



# THE CENTER FOR EFFECTIVE PHILANTHROPY

## Learning What Is and Is Not Working in a Foundation's Efforts: The CEO Perspective

This survey should take fewer than 15 minutes to complete.

***Please complete the survey by Friday, June 2, 2017.***

### Introduction

Thank you for participating in this survey. Your responses will be kept **completely confidential**. When results of this survey are shared:

- All numeric rating responses 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.

### 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.

## PROGRAMMATIC GOALS

For the following questions, please think across all of your foundation's programmatic goals/program areas and generalize to the best of your ability.

1. Overall, how well do you understand what **is working** in your foundation's efforts to achieve its programmatic goals?

| Do not understand at all<br>1 | Do not understand very well<br>2 | Understand moderately well<br>3 | Understand very well<br>4 | Understand extremely well<br>5 |
|-------------------------------|----------------------------------|---------------------------------|---------------------------|--------------------------------|
| <input type="checkbox"/>      | <input type="checkbox"/>         | <input type="checkbox"/>        | <input type="checkbox"/>  | <input type="checkbox"/>       |

2. Overall, how well do you understand what **is not working** in your foundation's efforts to achieve its programmatic goals?

| Do not understand at all<br>1 | Do not understand very well<br>2 | Understand moderately well<br>3 | Understand very well<br>4 | Understand extremely well<br>5 |
|-------------------------------|----------------------------------|---------------------------------|---------------------------|--------------------------------|
| <input type="checkbox"/>      | <input type="checkbox"/>         | <input type="checkbox"/>        | <input type="checkbox"/>  | <input type="checkbox"/>       |

3. What are the top three challenges you face in learning what is and is not working in your foundation's efforts to achieve its programmatic goals?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

4. How would you describe your foundation's level of investment (staff time and dollars) in learning what is and is not working in its efforts to achieve its programmatic goals?

| Invests far too little<br>1 | Invests too little<br>2  | Invests the appropriate amount<br>3 | Invests too much<br>4    | Invests far too much<br>5 |
|-----------------------------|--------------------------|-------------------------------------|--------------------------|---------------------------|
| <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>  |

5. How many program area(s) does your foundation have?

- 1 program area
- 2 to 4 program areas
- 5 to 7 program areas
- 8 or more program areas

N/A: My foundation does not have program areas.

6. Does your foundation have any staff whose role(s) focus on evaluation, knowledge, and/or learning?

Yes

No

7. Does your foundation work with third-party consultants to learn what is and is not working in its efforts to achieve its programmatic goals?

Yes

No

**COLLECTING AND USING DATA**

8. Does your foundation have the information it needs to know:

|                                                                                      | Yes, for <b>all</b> programmatic goals/areas | Yes, for <b>most</b> programmatic goals/areas | Yes, for <b>some</b> programmatic goals/areas | No, not for any programmatic goals/areas | Not sure                 |
|--------------------------------------------------------------------------------------|----------------------------------------------|-----------------------------------------------|-----------------------------------------------|------------------------------------------|--------------------------|
| Which of the foundation's strategies <b>are working</b>                              | <input type="checkbox"/>                     | <input type="checkbox"/>                      | <input type="checkbox"/>                      | <input type="checkbox"/>                 | <input type="checkbox"/> |
| Which of the foundation's strategies <b>are not working</b>                          | <input type="checkbox"/>                     | <input type="checkbox"/>                      | <input type="checkbox"/>                      | <input type="checkbox"/>                 | <input type="checkbox"/> |
| For what reason(s) the foundation's strategies <b>are working</b>                    | <input type="checkbox"/>                     | <input type="checkbox"/>                      | <input type="checkbox"/>                      | <input type="checkbox"/>                 | <input type="checkbox"/> |
| For what reason(s) the foundation's strategies <b>are not working</b>                | <input type="checkbox"/>                     | <input type="checkbox"/>                      | <input type="checkbox"/>                      | <input type="checkbox"/>                 | <input type="checkbox"/> |
| The overall performance of foundation initiatives                                    | <input type="checkbox"/>                     | <input type="checkbox"/>                      | <input type="checkbox"/>                      | <input type="checkbox"/>                 | <input type="checkbox"/> |
| The foundation's contributions to advancing knowledge in the areas in which it works | <input type="checkbox"/>                     | <input type="checkbox"/>                      | <input type="checkbox"/>                      | <input type="checkbox"/>                 | <input type="checkbox"/> |

9. Does your foundation use a shared set of measures (quantitative or qualitative) with any of the following organizations when collecting information to learn what is and is not working in its efforts to achieve its programmatic goals?

|                                                                                                  | Yes, we use shared measures for <b>all</b> programmatic goals/areas | Yes, we use shared measures for <b>most</b> programmatic goals/areas | Yes, we use shared measures for <b>some</b> programmatic goals/areas | No, we do not use shared measures |
|--------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|----------------------------------------------------------------------|----------------------------------------------------------------------|-----------------------------------|
| Other foundations working toward similar goals                                                   | <input type="checkbox"/>                                            | <input type="checkbox"/>                                             | <input type="checkbox"/>                                             | <input type="checkbox"/>          |
| The foundation's grantees                                                                        | <input type="checkbox"/>                                            | <input type="checkbox"/>                                             | <input type="checkbox"/>                                             | <input type="checkbox"/>          |
| Other nonprofit organizations not funded by the foundation that are working toward similar goals | <input type="checkbox"/>                                            | <input type="checkbox"/>                                             | <input type="checkbox"/>                                             | <input type="checkbox"/>          |
| Government organizations working toward similar goals                                            | <input type="checkbox"/>                                            | <input type="checkbox"/>                                             | <input type="checkbox"/>                                             | <input type="checkbox"/>          |

10. After collecting information about what is and is not working, how often does your foundation share what it has learned with any of the following organizations?

|                                                                                                  | Never shares what it has learned<br>1 | Does not share what it has learned very often<br>2 | Sometimes shares what it has learned<br>3 | Shares what it has learned very often<br>4 | Always shares what it has learned<br>5 |
|--------------------------------------------------------------------------------------------------|---------------------------------------|----------------------------------------------------|-------------------------------------------|--------------------------------------------|----------------------------------------|
| Other foundations working toward similar goals                                                   | <input type="checkbox"/>              | <input type="checkbox"/>                           | <input type="checkbox"/>                  | <input type="checkbox"/>                   | <input type="checkbox"/>               |
| The foundation's grantees                                                                        | <input type="checkbox"/>              | <input type="checkbox"/>                           | <input type="checkbox"/>                  | <input type="checkbox"/>                   | <input type="checkbox"/>               |
| Other nonprofit organizations not funded by the foundation that are working toward similar goals | <input type="checkbox"/>              | <input type="checkbox"/>                           | <input type="checkbox"/>                  | <input type="checkbox"/>                   | <input type="checkbox"/>               |
| Government organizations working toward similar goals                                            | <input type="checkbox"/>              | <input type="checkbox"/>                           | <input type="checkbox"/>                  | <input type="checkbox"/>                   | <input type="checkbox"/>               |

11. a) Does your foundation regularly use any of the following to learn what is and is not working in its efforts to achieve its programmatic goals?

|                                                                                                     | Yes                      | No                       |
|-----------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Anecdotal feedback from grantees (e.g., narratives, stories of impact)                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Surveys of grantees                                                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Focus groups/convenings of grantees                                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Anecdotal feedback from beneficiaries (i.e., those served by grantees)                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Surveys of beneficiaries conducted by grantees                                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Surveys of beneficiaries conducted by the foundation                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Focus groups/convenings of beneficiaries                                                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Quantitative outputs (e.g., number of beneficiaries served, number of outputs achieved by grantees) | <input type="checkbox"/> | <input type="checkbox"/> |
| Final grant reports                                                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Site visits and/or on-site assessments at grantee organizations                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Evaluations of individual grants                                                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Evaluations of clusters or groups of grants                                                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Evaluations of foundation program areas                                                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Analysis of cost-benefit/cost relative to outcomes                                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Information or research provided by organizations other than the foundation or its grantees         | <input type="checkbox"/> | <input type="checkbox"/> |
| Other (please specify): _____                                                                       | <input type="checkbox"/> | <input type="checkbox"/> |

11. b) Please provide an example of the type of information or research provided by organizations other than the foundation or its grantees that your foundation uses to learn what is and is not working. *(Only shown to respondents who select “Yes” to “Information or research provided by...” for 11a.)*

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12. Which of the following are **most** useful for learning what is and is not working in your foundation’s efforts to achieve its programmatic goals? Please select up to three of the following options. *(Only options for which respondents selected “Yes” in question 11a will be shown.)*

- Anecdotal feedback from grantees (e.g., narratives, stories of impact)
- Surveys of grantees
- Focus groups/convenings of grantees
- Anecdotal feedback from beneficiaries (i.e., those served by grantees)
- Surveys of beneficiaries conducted by grantees
- Surveys of beneficiaries conducted by the foundation
- Focus groups/convenings of beneficiaries

- Quantitative outputs (e.g., number of beneficiaries served, number of outputs achieved by grantees)
- Final grant reports
- Site visits and/or on-site assessments at grantee organizations
- Evaluations of individual grants
- Evaluations of cluster or group of grants
- Evaluations of foundation program areas
- Analysis of cost-benefit/cost relative to outcomes
- Information or research provided by organizations other than the foundation or its grantees
- Other (please specify): \_\_\_\_\_

13. How much of your foundation’s knowledge about what **is working** in its efforts to achieve its programmatic goals does it make publicly available?

| None of its knowledge<br>1 | Very little of its knowledge<br>2 | Some of its knowledge<br>3 | Quite a bit of its knowledge<br>4 | All of its knowledge<br>5 |
|----------------------------|-----------------------------------|----------------------------|-----------------------------------|---------------------------|
| <input type="checkbox"/>   | <input type="checkbox"/>          | <input type="checkbox"/>   | <input type="checkbox"/>          | <input type="checkbox"/>  |

14. How much of your foundation’s knowledge about what **is not working** in its efforts to achieve its programmatic goals does it make publicly available?

| None of its knowledge<br>1 | Very little of its knowledge<br>2 | Some of its knowledge<br>3 | Quite a bit of its knowledge<br>4 | All of its knowledge<br>5 |
|----------------------------|-----------------------------------|----------------------------|-----------------------------------|---------------------------|
| <input type="checkbox"/>   | <input type="checkbox"/>          | <input type="checkbox"/>   | <input type="checkbox"/>          | <input type="checkbox"/>  |

15. How does your foundation determine what knowledge to make publicly available?

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## LEARNING FROM OTHERS

16. How much does empirical research (e.g., peer-reviewed research, databases such as What Works Clearinghouse or the National Registry of Evidence-Based Programs and Practices) inform the strategies your foundation uses to achieve its programmatic goals?

| Does not inform at all<br>1 | Informs very little<br>2 | Informs moderately<br>3  | Informs quite a bit<br>4 | Informs completely<br>5  |
|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

For the following questions, please think about other foundations that are working to achieve **the same or similar programmatic goals** as your foundation.

17. How much knowledge do you have about what **is working** in these other foundations' efforts to achieve their programmatic goals?

| No knowledge<br>1        | Very little knowledge<br>2 | Some knowledge<br>3      | Quite a bit of knowledge<br>4 | All possible knowledge<br>5 |
|--------------------------|----------------------------|--------------------------|-------------------------------|-----------------------------|
| <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/>    |

18. How much knowledge do you have about what **is not working** in these other foundations' efforts to achieve their programmatic goals?

| No knowledge<br>1        | Very little knowledge<br>2 | Some knowledge<br>3      | Quite a bit of knowledge<br>4 | All possible knowledge<br>5 |
|--------------------------|----------------------------|--------------------------|-------------------------------|-----------------------------|
| <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/>      | <input type="checkbox"/>    |

19. How much does evidence of what is and is not working at these other foundations inform the strategies your foundation uses to achieve its own programmatic goals?

| Does not inform at all<br>1 | Informs very little<br>2 | Informs moderately<br>3  | Informs quite a bit<br>4 | Informs completely<br>5  |
|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## INTERNAL OPERATIONS

20. Overall, how well do you understand what **is working** in your foundation's internal operations (e.g., finance, governance, staffing)?

| Do not understand at all<br>1 | Do not understand very well<br>2 | Understand moderately well<br>3 | Understand very well<br>4 | Understand extremely well<br>5 |
|-------------------------------|----------------------------------|---------------------------------|---------------------------|--------------------------------|
| <input type="checkbox"/>      | <input type="checkbox"/>         | <input type="checkbox"/>        | <input type="checkbox"/>  | <input type="checkbox"/>       |

21. Overall, how well do you understand what **is not working** in your foundation's internal operations?

| Do not understand at all<br>1 | Do not understand very well<br>2 | Understand moderately well<br>3 | Understand very well<br>4 | Understand extremely well<br>5 |
|-------------------------------|----------------------------------|---------------------------------|---------------------------|--------------------------------|
| <input type="checkbox"/>      | <input type="checkbox"/>         | <input type="checkbox"/>        | <input type="checkbox"/>  | <input type="checkbox"/>       |

22. What information does your foundation use to determine what is and is not working in its internal operations?

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## OVERALL PERFORMANCE

23. a) Does your foundation regularly combine information about what is and is not working from across its different functions (e.g., programmatic, financial, governance) to assess its overall performance?

- Yes  
 No

23. b) Does your foundation share this overall performance assessment publicly? *(Only shown to respondents who select "Yes" for 23a.)*

- Yes  
 No

24. a) Would you be willing to share with us any of the key documents your foundation uses to assess its overall performance? As with all of your responses to this survey, what you share will be kept **completely confidential** and will only be analyzed in aggregate with information shared by other foundations. *(Only shown to respondents who select "Yes" for 23a.)*

- Yes  
 No

24. b) Please upload your file below. Alternatively, skip to the space below to enter the e-mail address of the person at your foundation who we can contact for this information. *(Only shown to respondents who select "Yes" for 24a.)*

[Upload file]

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## DEMOGRAPHIC INFORMATION

25. For how long have you been the CEO of 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