

Center for Effective Philanthropy 2021 Resource and Assessment Survey

Analysis Summary

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Prepared For

Center for Effective Philanthropy

Prepared By

Learning for Action (LFA)



Learning for Action enhances the impact and sustainability of social sector organizations through highly customized research, strategy development, and evaluation services.

Table of Contents

I. Survey Response Rates.....	1
II. All Responses 2016, 2018, and 2021 Analysis Summary	2
General Impressions of CEP	2
General Impressions of Your Most Recent CEP Engagement	9
About Your Most Recent Report and Services	10
Creating Change with Results	15
Background and the Overall Experience	18
III. Client vs. Stakeholder Analysis Summary	20
General Impressions of CEP	20
IV. Tool/Service Analysis Summary	25
General Impressions of CEP	25
General Impressions of Your Most Recent CEP Engagement	32
About Your Most Recent Report and Services	33
Creating Change with Results	38
Background and the Overall Experience	42
V. All Tool Users 2016 vs. 2018 vs. 2021 Analysis Summary.....	44
General Impressions of CEP	44
General Impressions of Your Most Recent CEP Engagement	48
About Your Most Recent Report and Services	48
Creating Change with Results	51
Background and the Overall Experience	53
VI. Stakeholders 2016 vs. 2018 vs. 2021 Analysis Summary	54
General Impressions of CEP	54

Notes:

- *This report displays frequencies, means, and counts of the data in each analysis cut. Statistical significance and data trends for additional cuts of data are detailed in the full Resource and Assessment Survey Report.*
- *Percentages may sum to greater or less than 100% due to rounding.*

I. Survey Response Rates

Type of Survey	Response Rate	Percent
GPR	39/74	53%
DPR	13/28	46%
SPR	5/11	45%
Advisory Services	8/13	62%
Stakeholders	288/1,704	17%
Total	353/1,830	19%

LFA sent surveys to about 1,800 individuals, of which 1,700 individuals are considered to be in CEP's core audience (senior leaders at foundations with at least \$2.5 million annual giving). The remaining surveys, about 130 in total, were sent to clients who have commissioned a GPR, SPR, DPR, or advisory service project in the past few years.

II. All Responses 2016, 2018, and 2021 Analysis Summary

Dashes within the tables indicate questions that were not asked in the 2016 or 2018 Resource and Assessment Survey.

General Impressions of CEP

Exhibit 1. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
2016	2% (n=5)	12% (n=32)	38% (n=104)	49% (n=136)	277
2018	0.3% (n=1)	8% (n=24)	45% (n=138)	46% (n=141)	304
2021	1% (n=5)	14% (n=48)	41% (n=144)	44% (n=156)	353

Exhibit 2. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

	CEP has a poor reputation among leaders of grantmaking organizations (1)	CEP has a somewhat negative reputation among leaders of grantmaking organizations (2)	CEP has a somewhat positive reputation among leaders of grantmaking organizations (3)	CEP has an excellent reputation among leaders of grantmaking organizations (4)	Don't know	Mean ¹	n
2016	0% (n=0)	1% (n=1)	32% (n=76)	58% (n=137)	10% (n=24)	3.6 (n=214)	238
2018	0% (n=0)	1% (n=2)	24% (n=66)	61% (n=165)	14% (n=39)	3.7 (n=233)	272
2021	0% (n=0)	1% (n=2)	26% (n=76)	62% (n=181)	11% (n=33)	3.7 (n=259)	292

¹The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

Exhibit 3. In the past year, have you or has someone in your organization read a CEP research publication (e.g. *Staying Connected: How Five Foundations Understand Those they Seek to Help; Relationships Matter: Program Officers, Grantees, and the Keys to Success; Benchmarking Program Officer Roles and Responsibilities; A Date Certain: Lessons from Limited Life Foundations; The Future of Foundation Philanthropy: The CEO Perspective; Benchmarking Foundation Evaluation Practices, etc.*)?²

	Yes	No	Don't know	n
2016	84% (n=202)	5% (n=11)	11% (n=27)	240
2018	82% (n=223)	8% (n=22)	10% (n=27)	272

² In 2021, this question was updated to include other CEP resources. See Exhibits 5, 7 and 9 for 2021 data.

Exhibit 4. In the past year, have you or your organization engaged CEP's resources in any of the following ways?

- Read a CEP research publication (e.g., *Foundations Respond to Crisis; New Attitudes, Old Practices: The Provision of Multiyear General Operating Support; Funder Support during the COVID-19 Pandemic; Policy Influence: What Foundations are Doing and Why*)
- Read *Giving Done Right* by Phil Buchanan
- Listened to the *Giving Done Right* podcast
- Attended CEP webinars/virtual learning programs (e.g., *Taking Stock: Philanthropy's Role in Supporting Racial Equity, Foundations Respond to Crisis, Global Funders: Have you Made a Plan to Listen?*)
- Attended an event at which a CEP staff member spoke (excluding a presentation of the results of an assessment your organization commissioned)
- Read CEP's blog

	Yes	No	Don't know	n
2016	-	-	-	-
2018	-	-	-	-
2021	80% (n=233)	14% (n=41)	6% (n=18)	292

Exhibit 5. Please select the CEP resources your organization engaged with during the past year.

		Frequency	Percent
A CEP research publication	2016	-	-
	2018	-	-
	2021	185	63%
<i>Giving Done Right</i> by Phil Buchanan	2016	-	-
	2018	-	-
	2021	91	31%
The <i>Giving Done Right</i> podcast	2016	-	-
	2018	-	-
	2021	22	8%
CEP webinars/virtual learning programs	2016	-	-
	2018	-	-
	2021	113	39%
An event at which a CEP staff member spoke	2016	-	-
	2018	-	-
	2021	55	19%
CEP's blog	2016	-	-
	2018	-	-
	2021	90	31%

Exhibit 6. In the past year, how useful have you found CEP's research publication(s) for reflecting on your or your foundation's work?³

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0% (n=0)	1% (n=2)	49% (n=99)	42% (n=85)	8% (n=15)	3.6	201
2018	0% (n=0)	3% (n=7)	43% (n=95)	46% (n=102)	8% (n=17)	3.6	221

³ In 2021, this question was switched to a 7-point scale to be consistent with other scales throughout the survey. This exhibit has been included for reference.

Exhibit 7. In the past year, how useful have you found CEP’s resources for reflecting on your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	1% (n=1)	3% (n=5)	8% (n=13)	27% (n=44)	38% (n=62)	23% (n=38)	5.7	163
<i>Giving Done Right</i> by Phil Buchanan	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	3% (n=3)	3% (n=3)	10% (n=9)	34% (n=29)	24% (n=21)	24% (n=21)	5.5	86
The <i>Giving Done Right</i> podcast	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	5% (n=1)	5% (n=1)	16% (n=3)	21% (n=4)	26% (n=5)	26% (n=5)	5.4	19
CEP webinars/virtual learning programs	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	3% (n=3)	7% (n=7)	34% (n=35)	36% (n=37)	20% (n=20)	5.6	102
An event at which a CEP staff member spoke	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	0% (n=0)	9% (n=4)	28% (n=13)	38% (n=18)	26% (n=12)	5.8	47
CEP’s blog	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	4% (n=3)	12% (n=10)	33% (n=27)	36% (n=30)	16% (n=13)	5.5	83

Exhibit 8. In the past year, how useful have you found CEP’s research publication(s) for improving your or your foundation’s work? ⁴

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0% (n=0)	8% (n=16)	62% (n=125)	24% (n=49)	6% (n=12)	3.3	202
2018	1% (n=1)	8% (n=17)	57% (n=125)	29% (n=64)	6% (n=12)	3.3	219

⁴ In 2021, this question was switched to a 7-point scale to be consistent with other scales throughout the survey. This exhibit has been included for reference.

Exhibit 9. In the past year, how useful have you found CEP’s resources for improving on your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	2% (n=3)	6% (n=10)	22% (n=36)	31% (n=50)	23% (n=37)	16% (n=26)	5.2	162
<i>Giving Done Right</i> by Phil Buchanan	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	3% (n=3)	2% (n=2)	8% (n=7)	26% (n=22)	27% (n=23)	20% (n=17)	14% (n=12)	4.9	86
The <i>Giving Done Right</i> podcast	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	6% (n=1)	17% (n=3)	17% (n=3)	33% (n=6)	28% (n=5)	5.6	18
CEP webinars/virtual learning programs	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	5% (n=5)	27% (n=27)	36% (n=36)	18% (n=18)	15% (n=15)	5.1	101
An event at which a CEP staff member spoke	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	6% (n=3)	24% (n=12)	31% (n=15)	20% (n=10)	18% (n=9)	5.2	49
CEP’s blog	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	1% (n=1)	6% (n=5)	33% (n=27)	35% (n=29)	11% (n=9)	13% (n=11)	4.9	82

Exhibit 10. In the past year, have you or your organization used any of CEP’s resources in informing conversations with board members?⁵

	Yes	No	Don’t know/ Not applicable	n
2016	31% (n=72)	60% (n=138)	9% (n=20)	230
2018	34% (n=75)	58% (n=128)	9% (n=19)	222
2021	43% (n=91)	43% (n=92)	14% (n=30)	213

⁵ The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: “In the past year, have you used any of CEP’s writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?”

Exhibit 11. In the past year, how useful have you found CEP’s resources for reflecting on your organization’s efforts related to the following?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	N/A (I did not use CEP resources for this purpose)	Mean ⁶	Total n
The COVID-19 Pandemic	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=1)	3% (n=6)	5% (n=11)	11% (n=22)	24% (n=50)	18% (n=38)	15% (n=31)	24% (n=49)	5.2 (n=159)	208
The movement for racial justice	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=1)	2% (n=5)	7% (n=14)	9% (n=18)	23% (n=47)	23% (n=48)	14% (n=28)	21% (n=44)	5.2 (n=161)	205

⁶ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 12. How strongly do you associate CEP with the following statements? CEP is...

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ⁷	Total n
Engaged in rigorous work	2016	-	-	-	-	-	-	-	-	-	-
	2018	0.4% (n=1)	2% (n=5)	1% (n=3)	4% (n=12)	15% (n=42)	35% (n=94)	29% (n=79)	13% (n=36)	5.9 (n=236)	272
	2021	0% (n=1)	0% (n=1)	1% (n=2)	6% (n=12)	13% (n=27)	38% (n=79)	34% (n=71)	7% (n=15)	6.0 (n=193)	208
An expert in the field of philanthropy	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	2% (n=6)	2% (n=6)	3% (n=7)	13% (n=33)	36% (n=95)	39% (n=103)	5% (n=14)	6.1 (n=250)	264
	2021	0% (n=1)	0% (n=0)	1% (n=3)	3% (n=6)	12% (n=24)	37% (n=76)	45% (n=93)	2% (n=5)	6.2 (n=203)	208
Focused on the most important issues in philanthropy	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	3% (n=8)	2% (n=6)	7% (n=18)	21% (n=58)	36% (n=97)	18% (n=50)	13% (n=35)	5.6 (n=237)	272
	2021	0% (n=0)	1% (n=2)	2% (n=5)	6% (n=13)	19% (n=40)	43% (n=89)	24% (n=49)	5% (n=10)	5.8 (n=198)	208

Table continues on next page.

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ⁷	Total n
Trusted	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	2% (n=5)	2% (n=5)	3% (n=9)	9% (n=23)	35% (n=96)	40% (n=107)	10% (n=26)	6.1 (n=245)	271
	2021	0% (n=0)	0% (n=1)	0% (n=1)	4% (n=8)	10% (n=21)	36% (n=74)	45% (n=93)	4% (n=8)	6.3 (n=198)	206
Influential on foundation practice and effectiveness	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	2% (n=5)	1% (n=3)	7% (n=19)	24% (n=64)	29% (n=76)	27% (n=71)	10% (n=25)	5.8 (n=238)	263
	2021	0% (n=0)	0% (n=1)	0% (n=1)	8% (n=16)	23% (n=47)	33% (n=68)	27% (n=56)	9% (n=18)	5.8 (n=189)	207
Innovative	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	2% (n=6)	4% (n=11)	10% (n=26)	28% (n=75)	27% (n=73)	11% (n=31)	18% (n=50)	5.3 (n=222)	272
	2021	0% (n=0)	0% (n=1)	5% (n=10)	18% (n=37)	23% (n=47)	35% (n=72)	13% (n=26)	7% (n=14)	5.3 (n=193)	207
Responsive to the pressing topics of the time	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	2% (n=4)	10% (n=21)	12% (n=24)	43% (n=90)	28% (n=59)	5% (n=10)	5.9 (n=198)	208

⁷The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

General Impressions of Your Most Recent CEP Engagement

Exhibit 13. How satisfied were you with your recent GPR, DPR, SPR, or Advisory experience overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	11% (n=5)	30% (n=14)	54% (n=25)	6.4	46
2018	0% (n=0)	1% (n=1)	2% (n=2)	1% (n=1)	7% (n=6)	35% (n=29)	53% (n=44)	6.3	83
2021	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	17% (n=11)	21% (n=13)	59% (n=37)	6.4	63

Exhibit 14. How responsive was staff from CEP to questions your organization had during your recent GPR, DPR, SPR, or Advisory process?

	Not at all responsive (1)	(2)	(3)	(4)	(5)	(6)	Very responsive (7)	Mean	n
2016	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=9)	80% (n=37)	6.8	46
2018	0% (n=0)	0% (n=0)	0% (n=0)	1% (n=1)	4% (n=3)	10% (n=8)	85% (n=70)	6.8	82
2021	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	3% (n=2)	13% (n=8)	81% (n=51)	6.7	63

Exhibit 15. Please rate the extent to which you agree or disagree that CEP accurately set expectations regarding the effort required on your end in preparations for the engagement.

	Strongly disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly agree (7)	Mean	n
2016	-	-	-	-	-	-	-	-	-
2018	-	-	-	-	-	-	-	-	-
2021	0% (n=0)	2% (n=1)	0% (n=0)	3% (n=2)	6% (n=4)	16% (n=10)	73% (n=46)	6.5	63

About Your Most Recent Report and Services⁸

Exhibit 16. How satisfied are you with the extent to which the CEP staff’s interpretation of the results of your recent GPR, DPR, SPR, or Advisory Report was meaningful for guiding reflection on your organization’s performance overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=2)	19% (n=8)	48% (n=20)	29% (n=12)	6.0	42
2018	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=3)	15% (n=11)	38% (n=27)	43% (n=31)	6.2	72
2021	0% (n=0)	0% (n=0)	2% (n=1)	11% (n=7)	13% (n=8)	26% (n=16)	48% (n=29)	6.1	61

⁸ In 2016 and 2018, Advisory respondents were not asked the remaining questions, with the exception of those posed in Exhibit 26 and Exhibit 27. In 2021, Advisory respondents were included, and the question language reflects that inclusion.

Exhibit 17. Please indicate which of the following services/features you used as part of your recent GPR, DPR, SPR, or Advisory engagement.

CEP Service		Frequency	Percent
Memorandum of Key Findings and Recommendations/ Executive Summary	2016	-	-
	2018	72	97%
	2021	59	97%
Online "Getting Ready" Guide	2016	-	-
	2018	-	-
	2021	28	46%
Segmentation of the data by subgroup (e.g., program area, department)	2016	-	-
	2018	68	92%
	2021	48	79%
Separate reports by team, program area, primary contact, etc.	2016	-	-
	2018	-	-
	2021	34	56%
Open-ended respondent comments and suggestions	2016	-	-
	2018	72	97%
	2021	60	98%
Discussion and presentation of results	2016	-	-
	2018	-	-
	2021	58	95%
Additional analyses or consultations after receiving your draft report	2016	-	-
	2018	55	74%
	2021	40	66%
CEP research publications relevant to your results	2016	-	-
	2018	37	50%
	2021	19	31%
Interactive, online reporting system	2016	-	-
	2018	62	84%
	2021	43	70%
Analysis of results by race and ethnicity, gender, or other demographic characteristics of respondents	2016	-	-
	2018	-	-
	2021	28	46%

Exhibit 18. For each service/feature that was part of your engagement, please rate its helpfulness in deepening your organization’s ability to use the GPR, DPR, SPR, or Advisory report to reflect on its performance.⁹

		Not at all helpful (1)	(2)	(3)	(4)	(5)	(6)	Very helpful (7)	Not applicable/ Did not use	Mean ¹⁰	Total n
Memorandum of Key Findings and Recommendations/ Executive Summary	2016	0% (n=0)	2% (n=1)	2% (n=1)	5% (n=2)	14% (n=6)	21% (n=9)	52% (n=22)	2% (n=1)	6.1 (n=41)	42
	2018	0% (n=0)	1% (n=1)	0% (n=0)	7% (n=5)	12% (n=9)	24% (n=18)	53% (n=39)	3% (n=2)	6.2 (n=72)	74
	2021	0% (n=0)	0% (n=0)	0% (n=0)	2% (n=1)	10% (n=6)	24% (n=14)	64% (n=37)	-	6.5 (n=58)	58
Online “Getting Ready” Guide	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	4% (n=1)	4% (n=1)	19% (n=5)	35% (n=9)	38% (n=10)	-	6.0 (n=26)	26
Segmentation of the data by subgroup (e.g., program area, department)	2016	0% (n=0)	0% (n=0)	7% (n=3)	5% (n=2)	10% (n=4)	26% (n=11)	48% (n=20)	5% (n=2)	6.1 (n=40)	42
	2018	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=3)	16% (n=12)	23% (n=17)	49% (n=36)	8% (n=6)	6.3 (n=68)	74
	2021	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	9% (n=4)	21% (n=10)	66% (n=31)	-	6.5 (n=47)	47
Separate reports by team, program area, primary contact, etc.	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	0% (n=0)	13% (n=4)	3% (n=1)	9% (n=3)	75% (n=24)	-	6.5 (n=32)	32
Open-ended respondent comments and suggestions ¹¹	2016	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=2)	7% (n=3)	24% (n=10)	62% (n=26)	2% (n=1)	6.5 (n=41)	42
	2018	0% (n=0)	0% (n=0)	0% (n=0)	7% (n=5)	14% (n=10)	31% (n=23)	46% (n=34)	3% (n=2)	6.2 (n=72)	74
	2021	0% (n=0)	0% (n=0)	2% (n=1)	2% (n=1)	10% (n=6)	27% (n=16)	59% (n=35)	-	6.5 (59)	59
Discussion and presentation of results	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	2% (n=1)	5% (n=3)	18% (n=10)	12% (n=7)	63% (n=36)	-	6.3 (n=57)	57

Table continues on next page.

		Not at all helpful					Very helpful (7)	Not applicable/ Did not use	Mean ¹	Total n	
		(1)	(2)	(3)	(4)	(5)					(6)
Additional analyses or consultations after receiving your draft report ¹²	2016	-	-	-	-	-	-	-	-	-	
	2018	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	9% (n=7)	24% (n=18)	39% (n=29)	27% (n=20)	6.4 (n=54)	74
	2021	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	15% (n=6)	23% (n=9)	56% (n=22)	-	6.3 (n=39)	39
CEP research publications relevant to your results	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	0% (n=0)	0% (n=0)	12% (n=9)	15% (n=11)	12% (n=9)	11% (n=8)	50% (n=37)	5.4 (n=37)	74
	2021	0% (n=0)	11% (n=2)	11% (n=2)	21% (n=4)	21% (n=4)	5% (n=1)	32% (n=6)	-	5.0 (n=19)	19
Interactive, online reporting system ¹³	2016	0% (n=0)	0% (n=0)	7% (n=3)	0% (n=0)	12% (n=5)	31% (n=13)	50% (n=21)	0% (n=0)	6.2 (n=42)	42
	2018	0% (n=0)	0% (n=0)	1% (n=1)	3% (n=2)	16% (n=12)	24% (n=18)	39% (n=29)	16% (n=12)	6.2 (n=62)	74
	2021	0% (n=0)	0% (n=0)	5% (n=2)	2% (n=1)	22% (n=9)	34% (n=14)	37% (n=15)	-	6.0 (n=41)	41
Analysis of results by race and ethnicity, gender, or other demographic characteristics of respondents	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	0% (n=0)	11% (n=3)	30% (n=8)	19% (n=5)	41% (n=11)	-	5.9 (n=27)	27

⁹ In 2016 respondents were asked one stem question: "Please indicate which of the following services/features you used as part of your recent GPR, DPR, or SPR engagement. For each service/feature that was part of your engagement, please rate its helpfulness in deepening your foundation's ability to use the GPR, DPR, or SPR to reflect on its performance." In 2018 and 2021, respondents were asked to select services/features first, and were then asked to rate only those services/features they selected. Those who selected the service/feature (Exhibit 17) may not have rated the service/feature.

¹⁰The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

¹¹ The 2016 survey question language is comparable to the 2018 and 2021 language. 2016 language reads as: "Downloadable PDF of all respondent comments and suggestions"

¹² The 2018 survey question language is comparable to the 2021 language. 2018 language reads as: "Additional analyses after receiving your draft report"

¹³ The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: "Interactive online report"

Exhibit 19. How well did CEP's work reflect a clear understanding of the specific context of your organization?

	Not at all well (1)	(2)	(3)	(4)	(5)	(6)	Extremely well (7)	Mean	n
2016	0% (n=0)	0% (n=0)	2% (n=1)	7% (n=3)	33% (n=14)	31% (n=13)	26% (n=11)	5.7	42
2018	0% (n=0)	3% (n=2)	0% (n=0)	7% (n=5)	19% (n=14)	35% (n=25)	36% (n=26)	5.9	72
2021	0% (n=0)	0% (n=0)	2% (n=1)	3% (n=2)	19% (n=12)	42% (n=26)	34% (n=21)	6.0	62

Exhibit 20. In general, how would you rate the quality of CEP’s presentation? ¹⁴

	Poor (1)	(2)	(3)	(4)	(5)	(6)	Excellent (7)	Not applicable	Mean ¹⁵	Total n
2016	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=2)	5% (n=2)	17% (n=7)	46% (n=19)	29% (n=11)	6.4 (n=30)	41
2018	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	7% (n=5)	14% (n=10)	56% (n=40)	21% (n=15)	6.5 (n=57)	72
2021	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	8% (n=5)	21% (n=13)	60% (n=37)	8% (n=5)	6.5 (n=57)	62

¹⁴ The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: “In general, how would you rate the quality of CEP’s in-person presentation?”

¹⁵ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 21. Did CEP’s presentation of results include a video presentation component?

	Yes	No	Don’t know	n
2016	-	-	-	-
2018	-	-	-	-
2021	49% (n=31)	41% (n=26)	10% (n=6)	63

Exhibit 22. Please rate the extent to which CEP’s video presentations were each of the following?

		Not at all (1)	(2)	(3)	(4)	(5)	(6)	Very (7)	Mean	Total n
Clear and compelling	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	0% (n=0)	10% (n=3)	10% (n=3)	23% (n=7)	58% (n=18)	6.3	31
Engaging (e.g. interactive, participatory, etc.)	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	3% (n=1)	13% (n=4)	13% (n=4)	26% (n=8)	45% (n=14)	6.0	31
Accessible to all participants (e.g., high quality video and audio, appropriate for any participants with disabilities, etc.)	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	13% (n=4)	29% (n=9)	58% (n=18)	6.5	31
Responsive to experience of participants (e.g., mood in “room,” implicit signals to dig in or move on, etc.)	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	23% (n=7)	35% (n=11)	35% (n=11)	6.0	31
Useful (e.g., a good jumping-off point for further internal engagement)	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=2)	10% (n=3)	32% (n=10)	52% (n=16)	6.3	31

Creating Change with Results

Exhibit 23. Considering the aspects of your work identified in the table below, please indicate the degree to which use of GPR, DPR, SPR, or Advisory report results affected change in your organization’s decision-making or practices. *(Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)*

		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ¹⁶	Total n
Communications with grantees, donors, and/or staff (e.g., clarity, methods of communication)	2016	33% (n=14)	7% (n=3)	29% (n=12)	26% (n=11)	2% (n=1)	2% (n=1)	2.3 (n=26)	42
	2018	15% (n=11)	7% (n=5)	50% (n=36)	25% (n=18)	3% (n=2)	0% (n=0)	2.2 (n=59)	72
	2021	10% (n=6)	7% (n=4)	46% (n=27)	31% (n=18)	0% (n=0)	7% (n=4)	2.3 (n=49)	59
Grantmaking processes (e.g., selection, reporting and evaluation processes)	2016	43% (n=18)	14% (n=6)	21% (n=9)	10% (n=4)	0% (n=0)	12% (n=5)	1.9 (n=19)	42
	2018	25% (n=18)	14% (n=10)	42% (n=30)	6% (n=4)	1% (n=1)	13% (n=9)	1.9 (n=44)	72
	2021	12% (n=7)	14% (n=8)	39% (n=23)	17% (n=10)	5% (n=3)	14% (n=8)	2.0 (n=41)	59
Grantmaking patterns (e.g., size, type, and length of grants)	2016	31% (n=13)	41% (n=17)	7% (n=3)	7% (n=3)	2% (n=1)	12% (n=5)	1.4 (n=23)	42
	2018	25% (n=18)	38% (n=27)	19% (n=14)	3% (n=2)	0% (n=0)	15% (n=11)	1.4 (n=43)	72
	2021	25% (n=15)	31% (n=18)	17% (n=10)	8% (n=5)	5% (n=3)	14% (n=8)	1.6 (n=33)	59
Organization strategy (e.g., what it is you’re trying to do, focus)	2016	31% (n=12)	44% (n=17)	10% (n=4)	5% (n=2)	5% (n=2)	5% (n=2)	1.4 (n=23)	39
	2018	22% (n=16)	42% (n=30)	22% (n=16)	4% (n=3)	3% (n=2)	7% (n=5)	1.5 (n=49)	72
	2021	10% (n=6)	33% (n=19)	38% (n=22)	9% (n=5)	3% (n=2)	7% (n=4)	1.7 (n=46)	58
Provision of assistance to grantees beyond “the check” (e.g., management assistance, field-related assistance, assistance securing funding from other sources)	2016	33% (n=14)	26% (n=11)	21% (n=9)	12% (n=5)	2% (n=1)	5% (n=2)	1.8 (n=25)	42
	2018	19% (n=14)	17% (n=12)	43% (n=31)	6% (n=4)	4% (n=3)	11% (n=8)	1.8 (n=47)	72
	2021	14% (n=8)	27% (n=16)	31% (n=18)	12% (n=7)	2% (n=1)	15% (n=9)	1.8 (n=41)	59
Staffing levels	2016	29% (n=12)	57% (n=24)	7% (n=3)	2% (n=1)	0% (n=0)	5% (n=2)	1.2 (n=28)	42
	2018	13% (n=9)	60% (n=43)	19% (n=14)	3% (n=2)	3% (n=2)	3% (n=2)	1.3 (n=59)	72
	2021	12% (n=7)	49% (n=29)	20% (n=12)	5% (n=3)	0% (n=0)	14% (n=8)	1.4 (n=44)	59

Table continues on next page.

		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ¹⁶	Total n
Attitudes toward work with grantees	2016	35% (n=14)	18% (n=7)	33% (n=13)	10% (n=4)	0% (n=0)	5% (n=2)	1.9 (n=24)	40
	2018	23% (n=16)	16% (n=11)	41% (n=29)	6% (n=4)	1% (n=1)	14% (n=10)	1.8 (n=44)	71
	2021	12% (n=7)	36% (n=21)	26% (n=15)	10% (n=6)	2% (n=1)	14% (n=8)	1.6 (n=21)	58
Attitudes toward work with donors	2016	31% (n=13)	17% (n=7)	2% (n=1)	2% (n=1)	2% (n=1)	45% (n=19)	1.3 (n=9)	42
	2018	10% (n=7)	19% (n=14)	13% (n=9)	6% (n=4)	1% (n=1)	51% (n=37)	1.6 (n=27)	72
	2021	10% (n=6)	19% (n=11)	19% (n=11)	7% (n=4)	0% (n=0)	46% (n=27)	1.7 (n=26)	59
Diversity, equity, and inclusion efforts <i>inside your organization</i>	2016	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-
	2021	10% (n=6)	28% (n=17)	27% (n=16)	15% (n=9)	0% (n=0)	20% (n=12)	1.8 (n=42)	60
Diversity, equity, and inclusion efforts <i>related to your programs, grantees, donors, or other partners</i>	2016	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-
	2021	15% (n=9)	27% (n=16)	32% (n=19)	10% (n=6)	0% (n=0)	15% (n=9)	1.8 (n=41)	59
Approach to understanding your impact	2016	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-
	2021	13% (n=8)	18% (n=11)	42% (n=25)	12% (n=7)	5% (n=3)	10% (n=6)	1.9 (n=43)	60
Organizational/team culture	2016	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-
	2021	10% (n=6)	28% (n=17)	33% (n=20)	15% (n=9)	2% (n=1)	12% (n=7)	1.8 (n=46)	60
Prioritization of staff time	2016	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-
	2021	12% (n=7)	20% (n=12)	42% (n=25)	14% (n=8)	0% (n=0)	12% (n=7)	1.9 (n=45)	59

¹⁶ The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.

Exhibit 24. In supporting your organization’s efforts related to the **COVID-19 pandemic**, how useful was:

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	N/A (My organization didn’t use this resource to support related efforts)	Mean ¹⁷	Total n
Your report and analysis (data, analysis, written narrative, etc.)	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	7% (n=4)	2% (n=1)	14% (n=8)	10% (n=6)	8% (n=5)	22% (n=13)	37% (n=22)	5.2 (n=37)	59
Your engagement with CEP staff (presentation, discussion, facilitation, etc.)	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	7% (n=4)	2% (n=1)	2% (n=1)	10% (n=6)	12% (n=7)	20% (n=12)	47% (n=28)	5.5 (n=31)	59

¹⁷ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 25. In supporting your organization’s efforts related to the **movement for racial justice**, how useful was:

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	N/A (My organization didn’t use this resource to support related efforts)	Mean ¹⁸	Total n
Your report and analysis (data, analysis, written narrative, etc.)	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	3% (n=2)	5% (n=3)	7% (n=4)	7% (n=4)	10% (n=6)	8% (n=5)	5% (n=3)	54% (n=32)	4.3 (n=27)	59
Your engagement with CEP staff (presentation, discussion, facilitation, etc.)	2016	-	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-	-
	2021	3% (n=2)	5% (n=3)	5% (n=3)	5% (n=3)	7% (n=4)	10% (n=6)	7% (n=4)	58% (n=34)	4.5 (n=25)	59

¹⁸ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Background and the Overall Experience

Exhibit 26. Relative to other processes your organization has undertaken to assess its overall effectiveness as a grantmaking organization, how useful was your recent GPR, DPR, or SPR?

	Much less useful (1)	(2)	(3)	(4)	(5)	(6)	Much more useful (7)	Don't know	Not applicable (no other assessment processes undertaken)	Mean ¹⁹	Total n
2016	0% (n=0)	0% (n=0)	2% (n=1)	5% (n=2)	27% (n=11)	24% (n=10)	29% (n=12)	2% (n=1)	10% (n=4)	5.8 (n=36)	41
2018	0% (n=0)	0% (n=0)	3% (n=2)	3% (n=2)	17% (n=12)	27% (n=19)	19% (n=13)	0% (n=0)	31% (n=22)	5.8 (n=48)	70
2021	0% (n=0)	0% (n=0)	4% (n=2)	4% (n=2)	20% (n=11)	25% (n=14)	27% (n=15)	0% (n=0)	21% (n=12)	5.9 (n=44)	56

¹⁹ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 27. Does your organization intend to commission the GPR, DPR, SPR, or Advisory report again in the future?

	Yes	No	Don't know	n
2016	69% (n=29)	0% (n=0)	31% (n=13)	42
2018	72% (n=52)	1% (n=1)	26% (n=19)	72
2021	69% (n=42)	0% (n=0)	31% (n=19)	61

Exhibit 28. Would you recommend the GPR, DPR, SPR, or CEP Advisory Services to a colleague organization?

	Yes	No	n
2016	100% (n=46)	0% (n=0)	46
2018	98% (n=79)	3% (n=2)	81
2021	100% (n=61)	0% (n=0)	61

Exhibit 29. How valuable was your recent GPR, DPR, SPR, or Advisory Service relative to its cost?

	Very poor value for the cost (1)	(2)	(3)	(4)	(5)	(6)	Excellent value for the cost (7)	Mean	n
2016	0% (n=0)	2% (n=1)	2% (n=1)	4% (n=2)	35% (n=16)	35% (n=16)	22% (n=10)	5.6	46
2018	0% (n=0)	0% (n=0)	3% (n=2)	15% (n=12)	17% (n=14)	36% (n=29)	30% (n=24)	5.8	81
2021	0% (n=0)	0% (n=0)	3% (n=2)	10% (n=6)	27% (n=16)	29% (n=17)	31% (n=18)	5.7	59

III. Client vs. Stakeholder Analysis Summary

General Impressions of CEP

Exhibit 30. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP (1)	I have heard of CEP, but I don't really know CEP's work (2)	I am somewhat familiar with CEP's work (3)	I know CEP's work well (4)	Mean ²⁰	n
Client	0% (n=0)	0% (n=0)	31% (n=20)	69% (n=45)	3.7***	65
Stakeholder	2% (n=5)	17% (n=48)	43% (n=124)	39% (n=111)	3.2	288

²⁰ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

*** Statistically significant difference $p < 0.001$

Exhibit 31. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

	CEP has a poor reputation among leaders of grantmaking organizations (1)	CEP has a somewhat negative reputation among leaders of grantmaking organizations (2)	CEP has a somewhat positive reputation among leaders of grantmaking organizations (3)	CEP has an excellent reputation among leaders of grantmaking organizations (4)	Don't know	Mean ²¹	n
Client	0% (n=0)	0% (n=0)	15% (n=10)	72% (n=47)	12% (n=8)	3.8**	65
Stakeholder	0% (n=0)	1% (n=2)	29% (n=66)	59% (n=134)	11% (n=25)	3.7	227

²¹ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

** Statistically significant difference $p < 0.01$

Exhibit 32. In the past year, have you or your organization engaged CEP's resources in any of the following ways?

- Read a CEP research publication (e.g., *Foundations Respond to Crisis; New Attitudes, Old Practices: The Provision of Multiyear General Operating Support; Funder Support during the COVID-19 Pandemic; Policy Influence: What Foundations are Doing and Why*)
- Read *Giving Done Right* by Phil Buchanan
- Listened to the *Giving Done Right* podcast
- Attended CEP webinars/virtual learning programs (e.g., *Taking Stock: Philanthropy's Role in Supporting Racial Equity, Foundations Respond to Crisis, Global Funders: Have you Made a Plan to Listen?*)
- Attended an event at which a CEP staff member spoke (excluding a presentation of the results of an assessment your organization commissioned)
- Read CEP's blog

	Yes	No	Don't know	n
Client	83% (n=54)	15% (n=10)	2% (n=1)	65
Stakeholder	79% (n=179)	14% (n=31)	7% (n=17)	227

Exhibit 33. In the past year, how useful have you found CEP’s resources for reflecting on your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	Client	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	21% (n=8)	46% (n=18)	28% (n=11)	6.0 [†]	39
	Stakeholder	0% (n=0)	1% (n=1)	3% (n=4)	10% (n=12)	29% (n=36)	35% (n=44)	22% (n=27)	5.6	124
<i>Giving Done Right</i> by Phil Buchanan	Client	0% (n=0)	0% (n=0)	5% (n=1)	15% (n=3)	45% (n=9)	15% (n=3)	20% (n=4)	5.3	20
	Stakeholder	0% (n=0)	5% (n=3)	3% (n=2)	9% (n=6)	30% (n=20)	27% (n=18)	26% (n=17)	5.5	66
The <i>Giving Done Right</i> podcast	Client	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	29% (n=2)	14% (n=1)	43% (n=3)	5.9	7
	Stakeholder	0% (n=0)	8% (n=1)	8% (n=1)	17% (n=2)	17% (n=2)	33% (n=4)	17% (n=2)	5.1	12
CEP webinars/virtual learning programs	Client	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=5)	45% (n=9)	30% (n=6)	6.1*	20
	Stakeholder	0% (n=0)	0% (n=0)	4% (n=3)	9% (n=7)	37% (n=30)	34% (n=28)	17% (n=14)	5.5	82
An event at which a CEP staff member spoke	Client	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=2)	33% (n=4)	50% (n=6)	6.3*	12
	Stakeholder	0% (n=0)	0% (n=0)	0% (n=0)	11% (n=4)	31% (n=11)	40% (n=14)	17% (n=6)	5.6	35
CEP’s blog	Client	0% (n=0)	0% (n=0)	9% (n=2)	9% (n=2)	41% (n=9)	27% (n=6)	14% (n=3)	5.3	22
	Stakeholder	0% (n=0)	0% (n=0)	2% (n=1)	13% (n=8)	30% (n=18)	39% (n=24)	16% (n=10)	5.6	61

[†] Approaches statistical significance $p < 0.10$

* Statistically significant difference $p < 0.05$

Exhibit 34. In the past year, how useful have you found CEP’s resources for improving your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	Client	0% (n=0)	0% (n=0)	3% (n=1)	21% (n=8)	39% (n=15)	16% (n=6)	21% (n=8)	5.3	38
	Stakeholder	0% (n=0)	2% (n=3)	7% (n=9)	23% (n=28)	28% (n=35)	25% (n=31)	15% (n=18)	5.1	124
<i>Giving Done Right</i> by Phil Buchanan	Client	0% (n=0)	0% (n=0)	0% (n=0)	40% (n=8)	30% (n=6)	15% (n=3)	15% (n=3)	5.1	20
	Stakeholder	5% (n=3)	3% (n=2)	11% (n=7)	21% (n=14)	26% (n=17)	21% (n=14)	14% (n=9)	4.8	66
The <i>Giving Done Right</i> podcast	Client	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	14% (n=1)	29% (n=2)	43% (n=3)	6.0	7
	Stakeholder	0% (n=0)	0% (n=0)	9% (n=1)	18% (n=2)	18% (n=2)	36% (n=4)	18% (n=2)	5.4	11
CEP webinars/virtual learning programs	Client	0% (n=0)	0% (n=0)	0% (n=0)	35% (n=7)	25% (n=5)	20% (n=4)	20% (n=4)	5.3	20
	Stakeholder	0% (n=0)	0% (n=0)	6% (n=5)	25% (n=20)	38% (n=31)	17% (n=14)	14% (n=11)	5.1	81
An event at which a CEP staff member spoke	Client	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=2)	33% (n=4)	17% (n=2)	33% (n=4)	5.7	12
	Stakeholder	0% (n=0)	0% (n=0)	8% (n=3)	27% (n=10)	30% (n=11)	22% (n=8)	14% (n=5)	5.0	37
CEP’s blog	Client	0% (n=0)	0% (n=0)	5% (n=1)	41% (n=9)	27% (n=6)	18% (n=4)	9% (n=2)	4.9	22
	Stakeholder	0% (n=0)	2% (n=1)	7% (n=4)	30% (n=18)	38% (n=23)	8% (n=5)	15% (n=9)	4.9	60

Exhibit 35. In the past year, have you or your organization used any of CEP’s resources in informing conversations with board members?

	Yes	No	Don’t know/ Not applicable	n
Client	52% (n=27)	25% (n=13)	23% (n=12)	52
Stakeholder	40% (n=64)	49% (n=79)	11% (n=18)	161

Exhibit 36. In the past year, how useful have you found CEP's resources for reflecting on your organization's efforts related to the following:

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	N/A (I did not use CEP resources for this purpose)	Mean ²²	Total n
The COVID-19 Pandemic	Client	0% (n=0)	0% (n=0)	0% (n=0)	18% (n=9)	27% (n=13)	18% (n=9)	22% (n=11)	14% (n=7)	5.5 [†] (n=42)	49
	Stakeholder	0% (n=0)	1% (n=1)	4% (n=6)	7% (n=11)	8% (n=13)	23% (n=37)	18% (n=29)	26% (n=42)	5.1 (n=117)	159
The movement for racial justice	Client	0% (n=0)	2% (n=1)	2% (n=1)	12% (n=6)	26% (n=13)	18% (n=9)	14% (n=7)	26% (n=13)	5.3 (n=37)	50
	Stakeholder	1% (n=1)	3% (n=4)	8% (n=13)	8% (n=12)	22% (n=34)	25% (n=39)	14% (n=21)	20% (n=31)	5.2 (n=124)	155

²² The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

[†] Approaches statistical significance $p < 0.10$

Exhibit 37. How strongly do you associate CEP with the following statements? CEP is...

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ²³	Total n
Engaged in rigorous work	Client	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=3)	8% (n=4)	35% (n=18)	46% (n=24)	6% (n=3)	6.3* (n=49)	52
	Stakeholder	1% (n=1)	1% (n=1)	1% (n=2)	6% (n=9)	15% (n=23)	39% (n=61)	30% (n=47)	8% (n=12)	5.9 (n=144)	156
An expert in the field of philanthropy	Client	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	4% (n=2)	37% (n=19)	54% (n=28)	2% (n=1)	6.4 [†] (n=51)	52
	Stakeholder	1% (n=1)	0% (n=0)	2% (n=3)	3% (n=4)	14% (n=22)	37% (n=57)	42% (n=65)	3% (n=4)	6.1 (n=152)	156
Focused on the most important issues in philanthropy	Client	0% (n=0)	0% (n=0)	2% (n=1)	2% (n=1)	13% (n=7)	48% (n=25)	27% (n=14)	8% (n=4)	6.0* (n=48)	52
	Stakeholder	0% (n=0)	1% (n=2)	3% (n=4)	8% (n=12)	21% (n=33)	41% (n=64)	22% (n=35)	4% (n=6)	5.7 (n=150)	156
Trusted	Client	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	35% (n=18)	60% (n=31)	2% (n=1)	6.6*** (n=51)	52
	Stakeholder	0% (n=0)	1% (n=1)	1% (n=1)	5% (n=8)	12% (n=19)	36% (n=56)	40% (n=62)	5% (n=7)	6.1 (n=147)	154
Influential on foundation practice and effectiveness	Client	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=3)	31% (n=16)	21% (n=11)	35% (n=18)	8% (n=4)	5.9 (n=48)	52
	Stakeholder	0% (n=0)	1% (n=1)	1% (n=1)	8% (n=13)	20% (n=31)	37% (n=57)	25% (n=38)	9% (n=14)	5.8 (n=141)	155

Table continues on next page.

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean²³	Total n
Innovative	Client	0% (n=0)	0% (n=0)	2% (n=1)	13% (n=7)	31% (n=16)	31% (n=16)	15% (n=8)	8% (n=4)	5.5 (n=48)	52
	Stakeholder	0% (n=0)	1% (n=1)	6% (n=9)	19% (n=30)	20% (n=31)	36% (n=56)	12% (n=18)	6% (n=10)	5.3 (n=145)	155
Responsive to the pressing topics of the time	Client	0% (n=0)	0% (n=0)	2% (n=1)	10% (n=5)	4% (n=2)	54% (n=28)	25% (n=13)	6% (n=3)	6.0 (n=49)	52
	Stakeholder	0% (n=0)	0% (n=0)	2% (n=3)	10% (n=16)	14% (n=22)	40% (n=62)	29% (n=46)	4% (n=7)	5.9 (n=149)	156

²³ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

[†] Approaches statistical significance $p < 0.10$

* Statistically significant difference $p < 0.05$

*** Statistically significant difference $p < 0.001$

IV. Tool/Service Analysis Summary

Dashes within the tables indicate questions that were not asked within the specific tool/service survey.

General Impressions of CEP

Exhibit 38. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
GPR	0% (n=0)	0% (n=0)	23% (n=9)	77% (n=30)	39
DPR	0% (n=0)	0% (n=0)	38% (n=5)	62% (n=8)	13
SPR	0% (n=0)	0% (n=0)	40% (n=2)	60% (n=3)	5
Advisory	0% (n=0)	0% (n=0)	50% (n=4)	50% (n=4)	8

Exhibit 39. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

	CEP has a poor reputation among leaders of grantmaking organizations (1)	CEP has a somewhat negative reputation among leaders of grantmaking organizations (2)	CEP has a somewhat positive reputation among leaders of grantmaking organizations (3)	CEP has an excellent reputation among leaders of grantmaking organizations (4)	Don't know	Mean ²⁴	n
GPR	0% (n=0)	0% (n=0)	15% (n=6)	74% (n=29)	10% (n=4)	3.8 (n=35)	39
DPR	0% (n=0)	0% (n=0)	0% (n=0)	77% (n=10)	23% (n=3)	4.0 [†] (n=10)	13
SPR	0% (n=0)	0% (n=0)	60% (n=3)	40% (n=2)	0% (n=0)	3.4 (n=5)	5
Advisory	0% (n=0)	0% (n=0)	13% (n=1)	75% (n=6)	13% (n=1)	3.9 (n=7)	8

²⁴ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

[†]DPR approaches statistical significant over GPR $p < 0.10$

Exhibit 40. In the past year, have you or your organization engaged CEP’s resources in any of the following ways?

- Read a CEP research publication (e.g., Foundations Respond to Crisis; New Attitudes, Old Practices: The Provision of Multiyear General Operating Support; Funder Support during the COVID-19 Pandemic; Policy Influence: What Foundations are Doing and Why)
- Read *Giving Done Right* by Phil Buchanan
- Listened to the *Giving Done Right* podcast
- Attended CEP webinars/virtual learning programs (e.g., Taking Stock: Philanthropy’s Role in Supporting Racial Equity, Foundations Respond to Crisis, Global Funders: Have you Made a Plan to Listen?)
- Attended an event at which a CEP staff member spoke (excluding a presentation of the results of an assessment your organization commissioned)
- Read CEP’s blog

	Yes	No	Don’t know	n
GPR	82% (n=32)	15% (n=6)	3% (n=1)	39
DPR	77% (n=10)	23% (n=3)	0% (n=0)	13
SPR	100% (n=5)	0% (n=0)	0% (n=0)	5
Advisory	88% (n=7)	13% (n=1)	0% (n=0)	8

Exhibit 41. In the past year, how useful have you found CEP’s resources for reflecting on your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	GPR	0% (n=0)	0% (n=0)	4% (n=1)	0% (n=0)	15% (n=4)	52% (n=14)	30% (n=8)	6.0	27
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	43% (n=3)	29% (n=2)	29% (n=2)	5.9	7
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	50% (n=1)	0% (n=0)	0% (n=0)	4.5	2
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	33% (n=1)	6.3	3
<i>Giving Done Right</i> by Phil Buchanan	GPR	0% (n=0)	0% (n=0)	9% (n=1)	0% (n=0)	45% (n=5)	27% (n=3)	18% (n=2)	5.5	11
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=2)	50% (n=3)	0% (n=0)	17% (n=1)	5.0	6
	SPR	-	-	-	-	-	-	-	-	-
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	33% (n=1)	0% (n=0)	33% (n=1)	5.3	3

Table continues on next page.



		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
The <i>Giving Done Right</i> podcast	GPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	0% (n=0)	50% (n=1)	6.0	2
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	33% (n=1)	33% (n=1)	6.0	3
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	4.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
CEP webinars/virtual learning programs	GPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=2)	60% (n=6)	20% (n=2)	6.0	10
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=1)	40% (n=2)	40% (n=2)	6.2	5
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	0% (n=0)	33% (n=1)	5.7	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	50% (n=1)	6.5	2
An event at which a CEP staff member spoke	GPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=2)	38% (n=3)	38% (n=3)	6.1	8
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	50% (n=1)	6.5	2
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
CEP's blog	GPR	0% (n=0)	0% (n=0)	15% (n=2)	0% (n=0)	46% (n=6)	31% (n=4)	8% (n=1)	5.2	13
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	25% (n=1)	25% (n=1)	5.5	4
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	0% (n=0)	50% (n=1)	0% (n=0)	5.0	2
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	0% (n=0)	33% (n=1)	5.7	3

Exhibit 42. In the past year, how useful have you found CEP’s resources for improving on your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	GPR	0% (n=0)	0% (n=0)	4% (n=1)	15% (n=4)	38% (n=10)	15% (n=4)	27% (n=7)	5.5	26
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	29% (n=2)	43% (n=3)	29% (n=2)	0% (n=0)	5.0	7
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=2)	0% (n=0)	0% (n=0)	0% (n=0)	4.0	2
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	0% (n=0)	33% (n=1)	5.7	3
<i>Giving Done Right</i> by Phil Buchanan	GPR	0% (n=0)	0% (n=0)	0% (n=0)	36% (n=4)	45% (n=5)	9% (n=1)	9% (n=1)	4.9	11
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=3)	17% (n=1)	17% (n=1)	17% (n=1)	5.0	6
	SPR	-	-	-	-	-	-	-	-	-
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	0% (n=0)	33% (n=1)	33% (n=1)	5.7	3
The <i>Giving Done Right</i> podcast	GPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	0% (n=0)	50% (n=1)	6.0	2
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	33% (n=1)	6.3	3
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	4.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
CEP webinars/virtual learning programs	GPR	0% (n=0)	0% (n=0)	0% (n=0)	40% (n=4)	40% (n=4)	10% (n=1)	10% (n=1)	4.9	10
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=1)	0% (n=0)	60% (n=3)	20% (n=1)	5.8	5
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	0% (n=0)	0% (n=0)	33% (n=1)	5.0	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	0% (n=0)	50% (n=1)	6.0	2
An event at which a CEP staff member spoke	GPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=2)	50% (n=4)	0% (n=0)	25% (n=2)	5.3	8
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	50% (n=1)	6.5	2
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	0% (n=0)	6.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1

Table continues on next page.

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
CEP's blog	GPR	0% (n=0)	0% (n=0)	8% (n=1)	31% (n=4)	38% (n=5)	23% (n=3)	0% (n=0)	4.8	13
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=2)	0% (n=0)	25% (n=1)	25% (n=1)	5.3	4
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=2)	0% (n=0)	0% (n=0)	0% (n=0)	4.0	2
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	33% (n=1)	0% (n=0)	33% (n=1)	5.3	3

Exhibit 43. In the past year, have you or your organization used any of CEP's resources in informing conversations with board members?

	Yes	No	Don't know/ Not applicable	n
GPR	53% (n=17)	34% (n=11)	13% (n=4)	32
DPR	70% (n=7)	0% (n=0)	30% (n=3)	10
SPR	0% (n=0)	0% (n=0)	100% (n=4)	4
Advisory	50% (n=3)	33% (n=2)	17% (n=1)	6

Exhibit 44. In the past year, how useful have you found CEP’s resources for reflecting on your organization’s efforts related to the following?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	N/A (I did not use CEP resources for this purpose)	Mean ²⁵	Total n
The COVID-19 Pandemic	GPR	0% (n=0)	0% (n=0)	0% (n=0)	22% (n=7)	28% (n=9)	22% (n=7)	19% (n=6)	9% (n=3)	5.4 (n=29)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	11% (n=1)	33% (n=3)	22% (n=2)	11% (n=1)	22% (n=2)	5.4 (n=7)	9
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	67% (n=2)	7.0 (n=1)	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=1)	20% (n=1)	0% (n=0)	60% (n=3)	0% (n=0)	6.0 (n=5)	5
The movement for racial justice	GPR	0% (n=0)	3% (n=1)	3% (n=1)	10% (n=3)	33% (n=10)	20% (n=6)	3% (n=1)	27% (n=8)	5.0 (n=22)	30
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	10% (n=1)	20% (n=2)	20% (n=2)	30% (n=3)	20% (n=2)	5.9 (n=8)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=2)	50% (n=2)	7.0 (n=2)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=2)	17% (n=1)	17% (n=1)	17% (n=1)	17% (n=1)	5.2 (n=5)	6

²⁵ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 45. How strongly do you associate CEP with the following statements? CEP is...

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ²⁶	Total n
Engaged in rigorous work	GPR	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=2)	9% (n=3)	28% (n=9)	50% (n=16)	6% (n=2)	6.3 (n=30)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	60% (n=6)	40% (n=4)	0% (n=0)	6.4 (n=10)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	0% (n=0)	25% (n=1)	50% (n=2)	0% (n=0)	6.0 (n=4)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=1)	33% (n=2)	33% (n=2)	17% (n=1)	6.2 (n=5)	6
An expert in the field of philanthropy	GPR	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=2)	3% (n=1)	38% (n=12)	50% (n=16)	3% (n=1)	6.4 (n=31)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	30% (n=3)	70% (n=7)	0% (n=0)	6.7 (n=10)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	50% (n=2)	0% (n=0)	6.3 (n=4)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=3)	50% (n=3)	0% (n=0)	6.5 (n=6)	6
Focused on the most important issues in philanthropy	GPR	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	6% (n=2)	56% (n=18)	25% (n=8)	6% (n=2)	6.0 (n=30)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	40% (n=4)	30% (n=3)	30% (n=3)	0% (n=0)	5.9 (n=10)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	0% (n=0)	50% (n=2)	25% (n=1)	6.3 (n=3)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=4)	17% (n=1)	17% (n=1)	6.2 (n=5)	6
Trusted	GPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=2)	31% (n=10)	59% (n=19)	3% (n=1)	6.6 (n=31)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	30% (n=3)	70% (n=7)	0% (n=0)	6.7 (n=10)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=2)	50% (n=2)	0% (n=0)	6.5 (n=4)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=3)	50% (n=3)	0% (n=0)	6.5 (n=6)	6
Influential on foundation practice and effectiveness	GPR	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=2)	34% (n=11)	22% (n=7)	31% (n=10)	6% (n=2)	5.8 (n=30)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=2)	20% (n=2)	50% (n=5)	10% (n=1)	6.3 (n=9)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	0% (n=0)	25% (n=1)	25% (n=1)	5.3 (n=3)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=2)	33% (n=2)	33% (n=2)	0% (n=0)	6.0 (n=6)	6

Table continues on next page.

		Strongly Disagree				Strongly Agree				Mean ²⁶	Total n
		(1)	(2)	(3)	(4)	(5)	(6)	(7)	Don't Know		
Innovative	GPR	0% (n=0)	0% (n=0)	3% (n=1)	13% (n=4)	25% (n=8)	34% (n=11)	16% (n=5)	9% (n=3)	5.5 (n=29)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	10% (n=1)	60% (n=6)	20% (n=2)	10% (n=10)	0% (n=0)	5.3 (n=10)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	25% (n=1)	25% (n=1)	0% (n=0)	5.5 (n=4)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=1)	17% (n=1)	33% (n=2)	17% (n=1)	17% (n=1)	5.6 (n=5)	6
Responsive to the pressing topics of the time	GPR	0% (n=0)	0% (n=0)	3% (n=1)	9% (n=3)	3% (n=1)	53% (n=17)	25% (n=8)	6% (n=2)	5.9 (n=30)	32
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	10% (n=1)	0% (n=0)	50% (n=5)	40% (n=4)	0% (n=0)	6.2 (n=10)	10
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	0% (n=0)	50% (n=2)	0% (n=0)	25% (n=1)	5.3 (n=3)	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=1)	67% (n=4)	17% (n=1)	0% (n=0)	6.0 (n=6)	6

²⁶ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

General Impressions of Your Most Recent CEP Engagement

Exhibit 46. How satisfied were you with your recent GPR, DPR, SPR, or Advisory experience overall?

	Not at all satisfied	(1)	(2)	(3)	(4)	(5)	(6)	Very satisfied	Mean	n
	(1)	(2)	(3)	(4)	(5)	(6)	(7)			
GPR	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=1)	15% (n=6)	26% (n=10)	56% (n=22)	6.4	39	
DPR	0% (n=0)	0% (n=0)	0% (n=0)	8% (n=1)	23% (n=3)	23% (n=3)	46% (n=6)	6.1	13	
SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	0% (n=0)	75% (n=3)	6.5	4	
Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	0% (n=0)	86% (n=6)	6.7	7	

Exhibit 47. How responsive was staff from CEP to questions your organization had during your recent GPR, DPR, SPR, or Advisory process?

	Not at all responsive (1)	(2)	(3)	(4)	(5)	(6)	Very responsive (7)	Mean	n
GPR	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	10% (n=4)	85% (n=33)	6.8	39
DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	8% (n=1)	23% (n=3)	69% (n=9)	6.6	13
SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	75% (n=3)	6.8	4
Advisory	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	0% (n=0)	0% (n=0)	86% (n=6)	6.6	7

Exhibit 48. Please rate the extent to which you agree or disagree that CEP accurately set expectations regarding the effort required on your end in preparations for the engagement.

	Strongly disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly agree (7)	Mean	n
GPR	0% (n=0)	3% (n=1)	0% (n=0)	5% (n=2)	5% (n=2)	10% (n=4)	77% (n=30)	6.5	39
DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	8% (n=1)	38% (n=5)	54% (n=7)	6.5	13
SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	75% (n=3)	6.8	4
Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	0% (n=0)	86% (n=6)	6.7	7

About Your Most Recent Report and Services

Exhibit 49. How satisfied are you with the extent to which the CEP staff’s interpretation of the results of your recent GPR, DPR, SPR, or Advisory report was meaningful for guiding reflection on your organization’s performance overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
GPR	0% (n=0)	0% (n=0)	0% (n=0)	11% (n=4)	16% (n=6)	24% (n=9)	49% (n=18)	6.1	37
DPR	0% (n=0)	0% (n=0)	8% (n=1)	8% (n=1)	15% (n=2)	31% (n=4)	38% (n=5)	5.9	13
SPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	0% (n=0)	25% (n=1)	50% (n=2)	6.0	4
Advisory	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	0% (n=0)	29% (n=2)	57% (n=4)	6.3	7

Exhibit 50. For each service/feature that was part of your engagement, please rate its helpfulness in deepening your organization’s ability to use the GPR, DPR, SPR, or Advisory report to reflect on its performance.

CEP Service		Not at all Helpful (1)	(2)	(3)	(4)	(5)	(6)	Very Helpful (7)	Mean	Total n
Memorandum of Key Findings and Recommendations/ Executive Summary	GPR	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=1)	9% (n=3)	23% (n=8)	66% (n=23)	6.5	35
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	15% (n=2)	23% (n=3)	62% (n=8)	6.5	13
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	67% (n=2)	6.7	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	29% (n=2)	57% (n=4)	6.4	7
Online “Getting Ready” guide	GPR	0% (n=0)	0% (n=0)	7% (n=1)	7% (n=1)	27% (n=4)	33% (n=5)	27% (n=4)	5.7	15
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	10% (n=1)	40% (n=4)	50% (n=5)	6.4	10
	SPR	-	-	-	-	-	-	-	-	-
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
Segmentation of the data by subgroup (e.g., program area, department)	GPR	0% (n=0)	0% (n=0)	0% (n=0)	7% (n=2)	0% (n=0)	23% (n=7)	70% (n=21)	6.6	30
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	27% (n=3)	27% (n=3)	45% (n=5)	6.2	11
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	0% (n=0)	67% (n=2)	6.3	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=3)	7.0	3
Separate reports by team, program area, primary contact, etc.	GPR	0% (n=0)	0% (n=0)	0% (n=0)	13% (n=3)	0% (n=0)	13% (n=3)	75% (n=18)	6.5	24
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=1)	20% (n=1)	0% (n=0)	60% (n=3)	6.0	5
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=2)	7.0	2
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
Open-ended respondent comments and suggestions	GPR	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	0% (n=0)	29% (n=10)	66% (n=23)	6.5	35
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	38% (n=5)	15% (n=2)	46% (n=6)	6.1	13
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=2)	50% (n=2)	6.5	4
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	29% (n=2)	57% (n=4)	6.4	7

Table continues on the next page.



CEP Service		Not at all Helpful (1)	(2)	(3)	(4)	(5)	(6)	Very Helpful (7)	Mean	Total n
Discussion and presentation of results	GPR	0% (n=0)	0% (n=0)	3% (n=1)	6% (n=2)	14% (n=5)	9% (n=3)	69% (n=24)	6.3	35
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	8% (n=1)	23% (n=3)	23% (n=3)	46% (n=6)	6.1	13
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=3)	7.0	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=2)	17% (n=1)	50% (n=3)	6.2	6
Additional analyses or consultations after receiving your draft report	GPR	0% (n=0)	0% (n=0)	4% (n=1)	4% (n=1)	15% (n=4)	19% (n=5)	58% (n=15)	6.2	26
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=2)	38% (n=3)	38% (n=3)	6.1	8
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=2)	7.0	2
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	67% (n=2)	6.7	3
CEP research publications relevant to your results	GPR	0% (n=0)	15% (n=2)	15% (n=2)	23% (n=3)	31% (n=4)	0% (n=0)	15% (n=2)	4.3	13
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	67% (n=2)	6.0	3
	SPR	-	-	-	-	-	-	-	-	-
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	67% (n=2)	6.7	3
Interactive, online reporting system	GPR	0% (n=0)	0% (n=0)	4% (n=1)	4% (n=1)	15% (n=4)	42% (n=11)	35% (n=9)	6.0	26
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=4)	13% (n=1)	38% (n=3)	5.9	8
	SPR	0% (n=0)	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	33% (n=1)	33% (n=1)	5.3	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	50% (n=2)	6.3	4
Analysis of results by race and ethnicity, gender, or other demographic characteristics of respondents	GPR	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=2)	29% (n=4)	21% (n=3)	36% (n=5)	5.8	14
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=4)	13% (n=1)	38% (n=3)	5.9	8
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	67% (n=2)	6.0	3
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=1)	50% (n=1)	6.5	2

Exhibit 51. How well did CEP’s work reflect a clear understanding of the specific organizational context of your organization?

	Not at all well (1)	(2)	(3)	(4)	(5)	(6)	Extremely well (7)	Mean	n
GPR	0% (n=0)	0% (n=0)	3% (n=1)	5% (n=2)	18% (n=7)	42% (n=16)	32% (n=12)	5.9	38
DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	23% (n=3)	54% (n=7)	23% (n=3)	6.0	13
SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	50% (n=2)	6.3	4
Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	29% (n=2)	57% (n=4)	6.4	7

Exhibit 52. In general, how would you rate the quality of CEP’s presentation?

	Poor (1)	(2)	(3)	(4)	(5)	(6)	Excellent (7)	Not applicable	Mean ²⁷	Total n
GPR	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=1)	8% (n=3)	24% (n=9)	58% (n=22)	8% (n=3)	6.5 (n=35)	38
DPR	0% (n=0)	0% (n=0)	0% (n=0)	8% (n=1)	8% (n=1)	31% (n=4)	54% (n=7)	0% (n=0)	6.3 (n=13)	13
SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=2)	50% (n=2)	7.0 (n=2)	4
Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	14% (n=1)	0% (n=0)	86% (n=6)	0% (n=0)	6.7 (n=7)	7

²⁷The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 53. Did CEP’s presentation of results include a video presentation component?

	Yes	No	Don’t know	n
GPR	51% (n=20)	36% (n=14)	13% (n=5)	39
DPR	46% (n=6)	46% (n=6)	8% (n=1)	13
SPR	25% (n=1)	75% (n=3)	0% (n=0)	4
Advisory	57% (n=4)	43% (n=3)	0% (n=0)	7

Exhibit 54. Please rate the extent to which CEP's video presentations were each of the following?

		Not at all (1)	(2)	(3)	(4)	(5)	(6)	Very (7)	Mean	Total n
Clear and compelling	GPR	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=1)	5% (n=1)	25% (n=5)	65% (n=13)	6.5	20
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=1)	33% (n=2)	17% (n=1)	33% (n=2)	5.7	6
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	0% (n=0)	25% (n=1)	50% (n=2)	6.0	4
Engaging (e.g. interactive, participatory, etc.)	GPR	0% (n=0)	0% (n=0)	5% (n=1)	10% (n=2)	5% (n=1)	30% (n=6)	50% (n=10)	6.1	20
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=1)	50% (n=3)	17% (n=1)	17% (n=1)	5.3	6
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	0% (n=0)	25% (n=1)	50% (n=2)	6.0	4
Accessible to all participants (e.g., high quality video and audio, appropriate for any participants with disabilities, etc.)	GPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	10% (n=2)	25% (n=5)	65% (n=13)	6.6	20
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=1)	50% (n=3)	33% (n=2)	6.2	6
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	50% (n=2)	6.3	4
Responsive to experience of participants (e.g., mood in "room," implicit signals to dig in or move on, etc.)	GPR	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=1)	20% (n=4)	35% (n=7)	40% (n=8)	6.1	20
	DPR	0% (n=0)	0% (n=0)	17% (n=1)	0% (n=0)	33% (n=2)	33% (n=2)	17% (n=1)	5.3	6
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	50% (n=2)	25% (n=1)	6.0	4
Useful (e.g., a good jumping-off point for further internal engagement)	GPR	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=1)	5% (n=1)	35% (n=7)	55% (n=11)	6.4	20
	DPR	0% (n=0)	0% (n=0)	0% (n=0)	17% (n=1)	17% (n=1)	33% (n=2)	33% (n=2)	5.8	6
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=1)	7.0	1
	Advisory	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	50% (n=2)	6.3	4

Creating Change with Results

Exhibit 55. Considering the aspects of your work identified in the table below, please indicate the degree to which use of GPR, DPR, SPR, or Advisory report results affected change in your foundation’s decision-making or practices. (Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)

Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ²⁸	Total n
Communications with grantees, donors, and/or staff (e.g., clarity, methods of communication)	GPR	11% (n=4)	3% (n=1)	51% (n=19)	32% (n=12)	0% (n=0)	3% (n=1)	2.3 (n=32)	37
	DPR	8% (n=1)	0% (n=0)	38% (n=5)	46% (n=6)	0% (n=0)	8% (n=1)	2.6 (n=11)	13
	SPR	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	1.0 (n=1)	3
	Advisory	17% (n=1)	33% (n=2)	50% (n=3)	0% (n=0)	0% (n=0)	0% (n=0)	1.6 (n=5)	6
Grantmaking processes (e.g., selection, reporting and evaluation processes)	GPR	16% (n=6)	0% (n=0)	54% (n=20)	24% (n=9)	5% (n=2)	0% (n=0)	2.3 (n=29)	37
	DPR	8% (n=1)	39% (n=5)	8% (n=1)	8% (n=1)	8% (n=1)	31% (n=4)	1.4 (n=7)	13
	SPR	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	1.0 (n=1)	3
	Advisory	0% (n=0)	33% (n=2)	33% (n=2)	0% (n=0)	0% (n=0)	33% (n=2)	1.5 (n=4)	6
Grantmaking patterns (e.g., size, type, and length of grants)	GPR	35% (n=13)	24% (n=9)	24% (n=9)	11% (n=4)	5% (n=2)	0% (n=0)	1.8 (n=22)	37
	DPR	15% (n=2)	46% (n=6)	8% (n=1)	8% (n=1)	0% (n=0)	23% (n=3)	1.3 (n=8)	13
	SPR	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	1.0 (n=1)	3
	Advisory	0% (n=0)	33% (n=2)	17% (n=1)	0% (n=0)	0% (n=0)	50% (n=3)	1.3 (n=3)	6
Organization strategy (e.g., what it is you’re trying to do, focus)	GPR	11% (n=4)	47% (n=17)	31% (n=11)	3% (n=1)	6% (n=2)	3% (n=1)	1.5 (n=29)	36
	DPR	8% (n=1)	0% (n=0)	62% (n=8)	23% (n=3)	0% (n=0)	8% (n=1)	2.3*** (n=11)	13
	SPR	0% (n=0)	33% (n=1)	33% (n=1)	0% (n=0)	0% (n=0)	33% (n=1)	1.5 (n=2)	3
	Advisory	17% (n=1)	17% (n=1)	33% (n=2)	17% (n=1)	0% (n=0)	17% (n=1)	2.0 (n=4)	6

Table continues on the next page.



Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ²⁸	Total n
Provision of assistance to grantees beyond “the check” (e.g., management assistance, field-related assistance, assistance securing funding from other sources)	GPR	16% (n=6)	24% (n=9)	41% (n=15)	16% (n=6)	3% (n=1)	0% (n=0)	1.9 (n=30)	37
	DPR	15% (n=2)	23% (n=3)	15% (n=2)	8% (n=1)	0% (n=0)	38% (n=5)	1.7 (n=6)	13
	SPR	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	1.0 (n=1)	3
	Advisory	0% (n=0)	50% (n=3)	17% (n=1)	0% (n=0)	0% (n=0)	33% (n=2)	1.3 (n=4)	6
Staffing levels	GPR	14% (n=5)	54% (n=20)	22% (n=8)	5% (n=2)	0% (n=0)	5% (n=2)	1.4 (n=30)	37
	DPR	15% (n=2)	38% (n=5)	23% (n=3)	8% (n=1)	0% (n=0)	15% (n=2)	1.6 (n=9)	13
	SPR	0% (n=0)	33% (n=1)	33% (n=1)	0% (n=0)	0% (n=0)	33% (n=1)	1.5 (n=2)	3
	Advisory	0% (n=0)	50% (n=3)	0% (n=0)	0% (n=0)	0% (n=0)	50% (n=3)	1.0 (n=3)	6
Attitudes toward work with grantees	GPR	14% (n=5)	33% (n=12)	39% (n=14)	11% (n=4)	3% (n=1)	0% (n=0)	1.7 (n=30)	36
	DPR	15% (n=2)	38% (n=5)	8% (n=1)	8% (n=1)	0% (n=0)	31% (n=4)	1.4 (n=7)	13
	SPR	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	1.0 (n=1)	3
	Advisory	0% (n=0)	50% (n=3)	0% (n=0)	17% (n=1)	0% (n=0)	33% (n=2)	1.5 (n=4)	6
Attitudes toward work with donors	GPR	14% (n=5)	19% (n=7)	11% (n=4)	3% (n=1)	0% (n=0)	54% (n=20)	1.5 (n=12)	37
	DPR	8% (n=1)	8% (n=1)	54% (n=7)	23% (n=3)	0% (n=0)	8% (n=1)	2.2 (n=11)	13
	SPR	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	1.0 (n=1)	3
	Advisory	0% (n=0)	33% (n=2)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=4)	1.0 (n=2)	6
Diversity, equity, and inclusion efforts <i>inside your organization</i>	GPR	11% (n=4)	38% (n=14)	27% (n=10)	8% (n=3)	0% (n=0)	16% (n=6)	1.6 (n=27)	37
	DPR	15% (n=2)	8% (n=1)	23% (n=3)	31% (n=4)	0% (n=0)	23% (n=3)	2.4 [†] (n=8)	13
	SPR	0% (n=0)	25% (n=1)	25% (n=1)	25% (n=1)	0% (n=0)	25% (n=1)	2.0 (n=3)	4
	Advisory	0% (n=0)	17% (n=1)	33% (n=2)	17% (n=1)	0% (n=0)	33% (n=2)	1.0 (n=4)	6

Table continues on the next page.

Foundation Functions		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ²⁸	Total n
Diversity, equity, and inclusion efforts <i>related to your programs, grantees, donors, or other partners</i>	GPR	16% (n=6)	38% (n=14)	35% (n=13)	3% (n=1)	0% (n=0)	8% (n=3)	1.5 (n=28)	37
	DPR	23% (n=3)	0% (n=0)	31% (n=4)	31% (n=4)	0% (n=0)	15% (n=2)	2.5 (n=8)	13
	SPR	0% (n=0)	33% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	67% (n=2)	1.0 (n=1)	3
	Advisory	0% (n=0)	17% (n=1)	33% (n=2)	17% (n=1)	0% (n=0)	33% (n=2)	2.0 (n=4)	6
Approach to understanding your impact	GPR	19% (n=7)	22% (n=8)	41% (n=15)	11% (n=4)	8% (n=3)	0% (n=0)	1.9 (n=27)	37
	DPR	8% (n=1)	15% (n=2)	54% (n=7)	15% (n=2)	0% (n=0)	8% (n=1)	2.0 (n=11)	13
	SPR	0% (n=0)	25% (n=1)	25% (n=1)	0% (n=0)	0% (n=0)	50% (n=2)	1.5 (n=2)	4
	Advisory	0% (n=0)	0% (n=0)	33% (n=2)	17% (n=1)	0% (n=0)	50% (n=3)	1.5 (n=3)	6
Organizational/team culture	GPR	11% (n=4)	32% (n=12)	38% (n=14)	8% (n=3)	0% (n=0)	11% (n=4)	1.7 (n=29)	37
	DPR	8% (n=1)	23% (n=3)	31% (n=4)	31% (n=4)	0% (n=0)	8% (n=1)	2.1 (n=11)	13
	SPR	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	25% (n=1)	25% (n=1)	2.5 (n=2)	4
	Advisory	17% (n=1)	33% (n=2)	17% (n=1)	17% (n=1)	0% (n=0)	17% (n=1)	1.8 (n=4)	6
Prioritization of staff time	GPR	14% (n=5)	27% (n=10)	41% (n=15)	8% (n=3)	0% (n=0)	11% (n=4)	1.8 (n=28)	37
	DPR	8% (n=1)	8% (n=1)	46% (n=6)	31% (n=4)	0% (n=0)	8% (n=1)	2.3 (n=11)	13
	SPR	0% (n=0)	0% (n=0)	67% (n=2)	0% (n=0)	0% (n=0)	33% (n=1)	2.0 (n=2)	3
	Advisory	17% (n=1)	17% (n=1)	33% (n=2)	17% (n=1)	0% (n=0)	17% (n=1)	2.0 (n=4)	6

²⁸ The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.

*** DPR statistically significant difference over GPR $p < 0.001$

† Indicates notable trend of DPR over GPR. Statistical significance testing was not conducted due to insufficient response rates.

Exhibit 56. In supporting your organization's efforts related to the COVID-19 pandemic, how useful was:

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	N/A (My organization didn't use this resource to support related efforts)	Mean ²⁹	Total n
Your report and analysis (data, analysis, written narrative, etc.)	GPR	0% (n=0)	5% (n=2)	0% (n=0)	13% (n=5)	13% (n=5)	11% (n=4)	24% (n=9)	34% (n=13)	5.4 (n=25)	38
	DPR	0% (n=0)	15% (n=2)	0% (n=0)	23% (n=3)	8% (n=1)	8% (n=1)	0% (n=0)	46% (n=6)	3.9 (n=7)	13
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	67% (n=2)	7.0 (n=1)	3
	Advisory	0% (n=0)	0% (n=0)	20% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	60% (n=3)	20% (n=1)	6.0 (n=4)	5
Your engagement with CEP staff (presentation, discussion, facilitation, etc.)	GPR	0% (n=0)	5% (n=2)	0% (n=0)	0% (n=0)	13% (n=5)	16% (n=6)	18% (n=7)	47% (n=18)	5.7 (n=20)	38
	DPR	0% (n=0)	15% (n=2)	0% (n=0)	8% (n=1)	8% (n=1)	8% (n=1)	8% (n=1)	54% (n=7)	4.3 (n=6)	13
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	33% (n=1)	67% (n=2)	7.0 (n=1)	3
	Advisory	0% (n=0)	0% (n=0)	20% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	60% (n=3)	20% (n=1)	6.0 (n=4)	5

²⁹ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 57. In supporting your organization's efforts related to the movement for racial justice, how useful was:

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	N/A (My organization didn't use this resource to support related efforts)	Mean ³⁰	Total n
Your report and analysis (data, analysis, written narrative, etc.)	GPR	5% (n=2)	3% (n=1)	3% (n=1)	11% (n=4)	13% (n=5)	8% (n=3)	8% (n=3)	50% (n=19)	4.6 (n=19)	38
	DPR	0% (n=0)	15% (n=2)	15% (n=2)	0% (n=0)	0% (n=0)	15% (n=2)	0% (n=0)	54% (n=7)	3.7 (n=6)	13
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=3)	N/A	3
	Advisory	0% (n=0)	0% (n=0)	20% (n=1)	0% (n=0)	20% (n=1)	0% (n=0)	0% (n=0)	60% (n=3)	4.0 (n=2)	5
Your engagement with CEP staff (presentation, discussion, facilitation, etc.)	GPR	5% (n=2)	3% (n=1)	3% (n=1)	5% (n=2)	11% (n=4)	11% (n=4)	11% (n=4)	53% (n=20)	4.8 (n=18)	38
	DPR	0% (n=0)	15% (n=2)	8% (n=1)	8% (n=1)	0% (n=0)	8% (n=1)	0% (n=0)	62% (n=8)	3.4 (n=5)	13
	SPR	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	100% (n=3)	N/A	3
	Advisory	0% (n=0)	0% (n=0)	20% (n=1)	0% (n=0)	0% (n=0)	20% (n=1)	0% (n=0)	60% (n=3)	4.5 (n=2)	5

³⁰ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Background and the Overall Experience

Exhibit 58. Relative to other processes your organization has undertaken to assess its overall effectiveness as a grantmaking organization, how useful was your recent GPR, DPR, or SPR?

	Much less useful (1)	(2)	(3)	(4)	(5)	(6)	Much more useful (7)	Don't know	Not applicable (no other assessment processes undertaken)	Mean ³¹	Total n
GPR	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	23% (n=9)	21% (n=8)	33% (n=13)	0% (n=0)	18% (n=7)	6.0 (n=32)	39
DPR	0% (n=0)	0% (n=0)	8% (n=1)	0% (n=0)	8% (n=1)	38% (n=5)	15% (n=2)	0% (n=0)	31% (n=4)	5.8 (n=9)	13
SPR	0% (n=0)	0% (n=0)	0% (n=0)	25% (n=1)	25% (n=1)	25% (n=1)	0% (n=0)	0% (n=0)	25% (n=1)	5.0 (n=3)	4
Advisory	-	-	-	-	-	-	-	-	-	-	-

³¹ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 59. Does your organization intend to commission the GPR, DPR, SPR, or Advisory report again in the future?

	Yes	No	Don't know	n
GPR	67% (n=26)	0% (n=0)	33% (n=13)	39
DPR	77% (n=10)	0% (n=0)	23% (n=3)	13
SPR	50% (n=2)	0% (n=0)	50% (n=2)	4
Advisory	80% (n=4)	0% (n=0)	20% (n=1)	5

Exhibit 60. Would you recommend the GPR, DPR, SPR, or CEP's Advisory Services to a colleague organization?

	Yes	No	n
GPR	100% (n=39)	0% (n=0)	39
DPR	100% (n=13)	0% (n=0)	13
SPR	100% (n=4)	0% (n=0)	4
Advisory	100% (n=5)	0% (n=0)	5

Exhibit 61. How valuable was your recent GPR, DPR, SPR, or Advisory Service relative to its cost?

	Very poor value for the cost (1)	(2)	(3)	(4)	(5)	(6)	Excellent value for the cost (7)	Mean	n
GPR	0% (n=0)	0% (n=0)	0% (n=0)	11% (n=4)	32% (n=12)	29% (n=11)	29% (n=11)	5.8	38
DPR	0% (n=0)	0% (n=0)	8% (n=1)	8% (n=1)	23% (n=3)	38% (n=5)	23% (n=3)	5.6	13
SPR	0% (n=0)	0% (n=0)	33% (n=1)	0% (n=0)	33% (n=1)	0% (n=0)	33% (n=1)	5.0	3
Advisory	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=1)	0% (n=0)	20% (n=1)	60% (n=3)	6.2	5

V. All Tool Users 2016 vs. 2018 vs. 2021 Analysis Summary

General Impressions of CEP

Exhibit 62. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP (1)	I have heard of CEP, but I don't really know CEP's work (2)	I am somewhat familiar with CEP's work (3)	I know CEP's work well (4)	Mean ³²	n
2016	0% (n=0)	0% (n=0)	11% (n=5)	89% (n=41)	3.9*	46
2018	0% (n=0)	0% (n=0)	37% (n=31)	64% (n=54)	3.6	85
2021	0% (n=0)	0% (n=0)	31% (n=20)	69% (n=45)	3.7	65

³² The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

*2016 statistically significant difference over 2021 $p < 0.05$

Exhibit 63. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

	CEP has a poor reputation among leaders of grantmaking organizations (1)	CEP has a somewhat negative reputation among leaders of grantmaking organizations (2)	CEP has a somewhat positive reputation among leaders of grantmaking organizations (3)	CEP has an excellent reputation among leaders of grantmaking organizations (4)	Don't know	Mean ³³	n
2016	0% (n=0)	0% (n=0)	24% (n=11)	74% (n=34)	2% (n=1)	3.8 (n=45)	46
2018	0% (n=0)	0% (n=0)	17% (n=14)	74% (n=62)	10% (n=8)	3.8 (n=76)	84
2021	0% (n=0)	0% (n=0)	15% (n=10)	72% (n=47)	12% (n=8)	3.8 (n=57)	65

³³The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

Exhibit 64. In the past year, have you or has someone in your organization read a CEP research publication?³⁴

	Yes	No	Don't know	n
2016	94% (n=43)	4% (n=2)	2% (n=1)	46
2018	88% (n=74)	7% (n=6)	5% (n=4)	84

³⁴ This language reflects the 2016 and 2018 version of the survey. This exhibit has been included for reference when reviewing Exhibit 63.

Exhibit 65. Please select the CEP resources your organization engaged with during the past year.

- Read a CEP research publication (e.g., *Foundations Respond to Crisis; New Attitudes, Old Practices: The Provision of Multiyear General Operating Support; Funder Support during the COVID-19 Pandemic; Policy Influence: What Foundations are Doing and Why*)³⁵

	Yes	No	n
2016	-	-	-
2018	-	-	-
2021	80% (n=43)	20% (n=11)	54

³⁵ This table shows those who did and did not select "Read a CEP research publication". Other resources were not asked about in 2016 and 2018, and thus, cannot be compared.

Exhibit 66. In the past year, how useful have you found CEP's research publication(s) for reflecting on your or your foundation's work?³⁶

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0% (n=0)	0% (n=0)	37% (n=16)	49% (n=21)	14% (n=6)	3.8	43
2018	0% (n=0)	0% (n=0)	37% (n=27)	50% (n=37)	14% (n=10)	3.8	74

³⁶ In 2021, this question was switched to a 7-point scale to be consistent with other scales throughout the survey. This exhibit has been included for reference.

Exhibit 67. In the past year, how useful have you found CEP's resources for reflecting on your or your organization's work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	21% (n=8)	46% (n=18)	28% (n=11)	6.0	39

Exhibit 68. In the past year, how useful have you found CEP’s research publication(s) for improving your or your foundation’s work?³⁷

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0% (n=0)	9% (n=4)	56% (n=24)	21% (n=9)	14% (n=6)	3.4	43
2018	0% (n=0)	1% (n=1)	52% (n=38)	36% (n=26)	11% (n=8)	3.6	73

³⁷ In 2021, this question was switched to a 7-point scale to be consistent with other scales throughout the survey. This exhibit has been included for reference.

Exhibit 69. In the past year, how useful have you found CEP’s resources for improving on your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	0% (n=0)	3% (n=1)	21% (n=8)	39% (n=15)	16% (n=6)	21% (n=8)	5.3	38

Exhibit 70. In the past year, have you or your organization used any of CEP’s resources in informing conversations with board members?³⁸

	Yes	No	Don’t know/ Not applicable	n
2016	44% (n=20)	50% (n=23)	7% (n=3)	46
2018	38% (n=28)	53% (n=39)	10% (n=7)	74
2021	52% (n=27)	25% (n=13)	23% (n=12)	52

³⁸ The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: “In the past year, have you used any of CEP’s writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?”

Exhibit 71. How strongly do you associate CEP with the following statements? CEP is...

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ³⁹	Total n
Engaged in rigorous work	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	1% (n=1)	1% (n=1)	4% (n=3)	14% (n=12)	32% (n=27)	45% (n=38)	2% (n=2)	6.2 (n=82)	84
	2021	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=3)	8% (n=4)	35% (n=18)	46% (n=24)	6% (n=3)	6.3 (n=49)	52
An expert in the field of philanthropy	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	1% (n=1)	0% (n=0)	1% (n=1)	7% (n=6)	33% (n=28)	55% (n=46)	2% (n=2)	6.4 (n=82)	84
	2021	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	4% (n=2)	37% (n=19)	54% (n=28)	2% (n=1)	6.4 (n=51)	52
Focused on the most important issues in philanthropy	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	1% (n=1)	1% (n=1)	1% (n=1)	14% (n=12)	49% (n=41)	26% (n=22)	7% (n=6)	6.0 (n=78)	84
	2021	0% (n=0)	0% (n=0)	2% (n=1)	2% (n=1)	13% (n=7)	48% (n=25)	27% (n=14)	8% (n=4)	6.0 (n=48)	52
Trusted	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	1% (n=1)	1% (n=1)	0% (n=0)	5% (n=4)	39% (n=32)	52% (n=43)	2% (n=2)	6.4 (n=81)	83
	2021	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	35% (n=18)	60% (n=31)	2% (n=1)	6.6 (n=51)	52
Influential on foundation practice and effectiveness	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	0% (n=0)	1% (n=1)	5% (n=4)	20% (n=17)	32% (n=27)	36% (n=30)	6% (n=5)	6.0 (n=79)	84
	2021	0% (n=0)	0% (n=0)	0% (n=0)	6% (n=3)	31% (n=16)	21% (n=11)	35% (n=18)	8% (n=4)	5.9 (n=48)	52
Innovative	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	2% (n=2)	1% (n=1)	8% (n=7)	29% (n=24)	35% (n=29)	14% (n=12)	11% (n=9)	5.5 (n=75)	84
	2021	0% (n=0)	0% (n=0)	2% (n=1)	13% (n=7)	31% (n=16)	31% (n=16)	15% (n=8)	8% (n=4)	5.5 (n=48)	52

³⁹ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

General Impressions of Your Most Recent CEP Engagement

Exhibit 72. How satisfied were you with your recent GPR, DPR, SPR, or Advisory experience overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	11% (n=5)	30% (n=14)	54% (n=25)	6.4	46
2018	0% (n=0)	1% (n=1)	2% (n=2)	1% (n=1)	7% (n=6)	35% (n=29)	53% (n=44)	6.3	83
2021	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	17% (n=11)	21% (n=13)	59% (n=37)	6.3	63

Exhibit 73. How responsive was staff from CEP to questions your foundation had during your recent GPR, DPR, SPR, or Advisory process?

	Not at all responsive (1)	(2)	(3)	(4)	(5)	(6)	Very responsive (7)	Mean	n
2016	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	20% (n=9)	80% (n=37)	6.8	46
2018	0% (n=0)	0% (n=0)	0% (n=0)	1% (n=1)	4% (n=3)	10% (n=8)	85% (n=70)	6.8	82
2021	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	3% (n=2)	13% (n=8)	81% (n=51)	6.7	63

About Your Most Recent Report and Services

Exhibit 74. How satisfied are you with the extent to which the CEP staff's interpretation of the results of your recent GPR, DPR, SPR, or Advisory report was meaningful for guiding reflection on your organization's performance overall?

	Not at all satisfied (1)	(2)	(3)	(4)	(5)	(6)	Very satisfied (7)	Mean	n
2016	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=2)	19% (n=8)	48% (n=20)	29% (n=12)	6.0	42
2018	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=3)	15% (n=11)	38% (n=27)	43% (n=31)	6.2	72
2021	0% (n=0)	0% (n=0)	2% (n=1)	11% (n=7)	13% (n=8)	26% (n=16)	48% (n=29)	6.1	61

Exhibit 75. Please indicate which of the following services/features you used as part of your recent GPR, DPR, or SPR engagement.

		Frequency	Percent
Memorandum of Key Findings and Recommendations/ Executive Summary	2016	-	-
	2018	72	97%
	2021	59	97%
Segmentation of the data by subgroup (e.g., program area, department)	2016	-	-
	2018	68	92%
	2021	48	79%
Open-ended respondent comments and suggestions	2016	-	-
	2018	72	97%
	2021	60	98%
Additional analyses or consultations after receiving your draft report	2016	-	-
	2018	55	74%
	2021	40	66%
CEP research publications relevant to your results	2016	-	-
	2018	37	50%
	2021	19	31%
Interactive online reporting system	2016	-	-
	2018	62	84%
	2021	43	70%

Exhibit 76. For each service/feature that was part of your engagement, please rate its helpfulness in deepening your organization’s ability to use the GPR, DPR, SPR, or Advisory to reflect on its performance.

		Not at all helpful (1)	(2)	(3)	(4)	(5)	(6)	Very helpful (7)	Not applicable/ Did not use	Mean ⁴⁰	Total n
Memorandum of Key Findings and Recommendations/ Executive Summary	2016	0% (n=0)	2% (n=1)	2% (n=1)	5% (n=2)	15% (n=6)	22% (n=9)	54% (n=22)	0% (n=0)	6.1 (n=41)	41
	2018	0% (n=0)	1% (n=1)	0% (n=0)	7% (n=5)	12% (n=9)	24% (n=18)	53% (n=39)	3% (n=2)	6.2 (n=72)	74
	2021	0% (n=0)	0% (n=0)	0% (n=0)	2% (n=1)	10% (n=6)	24% (n=14)	64% (n=37)	-	6.5 (n=58)	58
Segmentation of the data by subgroup (e.g., program area, department)	2016	0% (n=0)	0% (n=0)	8% (n=3)	5% (n=2)	10% (n=4)	28% (n=11)	50% (n=20)	0% (n=0)	6.1 (n=40)	40
	2018	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=3)	16% (n=12)	23% (n=17)	49% (n=36)	8% (n=6)	6.3 (n=68)	74
	2021	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=2)	9% (n=4)	21% (n=10)	66% (n=31)	-	6.5 (n=47)	47
Open-ended respondent comments and suggestions ⁴¹	2016	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=2)	7% (n=3)	24% (n=10)	63% (n=26)	0% (n=0)	6.5 (n=41)	41
	2018	0% (n=0)	0% (n=0)	0% (n=0)	7% (n=5)	14% (n=10)	31% (n=23)	46% (n=34)	3% (n=2)	6.2 (n=72)	74
	2021	0% (n=0)	0% (n=0)	2% (n=1)	2% (n=1)	10% (n=6)	27% (n=16)	59% (n=35)	-	6.4 (n=59)	59
Additional analyses or consultations after receiving your draft report ⁴²	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	9% (n=7)	24% (n=18)	39% (n=29)	27% (n=20)	6.4 (n=54)	74
	2021	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	15% (n=6)	23% (n=9)	56% (n=22)	-	6.3 (n=39)	39
CEP research publications relevant to your results	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	0% (n=0)	0% (n=0)	12% (n=9)	15% (n=11)	12% (n=9)	11% (n=8)	50% (n=37)	5.4 (n=37)	74
	2021	0% (n=0)	11% (n=2)	11% (n=2)	21% (n=4)	21% (n=4)	5% (n=1)	32% (n=6)	-	4.9 (n=19)	19
Interactive online reporting system ⁴³	2016	0% (n=0)	0% (n=0)	7% (n=3)	0% (n=0)	12% (n=5)	31% (n=13)	50% (n=21)	0% (n=0)	6.2 (n=42)	42
	2018	0% (n=0)	0% (n=0)	1% (n=1)	3% (n=2)	16% (n=12)	24% (n=18)	39% (n=29)	16% (n=12)	6.2 (n=62)	74
	2021	0% (n=0)	0% (n=0)	5% (n=2)	2% (n=1)	22% (n=9)	34% (n=14)	37% (n=15)	-	6.0 (n=41)	41

⁴⁰ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

⁴¹ The 2016 survey question language is comparable to the 2018 language. 2016 language reads as: “Downloadable PDF of all respondent comments and suggestions”

⁴² The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: “Additional analyses after receiving your draft report”

⁴³ The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: “Interactive online report”

Exhibit 77. How well did CEP’s work reflect a clear understanding of the specific context of your organization?

	Not at all well (1)	(2)	(3)	(4)	(5)	(6)	Extremely well (7)	Mean	n
2016	0% (n=0)	0% (n=0)	2% (n=1)	7% (n=3)	33% (n=14)	31% (n=13)	26% (n=11)	5.7	42
2018	0% (n=0)	3% (n=2)	0% (n=0)	7% (n=5)	19% (n=14)	35% (n=25)	36% (n=26)	5.9	72
2021	0% (n=0)	0% (n=0)	2% (n=1)	3% (n=2)	19% (n=12)	42% (n=26)	34% (n=21)	6.0	62

Exhibit 78. In general, how would you rate the quality of CEP’s presentation?⁴⁴

	Poor (1)	(2)	(3)	(4)	(5)	(6)	Excellent (7)	Not applicable	Mean ⁴⁵	Total n
2016	0% (n=0)	0% (n=0)	0% (n=0)	5% (n=2)	5% (n=2)	17% (n=7)	46% (n=19)	27% (n=11)	6.4 (n=30)	41
2018	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	7% (n=5)	14% (n=10)	56% (n=40)	21% (n=15)	6.5 (n=57)	72
2021	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=2)	8% (n=5)	21% (n=13)	60% (n=37)	8% (n=5)	6.5 (n=57)	62

⁴⁴ The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: “In general, how would you rate the quality of CEP’s in-person presentation?”

⁴⁵ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7

Creating Change with Results

Exhibit 79. Considering the aspects of your work identified in the table below, please indicate the degree to which use of GPR, DPR, SPR, or Advisory report results affected change in your organization’s decision-making or practices. (Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)

		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ⁴⁶	Total n
Communications with grantees, donors, and/or staff (e.g., clarity, methods of communication)	2016	33% (n=14)	7% (n=3)	29% (n=12)	26% (n=11)	2% (n=1)	2% (n=1)	2.3 (n=26)	42
	2018	15% (n=11)	7% (n=5)	50% (n=36)	25% (n=18)	3% (n=2)	0% (n=0)	2.2 (n=59)	72
	2021	10% (n=6)	7% (n=4)	46% (n=27)	31% (n=18)	0% (n=0)	7% (n=4)	2.3 (n=49)	59
Grantmaking processes (e.g., selection, reporting and evaluation processes)	2016	43% (n=18)	14% (n=6)	21% (n=9)	10% (n=4)	0% (n=0)	12% (n=5)	1.9 (n=19)	42
	2018	25% (n=18)	14% (n=10)	42% (n=30)	6% (n=4)	1% (n=1)	13% (n=9)	1.9 (n=44)	72
	2021	12% (n=7)	14% (n=8)	39% (n=23)	17% (n=10)	5% (n=3)	14% (n=8)	2.0 (n=41)	59

		Too Soon to Tell	No Change (1)	Some Change (2)	Significant Change (3)	Evaluation of Previous Change	Not applicable	Mean ⁴⁶	Total n
Grantmaking patterns (e.g., size, type, and length of grants)	2016	31% (n=13)	41% (n=17)	7% (n=3)	7% (n=3)	2% (n=1)	12% (n=5)	1.4 (n=23)	42
	2018	25% (n=18)	38% (n=27)	19% (n=14)	3% (n=2)	0% (n=0)	15% (n=11)	1.4 (n=43)	72
	2021	25% (n=15)	31% (n=18)	17% (n=10)	8% (n=5)	5% (n=3)	14% (n=8)	1.6 (n=33)	59
Organization strategy (e.g., what it is you're trying to do, focus)	2016	31% (n=12)	44% (n=17)	10% (n=4)	5% (n=2)	5% (n=2)	5% (n=2)	1.4 (n=23)	39
	2018	22% (n=16)	42% (n=30)	22% (n=16)	4% (n=3)	3% (n=2)	7% (n=5)	1.5 (n=49)	72
	2021	10% (n=6)	33% (n=19)	38% (n=22)	9% (n=5)	3% (n=2)	7% (n=4)	1.7 (n=46)	58
Provision of assistance to grantees beyond "the check" (e.g., management assistance, field-related assistance, assistance securing funding from other sources)	2016	33% (n=14)	26% (n=11)	21% (n=9)	12% (n=5)	2% (n=1)	5% (n=2)	1.8 (n=25)	42
	2018	19% (n=14)	17% (n=12)	43% (n=31)	6% (n=4)	4% (n=3)	11% (n=8)	1.8 (n=47)	72
	2021	14% (n=8)	27% (n=16)	31% (n=18)	12% (n=7)	2% (n=1)	15% (n=9)	1.8 (n=41)	59
Staffing levels	2016	29% (n=12)	57% (n=24)	7% (n=3)	2% (n=1)	0% (n=0)	5% (n=2)	1.2 (n=28)	42
	2018	13% (n=9)	60% (n=43)	19% (n=14)	3% (n=2)	3% (n=2)	3% (n=2)	1.3 (n=59)	72
	2021	12% (n=7)	49% (n=29)	20% (n=12)	5% (n=3)	0% (n=0)	14% (n=8)	1.4 (n=44)	59
Attitudes toward work with grantees	2016	35% (n=14)	18% (n=7)	33% (n=13)	10% (n=4)	0% (n=0)	5% (n=2)	1.9 (n=24)	40
	2018	23% (n=16)	16% (n=11)	41% (n=29)	6% (n=4)	1% (n=1)	14% (n=10)	1.8 (n=44)	71
	2021	12% (n=7)	36% (n=21)	26% (n=15)	10% (n=6)	2% (n=1)	14% (n=8)	1.6 (n=42)	58
Attitudes toward work with donors	2016	31% (n=13)	17% (n=7)	2% (n=1)	2% (n=1)	2% (n=1)	45% (n=19)	1.3 (n=9)	42
	2018	10% (n=7)	19% (n=14)	13% (n=9)	6% (n=4)	1% (n=1)	51% (n=37)	1.6 (n=27)	72
	2021	10% (n=6)	19% (n=11)	19% (n=11)	7% (n=4)	0% (n=0)	46% (n=27)	1.7 (n=26)	59

⁴⁶The n displayed represents all responses that are calculated into the mean, which includes responses for no change, some change, and significant change.

Background and the Overall Experience

Exhibit 80. Relative to other processes your foundation has undertaken to assess its overall effectiveness as a grantmaking organization, how useful was your recent GPR, DPR, or SPR?

	Much less useful (1)	(2)	(3)	(4)	(5)	(6)	Much more useful (7)	Don't know	Not applicable (no other assessment processes undertaken)	Mean ⁴⁷	Total n
2016	0% (n=0)	0% (n=0)	2% (n=1)	5% (n=2)	27% (n=11)	24% (n=10)	29% (n=12)	0% (n=0)	12% (n=5)	5.8 (n=36)	41
2018	0% (n=0)	0% (n=0)	3% (n=2)	3% (n=2)	17% (n=12)	27% (n=19)	19% (n=13)	0% (n=0)	31% (n=22)	5.8 (n=48)	70
2021	0% (n=0)	0% (n=0)	4% (n=2)	4% (n=2)	20% (n=11)	25% (n=14)	27% (n=15)	0% (n=0)	21% (n=12)	5.9 (n=44)	56

⁴⁷ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

Exhibit 81. Does your organization intend to commission the GPR, DPR, SPR, or Advisory report again in the future?

	Yes	No	Don't know	n
2016	69% (n=29)	0% (n=0)	31% (n=13)	42
2018	72% (n=52)	1% (n=1)	26% (n=19)	72
2021	69% (n=42)	0% (n=0)	31% (n=19)	61

Exhibit 82. Would you recommend the GPR, DPR, SPR, or CEP's Advisory Services to a colleague organization?

	Yes	No	n
2016	100% (n=46)	0% (n=0)	46
2018	98% (n=79)	3% (n=2)	81
2021	100% (n=61)	0% (n=0)	61

Exhibit 83. How valuable was your recent GPR, DPR, SPR, or Advisory Service relative to its cost?

	Very poor value for the cost (1)	(2)	(3)	(4)	(5)	(6)	Excellent value for the cost (7)	Mean	n
2016	0% (n=0)	2% (n=1)	2% (n=1)	4% (n=2)	35% (n=16)	35% (n=16)	22% (n=10)	5.6	46
2018	0% (n=0)	0% (n=0)	3% (n=2)	15% (n=12)	17% (n=14)	36% (n=29)	30% (n=24)	5.8	81
2021	0% (n=0)	0% (n=0)	3% (n=2)	10% (n=6)	27% (n=16)	29% (n=17)	31% (n=18)	5.9	59

VI. Stakeholders 2016 vs. 2018 vs. 2021 Analysis Summary

General Impressions of CEP

Exhibit 84. Please indicate your overall level of familiarity with the Center for Effective Philanthropy (CEP).

	I have never heard of CEP	I have heard of CEP, but I don't really know CEP's work	I am somewhat familiar with CEP's work	I know CEP's work well	n
2016	2% (n=5)	14% (n=32)	43% (n=99)	41% (n=95)	231
2018	1% (n=1)	11% (n=24)	49% (n=107)	40% (n=87)	219
2021	2% (n=5)	17% (n=48)	43% (n=124)	39% (n=111)	288

Exhibit 85. Which statement best describes how you perceive CEP's reputation among colleagues in your professional network?

	CEP has a poor reputation among leaders of grantmaking organizations (1)	CEP has a somewhat negative reputation among leaders of grantmaking organizations (2)	CEP has a somewhat positive reputation among leaders of grantmaking organizations (3)	CEP has an excellent reputation among leaders of grantmaking organizations (4)	Don't know	Mean ⁴⁸	n
2016	0% (n=0)	1% (n=1)	34% (n=65)	54% (n=103)	12% (n=23)	3.6 (n=169)	192
2018	0% (n=0)	1% (n=2)	28% (n=52)	55% (n=103)	17% (n=31)	3.6 (n=157)	188
2021	0% (n=0)	1% (n=2)	29% (n=66)	59% (n=134)	11% (n=25)	3.7 (n=202)	227

⁴⁸ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 4.

Exhibit 86. In the past year, have you or has someone in your organization read a CEP research publication?⁴⁹

	Yes	No	Don't know	n
2016	82% (n=159)	5% (n=9)	13% (n=26)	194
2018	79% (n=149)	9% (n=16)	12% (n=23)	188

⁴⁹ This language reflects the 2016 and 2018 version of the survey. This exhibit has been included for reference when reviewing Exhibit 84.

Exhibit 87. Please select the CEP resources your organization engaged with during the past year.

- Read a CEP research publication (e.g., *Foundations Respond to Crisis; New Attitudes, Old Practices: The Provision of Multiyear General Operating Support; Funder Support during the COVID-19 Pandemic; Policy Influence: What Foundations are Doing and Why*)⁵⁰

	Yes	No	n
2016	-	-	-
2018	-	-	-
2021	79% (n=142)	21% (n=37)	179

⁵⁰ This table shows those who did and did not select “Read a CEP research publication”. Other resources were not asked about in 2016 and 2018, and thus, cannot be compared.

Exhibit 88. In the past year, how useful have you found CEP’s research publication(s) for reflecting on your or your foundation’s work?⁵¹

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0% (n=0)	1% (n=2)	53% (n=83)	41% (n=64)	6% (n=9)	3.5	158
2018	0% (n=0)	5% (n=7)	46% (n=68)	44% (n=65)	5% (n=7)	3.5	147

⁵¹ In 2021, this question was switched to a 7-point scale to be consistent with other scales throughout the survey. This exhibit has been included for reference.

Exhibit 89. In the past year, how useful have you found CEP’s resources for reflecting on your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	1% (n=1)	3% (n=4)	10% (n=12)	29% (n=36)	35% (n=44)	22% (n=27)	5.6	124

Exhibit 90. In the past year, how useful have you found CEP’s research publication(s) for improving your or your foundation’s work?⁵²

	Not at all useful (1)	Not very useful (2)	Somewhat useful (3)	Very useful (4)	Extremely useful (5)	Mean	n
2016	0% (n=0)	8% (n=12)	64% (n=101)	25% (n=40)	4% (n=6)	3.3	159
2018	1% (n=1)	11% (n=16)	60% (n=87)	26% (n=38)	3% (n=4)	3.2	146

⁵² In 2021, this question was switched to a 7-point scale to be consistent with other scales throughout the survey. This exhibit has been included for reference.

Exhibit 91. In the past year, how useful have you found CEP’s resources for improving your or your organization’s work?

		Not at all useful (1)	(2)	(3)	(4)	(5)	(6)	Very useful (7)	Mean	Total n
A CEP research publication	2016	-	-	-	-	-	-	-	-	-
	2018	-	-	-	-	-	-	-	-	-
	2021	0% (n=0)	2% (n=3)	7% (n=9)	23% (n=28)	28% (n=35)	25% (n=31)	15% (n=18)	5.1	124

Exhibit 92. In the past year, have you used any of CEP’s resources in informing conversations with board members? ⁵³

	Yes	No	Don’t know/ Not applicable	n
2016	28% (n=52)	63% (n=115)	9% (n=17)	184
2018	32% (n=47)	60% (n=89)	8% (n=12)	148
2021	40% (n=64)	49% (n=79)	11% (n=18)	161

⁵³ The 2016/2018 survey question language is comparable to the 2021 language. 2016/2018 language reads as: “In the past year, have you used any of CEP’s writings (research publications, blog posts, other communications or publications) as a basis of discussion with board members?”

Exhibit 93. How strongly do you associate CEP with the following statements? CEP is...

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don’t Know	Mean ⁵⁴	Total n
Engaged in rigorous work	2016	-	-	-	-	-	-	-	-	-	-
	2018	1% (n=1)	2% (n=4)	1% (n=2)	5% (n=9)	16% (n=30)	36% (n=67)	22% (n=41)	18% (n=34)	5.8 (n=154)	188
	2021	1% (n=1)	1% (n=1)	1% (n=2)	6% (n=9)	15% (n=23)	39% (n=61)	30% (n=47)	8% (n=12)	5.9 (n=144)	156
An expert in the field of philanthropy	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	3% (n=5)	3% (n=6)	3% (n=6)	15% (n=27)	37% (n=67)	32% (n=57)	7% (n=12)	5.9 (n=168)	180
	2021	1% (n=1)	0% (n=0)	2% (n=3)	3% (n=4)	14% (n=22)	37% (n=57)	42% (n=65)	3% (n=4)	6.1* (n=152)	156
Focused on the most important issues in philanthropy	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	4% (n=7)	3% (n=5)	9% (n=17)	24% (n=46)	30% (n=56)	15% (n=28)	15% (n=29)	5.4 (n=159)	188
	2021	0% (n=0)	1% (n=2)	3% (n=4)	8% (n=12)	21% (n=33)	41% (n=64)	22% (n=35)	4% (n=6)	5.7* (n=150)	156

Table continues on next page.

		Strongly Disagree (1)	(2)	(3)	(4)	(5)	(6)	Strongly Agree (7)	Don't Know	Mean ⁵⁴	Total n
Trusted	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	2% (n=4)	2% (n=4)	5% (n=9)	10% (n=19)	34% (n=64)	34% (n=64)	13% (n=24)	6.0 (n=164)	188
	2021	0% (n=0)	1% (n=1)	1% (n=1)	5% (n=8)	12% (n=19)	36% (n=56)	40% (n=62)	5% (n=7)	6.1 (n=147)	154
Influential on foundation practice and effectiveness	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	3% (n=5)	1% (n=2)	8% (n=15)	26% (n=47)	27% (n=49)	23% (n=41)	11% (n=20)	5.6 (n=159)	179
	2021	0% (n=0)	1% (n=1)	1% (n=1)	8% (n=13)	20% (n=31)	37% (n=57)	25% (n=38)	9% (n=14)	5.8 (n=141)	155
Innovative	2016	-	-	-	-	-	-	-	-	-	-
	2018	0% (n=0)	2% (n=4)	5% (n=10)	10% (n=19)	27% (n=51)	23% (n=44)	10% (n=19)	22% (n=41)	5.2 (n=147)	188
	2021	0% (n=0)	1% (n=1)	6% (n=9)	19% (n=30)	20% (n=31)	36% (n=56)	12% (n=18)	6% (n=10)	5.3 (n=145)	155

⁵⁴ The n displayed represents all responses that are calculated into the mean, which includes answer response options 1 through 7.

* Statistically significant difference $p < 0.05$