DEMOGRAPHIC DATA COLLECTION AND VISUALIZATION

To advance their missions and make informed decisions, funders need to be able to understand the self-reported demographic data of their partners. But it can be challenging to collect this data in a way that reflects a funder's unique context, and is confidential, easy to complete, and grounded in inclusive, research-based questions. Moreover, it can be tricky to present the collected data in a way that allows for nuanced reflection and decision-making.

That's where the Center for Effective Philanthropy (CEP), with our deep understanding of the philanthropic sector and expertise in demographic data collection, can help. CEP has worked with about a dozen funders of all types and sizes – including the Robert Wood Johnson Foundation, William and Flora Hewlett Foundation, and the Commonwealth Fund – to co-design approaches to collecting demographics in ways that reflect their goals, strategies, and areas of grantmaking. CEP analyzes the aggregated data and displays it in a robust, interactive system that allows for understanding demographics with a high degree of nuance, leading to better reflection and more informed decision-making.

We work alongside funders to help them think through key questions, such as:

- Which demographics are most connected to your values and goals? Why?
- How will you clearly communicate the connection between your demographic work and your mission, both externally and internally?
- How can you best explain to grantees and applicants how you will use demographic data – and how you won't?
- Given your needs and goals, what is the right approach for collecting this data? For example, your organization might consider a confidential survey fielded by a third party with questions specific to your context, a required questionnaire as a component of your grant agreement, or a retrieval of publicly available demographics from Candid.
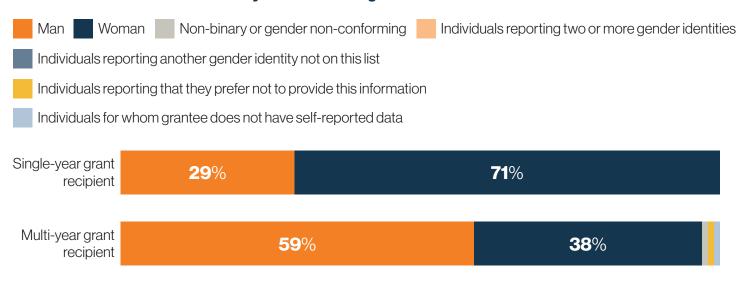- How will you share reflections and learnings with stakeholders and the broader field?

These and other questions fuel CEP's capacity to partner with funders to design and field confidential demographic surveys on their behalf. Then, CEP's interactive, dynamic online visualization tool displays results at an aggregate level and sliced by categories where you think you might find meaningful, actionable differences in the demographics of partners – for example by program, grant size, and funding history. CEP then facilitates conversations that allow funders to share reflections and begin thinking about what the results might mean for their work.

The charts on the next page show **fictionalized examples** of a few ways CEP's demographic reports display data to facilitate important reflection and insights.

CEP is one of Demographics via Candid's partners. We strive to ease burden on nonprofits by encouraging funders to use Candid's industry-standard categories for race and ethnicity, gender identity, sexuality, and disability even in private surveys. We also encourage grantees and foundations to help build the field by claiming their Candid profiles and sharing their organizational demographics.

CEP works with funders to collect and visualize demographic information for partners, including:

- Grantee and consultant leadership (i.e., trustees and CEOs), senior teams, and other staff
- Country-level staff of grantees with international offices
- Project leaders of grantee research teams
- Individual applicants of funders' open LOI calls
- Staff and trustees of funders

The types of demographic data CEP has helped funders collect vary across context and include:

- Race & ethnicity (U.S.-based)
- Cultural background (international)
- Gender identity & transgender identity
- Sexuality
- Disability
- Lived experience

CEP also asks open-ended questions – and rigorously codes responses – to help funders understand any barriers partners experience in collecting this information and the ways that funders can help grantees collect or act on demographic data.

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EXAMPLE A: Examining Grantee CEO Gender Identity by Grant Length Reveals that Organizations with Women CEOs are More Likely to Receive Single-Year Grants

■ Man ■ Woman ■ Non-binary or gender non-conforming ■ Individuals reporting two or more gender identities

■ Individuals reporting another gender identity not on this list

■ Individuals reporting that they prefer not to provide this information

■ Individuals for whom grantee does not have self-reported data

Single-year grant recipient	**29**%	**71**%
Multi-year grant recipient	**59**%	**38**%

EXAMPLE B: There is Wide Variation of Percent of People of Color (POC) on Grantee Boards across Program, though All Programs Have Some Grantees whose Boards are Entirely POC & Grantees with No POC on their Boards

Top tick mark (whisker) = % POC at grantee board with the highest % POC.

Middle line and shaded range = % POC at grantee boards with at the 75th, 50th, and 25th percentiles in terms of % people of color on grantees' boards.

Bottom tick mark (whisker) = % POC at grantee board with the lowest % POC.

Horizontal axis: Foundation Overall, Arts, Education, Environment, Local Community

Subgroup: Program Area
- Program Area
- Strategy
- Organizational Staff Size
- Annual Operating Budget

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