



**BRIDGING THE GAP:  
Grantee Perspectives on Intermediary Funders**

**Data Collection Instruments  
September 2024**

This document contains the interview protocols used to collect data for CEP’s “Bridging the Gap: Grantee Perspectives on Intermediary Funders” report.

**Contents**

Interview Protocol for Intermediaries.....2  
Interview Protocol for Grantees of Intermediaries .....3



## Interview Protocol for Intermediaries

*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.*

*Our conversation will be fully confidential. We plan to record this conversation for transcription so that it can be represented accurately. No one will have access to the recording and transcript of our interview except for the CEP staff members working on this research project, who have all signed confidentiality agreements. We plan to profile you and your organization in the final report, and will be sending you the draft of your profile before it is published so you can review it for accuracy and comfort level. This interview will take 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.*

1. Your grantees rated higher than those at almost all intermediary funders in our dataset for having strong relationships with grantees/your impact and your work in diversity, equity, inclusion. In your opinion, what are the practices or approaches that contributed to this?
  - a. Could you share an example of past work with grantees that used some of these practices or approaches?
2. How do your funders influence your organization's grantmaking, if at all?
  - a. What determines your organization's grant characteristics such as the grant's size, length, and flexibility?
  - b. Do your funders set requirements for the grantmaking process? If so, what are the requirements that are usually set?
3. Recently, discussions about funding through intermediaries have framed it as a way of giving that advances equity. Is this something you have heard of before, and do you see it that way?
4. Are there any challenges that intermediary funders encounter when working with grantees that you think others in philanthropy should know about?
5. Is there any advice you would give to funders who are interested in working with intermediaries?
  - a. Are there any funder practices that would help empower intermediaries in terms of creating impact and building relationships with grantees?
6. Is there anything else you would like to share that we didn't ask about today?



## Interview Protocol for Grantees of Intermediaries

*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.*

*Our conversation will be fully confidential. We plan to record this conversation for transcription so that it can be represented accurately. No one will have access to the recording and transcript of our interview except for the CEP staff members working on this research project, who have all signed confidentiality agreements. We plan to identify you and your organization in the final report, and will be sending you a draft before it is published so you can review it for accuracy and comfort level. This interview will take no more than 30 minutes. We will not go past our allotted time, and you can stop the interview at any point if you so desire.*

1. Could you tell me about what it's been like to work with Groundswell/Conservation Lands Foundation?
  - a. Do you have other funders that are intermediaries? If so, could you describe any differences about working with Groundswell/Conservation Lands Foundation compared to other intermediaries?
2. Have you worked with funders that are not intermediaries? If so, have you observed any differences when working with intermediary funders compared to other funders?
  - a. Could you tell me about a project or collaboration with an intermediary funder that you are proud of?
  - b. Are there any challenges when working with intermediary funders that you think they should be more attentive to?
  - c. In your experience, do intermediary and non-intermediary funders differ in terms of grantmaking characteristics such as the grant's size, length, and flexibility?
3. Recently, discussions about funding through intermediaries have framed it as a way of giving that advances equity. Is this something you have heard of before, and do you see it that way?
  - a. Do you see commitments to equity playing out differently when you work with an intermediary funder compared to other types of funders?
4. Is there any advice you would give to nonprofits who want to work with intermediary funders?
5. Is there anything else you would like to share that we didn't ask about today?