



Emerging Impacts: The Effects of MacKenzie Scott’s Large, Unrestricted Gifts
Results From Year Two of a Three-Year Study

Data Collection Instruments
November 2023

This document contains the survey instruments used to collect data for CEP’s *Emerging Impacts: The Effects of MacKenzie Scott’s Large, Unrestricted Gifts* report.

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The Effects of Large, Unrestricted Gifts on Nonprofits

Year 2 Survey Instrument

This survey should take approximately 15-20 minutes to complete.

Please complete this survey by **April 11, 2023**.

Introduction

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, 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. MacKenzie Scott and her office are in no way involved in this work and are not funding it.** For a list of foundations funding this research please see <https://cep.org/about/people/big-gifts-study-advisory-group/>.

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 Katarina Malmgren, associate manager, at (415) 651-5343 or at katarinam@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

This survey is intended for the person at your organization with the highest level of decision-making responsibility for use of the MacKenzie Scott grant money. Please indicate whether this person is you. If someone else within your organization is better suited to answer such questions, CEP will send a survey invitation to that person.

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

- No
- Yes (*Proceed to "About Your Organization and You".*)
- Not sure (*Proceed to "About Your Organization and You".*)

(Display only if "No" was selected above.)

- Name of person CEP should contact: _____
- E-mail address of this person: _____ (*Force response. Text entry validation set to email address.*)

(If "No" is selected in the question above and an email address is provided, then the respondent is sent to the end of the survey.)

ABOUT YOUR ORGANIZATION AND YOU

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

- Advocacy organization
- College or university
- Direct service organization
- Funder
- Grassroots organization
- K-12 school or school district
- Philanthropy serving organization
- Research organization
- Social finance institution
- Other (*please specify: _____*)

2) (*Display only if "Funder" was selected in the previous question.*) Which of the following best describes what type of funder your organization is?

- Community foundation
- Health conversion foundation
- Independent foundation
- Intermediary organization/Regrantor/Fund/Collaborative
- United Way
- Other (*please specify: _____*)

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

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

4) Please approximate the total number of paid 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.)

_____ Full-time equivalent staff members

5) In the fiscal year **prior to** receiving this grant, approximately what was your organization's operating budget (in dollars)?

\$ _____

6) 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

7) (*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? (If your organization received more than one grant, please consider your start date relative to the **first** grant.)

- 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

- 8) 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)*

- 9) Do you identify as a person of color?
- No
 - Yes
 - Prefer not to say

ABOUT YOUR GRANT

- 10) When did your organization receive the grant from MacKenzie Scott? If your organization received more than one grant from MacKenzie Scott, please provide the **date of the first grant** here.

(Month dropdown)

(Year dropdown – 2020, 2021, 2022)

- 11) How many grants did your organization receive from MacKenzie Scott?
- One
 - Two
 - Three
 - Four or more

(Display only to those who indicated they received more than one grant.) As you go through the survey, please consider the full amount of the multiple Scott grants you have received, where relevant.

- 12) What was the amount (in dollars) of the grant(s) received?

\$ _____

- 13) Before receiving this grant, was your organization offered an opportunity to request a specific amount from MacKenzie Scott's office?
- No
 - Yes
 - Not sure

- 14) *(Display only if "Yes" was selected in the previous question.)* Did your organization receive the amount that it requested?

- No, the amount we received was **lower** than we requested
- No, the amount we received was **higher** than we requested
- Yes, we received the amount we requested

15) To receive this grant, did your organization submit an application to an intermediary fund, regrantor, or collaborative?

- No
- Yes
- Not sure

16) *(Display only if “No” or “Not sure” was selected in the previous question.)* Before being notified that your organization would be receiving this grant, were you asked to provide any information or to participate in an interview?

- No
- Yes
- Not sure

17) *(Display only if “Yes” was selected in the previous question.)* Which of the following was your organization asked to provide or discuss? *(Select all that apply.)*

- Financial documents for your organization
- Strategic/business plan for your organization
- Information about your organization’s impact
- Information about your organization’s board or staff
- None of the above *(Mutually exclusive)*

ABOUT YOUR ORGANIZATION’S USE OF THE GRANT

18) 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

19) *(Display only if “Yes, we have determined specific uses for some of the grant” was selected in the previous question.)* Approximately what amount of the grant (in dollars) have you determined uses for?

\$ _____

20) *(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 18.)* 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

21) *(Display only if “Yes, we have spent some of the grant” was selected in the previous question.)* Approximately what amount (in dollars) has been spent?

\$ _____

22) *(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 18.)* How involved has your organization’s board been in the process for determining how to allocate the grant funds?

- Not at all involved
- Slightly involved
- Somewhat involved
- Very involved

23) *(Display only if “Slightly,” “Somewhat,” or “Very involved” was selected in the previous question.)* How aligned have your organization’s board and staff leadership been on how to allocate the funds?

- Not at all aligned
- Slightly aligned
- Somewhat aligned
- Mostly aligned
- Completely aligned

24) *(Display only if less than “Completely aligned” was selected in the previous question.)* On what issues regarding how to allocate the funds have the board and staff leadership not been aligned?

(Display next four questions 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 18.) 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.

25) Has or will your organization spend a portion of the grant on any of the following **financial uses**?

(Select all that apply.)

- Building financial reserves (e.g., board-designated reserve, “rainy day fund”)
- Creating a new endowment
- Contributing to an existing endowment for the organization
- Paying off debt
- Using the grant money to raise more money / start a fundraising campaign
- Managing revenue gaps (e.g., caused by delays in grant or contract payments, fundraising gaps, etc.)
- Creating a fund for special opportunities
- None of the above *(Mutually exclusive)*

26) Has or will your organization spend a portion of the grant on any of the following **operational uses**?

(Select all that apply.)

- Upgrading the organization’s technological infrastructure
- Hiring staff to fulfill needs existing prior to receipt of the grant
- Hiring staff to take on new work undertaken with these grant funds
- Hiring outside consultants to advise on the organization's work
- Increasing staff salaries
- Addressing pay equity issues for staff
- Providing a one-time bonus to staff
- Improving benefits for staff (e.g., health or retirement benefits)
- Hosting events for staff (e.g., retreats, gatherings)
- Offering sabbaticals for staff
- Providing professional development to leadership of the organization
- Providing professional development to staff other than the leadership
- None of the above *(Mutually exclusive)*

27) Has or will your organization spend a portion of the grant on any of the following **programmatic uses**? (Select all that apply.)

- Improving existing programmatic work
- Expanding existing programmatic work to new geographies
- Expanding existing programmatic work to new populations
- Engaging in new programmatic initiatives
- Expanding/improving your monitoring and/or evaluation efforts
- Engaging in advocacy efforts
- Increasing the number of constituents served
- Purchasing supplies for constituents (e.g., laptops, clothing, school supplies, food)
- Funding capital projects
- Engaging in new collaborations and partnerships
- Providing financial support to the communities served (e.g., scholarships/fellowships, direct cash transfer)
- Raising the organization’s profile (e.g., raising awareness of the organization, publicity)
- Responding to the COVID-19 crisis
- Regranting funds to other organizations or individuals
- Engaging in strategic planning
- Innovating or taking risks in your programs
- None of the above (*Mutually exclusive*)

28) Approximately **what percentage** of the grant are you allocating to the following categories? Please note that the percentages must sum to 100.

Programmatic uses	___%
Financial uses	___%
Operational uses	___%
Other	___%
Uncommitted funds	___%
Total	100%

29) (Display only if “Yes, we have spent some of the grant” or “Yes, we have spent all of the grant” was selected in question 20.) Reflecting on how you've allocated the grant, including the timeline for deployment, if you had it to do all over again, would you allocate any of the funds any differently?

- No
- Yes
- Not sure

30) *(Display only if “Yes” was selected in the previous question.)* Why would you allocate the funds differently?

IMPACT OF THIS GRANT ON YOUR ORGANIZATION

31) How much did this grant increase your organization’s ability to pursue opportunities that hadn’t been possible with previous funding your organization received?

- Did not increase
- Slightly increased
- Somewhat increased
- Significantly increased

32) To what extent do you believe this grant has or 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"/>
The ability of your organization to innovate or take risks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The credibility of your organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The fields or communities in which your organization seeks to have impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Impacts on Equity

33) 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, we did not use any of the grant money to advance equity in any area *(Mutually exclusive)*

34) *(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. 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
Response #1	<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"/>
Response #3	<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"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

35) *(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 in question 33.)* Which of the following statements describes *how* this grant has allowed your organization to more effectively advance equity? *(Select all that apply.)*

- We have been able to improve/expand our programming to better serve communities
- We have been able to begin/improve/expand our policy and advocacy work
- We have more capacity to listen to and/or incorporate community voices
- We have been able to improve internal DEI capacity through staff trainings and/or hiring staff dedicated to equity efforts
- We have been able to improve our internal commitments to equity (e.g., through pay equity, hiring practices)
- Other *(please specify: _____)*
- None of the above *(mutually exclusive)*

Follow-up Questions on Use of Funds

(Display these questions only if the respondent indicated they used the grant money for any of the uses listed below.)

36) Earlier in this survey, you indicated that your organization is using the funds for the following programmatic efforts. To date, how successful would you consider those efforts?

<i>(Display only the options selected in the programmatic uses section.)</i>	Not at all successful	Somewhat successful	Very successful	Too early to tell
Expanding existing programmatic work to new geographies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expanding existing programmatic work to new populations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engaging in new programmatic initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Innovating or taking risks in your programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

37) *(Display only if “Engaging in new collaborations and partnerships” was selected in Q27.)* Earlier in this survey, you indicated that your organization is using the funds for engaging in new collaborations and partnerships. With whom has your organization formed new partnerships or collaborations? *(Select all that apply.)*

- Other nonprofits
- Funders
- Private businesses
- Government
- Other *(please specify: _____)*

38) *(Display only if “Engaging in new collaborations and partnerships” was selected in Q27.)* What have been the effects of these new partnerships or collaborations?

39) *(Display only if “Managing revenue gaps” was selected in question 25.)* Earlier in this survey, you indicated that your organization is using the funds to manage revenue gaps. What were the sources of those revenue gaps?

40) *(Display only if “Hiring staff to fulfill needs existing prior to receipt of the grant” or “Hiring staff to take on new work undertaken with these grant funds” was selected in question 26.)* Earlier in this survey, you indicated that your organization is using the funds to increase the organization’s staff size. How many new staff members have you **added** with this grant?

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

_____ full-time equivalent staff members added

41) Do you anticipate any difficulty covering the ongoing costs associated with initiatives funded by your gift from MacKenzie Scott once the grant has been spent?

- No, I don’t anticipate any difficulty
- Yes, I anticipate a little bit of difficulty
- Yes, I anticipate some difficulty
- Yes, I anticipate a lot of difficulty
- Not sure
- Not applicable

42) *(Display only if “Yes” or “Not sure” was selected in the previous question.)* Please describe how you plan to cover these ongoing costs.

43) Has your organization encountered any challenge(s) – major or minor – related to the use or receipt of this grant? *(Select all that apply.)*

- No, we have not encountered any challenges *(Mutually exclusive)*
- Yes, we have encountered a minor challenge(s)
- Yes, we have encountered a major challenge(s)

44) *(Display only if “Yes” was selected in the previous question.)* Please describe the challenge(s) that your organization has encountered.

Impacts on Fundraising

45) 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**

46) Has your organization changed its approach to fundraising in any of the following ways as a result of having received this grant? *(Select all that apply.)*

- We now ask for larger grants
- We now ask for more unrestricted grants
- We are now pursuing grant opportunities that better align with the organization's values and strategy
- We have used the grant as evidence of our organization's credibility with other funders
- We have diversified our funding sources (e.g., pursued new/different types of funders)
- Other *(please specify: _____)*
- None of the above *(Mutually exclusive)*

47) 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.)*

- No *(Mutually exclusive)*
- Yes, at least one foundation funder has said they will **decrease** funding
- Yes, at least one foundation funder has said they will **increase** funding
- Yes, at least one individual donor has said they will **decrease** funding
- Yes, at least one individual donor has said they will **increase** funding

48) How would you best describe what has changed for your organization's contributed revenue from foundations since receiving the grant?

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

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

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

50) Reflecting on your experience as a MacKenzie Scott grant recipient, did the absence of the following types of nonmonetary or capacity building supports from Scott's team prevent you at all from maximizing the impact of this grant?

	Not at all	Slightly	Moderately	Significantly
Strategic planning assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial management assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communications/PR assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ABOUT YOUR ORGANIZATION'S GRANTMAKING PRACTICES

(Display this section only if "Funder" was selected in question 1 or if "Regranting funds to other organizations or individuals" was selected in question 27.)

51) Has your organization granted out any of the money received from the MacKenzie Scott grant?

- No
- Yes

52) *(Display if "Yes" was selected in the previous question.)* 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

53) *(Display if "Yes" was selected in question 51.)* When granting out the money received through the MacKenzie Scott grant, how would you best describe the application process your organization requires grantees to go through?

- The application process has been **shorter** than our typical process
- The application process has been **the same** as our typical process
- The application process has been **longer** than our typical process
- Not applicable – we have not required an application for these grants

54) *(Display if "Yes" was selected in question 51.)* How would you describe the reporting process your organization requires grantees to follow for these grants?

- The reporting process has been **shorter** than our typical process
- The reporting process has been **the same** as our typical process
- The reporting process has been **longer** than our typical process
- Not applicable – we did not require any reporting for these grants

55) *(Display if "Yes" was selected in question 51.)* Which of the following best describes how recipients of these grant funds were selected?

- We granted according to the same criteria/priorities we had prior to receiving the grant from Scott
- We modified our grantmaking criteria/priorities for regranting these funds from Scott
- Other *(please specify: _____)*

QUESTIONS FOR SCHOOLS & SCHOOL DISTRICTS

(Display this section only if “K-12 school or school district” was selected in question 1.)

56) How has your school or school district allocated the grant money it received from MacKenzie Scott in your budget?

- The grant funds were applied to our existing budget
- The grant funds were applied to a fund separate from our existing budget (e.g., a fund for special programs or opportunities)
- Other *(please specify: _____)*

57) *(Display this section only if “The grant funds were applied to a fund separate from our existing budget” was selected in the previous question.)* What is the stated purpose of this fund?

58) What opportunities did this grant allow your school or district to pursue that you were previously unable to pursue?

PARTICIPATING IN AN INTERVIEW

59) 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 address: _____ *(Text entry validation: email address only.)*

MORE ABOUT YOU

60) 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)*

61) Are you transgender?

- No
- Yes
- Prefer not to say

62) Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, Queer) community?

- No
- Yes
- Prefer not to say

63) Do you have a disability?

- No
- Yes
- Prefer not to say

64) This is the last question in this survey. By clicking "Submit" 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 2 Nonprofit Interview Protocol

Introduction Script

Thank you again for taking time to talk with us today. 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. Today's interview is a follow-up to last year's conversation, in which we're seeking to understand how your organization's experience as a recipient of a MacKenzie Scott grant has evolved since we last spoke. 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.

Like last year's interview, this interview is confidential. We plan to record this conversation for transcription so that it can be analyzed accurately. With the exception of the CEP staff members 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. Do we have your permission to record?

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.

IMPACTS OF THE GRANT

We'll start with the grant's impacts on your programmatic work and organization before turning to how it has impacted you personally as a leader.

Programmatic Impacts

1. Thinking about your programmatic work, what is the most important programmatic impact that your organization has been able to have on those it seeks to serve as a result of receiving this grant?
 - a. Has this grant enabled your organization to advance equity more effectively through its programs? If so, what has the grant enabled your organization to do that has had this impact?

2. From your observations, how is MacKenzie Scott’s giving having an impact on the broader ecosystems or movements where your organization works, if at all?

Organizational Impacts

3. In the first year of our study, we heard from many nonprofit leaders that receiving this grant raised their confidence and ability to ask for more while fundraising. To what extent do you find that the grant has shifted the power dynamics you experience with potential funders?
4. Has your organization added staff or otherwise grown—for example, in terms of capacity, internal specialization, or organizational complexity—because of this grant?
 - a. *(If your organization has grown)* How is that growth going?
 - b. Is the organization experiencing any growing pains?
5. How, if at all, has your organization’s internal culture or approach to internal equity shifted as a result of receiving this grant?
 - a. What has that meant for your leadership of the organization?
6. Once the Scott grant funds have been expended, how concerned are you about reaching a “financial cliff” that would force you to pull back on any new or expanded efforts?
 - a. What would you have to pull back on if you did reach this cliff?

Impacts on Leadership

7. *(If you identify as a leader of color)* We heard from many Scott grant recipients last year that receiving this grant was particularly meaningful for leaders of color. How has working with this grant over time shaped your experience as a nonprofit leader of color?
8. Has the grant influenced your thoughts on leadership succession?

Other Impacts

9. Has your organization experienced any unexpected negative consequences as a result of receiving this grant?

LEARNING

10. Given the amount of time your organization has had this grant, what lessons has your organization learned that you would encourage other nonprofits receiving a large, unrestricted grant to keep in mind?
11. We heard from many grant recipients last year that they hoped the impact of MacKenzie Scott’s giving would motivate funders to put more trust in nonprofits. Is that happening in your experience with funders?
 - a. Reflecting on key aspects of the grant—the unrestricted funds, limited reporting requirements, and so on—there is a debate in philanthropy between those wishing to prioritize nonprofits’ independence in similar ways and those seeking to use funder

expertise to decide how grant funds should be spent. When considering these perspectives, where do you fall and why?

CONCLUSION

12. Is there anything else you'd 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.

Similarly to last year, we plan on publishing our findings in a report later this year, and I'll make sure that you receive a copy. This year's report will also incorporate interviews with foundations and other funders to provide a more holistic view of the effects of MacKenzie Scott's giving.

Do you have any questions before we finish?

Thank you again for taking this time out of your schedule today. We look forward to sharing what we learn.



The Impact of Large, Unrestricted Gifts on Nonprofits

Year 2 Funder Interview Protocol

Introduction Script

*Thank you for making time to have this conversation with me today. As I said, I am [NAME], [POSITION] at CEP. As mentioned in our email, CEP is interested in understanding the range of funder perspectives when it comes to considering the effects of large, unrestricted gifts on nonprofits. In our conversation today, we will ask you about your current grantmaking practices as well as your perceptions of shifts in the funding landscape. **Community Foundation / United Way**: As you reflect on these questions please answer about your organization’s donors and your position as the leader of the organization.*

This interview is confidential. We plan to record this conversation for transcription so that it can be analyzed accurately. With the exception of the CEP staff members 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. Do we have your permission to record?

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.

CONVERSATIONS IN THE FIELD

In the last few years, there has been a good amount of conversation about, and advocacy for, foundations and donors to provide more multi-year, large, unrestricted support (for example, trust-based philanthropy, the pledge created by the Ford Foundation in 2020, MacKenzie Scott’s giving).

1. Are any of those conversations influencing your thinking around how your foundation provides grants?
Community Foundation/United Way: Are any of those conversations influencing your donors? Your own thinking around how your organization advises donors?
 - a. *If no*: Are there other conversations or things influencing your/your donors’ current thinking?

PERCEPTIONS OF MACKENZIE SCOTT’S APPROACH

As you may be aware, MacKenzie Scott’s gifts have been large, unrestricted grants that require minimal reporting.

2. What is your opinion on the approach to giving MacKenzie Scott has taken?
 - a. What, if anything, do you see as the greatest value of her approach?
 - b. Do you have any concerns about her approach? If yes, what concerns?
 - c. What do you hear from others (peers / donors) about her approach?
3. **Community Foundation/United Way:** Have donors been asking you questions about MacKenzie Scott's approach? If yes, what are the typical questions you're hearing?
4. **CEO/Community Foundation/United Way:** Has your board discussed MacKenzie Scott's giving at all?

Scott's giving has had a focus on funding organizations led by people of color and people with lived experience of the issues their organization seeks to affect.

5. Do you see MacKenzie Scott's approach to funding as playing a role in advancing equity? Why or why not?
6. How do considerations of equity fit, if at all, into your organization's decision-making about what type of support to provide?
7. The first couple years of her giving, Scott was making grants without solicitation. But as you may have heard, the newest phase of Scott's giving involves a call for applications. What are your thoughts on this shift in her grant making?

GRANTEE/DONOR RELATIONSHIPS

8. If you provide both unrestricted and restricted grants, how would you say your relationships with grantees differ, if at all, according to grant type?
9. In the last few years, have your grantees been asking for larger gifts? Fewer restrictions? Less reporting?
 - a. Have any of the grantees you interact with received a gift from MacKenzie Scott?

If yes:

 - i. Has the relationship with these grantees changed since they received their gift from Scott? If so, how?
 - ii. Do you have any concerns about their ability to handle the gift they received from Scott?
 - iii. Have you changed your giving to those organizations at all? Do you plan to?
10. What is your overall impression of nonprofits' abilities to handle large, unrestricted grants?

FOUNDATION/FUNDER ROLES

As we have already touched on, there has been increasing advocacy around practices like unrestricted gifts and minimal reporting that are seen as aligning with trust-based philanthropy, but not all funders have interest in that approach. Some funders believe there is great value in using their organization's expertise to guide how nonprofits should use funding.

11. When considering these perspectives, what do you believe your foundation/organizations' approach should be?
12. If unrestricted grants with minimal reporting became much more common in the field, what would you see as the benefits? What would be the challenges?
 - a. What would be the change in the nonprofit sector more broadly?
 - b. **Independent Foundation CEO/PO**: What role do you think program officers would play if patterns of giving shifted?

Exit Script

Those are all of the questions that we have for you. Thank you again for taking the time to speak with us.

We plan on publishing our findings in a report 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. We look forward to sharing what we learn.