THE CENTER FOR EFFECTIVE PHILANTHROPY

The Grantee Voice: Feedback for Foundations

The survey should take about 10 to 15 minutes to complete.

FUNDING FROM FOUNDATIONS

1. Approximately how many foundations currently provide grant support to your organization? _____
2. Approximately what proportion of your organization's revenue currently comes from foundation grants? _____%

PROGRESS TOWARD GOAL(S)

Throughout this survey, we will use the word "goal(s)" to refer to what your organization is trying to achieve through its programs and/or services.

3. How much progress has your organization made, overall, toward the goal(s) it seeks to achieve?
   ❑ Don't know (*skip question 4*)

   ❑ No progress
   ❑ Little progress
   ❑ Some progress
   ❑ Moderate progress
   ❑ A lot of progress

4. How confident are you in your assessment of your organization's progress toward the goal(s) it seeks to achieve?
   ❑ Not at all confident
   ❑ A little confident
   ❑ Somewhat confident
   ❑ Very confident
   ❑ Extremely confident

ASSESSING PERFORMANCE

For the following questions, we will use the word "performance" to refer to how your organization is doing relative to the goal(s) it seeks to achieve.

5. Does your organization collect any information to assess its performance?
   ❑ Yes
   ❑ No (*skip to end of survey*)

6. What types of information does your organization collect that you find most useful in understanding its performance? Please provide up to three examples:
   1. _____
   2. _____
   3. _____

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7. Does your organization employ one or more staff member(s) dedicated full-time to helping it assess its performance?
   - ❑ Yes
   - ❑ No

8. Does your organization use third-party evaluators to conduct formal assessments of its performance?
   - ❑ Yes
   - ❑ No

9. Approximately what proportion of your organization's budget is spent on efforts to assess its performance?
   _____%

10. What are the **two** most important reasons your organization assesses its performance?

    - ❑ Learn from our organization's work to improve its future performance
    - ❑ Hold staff accountable to our organization's performance
    - ❑ Help our organization communicate about its performance externally
    - ❑ Fulfill requirements set by our organization's board of directors
    - ❑ Fulfill requirements tied to grants our organization receives from funders
    - ❑ Hold our organization accountable to external stakeholders (i.e., beneficiaries, community leaders, policymakers, etc.)
    - ❑ Other *(please specify)*: _____

11. To what extent does your organization use the results of its performance assessment to do the following?

	Not at all	A little extent	Some extent	A great extent	A very great extent
Inform our organization's strategic direction	1	2	3	4	5
Make decisions about adding or eliminating programs and/or services	1	2	3	4	5
Change allocation of resources across programs and/or services	1	2	3	4	5
Make improvements to programs and/or services	1	2	3	4	5
Inform decisions about staffing levels at our organization	1	2	3	4	5
Recognize strong staff performance within our organization	1	2	3	4	5
Identify development opportunities for our organization's staff	1	2	3	4	5
Attract new and/or maintain existing donors or funders for our organization	1	2	3	4	5
Communicate publicly what our organization has achieved	1	2	3	4	5
Share what we've learned about what works, or what does not work, with other organizations	1	2	3	4	5

12. What more would you like to be able to do to assess and/or manage your organization's performance?
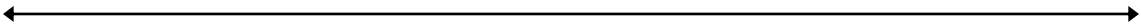_____
_____
_____

13. How helpful have your foundation funders been to your organization's ability to assess progress toward your goal(s)?

1	2	3	4	5	6	7
Not at all helpful	Not very helpful	A little helpful	Somewhat helpful	Moderately helpful	Very helpful	Extremely helpful

14. How much discussion tends to take place between you and your foundation funders on matters related to performance assessment?

1	2	3	4	5	6	7
No discussion	Very little discussion	A little discussion	Some discussion	Moderate discussion	Considerable discussion	A lot of discussion

15. Do your foundation funders tend to provide support to help your organization assess its performance?
    - ❑ Yes, we tend to receive **financial support** for assessment efforts (*skip question 18 and 20*)
    - ❑ Yes, we tend to receive **non-monetary support** for assessment efforts (*skip question 17 and 20*)
    - ❑ Yes, we tend to receive **both financial and non-monetary support** for assessment efforts (*skip question 20*)
    - ❑ No, we do not tend to receive any support for assessment efforts (*skip questions 16, 17, 18 and 19*)

16. How many of your foundation funders tend to provide support to help your organization assess its performance? (*Only shown to respondents who respond "Yes" to question 15*)
    - ❑ One of our foundation funders
    - ❑ A few of our foundation funders
    - ❑ Some of our foundation funders
    - ❑ Most of our foundation funders
    - ❑ All of our foundation funders

17. What type(s) of **financial support** has your organization received from its foundation funders to assess its performance? (*Please select all that apply*)
    - ❑ General operating support grant(s)
    - ❑ Percentage of project support grant(s) allocated for performance assessment
    - ❑ Funding for consultants
    - ❑ Funding for third-party evaluators
    - ❑ Funding for training on how to collect or analyze performance assessment data
    - ❑ Funding for technology to collect or analyze performance assessment data
    - ❑ Funding to support or create a position within our organization dedicated to performance assessment
    - ❑ Funding for other overhead costs associated with assessing our organization's performance
    - ❑ Other (*please specify*): _____

18. What type(s) of **non-monetary support** has your organization received from its foundation funders to assess its performance? (*Please select all that apply*)
- ❑ Advice on how to manage the assessment effort within our organization
- ❑ Help with identifying measurable outcomes that align with our organization's goal(s)
- ❑ Research or best practices for assessing performance
- ❑ Training on how to collect or analyze performance assessment data for our organization
- ❑ Help with interpreting the results of our organization's performance assessment
- ❑ Facilitation of collaboration of grantees to share performance assessment practices
- ❑ Facilitation of collaboration of grantees to agree upon shared measures to use for performance assessment
- ❑ Other (*please specify*): _____

19. How helpful have each of these types of support been to your organization's ability to assess its performance? *(Will only show the options that the respondent selects in questions 17 and 18)*

	Not at all helpful	Not very helpful	A little helpful	Somewhat helpful	Moderately helpful	Very helpful	Extremely helpful
General operating support grant(s)	1	2	3	4	5	6	7
Percentage of project support grant(s) allocated for performance assessment	1	2	3	4	5	6	7
Funding for consultants	1	2	3	4	5	6	7
Funding for third-party evaluators	1	2	3	4	5	6	7
Funding for training on how to collect or analyze performance assessment data	1	2	3	4	5	6	7
Funding for technology to collect or analyze performance assessment data	1	2	3	4	5	6	7
Funding to support or create a position within our organization dedicated to performance assessment	1	2	3	4	5	6	7
Funding for other overhead costs associated with assessing our organization's performance	1	2	3	4	5	6	7
Advice on how to manage the assessment effort within our organization	1	2	3	4	5	6	7
Help with identifying measurable outcomes that align with our organization's goal(s)	1	2	3	4	5	6	7
Research or best practices for assessing performance	1	2	3	4	5	6	7
Training on how to collect or analyze performance assessment data for our organization	1	2	3	4	5	6	7
Help with interpreting the results of our organization's performance assessment	1	2	3	4	5	6	7
Facilitation of collaboration of grantees to share performance assessment practices	1	2	3	4	5	6	7
Facilitation of collaboration of grantees to agree upon shared measures to use for performance assessment	1	2	3	4	5	6	7
Other (*please specify*): _____	1	2	3	4	5	6	7

20. If you could receive up to **two** of the following types of support from your foundation funders, which would be the most helpful to your organization's ability to assess its performance? (*Only shown to those who receive no type of support from their foundation funders.*)

Financial support

❑ General operating support grant(s)
❑ Percentage of project support grant(s) allocated for performance assessment
❑ Funding for consultants
❑ Funding for third-party evaluators
❑ Funding for training on how to collect or analyze performance assessment data
❑ Funding for technology to collect or analyze performance assessment data
❑ Funding to support or create a position within our organization dedicated to performance assessment
❑ Funding for other overhead costs associated with assessing our organization's performance

Non-monetary support

❑ Advice on how to manage the assessment effort within our organization
❑ Help with identifying measurable outcomes that align with our organization's goal(s)
❑ Research or best practices for assessing performance
❑ Training on how to collect or analyze performance assessment data for our organization
❑ Help with interpreting the results of our organization's performance assessment
❑ Facilitation of collaboration of grantees to share performance assessment practices
❑ Facilitation of collaboration of grantees to agree upon shared measures to use for performance assessment

❑ N/A: None of these types of support would be helpful (*mutually exclusive*)

Please think of the foundation that has been most helpful to your organization's efforts to assess its performance.

21. Which foundation was it? (*Only shown to respondents who select 2-7 in question 13*)

  _____

22. What specifically did that foundation do that was so helpful? (*Only shown to respondents who select 2-7 in question 13*)
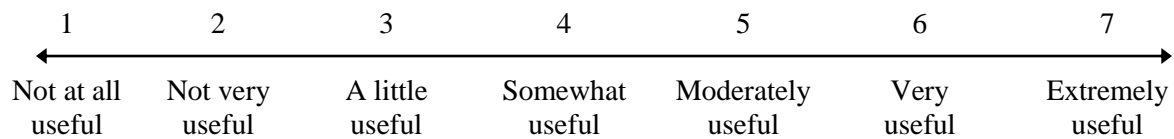
  _____
  _____
  _____

23. How many of your foundation funders require your organization to report to them data about its performance?
    - ❑ None of our foundation funders (*skip questions 24, 25 and 26*)
    - ❑ A few of our foundation funders
    - ❑ Some of our foundation funders
    - ❑ Most of our foundation funders
    - ❑ All of our foundation funders

24. How useful do these requirements tend to be to your organization's ability to assess its performance? *(Only shown to respondents who select "A few," "Some," "Most," or "All" in question 23)*

1	2	3	4	5	6	7
Not at all useful	Not very useful	A little useful	Somewhat useful	Moderately useful	Very useful	Extremely useful

25. What could your foundation funders change about their data requirements to be more useful to your organization's ability to assess its performance? (*Shown only to respondents who rate 1-4 in question 24.*)

    _____
    _____
    _____

26. What specific aspects of your foundation funders' data requirements are most useful to your organization's ability to assess its performance? (*Shown only to respondents who rate 5-7 in question 24.*)

    _____
    _____
    _____

27. Do you have any other suggestions for how foundations can work with your organization to help it assess or manage its performance?

    _____
    _____
    _____

28. Would you be willing to have a brief follow-up discussion with CEP regarding your organization's use of performance assessment?
    - ❑ Yes
    - ❑ No

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