



June 2024

The Center for Effective Philanthropy (CEP)

Resource Assessment

This report presents data and information about how CEP's resources are experienced and perceived and to what extent their services and resources are influencing changes in grant maker practices.

The Center for Effective Philanthropy (CEP) provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness. CEP is embarking on a new strategic planning process and seeks data and information on how its resources are experienced and perceived. Specifically, CEP aims to understand the extent to which these services and resources influence changes in practices. They are particularly interested in gaining insights into the external perceptions of clients who engage with their assessment and advisory services.

CEP brought on Harder+Company Community Research (Harder+Co) in February 2024 to serve as their research partner. Harder+Co initiated two simultaneous data collection and analysis phases: administering a resources assessment survey and conducting stakeholder interviews.

Resource Assessment Survey. Harder+Company invited around 1,900 individuals from more than 1,100 organizations to participate in the 2024 Resource and Assessment Survey. Approximately 1,800 survey links were sent to CEP's core audience—senior leaders at foundations with at least \$2.5 million in annual giving. Additionally, about 230 links were sent to clients who have commissioned a GPR, SPR, DPR, or advisory service project in recent years. The final sample consisted of 348 respondents, representing 292 different organizations.

Stakeholder Interviews. Harder+Co conducted interviews with four groups of stakeholders – 10 highly engaged assessment users, 10 previously engaged but now less engaged users, 9 international foundations, and 7 advisors to individual donors. The aim was to understand how these groups interact with CEP's services, tools, and resources, identify potential improvements, and explore additional ways CEP can support their organizations.

This report integrates findings from the Resource Assessment Survey and the stakeholder interviews. Key sections include:

- 1) Perception of CEP in the Philanthropic Sector
- 2) The Value of CEP's Assessment and Advisory Services
- 3) The Value of CEP's non-assessment resources
- 4) Considerations for CEP's Future Direction

This report also includes disaggregated findings and conclusions for each of the four interview groups based on the unique circumstances of these groups. While general themes from interviews were integrated into the body of this report, more nuanced observations within groups are shared in the last section.

Perception of CEP in the Philanthropic Sector

An organization’s reputation and credibility among its stakeholders is an important aspect of positively influencing its respective sector as well as the organization’s ability to achieve long-term success. CEP was interested in examining how stakeholders perceive their reputation and role in the philanthropic sector.

CEP is a well-respected research-based affinity organization. According to survey respondents, CEP has a positive reputation in their professional networks – which is a pattern that has held over time and within various segments of respondents. Exhibit 1 displays how respondents view CEP’s reputation in 2024. Exhibit 2 displays CEP’s perceived reputation in previous resource assessments dating back to 2016 and among segments of 2024 survey respondents.

Exhibit 1. Percent of Respondents: CEP’s Reputation in 2024

Poor	Somewhat negative	Somewhat positive	Excellent
0%	1%	26%	65%

65%
of respondents reported **CEP has an excellent reputation** among leaders of grantmaking organizations in 2024 – which is **higher than reports from past years** (62% in 2021, 61% in 2018, and 58% in 2016).

Exhibit 2. Average Scores: CEP’s Reputation Among Colleagues in Respondent’s Professional Network



Overall, interviewees shared CEP is a credible and trustworthy organization with deep knowledge and skill in supporting funders and grant makers. Assessment services were referenced as the defining service/feature of their contribution to the sector given the breadth of their reach and the quality of the services provided to clients. The following quotes describe interviewee’s general reflections on working with CEP, their value-add, and how they are viewed in the sector.

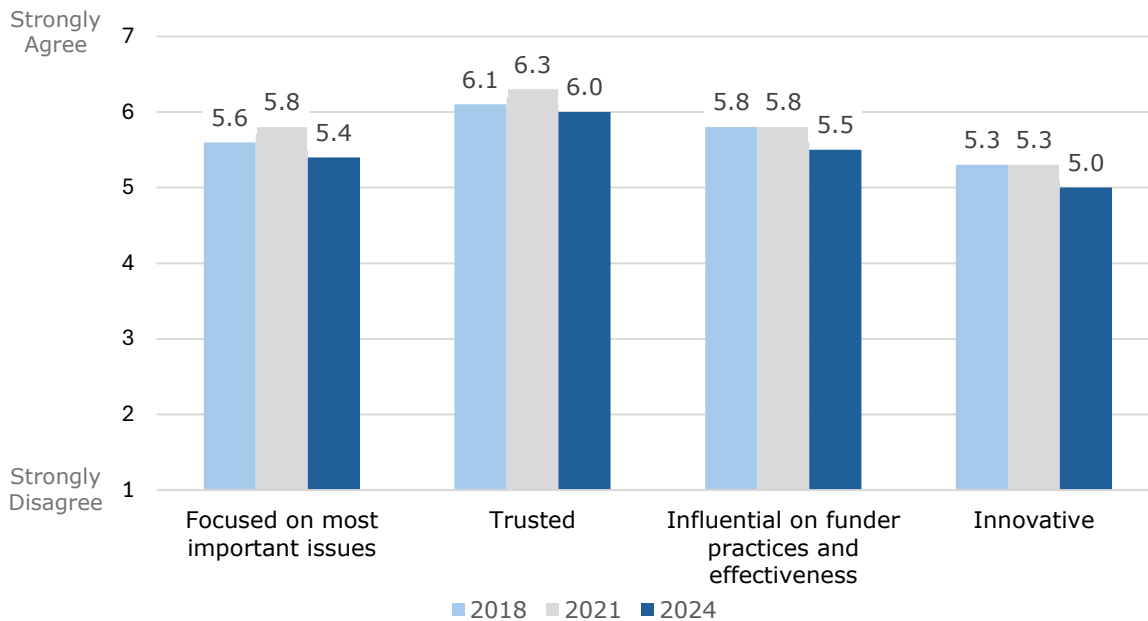
"Working with CEP was a really great experience. They clearly know what they're doing in their space and are the leaders, so we have a lot of confidence in them, which I think being a trusted advisor is a really unique position for a lot of organizations to be in. And they certainly feel that way to us." – High engagement interviewee

"CEP's super power is data. They are not grounding work in opinion. They ground work in evidence-based research and practices, which is so important. They can continue to find ways in this saturated market place to package and deliver these messages for those that really need to change." – High engagement interviewee

"[When I think of CEP, I think of] benevolent nerds who have a commitment to rigor in a fairly un-rigorous and unaccountable sector like philanthropy. And certainly CEP, they are, I guess, the gold standard for running grantee perception reports or at least the most ubiquitous." – Low engagement interviewee

CEP has maintained favorable impressions on a number of dimensions that factor into reputation. Many factors contribute to an organization’s reputation, and CEP has maintained favorable impressions over time with respect to being a trusted entity, focusing on important issues, and being influential on funder practices and effectiveness. Exhibit 3 describes average ratings on four reputation-related factors for which there is historical data from previous resource assessments. While there is a downward trend over time, the differences in average ratings of these elements are not statistically significant. While it is unclear why some elements of CEP’s reputation have experienced non-significant downward shifts, especially considering average overall reputation ratings remained high in 2024 (see Exhibit 2) and high levels of satisfaction with services and resources noted in subsequent sections of this report, it is important to consider how factors such as external influences and market dynamics might influence ratings of reputation, as well as differences in the samples being surveyed over time.

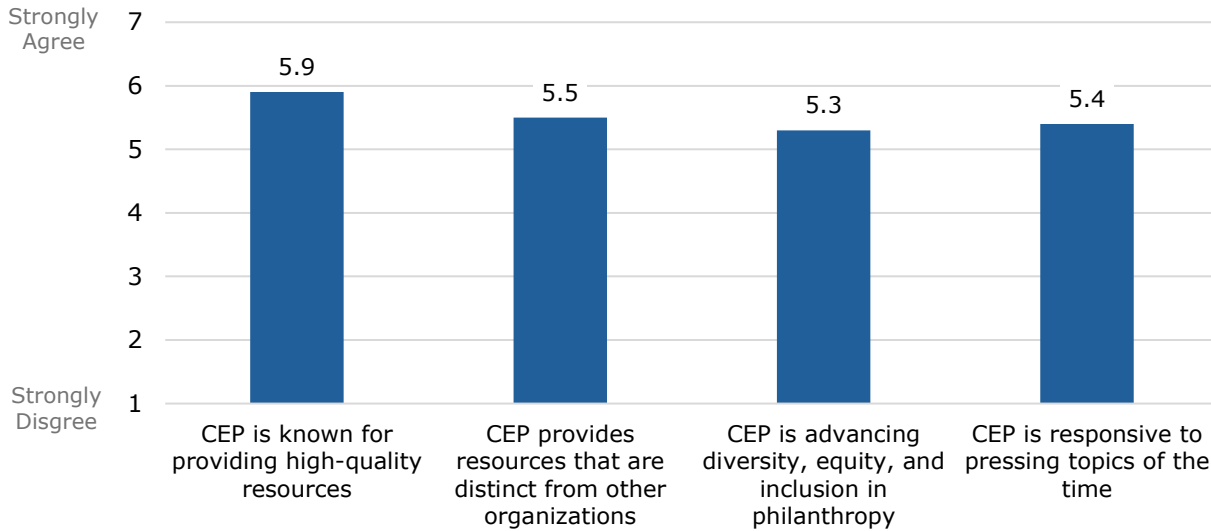
Exhibit 3. Average Scores: Aspects of CEP’s Reputation



CEP currently plays an important role as a research-forward affinity organization in the philanthropic sector. CEP’s emphasis on rigorous research focused on important and timely issues was evident to survey respondents and interviewees. The following sections of the report will unpack the impact of CEP’s assessment and advisory services and its research products and learning engagement offerings – which are all viewed as high-quality and impactful according to survey respondents and interviewees. Several interviewees also noted that CEP is an industry leader related to assessment services and has a reputation

that is synonymous with promoting philanthropic effectiveness – which holistically describes the key role that CEP is playing in the philanthropic sector. Given that understanding, survey respondents indicated moderately high levels of agreement on items that assess how well CEP is carrying out this role and how it is contributing to advancement of key issues in the sector (see Exhibit 4).

Exhibit 4. Average Scores: CEP’s Perceived Contribution to the Philanthropic Sector



Interviewees shared similar sentiments about the execution of this role.

"When I think about CEP, I think of strong cutting-edge research and an organization that is striving to help funders center the voices of their constituents."
 – Advisor interviewee

"When I think of Center for Effective Philanthropy, I will say one of the places I think of them most prominently is for their [assessment services] ... That's a valuable service to foundations, customized for them, important that you get a third-party unvarnished view of what your grantees really think of you."
 – High engagement interviewee

"[CEP has] been a consistent, trusted source for [stakeholder perception] reports and information for the field. I do think when it comes to reputation, CEP has a strong reputation for contributing to the sector."
 – Low engagement interviewee

Value of CEP’s Assessment and Advisory Services

Assessment and Advisory Services are CEP’s flagship service, thus CEP was interested in measuring satisfaction and the impact of assessment and advisory services on client organizations, as well as identifying opportunities for improving these offerings.

Organizations have benefited from CEP’s assessment and advisory services. Current and past clients generally agreed that CEP’s assessment services have added great value to their organizations. Assessment services create opportunities for interviewees’ organizations to reflect on what corresponding audiences (grantees, donors, and staff) perceive to be the impact of their grant making and strengths and challenges of processes and relationships. Among multiple groups of interviewees, the assessment services, particularly the GPR, were generally noted as the most valuable CEP resource they have engaged with. The following quotes illustrate how interviewees reflected on their experience with

89%

of respondents reported **high levels of satisfaction** with assessment and advisory services in 2024.

assessment and advisory services.

"We find this data very useful. It provides the opportunity to think about what might live underneath and what the patterns are. We appreciate the reports provided and also the conversation about the data and how to interpret and think about the data." – High engagement interviewee

"We did some scanning to identify who we could partner with to do a Grantee survey, and CEP was obviously the front-runner in terms of the ability to benchmark globally [and from] the feedback we had from other individuals that had engaged with CEP. I think recently two other philanthropic organizations [we knew] had completed their first and second surveys as well. I think we would say that our experience has been extremely positive in terms of our engagement." – High engagement interviewee

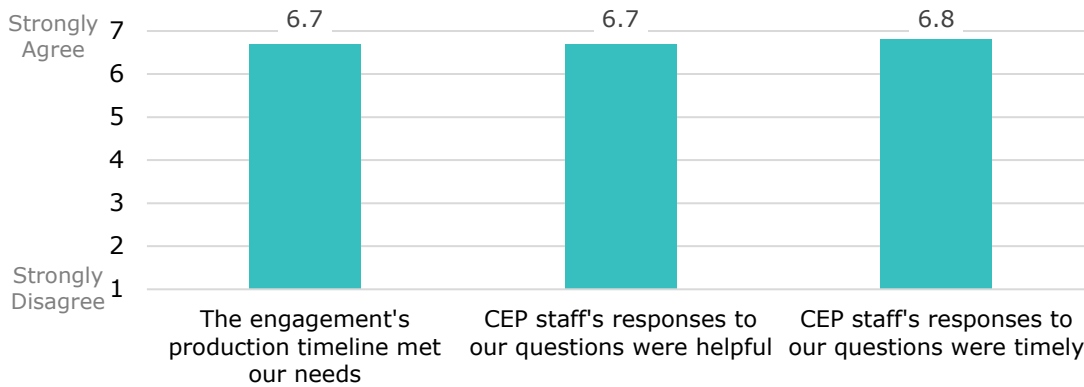
"I will say that what CEP does to facilitate foundations to compare themselves against their peers is extremely valuable, so whether that be through a perception survey or other means, I think there's a lot of room for them to do that." – High engagement interviewee

"There's huge value in the rigor and research quality that is part of the tools they offer. They are helpful from a validity standpoint so our board members who are more data oriented really value the fact that this isn't just one person's opinion, but it's actual hard data from across many different organizations. From a staff and implementation perspective, it's really helpful because they have knowledge of diverse practices from different funders." – High engagement interviewee

Benchmarking was repeatedly named as an important and valuable element of the assessment services, which gave clients the ability to use the results in a comparative context with other funder groups in CEP's database and internally to compare results year after year. As one interviewee described, "The ability to compare data across organizations has been imperative. We saw high numbers on our individual reports. However, comparative data didn't match our peer funders. We started to have robust internal conversations which extended to the board around what matters (quality of relationships; impact on the field) and made decisions around which ones we wanted to improve on and what our strategies would be to do this."

High quality interactions with CEP's staff were another important reason why clients were satisfied with assessment and advisory services (see Exhibit 5). Many interviewees raved about CEP's assessment services support staff. An interviewee stated, "We appreciated the support that was provided by CEP's staff. They managed our contract expertly, had a lot of industry knowledge to be able to work through things like custom questions with us, but also went above and beyond to really help us internalize and interpret the results. We flew them and a couple of their colleagues out to our staff retreat to present the findings." Another interviewee added, "Our CEP staff is so responsive and always trying to problem solve. I asked them a million questions. They are great at presenting these complicated things to our team and making it come alive."

Exhibit 5. Average Scores: Interactions with CEP’s Staff



While interviewees who had engaged with CEP’s assessment services were overwhelmingly positive, one critique was mentioned about the cost of assessment services being expensive or the cost-benefit not being clear, especially for smaller foundations with relatively less resources that they prefer be granted out. It is important to note that this was not a recurring theme among interviewees, but it explicitly named here as one of the very few overall critiques of CEP’s assessment services. In fact, on average, survey respondents reported high levels of value for their recent assessment service relative to its cost (an average 5.9 on a 7-point scale).

CEP’s assessment services have catalyzed reflection and/or tangible changes in administrative and operational processes and engagement approaches/practices with partners and grantees. Current and past clients of CEP’s assessment services reported that the process generated valuable data for understanding and benchmarking the perception, performance, and interactions with stakeholder groups, and according to one interviewee, “the data was helpful in making internal changes and improvements.” While translating data into action tends to be a more difficult task than using it to understand patterns and draw conclusions about how they are perceived and have performed, a few interviewees described material changes to their practices and behaviors based on the results. This most often looked like improvements to administrative processes to streamline the steps and effort required to complete them and shifts in how they are engaging and managing ongoing relationships with partners and grantees. Exhibit 6 shows that large proportions of survey respondents indicated that their CEP engagement motivated tangible change or assisted in reflection or planning.

100%
of AAS clients reported making a meaningful change or reflection in at least one organizational area.

Exhibit 6. Percent of Respondents: Impact of CEP Engagement on Organizational Areas

Organizational Areas	Too Soon to Tell	No, we did not use to reflect or change	Yes, it motivated change	Yes, it assisted in reflection or planning
Communication with grantees, donors, staff or others	9%	1%	42%	49%
Grantmaking processes	23%	6%	36%	34%
Organizational strategy	24%	18%	31%	27%

A subset of interviewees noted that assessment and advisory services had made a positive impact on their organizational and engagement process. The following quotes highlight tangible examples of how these services catalyzed change.

"Overall, the news [i.e., assessment results] was good. I think we've already instituted a lot of those good practices. Some of the things that we were not so good at, for example, we were overly bureaucratic in how we administered our grant agreements and paperwork and application. We've streamlined a lot of that. We're still in the process of doing more of that. So, it definitely helped inform some of that work." – High engagement interviewee

"We used the survey in 2022 to get an objective measure of our perception of how our grantees think about our work together and it was reflective of how we anticipated our grantee partners would rate their relationships. So just getting a sense [of how] the approach that we have developed and are working on with regard to partnership management, how we provide support to our grantee partners, how easy it is to apply, how difficult it is or whatnot. We just wanted to make sure that we have our home base dealt with." – International interviewee

"The really big point for us was in the first survey, we were rated less favorably by female respondents, which is a pretty big deal. For us to come out with the results that were less favorably was like, oh wow, we really need to think about our behaviors and our messaging and ask other people if there's any more kind of depth we can get here. We took that to heart and did a lot of reflecting and a lot of reading and changed some of our practices because of it." – International interviewee

Value of CEP’s Research Products and Other Offerings

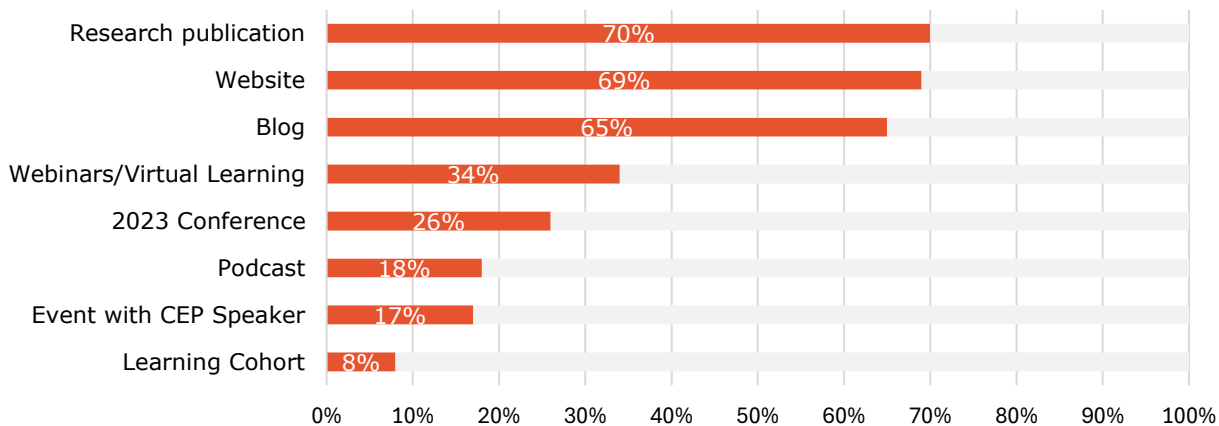
CEP also generates resources in a number of formats that provide sector-relevant information for grant makers. CEP was interested in exploring to what extent and how often non-assessment resources are used and why, as well as exploring how those resources could be improved.

CEP’s non-assessment resources have been used to different extents.

According to survey respondents, 88% have used at least one resource in the last 12 months, which was up from 80% in 2021. On average, respondents reported having used about 3 resource types in the last 12 months. Respondents most frequently cited written formats, such as research publications, CEP’s website, and the blog. Exhibit 7 displays the proportion of respondents who used each of the resources in the year prior.

3
Average **number of resources** survey respondents reported using in the 12 months prior to being surveyed in 2024.

Exhibit 7. Percent of Respondents: Use of Resources in the Last 12 Months



Interviewees were also generally positive about other formats that CEP uses to disseminate research and think pieces and reported that they gravitate towards certain resources based on their personal capacity/time, preferences for certain formats, and interest in certain topics over others. Further, 12% of survey respondents indicated they have not or did not know if they had engaged with any of CEP’s resources in the last 12 months – which was down from 20% in 2021. The following quotes illustrate examples of interviewees reflecting on what resources they have used and their general impressions of those resources.

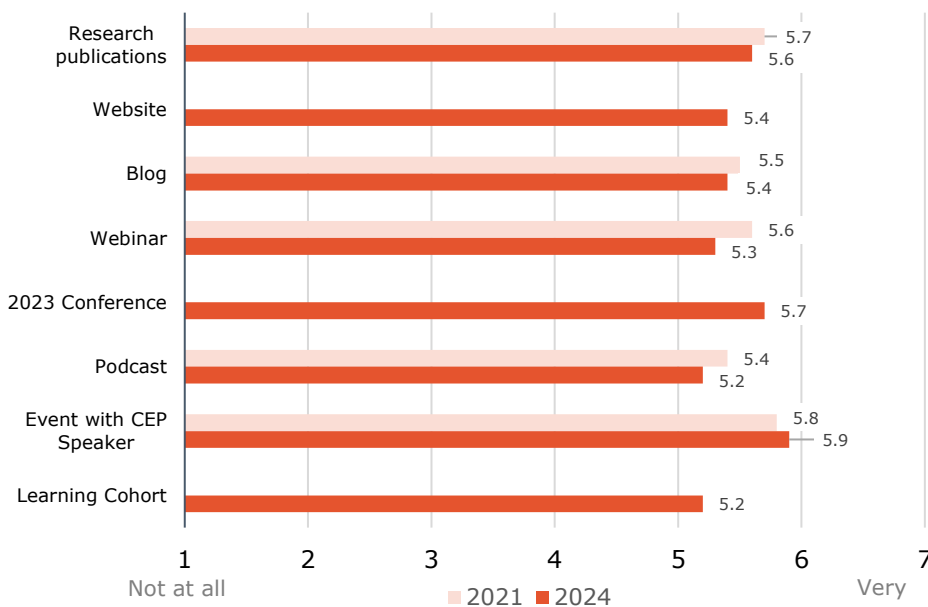
“Research, definitely, both as a recipient and consumer of the research that CEP produces. I have also been a consumer of webinars and content as issues have been very dynamic in the post-pandemic world. I think they’ve been really good at keeping on top of some of those issues and trends and documenting that and reinforcing the learning with webinars. So all that has been great.” – Advisor interviewee

“I’ve listened to all of the podcasts. I’m very sad that they’ve actually stopped them, and I found them really amazing... They were really useful resources.” – Low engagement interviewee

“I find [CEP’s] blog is something that I probably read, there’s a lot of blogs that come out quite rapidly, and it is good because it’s a three- or four-minute attention span read. That I find super useful because in a blog you’re able to be super responsive to needs, you also can [do more when] inviting people to write blogs. I think there’s an opportunity, and CEP has been perhaps a little more edgy, which is good. [One other] thing that I have found helpful was when there were some pieces about what the grantee perception report and what staff assessment findings mean for leadership... That was really helpful because it helped connect dots between aggregate data that CEP has access to. And so what does it really mean for you as a foundation and practice? What should you be thinking about reviewing?” – International interviewee

CEP’s non-assessment resources have been regarded as “useful” in practice. Survey respondents reported similar, and in some cases descriptively higher levels of usefulness compared to the 2021 assessment when asked about the resources they have engaged with in the past 12 months (see Exhibit 8).

Exhibit 8. Average Scores: Perceived Usefulness of CEP’s Resources



Similar to survey findings, research publications were also mentioned most often by interviewees as the products that created value for them in learning and reflection on their practice. Most notably, the Mackenzie Scott research report was named by a number of interviewees. One interviewee shared, “[the research] on the Mackenzie Scott giving, for example, that's quite brave and I think innovative and useful research for the rest of the field, both in the US or North American context and in the European context and beyond is thought-provoking. It promotes discussion, it shines a light on some of the power contradictions in philanthropic practice.”

Interviewees across groups shared that non-assessment resources have helped promote reflection and shared understanding within their foundation, created awareness and learning of how peers are practicing philanthropy, and informed thinking and problem-solving about internal and external issues. The following quotes illustrate how interviewees reflected on the role these resources have played in their learning and practice.

"The way that CEP can define 'buzzy terms' in the nonprofit sector, and philanthropy in particular, their definitions and research behind what those terms means have created points of reflection for me and my team to think about how it reflects to the conversations that we are currently having and want to have. And the shared definitions help level set with donors." – International interviewee

"Excited about the new learning institute CEP has recently launched. It will be helpful to continue to understand how others do the work. Can others do things in ways that cost less? It will be great to learn from those exemplary Foundations. I see this piece as a way to build community support around change." – High engagement interviewee

"The blogs, podcasts and publications in particular for me in my role, I have increasingly turned to CEP as a resource as we're trying to support practice and policy shifts within the foundation. Literally just got off an internal call about indirect cost rate policy and trust-based philanthropy. [Their] resources are very helpful in that regard." – High engagement interviewee

Relevance and granularity were common critiques of CEP's resources.

While the general response to CEP's offerings was positive, some interviewees noted that the topics of research or think pieces tend to be broad, which means they are not always relevant to any given context, whether that is the type of foundation/funder or its grant making approach, the specific issue area they fund, or the geographic context (both within and across the United States and the United States vs international/specific country/regional world context). One interviewee noted, “[CEP does] cover lots of different topics. Not everything is relevant to our work or our region because a lot of the work is in very broad strokes.” The following quotes highlight examples of instances where interviewees noted that CEP's resources did not resonate and why.

"I try to stay up and read and take note of different things going on. At this point, what I look for is things that can be very practical and concrete for me. So, the things that I really like are whether their salary surveys or aggregated information on what the retirement policies are for foundations across the US that are similarly sized to me, or how to work with generational change and trustees. I don't know, just very specific things as opposed to more broad topical areas." – Low engagement interviewee

"A lot of the offerings that CEP has, I think they might be more oriented to philanthropic actors. So the recommendations that are there, the reports that are there, they are super relevant to the field, but I don't think it's always possible for

us to relate them directly to the very specific [development] context that we are in.” – International interviewee

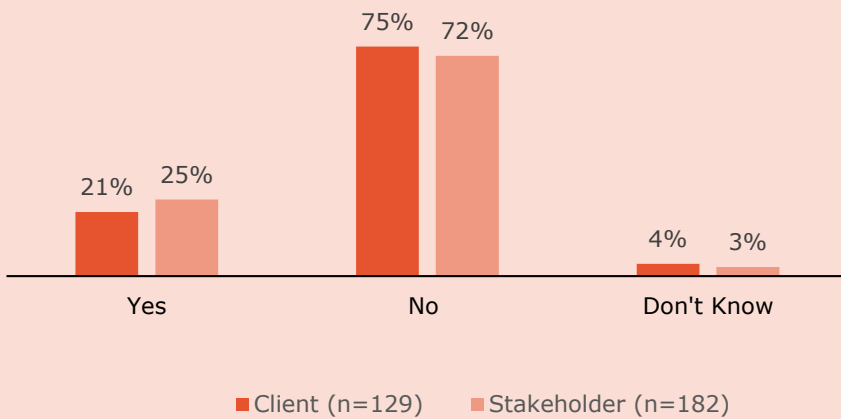
“There’s so much out in the philanthropic sector right now.... So I’ll say I looked less at CEP probably than others because I don’t need all of the data and research. I need donor tools that I can hand out to a learning environment audience of donors. So I think of CEP on the more academic end of the philanthropic sector. And so I just want to look a little bit more at what could be useful within their tools.” – High engagement interviewee

“Sometimes it is because the [publication] topics feel quite close to what sounds to me... like issues which are very, very hot topics in philanthropy maybe in the US at the moment, and we’re not US-based. Obviously, we have our own whole set of discussions in [this country]. Some of them are general, worldwide, some of them are more hot topics that happen in particular countries or under particular political systems. Sometimes I’ve been like, that doesn’t feel like that’s really where the conversation is at here.” – International interviewee

YouthTruth: An Area of Opportunity

CEP offers an assessment service called YouthTruth, which provides a cost-effective, rigorous, and meaningful way to hear from and understand youth and community perceptions of in K12 schools. While YouthTruth has surveyed near 3M students in 39 states, awareness of this service was low among clients and stakeholders in 2024.

Exhibit 9. Are you aware of CEP’s Youth Truth Initiative?



Of respondents who had heard of YouthTruth, reading about YouthTruth on CEP’s blog and visiting the YouthTruth website were the most frequently selected ways they had engaged with the initiative. CEP could focus on spreading awareness of YouthTruth and educating clients and stakeholders about its mission and methodology in an effort to further support the education sector.

Considerations for CEP's Future Direction

As CEP embarks on a strategic planning process in the summer of 2024, considerations have emerged from the analysis of the resource assessment survey and stakeholder interview groups that could support in prioritizing areas of action or exploring new avenues for supporting the philanthropic sector. CEP should weigh the following considerations and identify how they will or will not be addressed during the strategic planning process.

Continue to deliver high-quality assessment and advisory services.

Generally, foundations who have utilized CEP's assessment and advisory services report high levels of satisfaction, so much so that 99% of survey respondents would recommend these services to a peer organization and 77% intend to commission these services again in the future. It will be important for CEP to maintain focus on its core set of services when considering other areas of focus for the future. Specifically, one interviewee reinforced the value of CEP's GPR, expressing a desire for CEP to avoid actions that could detract from this key resource. Another interviewee added, "I'd say their claim to fame really is the GPR. So, to the extent they would stretch themselves by possibly under resourcing the GPR, I don't think it's necessary for them to do so."

Several interviewees highlighted the potential for CEP to incorporate additional learning opportunities to better aid clients in comprehending and operationalizing GPR data. One interviewee suggested, "This could involve designating a dedicated individual to offer recommended questions or regular check-ins to help us effectively apply the findings from the GPR." Interviewees mentioned that there is often a gap between conceptualizing improvement and actually implementing it. Bridging this divide requires connecting perspectives on best practices with tangible actions and impact. An interviewee stated,

"CEP can do more in terms of: "Here are a few of the challenges we're having with these specific board members," or, "Here are some specific challenges we're having with internal leadership. What practices or recommendations do you have for us as we're trying to navigate these sets of issues or questions?" They give you kind of a signal of where to go, but don't give you an idea of how to implement it. I wish CEP would ask folks more about their internal process. Trying to get into a little bit more of the organizational change and organizational dynamics that really are hugely at play for how folks decide to implement and can implement different recommendations. What would be interesting is if you have that initial broad set of recommendations from CEP, and then I think there could be an additional step. You get those recommendations and then CEP helps talk to staff about what it's like to implement those, including what the barriers are. I'm not saying CEP needs to get into the change management implementation piece, but giving folks a little bit more tools and honestly staff more ammo to kind of make the changes that they want. I think they're so relationship driven that they could have strong conversations with key stakeholders around those recommendations and do a good job."

Continue to generate and curate research (in all formats) on topics that are trending, controversial, and/or less mature. Interviewees, in particular, expressed the desire for CEP to continue producing research on philanthropic best practices and unpacking newer concepts that emerge. One interviewee noted, "We are looking for more information on operationalizing antiracist values; trust-based philanthropy; participatory philanthropic approaches; more niche topics of climate change, education equity, and youth mental health crisis prevention; impact measurement best practices; board training and benchmarking; limited life

Topics for Future Research

CEP might consider the following topics for future research efforts:

Technology and Artificial Intelligence

Unpacking appropriate potential uses and spreading awareness about potential bias, security risks, rules, and ethics on data sharing.

Generational Shifts

Investigating the ongoing evolution in philanthropic practices and values reflecting leadership succession.

Diversity, Equity, and Inclusion

Remaining vigilant about legal developments affecting grantees and ensuring philanthropic organizations maintain strong partnerships and support those working towards social justice.

Trust-Based Philanthropy

Embracing principles that aim to empower philanthropy by advocating for sustainable and meaningful social change practices.

foundations; and the role of donor-advised funds (DAFs) as a growing giving vehicle.”

Some interviewees pointed towards CEP considering developing more practical tools, more explicit/detailed organization of resources and/or a customized content curation strategy to support users accessing the most interesting and relevant resources.

Consider ways to break down financial barriers for experiential opportunities, such as conferences, events, and learning cohorts.

Experiential opportunities are utilized to a less extent than CEP’s research products for a number of reasons including participant capacity and access to funding to participate in paid activities. While CEP likely cannot address the participant capacity issue, consider additional measures to reduce or eliminate the financial barriers that inhibit organizations, particularly smaller foundations, from engaging. Interviewees specifically noted considering a conference equity model that includes virtual viewership or partial day pricing and considering travel sponsorship for domestic and international participants.

Consider sharing key findings and reflections from this Resource Assessment and engage stakeholders in reviewing the draft of the strategic plan.

Organizations appreciate the opportunity to understand what it looks like for an organization to facilitate research- or evaluation-based learning, also to ensure that the interviews are not extractive, it might be a good idea to publish a blog or thought piece that includes reactions/reflections and how it will inform key strategic planning questions.

Group, Defining Characteristics	Overview of Sample	Key Findings	Conclusions
<p>Highly Engaged</p> <p>Foundations who are highly engaged, possibly a current client, at least somewhat familiar with CEP’s work, and reported high levels of engagement with tools/resources in the last year.</p>	<p>10 total interviews were conducted with representatives from foundations that are currently using assessment tools (6) or have used assessment tools in recent years and intend to use them again in the future (4).</p>	<ul style="list-style-type: none"> When asked about the value CEP brings to their organization, all interviewees praised the usefulness of GPR data in driving internal policy and practice changes. Grantees emphasized the importance of comparing GPR data across different organizations. The most valuable tools and resources identified were the GPR data, the Mackenzie Scott report, trust-based philanthropy information, and racial justice equity initiatives. In addition to generating buzz around issues with research, CEP could go one step further to act as a bridge for connecting organizations to discuss the challenges, best practices, and implications of these issues they have been experiencing. 	<ul style="list-style-type: none"> Since assessment and advisory services are core services, consider ways to evolve them to best meet the foundation’s needs. For example, a few interviewees mentioned deeper coaching on actually implementing the improvements that are conceptualized based on assessment results. These interviewees experienced tension with moving to action. Considering breadth of CEP’s reach, consider whether adopting a focus on connecting those within the sector fits in with CEP’s future direction.
<p>Low Engagement</p> <p>Foundations who are not recent clients, are at least somewhat familiar with CEP’s work, and reported low levels of engagement with tools/resources in the last year.</p>	<p>10 total interviews were conducted with representatives from foundations, primarily consisting of relatively small family foundations. A subset of interviewees (3) described experiences that read as “more engaged” (i.e., did not fit the general profile of an organization we would describe as having “low engagement”.)</p>	<ul style="list-style-type: none"> Interviewees reported varying levels of familiarity with CEP’s work and available tools and resources (some not at all aware, some generally familiar, and some very familiar) – although we incorporated familiarity as a criterion. Of those who are past clients, nearly all reported an overwhelmingly positive experience with assessment and advisory services. Reasons for low engagement varied, and there were no clear or defining themes. This group reported similar types of actions as other groups when asked what else CEP could do, and those actions did not directly tie back to alleviating barriers for low engagement. 	<ul style="list-style-type: none"> Given the composition of this group, there might be underlying patterns related to the capacity and operations/culture of smaller family foundations that could be at play for this group – which might be worth investigating with a larger sample of interviewees or even CEP’s peer organizations who more directly serve this group (ex. NCFP). In future iterations of this work, consider alternative ways of identifying this sample, since the criteria that was used did not yield a group that was truly reflective of “low engagement” foundations.
<p>Advisors</p> <p>Philanthropic advisors working mostly out of nonprofits, as well as individuals who work in consulting, foundation, and investment banking industries.</p>	<p>7 total interviews were conducted with Advisors who held a variety of roles including Chief Operating Officer (CEO), Managing Director, Officer, Vice President (VP), Co-Founder, and President.</p>	<ul style="list-style-type: none"> Like all other groups, Advisors look to CEP to learn about philanthropic best practices, and in some cases have used CEP’s tools/resources to educate clients on issues or trends. Generally, Advisors emphasized the format of resources is important, preferably shorter and more action oriented. Advisors noted often working with donors and organizations with small budgets, which underscores the importance of being cognizant to not price them out of offerings and opportunities. 	<p>Related to resource type or topic area, Advisors named many of the same resources, formats, and topics that other groups did, and there were no clear themes on which of these resources are passed on to clients (if patterns do exist here). Consider doing more detailed follow-up with seasoned advisors to gather more specific information about what might be useful to this group.</p>
<p>International</p> <p>Philanthropic organizations not based in or serving populations outside of the United States.</p>	<p>9 total interviews were conducted with organizations primarily, but not exclusively, located in Europe. These organizations serve a variety of interests locally with a subset focused on development efforts in Africa and other developing areas of the world.</p>	<ul style="list-style-type: none"> Generally, international foundations have found great value in CEP’s tools and resources. Interviewees explicitly noted the value of assessment benchmarking and the ability to compare their performance to peer organizations. Interviewees noted that it is apparent that CEP is attuned to the US-context and western ideals, and some tools/resources do not seem relevant to their geographic or cultural milieu. 	<p>Ultimately, international organizations want sustained engagement with CEP – despite the relevance issue. However, focusing on “the international context” would be a difficult feat, however identifying overarching strategies that international funders use could be one approach to generating more targeted segment-specific research (e.g., organizations that do development work in “the global south”).</p>