Foundation Program Officers: Roles and Perspectives

This survey should take about 20 minutes to complete.

Please complete the survey by Friday, July 29, 2016.

Introduction

Thank you for participating in our survey. 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 any identifying information in the quote to thoroughly protect your anonymity.
- Results will be published by the Center for Effective Philanthropy in early 2017.

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 arrows 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.
**Professional Background and Experience**

1) At what types of organizations have you previously been employed? Please select all that apply.
- [ ] Another foundation
- [x] Nonprofit organization(s) (excluding foundations)
- [ ] Corporate/for-profit organization(s)
- [ ] Government organization(s) (municipal, state, or federal)
- [ ] Other (please specify): _____________________________________________________
- [ ] N/A: This is my first job.

2) Were you involved in raising money from foundations as part of your previous work at a nonprofit organization(s)? *(Only shown to respondents who select “Nonprofit organization(s)” in question 1)*
- [ ] Yes
- [ ] No

3) How frequently did you interact with foundation staff as part of your previous work at a nonprofit organization(s)? *(Only shown to respondents who select “Nonprofit organization(s)” in question 1)*

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>Rarely</td>
<td>Sometimes</td>
<td>Often</td>
<td>Very often</td>
</tr>
</tbody>
</table>

4) In your previous employment, did you work in the same issue area(s) that is the focus of your current role at the foundation? *(Not shown to respondents who skip question 1 or select N/A)*
- [ ] Yes
- [ ] No

**Your Role at Your Foundation**

5) Overall, how satisfied are you with your current job?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all</td>
<td>A little</td>
<td>Somewhat</td>
<td>Very</td>
<td>Extremely</td>
</tr>
</tbody>
</table>

6) In what program area(s) do you primarily work? Please select all that apply.
- [ ] Agriculture, fishing, and forestry
- [ ] Arts and culture
- [ ] Community and economic development
- [ ] Education
- [ ] Environment
- [ ] Health
- [ ] Human rights
- [ ] Human services
- [ ] Information and communications
- [ ] International relations
- [ ] Philanthropy
- [ ] Public affairs
- [ ] Public safety
- [ ] Religion
- [ ] Science
- [ ] Social sciences
- [ ] Sports and recreation
- [ ] Other (please specify): ___________________
7) What is the primary geographic focus of your work at your foundation?
   - Local
   - Regional
   - National
   - International

8) Which of the following statements is true of your work at your foundation?
   - My work focuses on a single issue area.
   - My work focuses on multiple issue areas that are interrelated.
   - My work focuses on multiple issue areas that are not necessarily related.
   - My work does not focus on issue areas.

9) Which of the following statements is true of your work at your foundation?
   - My work focuses on one geographic area.
   - My work focuses on multiple geographic areas.
   - My work does not focus on geographic areas.

10) Are you a full-time employee at your foundation?
    - Yes
    - No

11) In an average week, how many hours do you work (including time spent traveling for your job)?
    ________ hours

12) How many years have you been in your current role at your foundation?
    - 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 more

13) Please rate the degree to which you agree or disagree with each of the following statements.

<table>
<thead>
<tr>
<th>Don’t know/ N/A</th>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>My job requirements are clear.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My job makes good use of my skills and abilities.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have a clear path for career advancement at my foundation.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My career is meaningful.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
My work contributes to my personal growth. □ □ □ □ □ □ □
A primary reason I work at my foundation is because I believe in its mission. □ □ □ □ □ □ □
My foundation has a positive impact on the issue(s) or geographic area(s) in which I work. □ □ □ □ □ □ □
I have an appropriate amount of autonomy in my role at my foundation. □ □ □ □ □ □ □
I admire the leadership of my foundation’s CEO. □ □ □ □ □ □ □
Learning from my colleagues at my foundation is an integral part of my professional development. □ □ □ □ □ □ □
I can be honest with my supervisor. □ □ □ □ □ □ □
My foundation is respectful of staff of different backgrounds, races, and genders. □ □ □ □ □ □ □
I feel comfortable expressing my views with others at my foundation. □ □ □ □ □ □ □

14) How much do you believe you are working toward the same goals as the following parties at your foundation?

<table>
<thead>
<tr>
<th></th>
<th>Don’t know/ N/A</th>
<th>Not at all 1</th>
<th>Not very much 2</th>
<th>Somewhat 3</th>
<th>Very much 4</th>
<th>Completely 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board members</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>President/CEO</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>VP of programs</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

**YOUR JOB RESPONSIBILITIES**

15) In order to be most effective in your role, what three job responsibilities do you believe should take up the greatest amount of your time?

1. ___________________________
2. ___________________________
3. ___________________________

16) What three job responsibilities currently do take up the greatest amount of your time?

1. ___________________________
2. ___________________________
3. ___________________________
17) Are there responsibilities on which you believe you should be spending less time in order to be most effective in your role?

- Yes
- No

18) On what responsibilities do you believe you should be spending less time in order to be most effective in your role? Please list up to three. (Only shown to respondents who select “Yes” in question 17)

1. ____________________
2. ____________________
3. ____________________

19) How involved are you in the following processes at your foundation for your program area(s)?

<table>
<thead>
<tr>
<th>Process</th>
<th>N/A</th>
<th>Not at all</th>
<th>Not very</th>
<th>Somewhat</th>
<th>Very</th>
<th>Extremely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing programmatic goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing strategies used to achieve programmatic goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing measures used to assess progress against programmatic goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assessing progress toward programmatic goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Using information from assessments of progress to make improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deciding if a grant gets awarded</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deciding the type of support to award a grantee (e.g., general operating support, program support, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deciding the length of a grant awarded to a grantee (e.g., one-year grant, two-year grant, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deciding the size of a grant awarded to a grantee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

20) Please select the level of involvement you would prefer to have in each of the following processes at your foundation for your program area(s). For processes in which you are currently not at all involved, please indicate whether you would prefer to be more involved.

<table>
<thead>
<tr>
<th>Process</th>
<th>N/A</th>
<th>Prefer to be more involved</th>
<th>Satisfied with current level of involvement, or lack thereof</th>
<th>Prefer to be less involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing programmatic goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Developing strategies used to achieve programmatic goals ☐ ☐ ☐ ☐ ☐

Developing measures used to assess progress against programmatic goals ☐ ☐ ☐ ☐ ☐

Assessing progress toward programmatic goals ☐ ☐ ☐ ☐ ☐

Using information from assessments of progress to make improvements ☐ ☐ ☐ ☐ ☐

Deciding if a grant gets awarded ☐ ☐ ☐ ☐ ☐

Deciding the type of support to award a grantee (e.g., general operating support, program support, etc.) ☐ ☐ ☐ ☐ ☐

Deciding the length of a grant awarded to a grantee (e.g., one-year grant, two-year grant, etc.) ☐ ☐ ☐ ☐ ☐

Deciding the size of a grant awarded to a grantee ☐ ☐ ☐ ☐ ☐

21) How much risk do you feel you can take when choosing which grantees to fund?
☐ N/A: I am not involved in these decisions.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>A little</td>
<td>Some</td>
<td>Quite a bit</td>
<td>A lot</td>
</tr>
</tbody>
</table>

22) How often are your funding recommendations accepted by your foundation’s leadership?
☐ N/A: I am not involved in these decisions.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>Rarely</td>
<td>Sometimes</td>
<td>Often</td>
<td>Very often</td>
</tr>
</tbody>
</table>

**PROFESSIONAL GROWTH AND DEVELOPMENT**

23) How often do you and your supervisor discuss your job performance?
☐ A few times a month
☐ Monthly
☐ Once every few months
☐ Yearly
☐ Less than once a year
☐ N/A: I have not yet discussed my job performance with my supervisor.

24) What are the biggest challenges you face in your role?

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

25) Please indicate whether you participated in any of the following professional development opportunities in the past year. Please select all that apply.
☐ Conference(s) or seminar(s)
☐ Job-specific training by foundation staff
Job-specific training through a third party (e.g., Nonprofit Finance Fund, Council on Foundations, Grantmakers for Effective Organizations)
Leadership/management coaching through a third party
Enrollment in courses/degree programs related to skills relevant for your job
Enrollment in courses/degree programs unrelated to your job
Activities or events offered by relevant affinity groups
Other (please specify):
N/A: I have not participated in professional development opportunities in the past year.

26) In what skill set or knowledge area do you believe you could benefit the most from further professional development?
_________________________________________________________________________________
_________________________________________________________________________________

GRANTEE RELATIONSHIPS

27) How many active grants do you currently have open?
_______

28) Typically, when your current grantees contact you, how quickly are you able to respond?
   ❑ That same day
   ❑ By the following day
   ❑ 1-3 days later
   ❑ Within the week
   ❑ Within a few weeks

29) Please indicate your level of understanding of the following aspects of your grantees’ work.

<table>
<thead>
<tr>
<th></th>
<th>Limited understanding</th>
<th>Slight understanding</th>
<th>Moderate understanding</th>
<th>Considerable understanding</th>
<th>Thorough understanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>The field(s) in which my grantees work</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>The community(ies) in which my grantees work</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>The goals and strategies of my grantees</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>The needs of my grantees’ intended beneficiaries</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>The social, cultural, or socioeconomic</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>
factors that affect my grantees’ work

30) Please rate the degree to which you agree or disagree with each of the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Don’t know/ N/A</th>
<th>Strongly disagree 1</th>
<th>Disagree 2</th>
<th>Neither agree nor disagree 3</th>
<th>Agree 4</th>
<th>Strongly agree 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having strong relationships with grantees is important for achieving my foundation’s goals.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Learning from the grantees I work with is an integral part of my professional development.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>In general, nonprofit organizations maximize their impact given the resources they have.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>In general, nonprofit organizations are well-run.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>In general, nonprofit organizations have the knowledge necessary to assess the results of their work.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>In general, nonprofit organizations have the resources necessary to assess the results of their work.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I have the knowledge necessary to help the grantees I work with assess the results of their work.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I am aware of the challenges the grantees I work with face in achieving their goals.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>I believe the grantees I work with feel comfortable approaching me if a problem arises.</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

31) If you had more time to spend with your grantees, how would you spend that time?
______________________________________________________________________________
______________________________________________________________________________

THOUGHTS ABOUT THE FUTURE

32) Is your foundation planning to limit its life (i.e., eventually spend down its assets)?
   □ Yes, the foundation plans to limit its life.
   □ No, the foundation plans to exist in perpetuity.
   □ The foundation is undecided.
   □ Other (please specify): ____________________________
I don’t know my foundation’s plans.

33) By when does your foundation plan to spend down its assets? *(Only shown to those who select “Yes” in question 32)*
- In a fixed number of years *(please specify the number)*: ________
- After a specific event occurs *(please specify the event)*:
  ______________________________________________________________________
- At a time to be determined in the future
- Other *(please specify)*: ________________________________________________

34) Do you see yourself staying in philanthropy for the remainder of your career?
- Yes
- No
- Don’t know

35) At what type of organization do you plan to work after leaving philanthropy? *(Only shown to those who select “No” in question 34)*
- Nonprofit organization (excluding foundations)
- Corporate/for-profit organization
- Government organization (municipal, state, or federal)
- Other *(please specify)*: ________________________________________________
- Don’t know

36) What advice would you give someone who is just beginning their career as a program officer?
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**DEMOGRAPHIC INFORMATION**

37) What is the highest degree or level of education you have completed?
- Associate’s degree
- Bachelor’s degree
- Master’s degree
- Doctoral degree
- Professional degree (MD, JD, etc.)
- Other *(please specify)*: ________________________________________________

38) In what field of study is the highest degree or level of education you have completed?
- Business/business administration
- Communications
- Finance/accounting
- Health/medicine
- Law
- Natural sciences
- Nonprofit management
- Philanthropic studies
- Public administration
- Public policy
☐ Research/evaluation  ☐ Other (please specify):  
☐ Social sciences  
☐ Technology  

39) What is your gender identity?
☐ Male
☐ Female
☐ Identify as both male and female
☐ Do not identify as male or female
☐ Prefer not to say

40) What is your race/ethnicity? Please select all that apply.
☐ African-American/Black
☐ American Indian or Alaska Native
☐ Asian (including the Indian subcontinent)
☐ Caucasian/White
☐ Hispanic/Latino
☐ Pacific Islander
☐ Multi-racial
☐ Race/ethnicity not included above
☐ Prefer not to say