



THE CENTER
FOR EFFECTIVE
PHILANTHROPY

Strengthening Nonprofit Organizations – The Grantee Perspective

The survey should take approximately 20 minutes to complete.

Please complete this survey by **Friday, February 2, 2018**.

Introduction

Thank you for your participation in this research study conducted by the Center for Effective Philanthropy, funded in part by the David and Lucile Packard Foundation.

The purpose of this survey is to understand what support nonprofits are receiving from their foundation funders to help strengthen their organizations.

This support may come in the form of grants (such as capacity-building, organizational effectiveness, or general operating support grants), and/or assistance beyond the grant (provided by foundation staff or a third party paid by the foundation) to strengthen the infrastructure, professional development, and other needs at nonprofit organizations. Examples of assistance beyond the grant include assistance for a grantee's internal management and operations, assistance for external efforts such as collaborating and networking, and assistance developing skills of staff.

Your responses to this survey will be kept **completely confidential**. When results of this survey are shared:

- All numeric rating responses to this survey will be reported in aggregate.
- If we quote part of your response to an open-ended question, we will mask all identifying information in the quote to thoroughly protect your anonymity.

Instructions

- **Please do not use the forward and back buttons on your browser's navigation bar** to move forward and back in the survey. Instead, use the directional buttons at the bottom of each screen.
- **To stop and continue the survey at a future time**, close your browser and use the survey link found in your email to resume the survey.

SURVEY INSTRUMENT

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1. Overall, how much impact do the following types of support from your foundation funders have on strengthening your organization?

	We do not receive this type of support	No impact 1	A little impact 2	Moderate impact 3	Quite a bit of impact 4	A lot of impact 5
Capacity-building or organizational effectiveness grant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assistance beyond the grant (provided by foundation staff or a third party paid by the foundation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General operating support grant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grants that combine both general operating and organizational strengthening support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Overall, how comfortable are you telling your foundation funders which areas of your organization are most in need of strengthening?

Not at all comfortable 1	Slightly comfortable 2	Comfortable 3	Very comfortable 4	Extremely comfortable 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2b. What makes you comfortable or uncomfortable about telling foundation funders this information?

3. For approximately what percentage of your foundation funders do you find each of the following is happening?

	None of my foundation funders (0%)	A few of my foundation funders (1-25%)	Some of my foundation funders (26-50%)	Most of my foundation funders (51-75%)	Almost all of my foundation funders (76-100%)
Cares about strengthening the overall health of my organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has a thorough understanding of the mission my organization is working toward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Demonstrates awareness of my organization's needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asks about my organization's overall needs, beyond funding.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. What would be most valuable to strengthening your organization's ability to work toward achieving its mission?

- Support targeted at a group/network of nonprofits
- Support targeted at a group of nonprofit leaders
- Support targeted at my organization directly
- Support for me as the leader of a nonprofit organization
- Support targeted at specific projects at my organization

SUPPORT RECEIVED: GRANT SUPPORT

5. Currently, from approximately what percentage of your organization's foundation funders does your organization receive the following types of grants?

	None of my foundation funders (0%)	A few of my foundation funders (1-25%)	Some of my foundation funders (26-50%)	Most of my foundation funders (51-75%)	All of my foundation funders (76-100%)
Capacity-building or organizational effectiveness grant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General operating support grant(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grants that combine both general operating and organizational strengthening support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. *(Display only if Yes for Q5 CB or OE or combination grant is selected.)* Currently, of all the capacity-building or organizational effectiveness grants your organization receives from foundation funders, approximately what percentage are **multi-year** capacity-building or organizational effectiveness grants?

- None (0%)
- A few (1-25%)
- Some (26-50%)
- Most (51-75%)
- Almost all (76-100%)
- Not sure

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7. *(Display only if Yes for Q5 GOS or combination grant is selected.)* Currently, of all the grants your organization receives from foundation funders, approximately what percentage are **multi-year** general operating support grants that provide **\$100,000 or more** per year?

- None (0%)
- A few (1-25%)
- Some (26-50%)
- Most (51-75%)
- Almost all (76-100%)
- Not sure

8. What is the most important benefit of receiving a capacity-building or organizational effectiveness grant from a foundation funder?

9. What is the most important benefit of receiving a general operating support grant from a foundation funder?

SUPPORT RECEIVED: ASSISTANCE BEYOND THE GRANT SUPPORT

10. From approximately what percentage of your foundation funders is your organization receiving **assistance beyond the grant** (whether provided by foundation staff or a third party paid by the foundation)? (Examples might include financial management assistance, fundraising help, assistance with external communications, etc.)

- None (0%)
- A few (1-25%)
- Some (26-50%)
- Most (51-75%)
- Almost all (76-100%)

11. *(Display only if “A few”, “Some”, “Most”, or “Almost all” is selected in Q10.)* Who provides the assistance beyond the grant that your organization receives? *(Select one.)*

- Typically, staff** at foundations that fund us provide the assistance.
- Typically, third-party providers** provide the assistance.
- Staff at foundations that fund us and third-party providers provide the assistance about equally.

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12. *(Display only if 1 or 3 is selected in Q11.)* Overall, how satisfied are you with the quality of the assistance provided by **foundation staff** to strengthen your organization?

Not at all satisfied 1	Not very satisfied 2	Moderately satisfied 3	Very satisfied 4	Completely satisfied 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. *(Display only if 2 or 3 is selected in Q11.)* Overall, how satisfied are you with the quality of the assistance provided by **third-party providers** to strengthen your organization?

Not at all satisfied 1	Not very satisfied 2	Moderately satisfied 3	Very satisfied 4	Completely satisfied 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. *(Display only if 2 or 3 is selected in Q11.)* Please comment on the quality of third-party providers that provide assistance to your organization.

15. *(Display only if 2 or 3 is selected in Q11.)* Typically, who selects the third-party provider?

- My organization typically selects the third-party provider.
- Our foundation funders typically select the third-party provider.
- Typically, my organization and our foundation funders jointly select the third-party provider.

16. Currently, from approximately what percentage of your foundation funders does your organization receive support— through **capacity-building or organizational effectiveness grants, or assistance beyond the grant**—to strengthen each of the following aspects of your organization, staff, or work?

Internal Aspects	None of my foundation funders (0%)	A few of my foundation funders (1-25%)	Some of my foundation funders (26-50%)	Most of my foundation funders (51-75%)	All of my foundation funders (76-100%)
Governance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership (including executive transitions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staffing (including salaries and retention)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-care (including resilience and work-life balance)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Diversity, equity, and inclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cybersecurity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performance measurement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talent management/development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Field-Related Aspects	None of my foundation funders (0%)	A few of my foundation funders (1-25%)	Some of my foundation funders (26-50%)	Most of my foundation funders (51-75%)	All of my foundation funders (76-100%)
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer management and engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mergers and acquisitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking with organizations/leaders in the field	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advocacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Movement-building	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Aspects	None of my foundation funders (0%)	A few of my foundation funders (1-25%)	Some of my foundation funders (26-50%)	Most of my foundation funders (51-75%)	All of my foundation funders (76-100%)
Other (please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Please indicate the degree to which your organization still needs more support from foundation funders to strengthen any of the following aspects of your organization, staff, or work:

Internal Aspects	We do not need any additional foundation support	We need a little additional foundation support	We need some additional foundation support	We need a lot of additional foundation support
Governance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership (including executive transitions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategic planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Financial management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staffing (including salaries and retention)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-care (including resilience and work-life balance)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diversity, equity, and inclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cybersecurity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performance measurement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talent management/development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Field-Related Aspects	We do not need any additional foundation support	We need a little additional foundation support	We need some additional foundation support	We need a lot of additional foundation support
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Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer management and engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mergers and acquisitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking with organizations/leaders in the field	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advocacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Movement-building	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Aspects	We do not need any additional foundation support	We need a little additional foundation support	We need some additional foundation support	We need a lot of additional foundation support
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Other (<i>please specify:</i> _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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CONSIDERATIONS WHEN SUPPORT IS PROVIDED

18. Who typically initiates the conversation about the possibility of receiving support to strengthen your organization? *(Select one.)*

- My organization typically initiates the conversation with funders.
- Funders typically initiate the conversation with my organization.
- About half of the time, my organization initiates, and the other half of the time, funders initiate.

19. How often is strengthening certain aspects of your organization a condition of receiving a grant from a foundation funder?

Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. When the topic of support to strengthen your organization is discussed, how often do your foundation funders ask you what support your organization is already receiving from other sources?

Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. To what extent do you take into consideration each of the following when determining whether to request support to strengthen your organization, or what support to request?

	Not at all 1	To a small extent 2	To a moderate extent 3	To a large extent 4
What you think foundations prefer to fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What the foundation thinks your organization most needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Results of an assessment of your organization’s needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The cost of different types of support to the foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Concerns about how exposing your organization’s needs might negatively impact chances of funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Your organization’s future sustainability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other <i>(please specify: _____)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. After providing support to strengthen your organization, how often do your foundation funders follow up to understand the effects of the support?

Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. What is the most helpful type of assistance beyond the grant that your organization has received?

23b. *(Display only if Q23 is answered)* Why was it so helpful?

24. What is the least helpful type of assistance beyond the grant that your organization has received?

24b. *(Display only if Q24 is answered)* Why was it not so helpful?

SUPPORT NEEDED

25. Currently, how responsible do you believe your foundation funders feel for strengthening your organization?

Not at all responsible 1	A little responsible 2	Somewhat responsible 3	Very responsible 4	Extremely responsible 5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. What do you believe are the **top three aspects** of your organization that need strengthening?

1.

2.

3.

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27. As the leader, what is the **one type** of professional development or assistance from which you personally could most benefit?

28. Are you concerned about a potential decrease in individual giving to your organization as a result of the tax bill that takes effect this year? *(Select one.)*

- Yes
- No
- Not sure/Don't fully understand the legislation yet

29. *(Display only if Yes or Not sure are selected.)* What can foundations do, other than making more or larger grants, to assist your organization in responding to this possibility?

ABOUT YOU AND YOUR ORGANIZATION

30. How many years have you been in your current role at your organization?

- Less than 1 year
- At least 1 year but fewer than 3 years
- At least 3 years but fewer than 6 years
- At least 6 years but fewer than 10 years
- 10 years or longer

31. How would you describe the geographical scope(s) of your organization?

	Yes	No
Local	<input type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>
Regional	<input type="checkbox"/>	<input type="checkbox"/>
National	<input type="checkbox"/>	<input type="checkbox"/>
Global	<input type="checkbox"/>	<input type="checkbox"/>

32. In what program area(s) does your organization work? *(Select all that apply.)*

	Yes	No
Agriculture, fishing, and forestry	<input type="checkbox"/>	<input type="checkbox"/>
Animals	<input type="checkbox"/>	<input type="checkbox"/>
Arts and culture	<input type="checkbox"/>	<input type="checkbox"/>
Community and economic development	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>
Environment	<input type="checkbox"/>	<input type="checkbox"/>
Health	<input type="checkbox"/>	<input type="checkbox"/>
Human rights	<input type="checkbox"/>	<input type="checkbox"/>
Human services	<input type="checkbox"/>	<input type="checkbox"/>
Information and communications	<input type="checkbox"/>	<input type="checkbox"/>
International relations	<input type="checkbox"/>	<input type="checkbox"/>
Philanthropy	<input type="checkbox"/>	<input type="checkbox"/>
Public affairs	<input type="checkbox"/>	<input type="checkbox"/>
Public safety	<input type="checkbox"/>	<input type="checkbox"/>
Religion	<input type="checkbox"/>	<input type="checkbox"/>
Science	<input type="checkbox"/>	<input type="checkbox"/>
Social justice	<input type="checkbox"/>	<input type="checkbox"/>
Social sciences	<input type="checkbox"/>	<input type="checkbox"/>
Sports and recreation	<input type="checkbox"/>	<input type="checkbox"/>
Other (<i>please specify:</i> _____)	<input type="checkbox"/>	<input type="checkbox"/>

33. Is your organization involved in advocacy or movement-building?

- Yes
- No

34. How many foundations currently give grants to help fund your organization? _____

35. What percentage of your organization's 2017 budget was funded by foundations? _____

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