.0	12
DPR	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=0)	(n=11)	6.8	12
CDD	0%	0%	0%	0%	17%	17%	67%	6 5	6
SPR	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=1)	(n=4)	6.5	6
Advison	0%	0%	0%	0%	10%	10%	80%	6.7	10
Advisory	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=1)	(n=8)	0.7	10

About Your Most Recent Report and Services

Exhibit 35. How satisfied are you with the extent to which the CEP staff's interpretation of the results of your recent GPR, DPR, or SPR was meaningful for guiding reflection on your foundation's performance overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
CDD	0%	0%	0%	6%	11%	43%	41%		
GPR	(n=0)	(n=0)	(n=0)	(n=3)	(n=6)	(n=23)	(n=22)	6.2	54
DDD	0%	0%	0%	0%	25%	25%	50%	6.2	12
DPR	(n=0)	(n=0)	(n=0)	(n=0)	(n=3)	(n=3)	(n=6)	6.3	12
SPR	0%	0%	0%	0%	33%	17%	50%	6.2	6
3FK	(n=0)	(n=0)	(n=0)	(n=0)	(n=2)	(n=1)	(n=3)	0.2	
Advisory	-	-	-	-	-	-	-	-	-



Exhibit 36. Please indicate which of the following services/features you used as part of your recent GPR, DPR, or SPR engagement. For each service/feature that was part of your engagement, please rate its helpfulness in deepening your foundation's ability to use the GPR, DPR, or SPR to reflect on its performance.

CEP Service		Not at all Helpful (1)	(2)	(3)	(4)	(5)	(6)	Very Helpful (7)	Not applicable/ Did not use	Mean ¹	Total n
	GPR	0%	2%	0%	6%	13%	29%	48%	4%	6.2	56
	UF IX	(n=0)	(n=1)	(n=0)	(n=3)	(n=7)	(n=16)	(n=27)	(n=2)	(n=54)	
Memorandum of Key Findings and	DPR	0%	0%	0%	0%	8%	17%	75%	0%	6.7	12
Recommendations/	——————————————————————————————————————	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=2)	(n=9)	(n=0)	(n=12)	
Executive Summary	SPR	0%	0%	0%	33%	17%	0%	50%	0%	5.7	6
,		(n=0)	(n=0)	(n=0)	(n=2)	(n=1)	(n=0)	(n=3)	(n=0)	(n=6)	
	Advisory	-	-	-	-	-	-	-	-	-	-
	GPR	0%	0%	2%	4%	16%	25%	39%	14%	6.1	56
		(n=0)	(n=0)	(n=1)	(n=2)	(n=9)	(n=14)	(n=22)	(n=8)	(n=48)	
Interactive online	DPR	0%	0%	0%	0%	25%	25%	33%	17%	6.1	12
report	——————————————————————————————————————	(n=0)	(n=0)	(n=0)	(n=0)	(n=3)	(n=3)	(n=4)	(n=2)	(n=10)	
report	SPR	0%	0%	0%	0%	0%	17%	50%	33%	6.8	6
	JI IX	(n=0)	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=2)	(n=4)	
	Advisory	-	-	-	-	-	-	-	-	-	-
	GPR	0%	0%	0%	4%	16%	25%	45%	11%	6.2	56
		(n=0)	(n=0)	(n=0)	(n=2)	(n=9)	(n=14)	(n=25)	(n=6)	(n=50)	
Segmentation of the data by subgroup	DPR	0%	0%	0%	8%	25%	17%	50%	0%	6.1	12
(e.g., program area,	——————————————————————————————————————	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=2)	(n=6)	(n=0)	(n=12)	
department)	SPR	0%	0%	0%	0%	0%	17%	83%	0%	6.8	6
,	JI IX	(n=0)	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=5)	(n=0)	(n=6)	
	Advisory	-	-	-	-	-	-	-	-	-	-
	GPR	0%	0%	0%	4%	14%	30%	48%	4%	6.3	56
0		(n=0)	(n=0)	(n=0)	(n=2)	(n=8)	(n=17)	(n=27)	(n=2)	(n=54)	
Open-ended respondent	DPR	0%	0%	0%	8%	8%	42%	42%	0%	6.2	12
comments and		(n=0)	(n=0)	(n=0)	(n=1)	(n=1)	(n=5)	(n=5)	(n=0)	(n=12)	
suggestions	SPR	0%	0%	0%	33%	17%	17%	33%	0%	5.5	6
33		(n=0)	(n=0)	(n=0)	(n=2)	(n=1)	(n=1)	(n=2)	(n=0)	(n=6)	
	Advisory	-	-	-	-	-	-	-	-	-	-
	GPR	0%	0%	0%	7%	14%	29%	46%	4%	6.2	56
		(n=0)	(n=0)	(n=0)	(n=4)	(n=8)	(n=16)	(n=26)	(n=2)	(n=54)	
An initial call with	DPR	0%	0%	0%	8%	0%	17%	67%	8%	6.6	12
CEP staff to discuss		(n=0)	(n=0)	(n=0)	(n=1)	(n=0)	(n=2)	(n=8)	(n=1)	(n=11)	
your draft report	SPR	OR 0% 0%		17%	0%	17%	50%	17%	6.2	6	
		(n=0)	(n=0)	(n=0)	(n=1)	(n=0)	(n=1)	(n=3)	(n=1)	(n=5)	
	Advisory	-	-	-	-	-	-	-	_	-	

Table continues on the next page.



CEP Service		Not at all Helpful (1)	(2)	(3)	(4)	(5)	(6)	Very Helpful (7)	Not applicable/ Did not use	Mean ¹	Total n
	GPR	0%	0%	0%	0%	7%	23%	39%	30%	6.5	56
	GPK	(n=0)	(n=0)	(n=0)	(n=0)	(n=4)	(n=13)	(n=22)	(n=17)	(n=39)	50
Additional analyses	DPR	0%	0%	0%	0%	17%	25%	42%	17%	6.3	12
after receiving your	DPK	(n=0)	(n=0)	(n=0)	(n=0)	(n=2)	(n=3)	(n=5)	(n=2)	(n=10)	12
draft report	SPR	0%	0%	0%	0%	17%	33%	33%	17%	6.2	6
	3FN	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=2)	(n=2)	(n=1)	(n=5)	0
	Advisory	-	-	-	-	-	-	-	-	-	-
	GPR	0%	0%	0%	11%	14%	16%	9%	50%	5.5	56
	GPK	(n=0)	(n=0)	(n=0)	(n=6)	(n=8)	(n=9)	(n=5)	(n=28)	(n=28)	30
CEP research	DPR	0%	0%	0%	8%	17%	0%	17%	58%	5.6	12
publications relevant	DPK	(n=0)	(n=0)	(n=0)	(n=1)	(n=2)	(n=0)	(n=2)	(n=7)	(n=5)	12
to your results	SPR	0%	0%	0%	33%	17%	0%	17%	33%	5.0	6
	Jrk	(n=0)	(n=0)	(n=0)	(n=2)	(n=1)	(n=0)	(n=1)	(n=2)	(n=4)	· ·
	Advisory	-	-	-	-	-	-	-	-	-	-

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 37. How well did CEP's work reflect a clear understanding of the specific organizational context of your foundation?

	Not at all well (1)	(2)	(3)	(4)	(5)	(6)	Extremely well (7)	Mean	n
GPR	0%	4%	0%	7%	22%	33%	33%	5.8	54
GFK	(n=0)	(n=2)	(n=0)	(n=4)	(n=12)	(n=18)	(n=18)	5.0	J 4
DPR	0%	0%	0%	0%	8%	50%	42%	6.3	12
DPK	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=6)	(n=5)	0.5	12
CDD	0%	0%	0%	17%	17%	17%	50%	6.0	6
SPR	(n=0)	(n=0)	(n=0)	(n=1)	(n=1)	(n=1)	(n=3)	6.0	6
Advisory	-	-	-	-	-	-	-	-	-

Exhibit 38. In general, how would you rate the quality of CEP's in-person presentation?

	Poor (1)	(2)	(3)	(4)	(5)	(6)	Excellent (7)	Not applicable	Mean ¹	Total n
GPR	0%	0%	0%	2%	6%	15%	59%	19%	6.6	54
DPR	(n=0) 0% (n=0)	(n=0) 0% (n=0)	(n=0) 0% (n=0)	(n=1) 8% (n=1)	(n=3) 0% (n=0)	(n=8) 8% (n=1)	(n=32) 58% (n=7)	(n=10) 25% (n=3)	(n=44) 6.6 (n=9)	12
SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=2)	17% (n=1)	17% (n=1)	33% (n=2)	5.8 (n=4)	6
Advisory	-	-	-	-	-	-	-	-	-	-

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.



Creating Change with Results

Exhibit 39. Considering the aspects of your work identified in the table below, please indicate the degree to which use of GPR, DPR, or SPR results affected change in your foundation's decisionmaking or practices. (Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)

Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ¹	Total n
	GPR	15%	7%	61%	15%	2%	0%	2.1	54
	OI IX	(n=8)	(n=4)	(n=33)	(n=8)	(n=1)	(n=0)	(n=45)	
Communications with grantees,	DPR	17%	8%	25%	42%	8%	0%	2.4	12
donors, and/or staff (e.g., clarity,		(n=2)	(n=1)	(n=3)	(n=5)	(n=1)	(n=0)	(n=9)	
methods of communication)	SPR	17%	0%	0%	83%	0%	0%	3.0	6
	JI IX	(n=1)	(n=0)	(n=0)	(n=5)	(n=0)	(n=0)	(n=5)	
	Advisory	-	-	-	-	-	-	-	_
	GPR	28%	17%	46%	7%	2%	0%	1.9	54
	GFK	(n=15)	(n=9)	(n=25)	(n=4)	(n=1)	(n=0)	(n=38)	J 4
Grantmaking processes (e.g.,	DPR	17%	8%	8%	0%	0%	67%	1.5	12
selection, reporting and	DFN	(n=2)	(n=1)	(n=1)	(n=0)	(n=0)	(n=8)	(n=2)	12
evaluation processes)	SPR	17%	0%	67%	0%	0%	17%	2.0	6
	3FN	(n=1)	(n=0)	(n=4)	(n=0)	(n=0)	(n=1)	(n=4)	
	Advisory	-	-	-	-	-	-	-	-
	CDD	32%	41%	20%	4%	4%	0%	1.4	54
	GPR	(n=17)	(n=22)	(n=11)	(n=2)	(n=2)	(n=0)	(n=35)	5 4
Construction and the same (a.g. since	DPR	8%	8%	17%	0%	0%	67%	1.7	12
Grantmaking patterns (e.g., size and length of grants)	DFN	(n=1)	(n=1)	(n=2)	(n=0)	(n=0)	(n=8)	(n=3)	12
and length of grants)	SPR	0%	67%	17%	0%	0%	17%	1.2	6
	JFN	(n=0)	(n=4)	(n=1)	(n=0)	(n=0)	(n=1)	(n=5)	<u> </u>
	Advisory	-	-	-	-	-	-	-	-
	GPR	26%	48%	13%	6%	2%	6%	1.4	ГΛ
	GPK	(n=14)	(n=26)	(n=7)	(n=3)	(n=1)	(n=3)	(n=36)	54
Foundation strategy (e.g., what it E is you're trying to do, focus)	DDD	17%	0%	58%	0%	8%	17%	2.0 [‡]	10
	DPK	(n=2)	(n=0)	(n=7)	(n=0)	(n=1)	(n=2)	(n=7)	12
	CDD	0%	67%	33%	0%	0%	0%	1.3	6
	SPR	(n=0)	(n=4)	(n=2)	(n=0)	(n=0)	(n=0)	(n=6)	O
	Advisory	-	-	-	-	-	-	-	-

Table continues on the next page.

¹The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.

[†]Indicates notable trend. Statistical significance testing was not conducted due to insufficient response rates.



Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change		Mean ¹	Total n
	GPR	20%	19%	50%	6%	6%	0%	1.8	54
Provision of assistance to	UFIX	(n=11)	(n=10)	(n=27)	(n=3)	(n=3)	(n=0)	(n=40)	J 4
grantees beyond "the check"	DPR	25%	0%	17%	%0	0%	58%	2.0	12
(e.g., management assistance, field-related assistance,	DI IX	(n=3)	(n=0)	(n=2)	(n=0)	(n=0)	(n=7)	(n=2)	12
assistance securing funding	SPR	0%	33%	33%	17%	0%	17%	1.8	6
from other sources)	JI IX	(n=0)	(n=2)	(n=2)	(n=1)	(n=0)	(n=1)	(n=5)	
,	Advisory	-	-	-	-	-	-	-	-
	CDD	11%	61%	19%	2%	4%	4%	1.3	- 1
	GPR	(n=6)	(n=33)	(n=10)	(n=1)	(n=2)	(n=2)	(n=44)	54
	DDD	25%	58%	17%	0%	0%	0%	1.2	12
Staffing levels	DPR	(n=3)	(n=7)	(n=2)	(n=0)	(n=0)	(n=0)	(n=9)	12
	CDD	0%	50%	33%	17%	0%	0%	1.7	c
	SPR	(n=0)	(n=3)	(n=2)	(n=1)	(n=0)	(n=0)	(n=6)	6
	Advisory	-	-	-	-	-	-	-	-
	CDD	23%	21%	45%	8%	2%	2%	1.8	53
	GPR	(n=12)	(n=11)	(n=24)	(n=4)	(n=1)	(n=1)	(n=39)	55
Assistant and a second and a single state	DPR	25%	0%	8%	0%	0%	67%	2.0	12
Attitudes toward work with grantees	DPK	(n=3)	(n=0)	(n=1)	(n=0)	(n=0)	(n=8)	(n=1)	12
grantees	SPR	17%	0%	67%	0%	0%	17%	2.0	6
	3PK	(n=1)	(n=0)	(n=4)	(n=0)	(n=0)	(n=1)	(n=4)	6
	Advisory	-	-	-	-	-	-	-	-
	GPR	11%	22%	7%	0%	0%	59%	1.3	54
	GPK	(n=6)	(n=12)	(n=4)	(n=0)	(n=0)	(n=32)	(n=16)	34
Attitudes toward would with	DPR	8%	17%	33%	33%	8%	0%	2.2**	12
Attitudes toward work with donors	DF N	(n=1)	(n=2)	(n=4)	(n=4)	(n=1)	(n=0)	(n=10)	12
donors	SPR	0%	0%	17%	0%	0%	83%	2.0	6
	3FN	(n=0)	(n=0)	(n=1)	(n=0)	(n=0)	(n=5)	(n=1)	<u> </u>
	Advisory	-	-	-	-	-	-	-	-
	GPR	22%	50%	15%	0%	2%	11%	1.2	54
Allocation of resources for a particular program area or department		(n=12)	(n=27)	(n=8)	(n=0)	(n=1)	(n=6)	(n=35)	J -1
	DPR	17%	25%	33%	0%	0%	25%	1.6	12
		(n=2)	(n=3)	(n=4)	(n=0)	(n=0)	(n=3)	(n=7)	14
	SPR	17%	17%	33%	17%	0%	17%	2.0 [‡]	6
		(n=1)	(n=1)	(n=2)	(n=1)	(n=0)	(n=1)	(n=4)	
	Advisory	-	-	-	-	-	-	-	_

Table continues on the next page.

¹The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.

^{**} DPR statistically significantly higher than GPR p < 0.01

[‡]Indicates notable trend. Statistical significance testing was not conducted due to insufficient response rates.



		Too Soon	No Change	Some Change	Significant Change	Evaluation of Previous			Total
Foundation Functions		to Tell	(1)	(2)	(3)	Change	applicable	Mean ¹	n
	GPR	28%	28%	19%	0%	0%	26%	1.4	54
	GPK	(n=15)	(n=15)	(n=10)	(n=0)	(n=0)	(n=14)	(n=25)	34
Addressing performance of a	DPR	8%	8%	25%	8%	0%	50%	2.0 [‡]	12
particular program officer/other	DPK	(n=1)	(n=1)	(n=3)	(n=1)	(n=0)	(n=6)	(n=5)	12
staff member	SPR	0%	0%	0%	50%	17%	33%	3.0	6
	SPK	(n=0)	(n=0)	(n=0)	(n=3)	(n=1)	(n=2)	(n=3)	6
	Advisory	-	-	-	-	-	-	-	-
	CDD	24%	33%	24%	4%	0%	15%	1.5	
	GPR	(n=13)	(n=18)	(n=13)	(n=2)	(n=0)	(n=8)	(n=33)	54
Addressing performance of or	DDD	17%	0%	42%	25%	0%	17%	2.4 [‡]	12
approach to a particular	DPR	(n=2)	(n=0)	(n=5)	(n=3)	(n=0)	(n=2)	(n=8)	12
program area or department	CDD	0%	17%	50%	17%	0%	17%	2.0	
	SPR	(n=0)	(n=1)	(n=3)	(n=1)	(n=0)	(n=1)	(n=5)	6
	Advisory	-	-	-	-	-	-	-	_
	CDD	14%	5%	43%	14%	5%	19%	2.2	21
	GPR	(n=3)	(n=1)	(n=9)	(n=3)	(n=1)	(n=4)	(n=13)	21
	DDD	0%	0%	0%	25%	25%	50%	3.0	4
Other	DPR	(n=0)	(n=0)	(n=0)	(n=1)	(n=1)	(n=2)	(n=1)	4
	CDD	0%	0%	0%	0%	0%	0%	0.0	0
	SPR	(n=0)	(n=0)	(n=0)	(n=0)	(n=0)	(n=0)	(n=0)	0
	Advisory	-	-	-	-	-	-	-	-

¹The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.

Exhibit 40. Percent of respondents who reported "Some Change", "Significant Change", and "Some Change" or "Significant Change" in at least one of the eleven foundation function areas detailed in Exhibit 30.

	Reported "Some Change" in at least one foundation function area	Change" in at least one	Reported "Some Change" or "Significant Change" in at least one foundation function area	Total n
GPR	88% (n=49)	34% (n=19)	89% (n=50)	56
DPR	92% (n=11)	58% (n=7)	92% (n=11)	12
SPR	83% (n=5)	83% (n=5)	83% (n=5)	6
Advisory	-	-	-	-

[‡]Indicates notable trend. Statistical significance testing was not conducted due to insufficient response rates.



Background and the Overall Experience

Exhibit 41. Relative to other processes your foundation has undertaken to assess its overall effectiveness as a grantmaking organization, how useful was your recent GPR, DPR, or SPR?

	Much less useful (1)	(2)	(3)	(4)	(5)	(6)	Much more useful (7)	Don't know	Not applicable (no other assessment processes undertaken)	Mean ¹	Total n
GPR	0%	0%	4%	4%	19%	25%	17%	0%	31%	5.7	52
GFK	(n=0)	(n=0)	(n=2)	(n=2)	(n=10)	(n=13)	(n=9)	(n=0)	(n=16)	(n=36)	32
DPR	0%	0%	0%	0%	8%	25%	17%	0%	50%	6.2	12
DPK	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=2)	(n=0)	(n=6)	(n=6)	12
CDD	0%	0%	0%	0%	17%	50%	33%	0%	0%	6.2	6
SPR	(n=0)	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=2)	(n=0)	(n=0)	(n=6)	6
Advisory	-	-	-	-	-	-	-	-	-	-	-

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 42. Does your foundation intend to commission the GPR, DPR, or SPR again in the future?

	Yes	No	Don't know	n
CDD	69%	0%	32%	54
GPR	(n=37)	(n=0)	(n=17)	34
DDD	75%	8%	17%	12
DPR	(n=9)	(n=1)	(n=2)	12
CDD	100%	0%	0%	6
SPR	(n=6)	(n=0)	(n=0)	6
Advisory	-	-	-	-

Exhibit 43. Would you recommend the GPR, DPR, SPR, or CEP's Advisory Services to a colleague foundation?

	Yes	No	n	
GPR	98%	2%	54	
GPK	(n=53)	(n=1)	34	
DDD	100%	0%	12	
DPR	(n=12)	(n=0)	12	
CDD	100%	0%	c	
SPR	(n=6)	(n=0)	6	
A divisors	89%	11%	0	
Advisory	(n=8)	(n=1)	9	



Exhibit 44. How valuable was your recent GPR, DPR, SPR, or Advisory Service relative to its cost?

	Very poor value for the cost (1)	(2)	(3)	(4)	(5)	(6)	Excellent value for the cost (7)	Mean	n
GPR	0%	0%	4%	13%	20%	37%	26%	5.7	54
	(n=0)	(n=0)	(n=2)	(n=7)	(n=11)	(n=20)	(n=14)	5.7	34
DDD	0%	0%	0%	8%	25%	42%	25%	го	10
DPR	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=5)	(n=3)	5.8	12
CDD	0%	0%	0%	17%	0%	33%	50%	6.3	c
SPR	(n=0)	(n=0)	(n=0)	(n=1)	(n=0)	(n=2)	(n=3)	6.2	6
A 1 .	0%	0%	0%	33%	0%	22%	44%	го	0
Advisory	(n=0)	(n=0)	(n=0)	(n=3)	(n=0)	(n=2)	(n=4)	5.8	9



V. All Tool Users 2016 vs. 2018 Analysis Summary

Statistical analyses revealed no statistically significant differences in the All Tool Users 2016 vs. 2018 comparison

General Impressions of CEP

Exhibit 45. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
2016	0%	0%	11%	89%	46
2016	(n=0)	(n=0)	(n=5)	(n=41)	40
2010	0%	0%	37%	64%	QΓ
2018	(n=0)	(n=0)	(n=31)	(n=54)	85

Exhibit 46. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

		CEP has a somewhat	CEP has a somewhat				
	CEP has a poor	negative reputation	positive reputation	CEP has an excellent			
	reputation among	among leaders of	among leaders of	reputation among			
	leaders of grantmaking	grantmaking	grantmaking	leaders of grantmaking	Don't		
	organizations	organizations	organizations	organizations	know	Mean ¹	n
2016	0%	0%	24%	74%	2%	3.8	46
2010	(n=0)	(n=0)	(n=11)	(n=34)	(n=1)	(n=45)	40
2010	0%	0%	17%	74%	10%	3.8	84
2018	(n=0)	(n=0)	(n=14)	(n=62)	(n=8)	(n=76)	04

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

Exhibit 47. In the past year, have you or has someone in your organization read a CEP research publication (e.g. Staying Connected: How Five Foundations Understand Those they Seek to Help; Relationships Matter: Program Officers, Grantees, and the Keys to Success; Benchmarking Program Officer Roles and Responsibilities; A Date Certain: Lessons from Limited Life Foundations; The Future of Foundation Philanthropy: The CEO Perspective; Benchmarking Foundation Evaluation Practices, etc.)?

	Yes	No	Don't know	n
2016	94%	4%	2%	16
2016	(n=43)	(n=2)	(n=1)	46
2010	88%	7%	5%	0.4
2018	(n=74)	(n=6)	(n=4)	84



Exhibit 48. In the past year, how useful have you found CEP's research publication(s) for reflecting on your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0%	0%	37%	49%	14%	3.8	43
2010	(n=0)	(n=0)	(n=16)	(n=21)	(n=6)	5.0	43
2018	0%	0%	37%	50%	14%	3.8	74
2010	(n=0)	(n=0)	(n=27)	(n=37)	(n=10)	5.0	/4

Exhibit 49. In the past year, how useful have you found CEP's research publication(s) for improving your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0%	9%	56%	21%	14%	3.4	43
2010	(n=0)	(n=4)	(n=24)	(n=9)	(n=6)	3.4	43
2010	0%	1%	52%	36%	11%	2.6	72
2018	(n=0)	(n=1)	(n=38)	(n=26)	(n=8)	3.6	73

Exhibit 50. In the past year, have you used any of CEP's writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?

	Yes	No	Don't know/ Not applicable	n
2016	44%	50%	7%	46
2016	(n=20)	(n=23)	(n=3)	40
2018	38%	53%	10%	74
2010	(n=28)	(n=39)	(n=7)	/4

General Impressions of Your Most Recent CEP Engagement

Exhibit 51. How satisfied were you with your recent GPR, DPR, SPR, or Advisory experience overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0%	0%	0%	4%	11%	30%	54%	6.4	46
	(n=0)	(n=0)	(n=0)	(n=2)	(n=5)	(n=14)	(n=25)		
2010	0%	1%	2%	1%	7%	35%	53%	6.3	00
2018	(n=0)	(n=1)	(n=2)	(n=1)	(n=6)	(n=29)	(n=44)	0.5	83



Exhibit 52. How responsive was staff from CEP to questions your foundation had during your recent GPR, DPR, SPR, or Advisory process?

	Not at all responsive (1)	(2)	(3)	(4)	(5)	(6)	Very responsive (7)	Mean	n
2016	0%	0%	0%	0%	0%	20%	80%	6.8	46
2016	(n=0)	(n=0)	(n=0)	(n=0)	(n=0)	(n=9)	(n=37)	0.0	40
2010	0%	0%	0%	1%	4%	10%	85%	6.8	02
2018	(n=0)	(n=0)	(n=0)	(n=1)	(n=3)	(n=8)	(n=70)	0.8	82

About Your Most Recent Report and Services

Exhibit 53. How satisfied are you with the extent to which the CEP staff's interpretation of the results of your recent GPR, DPR, or SPR was meaningful for guiding reflection on your foundation's performance overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0%	0%	0%	5%	19%	48%	29%	6.0	42
2016	(n=0)	(n=0)	(n=0)	(n=2)	(n=8)	(n=20)	(n=12)	0.0	42
2010	0%	0%	0%	4%	15%	38%	43%	6.2	72
2018	(n=0)	(n=0)	(n=0)	(n=3)	(n=11)	(n=27)	(n=31)	6.2	72

Exhibit 54. Please indicate which of the following services/features you used as part of your recent GPR, DPR, or SPR engagement. For each service/feature that was part of your engagement, please rate its helpfulness in deepening your foundation's ability to use the GPR, DPR, or SPR to reflect on its performance.

CEP Service		Not at all helpful (1)	(2)	(3)	(4)	(5)	(6)	Very helpful (7)	Not applicable/ Did not use	Mean ¹	Total n
Memorandum of	2016	0%	2%	2%	5%	15%	22%	54%	0%	6.1	41
Key Findings and Recommendations/	2018	(n=0) 0%	(n=1) 1%	(n=1) 0%	(n=2) 7%	(n=6) 12%	(n=9) 24%	(n=22) 53%	(n=0) 3%	(n=41) 6.2	 74
Executive Summary		(n=0) 0%	(n=1) 0%	(n=0) 7%	(n=5) 0%	(n=9) 12%	(n=18) 31%	(n=39) 50%	(n=2) 0%	(n=72) 6.2	42
Interactive online	2016	(n=0)	(n=0)	(n=3)	(n=0)	(n=5)	(n=13)	(n=21)	(n=0)	(n=42)	42
report	2018	0% (n=0)	0% (n=0)	1% (n=1)	3% (n=2)	16% (n=12)	24% (n=18)	39% (n=29)	16% (n=12)	6.2 (n=62)	74
Segmentation of the data by subgroup	2016	0% (n=0)	0% (n=0)	8% (n=3)	5% (n=2)	10% (n=4)	28% (n=11)	50% (n=20)	0% (n=0)	6.1 (n=40)	40
(e.g., program area, department)	2018	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=3)	16% (n=12)	23% (n=17)	49% (n=36)	8% (n=6)	6.3 (n=68)	74

Table continues on next page.



CEP Service		Not at all helpful (1)	(2)	(3)	(4)	(5)	(6)	Very helpful (7)	Not applicable/ Did not use	Mean ¹	Total n
Open-ended	2016	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=2)	7% (n=3)	24% (n=10)	63% (n=26)	0% (n=0)	6.5 (n=41)	41
respondent comments and suggestions ²	2018	0% (n=0)	0% (n=0)	0% (n=0)	7% (n=5)	14% (n=10)	31% (n=23)	46% (n=34)	3% (n=2)	6.2 (n=72)	74

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 55. How well did CEP's work reflect a clear understanding of the specific organizational context of your foundation?

	Not at all well (1)	(2)	(3)	(4)	(5)	(6)	Extremely well (7)	Mean	n
2016	0%	0%	2%	7%	33%	31%	26%	5.7	42
2010	(n=0)	(n=0)	(n=1)	(n=3)	(n=14)	(n=13)	(n=11)	3.7	42
2010	0%	3%	0%	7%	19%	35%	36%	Γ0	72
2018	(n=0)	(n=2)	(n=0)	(n=5)	(n=14)	(n=25)	(n=26)	5.9	72

Exhibit 56. In general, how would you rate the quality of CEP's in-person presentation?

	Poor						Excellent	Not		Total
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	applicable	Mean ¹	n
2016	0%	0%	0%	5%	5%	17%	46%	27%	6.4	41
2010	(n=0)	(n=0)	(n=0)	(n=2)	(n=2)	(n=7)	(n=19)	(n=11)	(n=30)	41
2010	0%	0%	0%	3%	7%	14%	56%	21%	6.5	72
2018	(n=0)	(n=0)	(n=0)	(n=2)	(n=5)	(n=10)	(n=40)	(n=15)	(n=57)	72

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

² The 2016 survey question language is comparable to the 2018 language. 2016 language reads as: "Downloadable PDF of all respondent comments and suggestions"



Creating Change with Results

Exhibit 57. Considering the aspects of your work identified in the table below, please indicate the degree to which use of GPR, DPR, or SPR results affected change in your foundation's decisionmaking or practices. (Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)

Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)	Change (3)	Evaluation of Previous Change	Not applicable	Mean ¹	Total n
Communications with grantees,	2016	33%	7%	29%	26%	2%	2%	2.3	42
donors, and/or staff (e.g., clarity,		(n=14) 15%	(n=3) 7%	(n=12) 50%	(n=11) 25%	(n=1) 3%	(n=1) 0%	(n=26) 2.2	
methods of communication)	2018	(n=11)	(n=5)	(n=36)	(n=18)	(n=2)	(n=0)	(n=59)	72
		43%	14%	21%	10%	0%	12%	1.9	
Grantmaking processes (e.g.,	2016	(n=18)	(n=6)	(n=9)	(n=4)	(n=0)	(n=5)	(n=19)	42
selection, reporting and		25%	14%	42%	6%	1%	13%	1.9	
evaluation processes)	2018	(n=18)	(n=10)	(n=30)	(n=4)	(n=1)	(n=9)	(n=44)	72
	2016	31%	41%	7%	7%	2%	12%	1.4	42
Grantmaking patterns (e.g., size	2016	(n=13)	(n=17)	(n=3)	(n=3)	(n=1)	(n=5)	(n=23)	42
and length of grants)	2010	25%	38%	19%	3%	0%	15%	1.4	72
	2018	(n=18)	(n=27)	(n=14)	(n=2)	(n=0)	(n=11)	(n=43)	/2
	2016	31%	44%	10%	5%	5%	5%	1.4	39
Foundation strategy (e.g., what it	2010	(n=12)	(n=17)	(n=4)	(n=2)	(n=2)	(n=2)	(n=23)	39
is you're trying to do, focus)	2018	22%	42%	22%	4%	3%	7%	1.5	72
	2010	(n=16)	(n=30)	(n=16)	(n=3)	(n=2)	(n=5)	(n=49)	12
Provision of assistance to	2016	33%	26%	21%	12%	2%	5%	1.8	42
grantees beyond "the check"		(n=14)	(n=11)	(n=9)	(n=5)	(n=1)	(n=2)	(n=25)	<u>-</u>
(e.g., management assistance, field-related assistance, assistance securing funding	2018	19% (n=14)	17% (n=12)	43% (n=31)	6% (n=4)	4% (n=3)	11% (n=8)	1.8 (n=47)	72
from other sources)		29%	57%	7%	2%	0%	5%	1.2	
	2016	(n=12)	(n=24)	(n=3)	(n=1)	(n=0)	(n=2)	(n=28)	42
Staffing levels		13%	60%	19%	3%	3%	3%	1.3	
	2018	(n=9)	(n=43)	(n=14)	(n=2)	(n=2)	(n=2)	(n=59)	72
		35%	18%	33%	10%	0%	5%	1.9	
Attitudes toward work with	2016	(n=14)	(n=7)	(n=13)	(n=4)	(n=0)	(n=2)	(n=24)	40
grantees	2010	23%	16%	41%	6%	1%	14%	1.8	74
	2018	(n=16)	(n=11)	(n=29)	(n=4)	(n=1)	(n=10)	(n=44)	71
	2016	31%	17%	2%	2%	2%	45%	1.3	42
Attitudes toward work with	2016	(n=13)	(n=7)	(n=1)	(n=1)	(n=1)	(n=19)	(n=9)	42
donors	2018	10%	19%	13%	6%	1%	51%	1.6	72
	2010	(n=7)	(n=14)	(n=9)	(n=4)	(n=1)	(n=37)	(n=27)	72
Allocation of recourses for a	2016	29%	50%	7%	5%	0%	10%	1.3	42
Allocation of resources for a		(n=12)	(n=21)	(n=3)	(n=2)	(n=0)	(n=4)	(n=26)	⊣∠
particular program area or department	2018	21%	43%	19%	1%	1%	14%	1.4	72
,		(n=15)	(n=31)	(n=14)	(n=1)	(n=1)	(n=10)	(n=46)	



Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)		Evaluation of Previous Change		Mean ¹	Total n
Addressing performance of a	2016	31%	31%	17%	7%	0%	14%	1.6	42
particular program officer/other	2010	(n=13)	(n=13)	(n=7)	(n=3)	(n=0)	(n=6)	(n=23)	72
staff member	2018	22%	22%	18%	6%	1%	31%	1.6	72
stari member		(n=16)	(n=16)	(n=13)	(n=4)	(n=1)	(n=22)	(n=33)	12
A d durantina un aufauran an af au	2016	33%	29%	21%	10%	0%	7%	1.7	42
approach to a particular	2010	(n=14)	(n=12)	(n=9)	(n=4)	(n=0)	(n=3)	(n=25)	42
	2010	21%	26%	29%	8%	0%	15%	1.7	72
	2018	(n=15)	(n=19)	(n=21)	(n=6)	(n=0)	(n=11)	(n=46)	12

¹The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.

Background and the Overall Experience

Exhibit 58. Relative to other processes your foundation has undertaken to assess its overall effectiveness as a grantmaking organization, how useful was your recent GPR, DPR, or SPR?

	Much less useful						Much more useful	Don't	Not applicable (no other assessment processes		Total
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	know	undertaken)	Mean⁺	n
2016	0%	0%	2%	5%	27%	24%	29%	0%	12%	5.8	41
2010	(n=0)	(n=0)	(n=1)	(n=2)	(n=11)	(n=10)	(n=12)	(n=0)	(n=5)	(n=36)	4 1
2010	0%	0%	3%	3%	17%	27%	19%	0%	31%	5.8	70
2018	(n=0)	(n=0)	(n=2)	(n=2)	(n=12)	(n=19)	(n=13)	(n=0)	(n=22)	(n=48)	70

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 59. Does your foundation intend to commission the GPR, DPR, or SPR again in the future?

	Yes	No	Don't know	n
2016	69%	0%	31%	42
2016	(n=29)	(n=0)	(n=13)	42
2010	72%	1%	26%	72
2018	(n=52)	(n=1)	(n=19)	12

Exhibit 60. Would you recommend the GPR, DPR, SPR, or CEP's Advisory Services to a colleague foundation?

	Yes	No	n
2016	100%	0%	46
2016	(n=46)	(n=0)	40
2010	98%	3%	81
2018	(n=79)	(n=2)	91



Exhibit 61. How valuable was your recent GPR, DPR, SPR, or Advisory Service relative to its cost?

	Very poor value for the cost (1)	(2)	(3)	(4)	(5)	(6)	Excellent value for the cost (7)	Mean	n
2016	0%	2%	2%	4%	35%	35%	22%	5.6	16
2016	(n=0)	(n=1)	(n=1)	(n=2)	(n=16)	(n=16)	(n=10)		46
2010	0%	0%	3%	15%	17%	36%	30%	го	01
2018	(n=0)	(n=0)	(n=2)	(n=12)	(n=14)	(n=29)	(n=24)	5.8	81



VI. Stakeholders 2016 vs. 2018 Analysis Summary

Statistical analyses revealed no statistically significant differences in the Stakeholders 2016 vs. 2018 comparison.

General Impressions of CEP

Exhibit 62. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
2016	2%	14%	43%	41%	231
2016	(n=5)	(n=32)	(n=99)	(n=95)	231
2010	1%	11%	49%	40%	210
2018	(n=1)	(n=24)	(n=107)	(n=87)	219

Exhibit 63. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

		CEP has a somewhat	CEP has a somewhat				
	CEP has a poor	negative reputation	positive reputation	CEP has an excellent			
	reputation among	among leaders of	among leaders of	reputation among			
	leaders of grantmaking	grantmaking	grantmaking	leaders of grantmaking	Don't		
	organizations	organizations	organizations	organizations	know	Mean ¹	n
2016	0%	1%	34%	54%	12%	3.6	192
2016	(n=0)	(n=1)	(n=65)	(n=103)	(n=23)	(n=169)	192
2018	0%	1%	28%	55%	17%	3.6	100
	(n=0)	(n=2)	(n=52)	(n=103)	(n=31)	(n=157)	188

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

Exhibit 64. In the past year, have you or has someone in your organization read a CEP research publication (e.g. Staying Connected: How Five Foundations Understand Those they Seek to Help; Relationships Matter: Program Officers, Grantees, and the Keys to Success; Benchmarking Program Officer Roles and Responsibilities; A Date Certain: Lessons from Limited Life Foundations; The Future of Foundation Philanthropy: The CEO Perspective; Benchmarking Foundation Evaluation Practices, etc.)?

	Yes	No	Don't know	n	
2016	82%	5%	13%	194	
2016	(n=159)	(n=9)	(n=26)		
2010	79%	9%	12%	100	
2018	(n=149)	(n=16)	(n=23)	188	



Exhibit 65. In the past year, how useful have you found CEP's research publication(s) for reflecting on your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0%	1%	53%	41%	6%	3.5	158
2016	(n=0)	(n=2)	(n=83)	(n=64)	(n=9)		
2018	0%	5%	46%	44%	5%	3.5	147
	(n=0)	(n=7)	(n=68)	(n=65)	(n=7)		

Exhibit 66. In the past year, how useful have you found CEP's research publication(s) for improving your or your foundation's work?

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0%	8%	64%	25%	4%	3.3	159
2010	(n=0)	(n=12)	(n=101)	(n=40)	(n=6)		
2018	1%	11%	60%	26%	3%	3.2	146
2010	(n=1)	(n=16)	(n=87)	(n=38)	(n=4)		

Exhibit 67. In the past year, have you used any of CEP's writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?

	Yes	No	Don't know/ Not applicable	n	
2016	28%	63%	9%	184	
2010	(n=52)	(n=115)	(n=17)	104	
2018	32%	60%	8%	148	
2016	(n=47)	(n=89)	(n=12)	140	