



Giving Big: The Impact of Large, Unrestricted Gifts on Nonprofits
Results From Year One of a Three-Year Study of Mackenzie Scott's Giving

Data Collection Instruments
November 2022

This document contains the survey instruments used to collect data for CEP's *Giving Big: The Impact of Large, Unrestricted Gifts on Nonprofits* report.

Contents

Year 1 Survey Instrument	2
Year 1 Interview Protocol	23



The Impact of Large, Unrestricted Gifts on Nonprofits

Year 1 Survey Instrument

This survey should take approximately 25-30 minutes to complete.

Please complete this survey by **May 27, 2022**.

Introduction

For years, the relative scarcity of meaningfully sized, unrestricted gifts has been a frustration of nonprofit leaders. Research by CEP and others has documented the frustration of nonprofits faced with short-term, restricted funding and the challenges it creates for planning; hiring and retention; and investment in strengthening the capacity of their organizations. Recent giving by billionaire MacKenzie Scott offers an opportunity to study the effects on hundreds of nonprofits of an approach to giving in which gifts are both extremely large relative to the norm and completely unrestricted.

In this survey, we will ask you for some background information about your organization, what your organization has decided to do with the funds from its MacKenzie Scott grant to date, and what the impact of this grant has been on your organization. With your participation, it is our hope that this research will inform other donors' approaches in the future and that it will be helpful to nonprofit leaders who find themselves on the receiving end of large, unrestricted grants.

The Center for Effective Philanthropy is an independent nonprofit organization. **This research is being conducted solely by CEP.** For a list of foundations funding this research please see <https://cep.org/big-gifts-study/>.

CEP takes the confidentiality of data very seriously. Your responses to this survey will be kept completely confidential. Although CEP will know the identity of survey respondents, when results of this study are shared through a publicly available research report:

- CEP will not reveal the identity of nonprofit organizations that did or did not participate in this survey.
- All numeric rating responses to this survey will be reported in aggregate.
- If we quote part of your responses to an open-ended question, we will mask all identifying information in the quote to thoroughly protect your anonymity.

If you have any questions about this survey or research project, please contact Maria Lopez, analyst, at (617) 500-1242 or at marial@cep.org.

Instructions

- **Please do not use the forward and back buttons on your browser’s navigation bar** to move forward and back in the survey. Instead, use the directional buttons at the bottom of each screen.
- **To stop and continue the survey at a future time**, close your browser and use the survey link found in your email to resume the survey.

BEFORE YOU BEGIN

It was our intention to send this survey to the person at your organization with the highest level of decision-making responsibility for use of the MacKenzie Scott grant money. However, it is sometimes difficult to identify the most appropriate contact from a website. If this person is you, please select “Yes” below and proceed to the survey.

If you feel like there is another person within your organization who is better suited to answer questions about the Scott grant (in terms of amounts spent or set aside, its impact on fundraising and on your organization overall), please select “No” below, and enter their name and email below. CEP will send a survey invitation to this person.

Do you believe you are the person within your organization best suited to respond to this survey?

(Qualtrics: require a response to this question.)

- Yes *(Qualtrics: Proceed to “About the survey”.)*
- No
- Not sure *(Qualtrics: Proceed to “About the survey”.)*

(Display only if “No” was selected above.)

- Name of person CEP should contact: _____
- E-mail address of this person: _____ *(Qualtrics: required field. Text entry validation set to email address only.)*

(Qualtrics: if selected “No” in question above, and provided an email address, then the respondent is sent to the end of the survey, and are not shown any of the survey questions.)

ABOUT THE SURVEY

This survey is organized under the following sections:

- About your organization and you
- About your grant
- About your organization’s finances
- About your organization’s use of the grant
- About the impact of this grant on your organization
- More about your organization and you

Please note that questions about the impact of Scott’s grant on your organization appear towards the end of the survey. In order to be able to report on the impact these grants have had on as many organizations as possible, we would greatly appreciate it if you could complete the full survey.

You will be able to exit the survey and continue working on it later at any time by closing your browser and using the survey link found in your email to resume the survey. We will send periodic reminders, which will always include your survey link.

ABOUT YOUR ORGANIZATION AND YOU

1) In what year was your organization founded? (*Qualtrics: list of years between 1900 and 2021. Also includes “Don’t know” as an answer option.*)

2) (*Display only if 2020 or 2021 was selected in Q1.*) Was your organization, or an initiative within your organization, created specifically to meet the needs of communities during the COVID-19 pandemic?

- No
- Yes, my organization was set up this way during the COVID-19 pandemic
- Yes, an initiative within my organization was set up this way during the COVID-19 pandemic

3) Please approximate the total number of staff members at your organization. (Please indicate full-time equivalents. If your organization has multiple chapters, please only include employees from the chapter - or headquarters - at which you work. Please do not include volunteers in your count.)

Please count each full-time staff member as “1” and each part-time staff member as the decimal representing the proportion of time he/she works (e.g., if a staff member works half-time, they would be represented as “0.5”).

_____ full-time equivalent staff members (*Qualtrics: validation in place so that only numbers can be entered here.*)

4) Which of the following best describes the relationship of your organization to others?

- Independent/standalone nonprofit
- Local affiliate or chapter office
- National office of a group of affiliate organizations
- Other (*please specify: _____*)

5) Which of the following best describes your organization? *(Select all that apply.)*

- Advocacy organization
- College or university
- Community foundation
- Direct service organization
- Grassroots organization
- Intermediary organization/regrantor
- Museum
- Philanthropy serving organization
- Private foundation
- Religious organization
- Research organization
- Social finance institution
- Other *(please specify: _____)*

6) How would you describe the geographical scope(s) of your organization? *(Select all that apply.)*

- Local
- State
- Regional
- National
- Global

7) What is your current role at your organization?

- CEO/Executive Director or equivalent
- CFO or equivalent
- Development Director or equivalent
- Head of Programs or equivalent
- Other *(please specify: _____)*

8) How many years have you been in your current role at your organization?

- Less than 1 year
- At least 1 year but fewer than 3 years
- At least 3 years but fewer than 6 years
- At least 6 years but fewer than 10 years
- 10 years or longer

9) *(Display only if “Less than 1 year” or “At least 1 year but fewer than 3 years” was selected in the previous question.)* Which of the following best describes the timing of the grant award relative to when you joined your organization?

- The organization received the grant before I joined
- The organization received the grant at about the same time I joined
- The organization received the grant after I joined

10) What is your race or ethnicity? *(Select all that apply.)*

- Asian or Asian American
- Black or African American
- Hispanic or Latina, Latino, or Latinx
- Middle Eastern or North African
- Multiracial or Multi-ethnic
- Native American, Native Alaskan, or Indigenous
- Native Hawaiian or Pacific Islander
- White
- Race or ethnicity not included above *(optional, please describe: _____)*
- Prefer not to say *(Mutually exclusive)*

11) Do you identify as a person of color?

- Yes
- No
- Prefer not to say

ABOUT YOUR GRANT

12) When did you receive this grant? (Note: If your organization received more than one grant from MacKenzie Scott, please provide information about the first grant here.)

(Month dropdown)

(Year dropdown - 2020 and 2021)

13) *(Qualtrics: text entry validation set to numerical value only. Maximum amount set to 99999999999.)* What was the amount (in dollars) of the grant received?

\$ _____

14) Did you receive more than one grant from MacKenzie Scott?

- Yes, my organization received two grants
- Yes, my organization received three grants
- No

15) *(Display only if "Yes, my organization received two grants" was selected in the previous question.)*
When did you receive the second grant?

(Month dropdown)

(Year dropdown – 2020, 2021, 2022)

16) *(Display only if “Yes, my organization received two grants” was selected in question 14. Qualtrics: text entry validation set to numerical value only. Maximum amount set to 999999999999.)* What was the amount (in dollars) of the second grant?

\$ _____

17) *(Display only if “Yes, my organization received three grants” was selected in question 14.)* When did you receive the third grant?

(Month dropdown) (Year dropdown – 2020, 2021, 2022)

18) *(Display only if “Yes, my organization received three grants” was selected in question 14. Qualtrics: text entry validation set to numerical value only. Maximum amount set to 999999999999.)* What was the amount (in dollars) of the third grant?

\$ _____

(Display text only for those who selected “Yes, my organization received two grants” or “Yes, my organization received three grants” in Q14.) As you go through the survey, please consider the full amount of the multiple Scott grants you have received, where relevant, when asked about the grant money that your organization received.

19) Before being notified that you would be receiving this grant, which of the following, if any, were you asked to provide or participate in? *(Select all that apply.)*

- Financial documents for your organization
- Strategic/business plan for your organization
- Interview with Scott’s team and/or consultants
- Other *(please specify: _____)*
- We were not required to provide any information before receiving the grant *(Mutually exclusive)*

20) *(Qualtrics: Limit the text entry to 500 characters.)* As best as you can recall, please describe what went through your mind when you first heard that the organization you lead was receiving this grant? (500 character limit)

YOUR ORGANIZATION'S FINANCES

21) *(Qualtrics: text entry validation set to numerical value only. Maximum amount set to 99999999999.)* In the fiscal year **prior to** receiving this grant, what was your organization's operating budget (in dollars)?

\$ _____

22) Is this the largest unrestricted grant, gift, or bequest your organization has ever received?

- Yes
- No
- Not sure

23) Did your organization have any of the following prior to receiving this grant? *(Select all that apply.)*

- Endowment
- Board-designated reserve fund
- Board-designated fund for strategic opportunities
- None of the above *(Mutually exclusive)*

ABOUT YOUR ORGANIZATION'S USE OF THE GRANT

24) At this time, has your organization **determined specific uses** for the grant money you received from MacKenzie Scott?

- No, we have not yet determined specific uses for any of the grant
- Yes, we have determined specific uses for **some** of the grant
- Yes, we have determined specific uses for **all** of the grant

25) *(Display only if "Yes, we have determined specific uses for some of the grant" was selected in question 24. Qualtrics: text entry validation set to numerical value only. Maximum amount set to 99999999999.)* Approximately what amount (in dollars) have you determined uses for?

\$ _____

26) (Display only if “Yes, we have determined specific uses for some of the grant” or “Yes, we have determined specific uses for all of the grant” was selected in question 24.) At this time, has your organization **spent** any of the grant money?

- No, we have not yet spent any portion of the grant
- Yes, we have spent **some** of the grant
- Yes, we have spent **all** of the grant

27) (Display only if “Yes, we have spent some of the grant” was selected in the previous question. Qualtrics: text entry validation set to numerical value only. Maximum amount set to 999999999999.) Approximately what amount (in dollars) has been spent?

\$ _____

28) Please describe any challenges that your organization has encountered when determining how to use the grant money.

29) (Display only if “Yes, we have determined specific uses for some of the grant” or “Yes, we have determined specific uses for all of the grant” was selected in question 24.) Of the portion of the grant you have determined specific uses for, what are the top five expenditures that you believe will have the greatest impact on your organization? Please provide as detailed a description as you see fit for each expenditure.

Description of Expenditure	Amount of Scott grant money your organization has spent or intends to spend on this expenditure <i>(Qualtrics: text entry validation set to numerical value only. Maximum amount set to 999999999999.)</i>
#1	
#2	
#3	
#4	
#5	

(Display questions 30 through 32 only if “Yes, we have determined specific uses for some of the grant” or “Yes, we have determined specific uses for all of the grant” was selected in question 24.) Given the unrestricted nature of the grant, organizations have decided to use this money in many different ways. The following questions attempt to capture how your organization has determined it will spend or has already spent the grant money. We understand that these questions are broad and do not capture the specifics of how the funds will or have been spent.

If you wish to provide more detailed information about the types of activities your organization has or will engage in, you can share your name and contact information with us at the end of the survey for an opportunity to participate in a follow-up interview with CEP.

30) For which of the following **financial uses** has or will your organization spend a portion of the grant? (Select all that apply.)

	Will not spend <i>(Mutually exclusive)</i>	Has already spent	Will spend
Build financial reserves (e.g., board-designated reserve, “rainy day fund”)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a new endowment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contribute to an existing endowment for the organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay off debt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the grant money to raise more money / start a fundraising campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage revenue gaps (caused by delays in grant or contract payments, fundraising gaps, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a fund for special opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 1 (please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 2 (please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 3 (please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31) For which of the following **operational uses** has or will your organization spend some portion of the grant? *(Select all that apply.)*

	Will not spend <i>(Mutually exclusive)</i>	Has already spent	Will spend
Upgrade the organization's technological infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hire staff to fulfill needs existing prior to receipt of the grant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hire staff to take on new work undertaken with these grant funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase staff salaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address pay equity issues for staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide a one-time bonus to staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improve benefits for staff (e.g., health or retirement benefits)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host events for staff (e.g., retreats, gatherings)			
Offer sabbaticals for staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide professional development to leadership of the organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide professional development to staff other than leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 1 <i>(please specify: _____)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 2 <i>(please specify: _____)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 3 <i>(please specify: _____)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

32) For which of the following **programmatic uses** has or will your organization spend some portion of the grant? (*Select all that apply.*)

	Will not spend <i>(Mutually exclusive)</i>	Has already spent	Will spend
Improve existing programmatic work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expand existing programmatic work to new geographies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expand existing programmatic work to new populations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engage in new programmatic initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expand/improve your monitoring and/or evaluation efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engage in advocacy efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase the number of constituents served	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase supplies for constituents (e.g., laptops, clothing, school supplies, food)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fund capital projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engage in new collaborations and partnerships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide financial support to the communities served (e.g., scholarships/fellowships, direct cash transfer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Raise the organization's profile (e.g., raise awareness of the organization, publicity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respond to the COVID-19 crisis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regrant funds to other organizations or individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engage in strategic planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 1 (<i>please specify:</i> _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other 2 (please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other 3 (please specify: _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ABOUT YOUR ORGANIZATION'S REGRANTING PRACTICES

(Display questions 33 through 45 only if "Intermediary organization/regrantor" was selected in question 5 or if "Regrant funds to other organizations or individuals --> Has already spent" was selected in question 32.)

33) Which of the following best describes your organization's regranting activities prior to receiving the MacKenzie Scott grant?

- My organization did not do any regranting prior to receiving the Scott grant
- My organization did some regranting prior to receiving the Scott grant
- My organization focused on regranting prior to receiving the Scott grant

34) Has your organization regranted any of the money received through the MacKenzie Scott grant?

- Yes
- No

35) (Display if "Yes" was selected in question 34. Qualtrics: text entry validation set to numerical value only. Maximum amount set to 99999999999.) What amount (in dollars) of the MacKenzie Scott grant has your organization regranted?

\$ _____

36) (Display if "Yes" was selected in question 34. Qualtrics: text entry validation set to numerical value only. Maximum amount set to 99999999999.) What amount (in dollars) of the MacKenzie Scott grant has your organization decided to use for internal purposes, rather than regrant to other organizations?

\$ _____

37) (Display if "Yes" was selected in question 34. Qualtrics: text entry validation set to numerical value only.) How many grants has your organization made from this money?

38) *(Display if "Yes" was selected in question 34.)* Have the grants you have made from this money been restricted or unrestricted?

- Most have been restricted
- Most have been unrestricted
- A mix of some restricted and some unrestricted

39) *(Display if "Yes" was selected in question 34.)* When regranting the money received through the MacKenzie Scott grant, did you require an application process?

- Yes
- No

40) *(Display if "Yes" was selected in the previous question and "My organization did not do any regranting prior to receiving the Scott grant" was not selected in question 33.)* Was the application process any different than your organization's typical application process?

- Yes
- No
- Prior to this, we did not have an application process

41) *(Display if "Yes" was selected in the previous question.)* Please explain how the application process differed from your organization's typical application process.

42) *(Display if "Yes" was selected in question 34.)* Did you or are you requiring a reporting process for these grants?

- Yes
- No

43) *(Display if "Yes" was selected in the previous question and "My organization did not do any regranting prior to receiving the Scott grant" was not selected in question 33.)* Was or will the reporting process be any different than your organization's typical reporting process?

- Yes
- No
- Prior to this, we did not have a reporting process

44) (Display if "Yes" was selected in the previous question.) Please explain how the reporting process has or will differ from other reporting processes your organization previously has required.

45) (Display if "Yes" was selected in question 34.) When regranting the money received through the MacKenzie Scott grant, did your organization think of these funds in a different way than it typically would? If yes, please explain.

IMPACT OF THIS GRANT

46) What opportunities did this grant allow you to pursue that previous funding your organization received had not?

- Opportunity 1 - _____
- Opportunity 2 - _____
- Opportunity 3 - _____

47) (Display only if at least one response was entered in the previous question.) Please explain why these opportunities were possible with this grant, but not possible with previous funding your organization had received.

48) What do you believe your organization has *already* achieved because it received this grant?

49) Looking forward, what do you believe your organization *will be able to* achieve because it received this grant?

50) To what extent do you believe this grant will strengthen the following?

	Not at all	Slightly	Moderately	Significantly
The long-term financial sustainability of your organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The long-term operational capacity of your organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The ability of your organization to achieve its mission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

51) Did your organization use some of the grant money to advance equity in any of the following areas?

(Select all that apply.)

- Racial equity
- Gender equity
- LGBTQ+ equity
- Health equity (including disability)
- Economic mobility
- Other *(please specify: _____)*
- No, I did not use any of the grant money to advance equity in any area *(Mutually exclusive)*

52) *(Display only if an answer other than “No, I did not use any of the grant money to advance equity in any area” was selected above. Qualtrics: Responses will be piped in depending on the responses selected above.)* To what extent has this grant allowed your organization to contribute to advancing each of the following more effectively than it could have otherwise?

	Not at all	Slightly	Somewhat	Moderately	Significantly	Not applicable
Response #1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Response #2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Response #3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Response #4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other <i>(please specify: _____)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

53) Which of the following statements best reflects how receiving this grant has affected your organization’s ability to fundraise?

- It has made fundraising **much more difficult**
- It has made fundraising **somewhat more difficult**
- It has had **no effect** on fundraising
- It has made fundraising **somewhat easier**
- It has made fundraising **much easier**

54) How has receiving this grant changed your approach to fundraising, if at all?

55) Have any of your funders - foundations or individual donors - **explicitly** told you that they are changing the amount of funding they provide or will provide to your organization because it received a grant from MacKenzie Scott? *(Select all that apply)*

- Yes, at least one foundation funder
- Yes, at least one individual donor
- No *(Mutually exclusive)*

56) *(Display only if “Yes, at least one foundation funder” or “Yes, at least one individual donor” was selected above. Qualtrics: text entry validation set to numerical value only.)* Please indicate how many funders are changing the amount of funding they provide or will provide to your organization. If one of the columns does not apply, please enter “0.”

	Will increase	Will decrease
Foundation funders fundraising4a <i>(display only if Yes, at least one foundation funder” was selected in Q55)</i>	-----	-----
Individual donors fundraising4b <i>(display only if Yes, at least one individual funder” was selected in Q55)</i>	-----	-----

57) Excluding the grant money received from MacKenzie Scott, how would you best describe what has changed for your organization’s contributed revenue since receiving the grant?

	Decreased	Stayed the same	Increased	Not applicable
Amount of budget coming from restricted grants from foundations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of budget coming from restricted grants from individual donors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of budget coming from unrestricted grants from foundations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount of budget coming from unrestricted grants from individual donors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

58) To date, what has been the effect of this grant on the way your organization functions?

59) MacKenzie Scott’s grantmaking approach is different from traditional funding approaches followed by foundations. Her grants were given with fewer process requirements (e.g., application and reporting) and there is not much contact with her or her team following receipt of the grant money.

Reflecting on your experience as a MacKenzie Scott grant recipient, to what extent do you feel like the following opportunities would have helped improve this experience?

	Not at all	Slightly	Moderately	Significantly
Opportunity to build a relationship with Scott’s team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to build a relationship with other Scott grant recipients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to understand future funding opportunities from Scott	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to discuss with Scott’s team any challenges the organization is having	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Receipt of non-monetary assistance or capacity building support from Scott’s team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

60) Would you be interested in potentially participating in a confidential interview with CEP staff about your experience with this grant? If so, please provide your name and email address below. During interviews, we will refer to some of your survey responses above so as not to ask you for information you have already provided.

Name _____

Email _____ *(Qualtrics: text entry validation set to email address only.)*

MORE ABOUT YOUR ORGANIZATION AND YOU

We realize you have answered many questions to this point. The remaining questions ask for demographic information about your organization and your identity. We would appreciate it if you took the time to complete these items.

About your organization

61) Currently, from approximately how many staffed foundations does your organization receive grants?

- 0 foundations
- 1 foundation
- 2-10 foundations
- More than 10 foundations

62) In what program areas does your organization work? *(Select all that apply.)*

- Agriculture, fishing, and forestry
- Animals
- Arts and culture
- Civic engagement
- Community and economic development
- Climate change
- K-12 education
- Higher education
- Environment
- Health
- Human rights
- Human services
- Information and communications
- International relations
- Philanthropy
- Public affairs
- Public safety
- Religion
- Science
- Social justice
- Social sciences
- Sports and recreation
- Other *(please specify: _____)*

63) Does your organization serve any of the following communities? *(Select all that apply.)*

- Asian or Asian American communities
- Black or African American communities
- Hispanic or Latina, Latino, or Latinx communities
- Middle Eastern or North African communities
- Native American, Native Alaskan, or Indigenous communities
- Native Hawaiian or Pacific Islander communities
- Children and youth
- Older adults
- People with disabilities
- People from lower-income communities
- Undocumented immigrants
- People without housing
- Veterans
- Other *(please specify: _____)*
- None of the above *(Mutually exclusive)*

64) Does your organization serve rural communities?

- Yes
- No

65) Has your organization been a client of the Bridgespan Group within the last five years?

- Yes
- No
- Not sure

About you

66) How do you describe yourself? *(Select all that apply.)*

- Gender non-conforming or non-binary
- Man
- Woman
- Prefer to self-describe/identify *(optional, please describe: _____)*
- Prefer not to say *(Mutually exclusive)*

67) Are you transgender?

- Yes
- No
- Prefer not to say

68) Do you consider yourself to be: *(Select all that apply.)*

- Bisexual
- Gay or Lesbian
- Heterosexual or straight
- Queer
- Questioning
- Another identity not included above *(optional, please describe: _____)*
- Prefer not to say *(Mutually exclusive)*

69) Do you have a disability?

- Yes
- No
- Prefer not to say

70) *(Display only if "email address" is empty in question 60.)* Would you be interested in potentially participating in a confidential interview with CEP staff about your experience with this grant? If so, please provide your name and email address below. During interviews, we will refer to some of your survey responses above so as not to ask you for information you have already provided.

Name _____

Email _____ *(Qualtrics: text entry validation set to email address only.)*

71) This is the last question in this survey. By clicking "Next" you will submit your responses.

Do you have any comments, questions, or feedback that you would like to share with CEP?



The Impact of Large, Unrestricted Gifts on Nonprofits Year 1 Interview Protocol

Introduction Script

Thank you again for taking time out of your busy schedule to share your thoughts and experiences as a MacKenzie Scott grant recipient for our research. Before we get started with the interview, we'd like to take a moment to introduce ourselves and provide some context for this conversation and our project.

As I said, I am [NAME], [POSITION] at CEP. As you may know, CEP is a nonprofit with a mission to provide data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness. We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world. As a part of that mission, we are a part of CEP's research team, which conducts research so that we can provide data about important topics and discussions happening in the field of philanthropy.

Today's interview is part of a project in which we're seeking to understand your organization's experience so far as a recipient of a large, unrestricted grant from MacKenzie Scott. We are currently conducting interviews with nonprofit leaders of approximately 40 nonprofit organizations that have received a grant from Scott. These interviews will build on data we collected through a survey to nonprofit leaders who received a grant from Scott between 2020 and 2021 — thank you for completing that survey. We plan to publish our findings later this year. Do you have any questions about this research project?

Throughout this interview we will be asking you questions to better understand your organization's experience as a grant recipient, your decision-making process, and the impact this grant has had on your organization so far. I'd like to highlight that there are no "right or wrong answers" to the questions we'll be asking, and we are not looking for any particular responses — we'll simply be learning from you during this conversation. We hope that you feel comfortable and can share your honest responses with us.

I also want to take a moment to talk about confidentiality. We take the issue of confidentiality very seriously at CEP. This is a confidential interview. As you know your survey responses are confidential — CEP will not share your individual survey responses with anyone. In addition, we plan to record this interview so that it can be transcribed. Transcriptions allow us to accurately analyze interview data. With the exception of the staff members here at CEP working on this research project and the transcriber, all of whom have signed confidentiality agreements, no one else will have access to the recording and transcript of our interview, and they will not be shared with anyone at your organization or any other organization.

This interview will take up no more than 60 minutes. We will not go past our allotted time, and you can stop the interview at any point if you so desire.

Do you have any questions?

Great! Let's get started. We will hit record and you will hear an automated message.

DECISION MAKING PROCESSES

In the survey, you were asked about how your organization has spent or will spend the money from its MacKenzie Scott grant.

Today, we'd like to learn more about why your organization spent, or plans to spend, the money in the ways decided, and how those decisions were made.

1. Why did your organization choose to focus on these priorities with its grant from Scott?
2. Who was involved in the process of determining how to use the money, and how?
 - a. What role did the board play in the process of deciding how to use this money?
 - b. Who was the ultimate decision maker?
 - i. Where did the power reside for decision-making among the staff/CEO/board?
 - c. Which parts of your organization's process for determining the use of this money worked well? Which did you wish you had approached differently?
3. Did the decision-making process for how to use this money differ from how you've traditionally made decisions? If yes, how, if at all, will this change your decision-making processes moving forward?
4. Did you and your organization feel like you were expected to spend the money in particular ways? (e.g., from your board, those your organization serves, funders, or other external constituents?)
 - a. If yes, what were those expectations?
 - b. If yes, from whom or where were these expectations coming?

FURTHER UNDERSTANDING THE IMPACT OF THIS GRANT

In the survey, you answered several questions about the impact of this grant on the work your organization does. In this next section, we'll be asking questions to further reflect on your responses as well as about some topics we didn't cover in the survey.

5. Because of this grant, what kind of impact has your organization been able to have on the communities or fields it seeks to affect?

- a. [If the interviewee indicated that the grant was used to advance equity in the survey but did not mention it in the answer above.] You noted that your organization has used some of the grant money to advance [type(s) of] equity. Could you share more with us about how this grant enabled your organization to do that?
6. What are the one or two most important changes that your organization has experienced because of this grant? Why was that change so important?
 - a. What about impact on your organization's operations: Were there any operational changes your organization made to better accommodate management of use of the funds?
7. What about you as the leader of your organization – what are the one or two most important changes you have experienced because of this grant? Why was that change so important?

LEARNING

8. What do you want other funders to learn from what this grant did for your organization?
9. What have been some of the unexpected consequences - positive or negative - that your organization has experienced as a result of receiving this grant?
10. What lessons has your organization learned so far as a result of receiving this gift?

CONCLUSION

11. *(Time permitting.)* Is there anything else you would like to share that we didn't ask about today?

Exit Script

Those are all of the questions that we have for you. Thank you again for taking the time to speak with us about this important and fascinating topic.

As far as next steps, we will continue to conduct interviews for the next few weeks, then we'll turn to analyzing the themes emerging across our conversations. As I mentioned earlier, we will publish the report of our findings later this year, and I'll make sure that you receive a copy.

Do you have any questions before we finish?

Thank you again for taking this time out of your schedule today.