



**Breaking the Mold:
The Transformative Effect of MacKenzie Scott’s Big Gifts**
The Final Report in a Three-Year Study

Data Collection Instruments
February 2025

This document contains the survey instruments used to collect data for CEP’s *Breaking the Mold: The Transformative Effect of MacKenzie Scott’s Big Gifts* report.

Contents

Year 3 Nonprofit Survey Instrument2
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The Effects of Large, Unrestricted Gifts on Nonprofits Year 3 Nonprofit Survey Instrument

This survey should take approximately 15-20 minutes to complete.
Please complete this survey by **June 21, 2024**.

Introduction

In this survey, we will ask you for 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, we hope this research will inform other donors' approaches in the future and that it will be helpful to nonprofit leaders who also receive 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 team 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 Christina Im, senior analyst, at (415) 839-8043 or at christinai@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
- Community foundation
- Direct service organization
- Grassroots organization
- Health conversion foundation
- Independent foundation
- Intermediary organization/Regrantor/Fund/Funding collaborative
- K-12 school or school district
- Philanthropy serving organization
- Research organization
- Social finance institution
- Other (*please specify: _____*)

2) What are your organization’s key focus areas? (*Select all that apply.*)

- Arts, culture, and humanities
- Civic engagement and government
- Education
- Environment and animals
- Health
- Human services
- International/foreign affairs

- Mutual/membership benefit
- Public, societal benefit
- Religion
- Social justice
- 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) Which of the following best describes where your organization is based?

- Based solely in the United States
- Based partly in the United States with headquarters outside the United States
- Based partly outside the United States with headquarters in the United States
- Based solely outside of the United States
- Other (please specify: _____)

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

- Local
- State/Province
- Regional
- National
- Multi-national/Global

6) 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

7) In the fiscal year **prior to** receiving this grant, approximately what was your organization's operating budget (in dollars)? (HTML/JS: Response field should include a dollar sign and commas as respondents input amounts.)

\$ _____

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? (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

10) *(Display only if respondent selected “Based solely in the United States” or “Based partly outside the United States with headquarters in the United States” in Q4.)* 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) *(Display only if respondent selected “Based solely in the United States” or “Based partly outside the United States with headquarters in the United States” in Q4.)* Do you identify as a person of color?

- No
- Yes
- Prefer not to say

12) *(Display if respondent selected a response other than “Based solely in the United States” or “Based partly outside the United States with headquarters in the United States” in Q4.)* Do you identify as Black, Indigenous, or as a member of a minority or historically marginalized ethnic group?

- No
- Yes
- Prefer not to say

ABOUT YOUR GRANT

13) In what year 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.

- 2020
- 2021
- 2022
- 2023
- 2024

14) 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.

15) What was the amount (in dollars) of the grant(s) received? *(HTML/JS: Response field should include a dollar sign and commas as respondents input amounts.)*

\$ _____

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

- No
- Yes
- Not sure

17) *(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

18) *(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)*

19) *(Display only if “Information about your organization’s impact” was selected in the previous question.)* What information was your organization asked to provide about its impact? *(Select all that apply.)*

- Annual reports
- Programmatic evaluation results that my organization already had
- New information about impact that my organization gathered specifically for MacKenzie Scott’s team
- Other *(please specify: _____)*

ABOUT YOUR ORGANIZATION'S USE OF THE GRANT

20) 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

21) *(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 20.)* 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

22) *(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? *(HTML/JS: Response field should include a dollar sign and commas as respondents input amounts.)*

\$ _____

23) *(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 20.)* Over how many years does your organization intend to spend down the grant money from Scott?

- One year or less from receipt
- 2-5 years from receipt
- 6-10 years from receipt
- More than 10 years from receipt

(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 20.) 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.

24) 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”)
- Contributing to a new or 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*)

25) 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 outside consultants to advise on the organization's work
- Increasing staff salaries
- 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)
- Providing professional development to staff/leadership of the organization
- None of the above (*Mutually exclusive*)

26) 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
- Funding capital projects
- Engaging in new collaborations and partnerships
- Providing financial support to the communities served (e.g., supplies, scholarships/fellowships, direct cash transfer)
- Raising the organization’s profile (e.g., raising awareness of the organization, publicity)
- Responding to the COVID-19 crisis
- Engaging in strategic planning
- Innovating or taking risks in your programs
- None of the above (*Mutually exclusive*)

27) (*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 20.*) Did you regrant any

of the funds you received from MacKenzie Scott to other granting institutions (e.g., intermediary funders, giving circles, etc.)?

- No
- Yes

28) *(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 20.)* To which of the following categories did your organization allocate the largest proportion of the grant funds?

- Financial uses
- Operational uses
- Programmatic uses
- Uncommitted funds
- Other *(please specify: _____)*

29) 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)

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

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) How, if at all, did receipt of this grant change how you thought about risk when considering new programs or other efforts?

33) To what extent do you believe this grant has or will strengthen the following?

	Not at all	Slightly	Moderately	Significantly
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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 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"/>

34) *(Display only if respondent responded "Slightly," "Moderately," or "Significantly" in response to "The long-term financial sustainability of your organization" in the previous question.)* How has or will this grant strengthen the long-term financial sustainability of your organization?

35) Has receipt of this grant had any negative consequences for your organization and/or its work?

- No
- Yes

36) *(Display only if respondent selected "yes" in the previous question.)* Please describe the negative consequence(s) this grant has had for your organization.

Impacts on Equity

37) Did your organization use some of the grant money to advance equity in any of the following areas – either among your organization’s staff or through programs for those the organization serves? *(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)*

38) *(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.)* What is the most important impact that the grant has had on your organization’s ability to advance equity?

39) *(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 37.)* Which of the following statements describes *how* this grant has allowed your organization to more effectively advance equity **among those it serves**? *(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
- Other *(please specify: _____)*
- None of the above *(mutually exclusive)*

40) *(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 37.)* Which of the following statements describes *how* this grant has allowed your organization to more effectively advance equity **among its staff**? *(Select all that apply.)*

- We have made staff pay more equitable
- We have adjusted hiring practices to align with best practices for DEI
- We have diversified our leadership team
- We have been able to improve internal DEI capacity through staff trainings and/or hiring staff dedicated to equity efforts
- Other *(please specify: _____)*
- None of the above *(mutually exclusive)*

41) *(Display only if “yes” was selected in question 11.)* How, if at all, has working with this grant over time shaped your experience as a nonprofit leader of color?

Internal Culture

42) How has receipt of the grant from Scott affected the internal culture of your organization?

43) Since your organization’s receipt of a Scott grant, has staff burnout been a concern to you?

- Not at all a concern
- A little bit a concern
- Somewhat a concern

- Very much a concern

44) *(Display only if respondent selected an option other than “Not at all a concern” in the previous question.)* What do you believe are the top two underlying reasons for the burnout your staff is experiencing? *(Select two options.)*

- High demand for programs/services
- Unmet needs for more staff members
- Unmet infrastructure needs (e.g., systems, equipment, technology)
- Process requirements from funders
- Pressure created by receipt of Scott grant
- Fundraising needs
- External political pressures
- Rapid growth/scaling
- Adaptations to COVID (e.g., remote/hybrid work)
- Other *(please specify: _____)*

45) How has your organization’s receipt of a Scott grant affected levels of staff burnout?

- Reduced levels of staff burnout
- Did not change levels of staff burnout
- Increased levels of staff burnout

Your Leadership

46) How has receipt of this grant affected your confidence in your own leadership?

- Significantly decreased
- Somewhat decreased
- No change
- Somewhat increased
- Significantly increased

47) Since your organization’s receipt of a Scott grant, has your own burnout as the Executive Director, CEO, or equivalent been a concern to you?

- Not at all a concern
- A little bit a concern
- Somewhat a concern
- Very much a concern
- I am not the Executive Director, CEO, or equivalent

48) *(Display only if a response other than “I am not the CEO” was selected in Q47.)* How has your organization’s receipt of a Scott grant affected your own level of burnout?

- Reduced my level of burnout
- Did not change my level of burnout
- Increased my level of burnout

49) Is the time you intend to stay in your current role as leader longer or shorter because of your organization’s receipt of a Scott grant?

- Yes, significantly shorter

- Yes, somewhat shorter
- No, no change
- Yes, somewhat longer
- Yes, significantly longer
- I was not at the organization at the time of grant receipt

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.)

50) 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, Q26.)</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"/>

51) Please describe the impact this grant has had on the population(s) your organization serves. (If you have quantitative information about the impact of this grant, please include that information in your response.)

52) Is your organization using any of the following approaches to develop its understanding of the impact of the Scott grant on the population(s) your organization serves? *(Please select all that apply)*

- Randomized control trial
- Developmental evaluation
- Other type of impact evaluation
- Cases studies
- Surveys of clients or other stakeholders
- Focus groups of clients or other stakeholders
- Tracking number of people/clients served

- Monitoring policy/political outcomes
- Monitoring publicly available indicators (e.g., graduation rates, estimates of food insecurity, etc.)
- Other (please specify: _____)
- None of the above (*Mutually exclusive*)

53) (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: _____)

54) (Display only if respondent selected “Engaging in new programmatic initiatives” in Q26.) You indicated that your organization engaged in new programmatic initiatives with this grant. Have you since maintained the new programmatic initiatives added with this grant?

- No, we have not maintained these programmatic initiatives
- No, we planned for these programmatic initiatives to be temporary
- Yes, we have maintained these programmatic initiatives
- Yes, we have maintained these programmatic initiatives and expanded further

55) How many new staff members, if any, 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”). [If you have not added any staff members, please input “0.”]

_____ full-time equivalent staff members added

56) (Display only if respondent entered a number greater than 0 in the previous question.) You indicated that your organization added new staff members with this grant. Have you since maintained the positions of the staff added with this grant?

- No, we have not maintained these staff positions
- No, we planned for these staff positions to be temporary
- Yes, we have maintained these staff positions
- Yes, we have maintained these staff positions and expanded further

Your Organization’s Finances

57) Are you having, or do you anticipate having, any difficulty covering the ongoing costs associated with initiatives funded by your gift from MacKenzie Scott once the grant has been spent?

- No
- Yes, a little bit of difficulty
- Yes, some difficulty

- Yes, a lot of difficulty
- Not sure
- Not applicable

58) *(Display only if respondent selected “No, I don’t anticipate any difficulty” in response to previous question.)* What steps did your organization take in the allocation of these funds to ensure that ongoing costs would be covered without difficulty?

59) *(Display only if respondent selected one of the “Yes” options in response to previous question.)* What are the reasons you anticipate difficulties covering these ongoing costs?

60) Do you have concerns about your organization’s financial stability?

- No
- Yes

61) *(Display only if respondent selected “Yes” in response to previous question.)* To what extent are these concerns related to the grant your organization received from Scott? finance5

- Not at all
- A little
- Somewhat
- Mostly
- Completely

62) *(Display only if respondent selected “Yes” in response to Q60.)* What does your organization plan to do to address these concerns about financial stability? *(Select all that apply.)*

- Reducing staff positions
- Pausing staff benefits, compensation, or bonuses
- Refraining from planned cost increases related to staffing (e.g., postponing compensation increases, freezing hiring)
- Using reserve funds
- Using a higher than typical amount of endowment funds
- Engaging existing funders/donors
- Pursuing funding from new funders
- Decreasing or eliminating office space
- Other *(please specify: _____)*

Impacts on Fundraising

63) Has your organization used funds from Scott to support any of the following fundraising efforts? *(Select all that apply.)*

- Hiring a firm or consultant to help with fundraising

- Hiring fundraising staff at your organization
- Starting a fundraising campaign
- Other (*please specify: _____*)
- None of the above (*Mutually exclusive*)

64) Since receiving a grant from Scott, has your organization received funding from new sources through any of the following giving models? (*Select all that apply.*)

- Donor-advised funds (DAFs)
- Intermediary grantmakers or philanthropic collaboratives
- Individual donors working with philanthropy consultants
- LLCs or impact investment firms
- Funding competitions (e.g., The Audacious Project)
- Other (*please specify: _____*)
- None of the above (*Mutually exclusive*)

65) 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**

66) 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 have turned down at least one grant because it was restricted
- We are now pursuing grant opportunities that better align with the organization's values and strategy
- We have turned down at least one grant because it did not 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*)

67) Do you believe your organization has lost any funders (institutional or individual) because it received a grant from Scott?

- No
- Yes
- Not sure

68) (*Display only if respondent selected "Yes" in response to previous question.*) Did any funders that stopped funding your organization since receipt of the Scott grant explicitly tell you that they chose to stop funding because you were a recipient of a grant from Scott?

- No
- Yes

69) Do you believe your organization has been able to attract new funders (institutional or individual) because it received a grant from Scott?

- No
- Yes
- Not sure

70) *(Display only if respondent selected "Yes" in response to previous question.)* Did any funders new to your organization since receipt of the grant from Scott explicitly tell you that they chose to provide funding because you were a recipient of a grant from Scott?

- No
- Yes

71) Have any of your **existing** 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

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

Amount of budget coming from **restricted** grants

- Decreased
- Stayed the same
- Increased
- Not applicable

Amount of budget coming from **unrestricted** grants

- Decreased
- Stayed the same
- Increased
- Not applicable

73) 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?

Amount of budget coming from **restricted** grants

- Decreased
- Stayed the same
- Increased
- Not applicable

Amount of budget coming from **unrestricted** grants

- Decreased
- Stayed the same
- Increased
- Not applicable

74) Data from CEP show that as of 2021, 27 percent of foundations were giving more multiyear general operating support, compared to pre-pandemic levels. Based on your organization's experience with this grant, what is your reaction to this data?

MORE ABOUT YOU

75) 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)*

76) Are you transgender?

- No
- Yes
- Prefer not to say

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

- No
- Yes
- Prefer not to say

78) Do you have a disability?

- No
- Yes
- Prefer not to say

79) Thank you for completing our survey! Please confirm the email address we should send your giftcard to and hit "Submit." You will be receiving two emails from "noreply@tangocard.com," one to choose your retailer and one to redeem your giftcard.

_____ *(Request response. Text entry validation set to valid email address.)*

80) 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 Effects of Large, Unrestricted Gifts on Nonprofits Year 3 Funder Survey Instrument

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

Please complete this survey by **September 25, 2024**.

Introduction

Thank you for your participation in this research study conducted by the Center for Effective Philanthropy. In this survey, we will ask you about your perspectives on a number of topics currently under discussion among foundation leaders:

- Section 1: MacKenzie Scott's Approach to Giving
- Section 2: Large, Multiyear, Unrestricted Support

Please answer the questions in the survey to the best of your ability; there are no right or wrong answers. The Center for Effective Philanthropy is an independent nonprofit organization. **This research is being conducted solely by CEP.**

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If you have any questions about this survey or research project, please contact Seara Grundhoefer, analyst, at (415) 541-0291 or at searag@cep.org.

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- **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.

ABOUT YOUR FOUNDATION

1. Which of the following best describes what type of funder your organization is?
 - Community foundation
 - Corporate foundation
 - Private foundation
 - Intermediary organization/Regrantor/Collaborative
 - Other (*please specify*): _____

2. In what program area(s) does your foundation provide funding? (*Select all that apply.*)
 - Arts, culture, and humanities
 - Education
 - Environment and animals
 - Health
 - Human services
 - International/foreign affairs
 - Mutual/membership benefit
 - Public, societal benefit
 - Religion
 - Social justice
 - Other (*please specify*): _____

3. What is the geographic focus of your foundation's grantmaking? (*Select all that apply.*)
 - Local
 - State
 - Multi-state or regional
 - National
 - Global
 - Other (*please specify*): _____

ABOUT YOU

4. What is your current role?
 - CEO/Executive Director or equivalent
 - Vice President of Programs or equivalent
 - Director of Strategy or equivalent
 - Other (*please specify*): _____

5. How many years have you been in your current role?
 - 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

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

MACKENZIE SCOTT'S APPROACH TO GIVING

The following section will ask questions about your perspective on philanthropist MacKenzie Scott's approach to giving. MacKenzie Scott's giving is characterized by the large size of her gifts. Less well recognized is the fact that oftentimes Scott's giving comes with no restrictions on how or when gifts must be used, and few, if any, reporting requirements.

7. Have any of the following groups at your foundation had conversations about MacKenzie Scott's approach to grantmaking? *(Select all that apply.)*
- Board of directors
 - Executive leadership
 - Staff
 - Other *(please specify)*: _____
8. How much influence, if any, has MacKenzie Scott's grantmaking had on your foundation's grantmaking practices?
- No influence
 - A little influence
 - Some influence
 - A lot of influence
9. How effective do you think MacKenzie Scott's approach to giving has been for **strengthening** the nonprofit organizations she has funded?
- Not at all effective
 - Slightly effective
 - Somewhat effective
 - Quite effective
 - Very effective
 - Don't know
10. How effective do you think MacKenzie Scott's approach to giving has been for **increasing the impact** of nonprofit organizations she has funded?
- Not at all effective
 - Slightly effective
 - Somewhat effective
 - Quite effective
 - Very effective
 - Don't know

11. What do you believe are the greatest **drawbacks** of MacKenzie Scott's approach to giving?
(Select all that apply).

- Inability of recipient organizations to handle gifts of that magnitude
- Potential for a funding cliff for recipient organizations
- Lack of accountability due to minimal or no reporting requirements
- Lack of learning for the field due to minimal or no reporting requirements
- Lack of transparency in Scott's selection process
- Other funders' perceptions that recipient organizations do not need their funding
- Expectations that other funders will give the way Scott has
- Lack of recipient organizations' ongoing/continued relationship with funders
- Other (please specify): _____

12. What do you believe are the greatest **benefits** of MacKenzie Scott's approach to giving? (Select all that apply).

- Strengthening recipient organizations
- Allowing recipient organizations to allocate grant dollars where they see fit
- Allowing recipient organizations to determine when to spend grant dollars
- Building reputation/credibility of recipient organizations
- Increasing self-confidence of the leaders of recipient organizations
- Saving time by having minimal or no application/reporting requirements for staff at recipient organizations
- Targeting funding toward equity-focused organizations
- Creating opportunities for greater impact on those served by recipient organizations
- Other (please specify): _____

13. How able do you believe nonprofit organizations are to handle large gifts with no restrictions on how or when they must be used?

- Not at all able
- Slightly able
- Somewhat able
- Very able
- Completely able

14. What contributes to your perception of the ability of nonprofit organizations to handle these types of gifts?

15. Would your foundation be more or less likely to fund a nonprofit organization that has received a large gift with no restrictions on how or when it must be used from MacKenzie Scott?

- Would not have an impact on our funding decisions
- Less likely

More likely

16. *(Display only if “More likely” was selected in the previous question.)* Why would your foundation be more likely to fund a nonprofit that has received this type of gift from MacKenzie Scott?

17. *(Display only if “Less likely” was selected in Q15.)* Why would your foundation be less likely to fund a nonprofit organization that has received this type of gift from MacKenzie Scott?

18. MacKenzie Scott’s giving comes with few, if any, reporting requirements. With so few requirements, how accountable do you think recipient organizations are to spend the funds well?

- Just as accountable as with other gifts or grants
- Less accountable than with other gifts or grants
- More accountable than with other gifts or grants
- Don’t know

19. What lessons, if any, do you think funders should take away from MacKenzie Scott’s giving?

LARGE, MULTIYEAR, UNRESTRICTED SUPPORT

20. Do you believe your foundation should provide more large (i.e., six-figure), multiyear, unrestricted support than it currently provides?

- No
- Yes

21. *(Display only if “Yes” was selected in the previous question.)* Why has your foundation not provided more large (i.e., six-figure), multiyear, unrestricted support to date? *(Select all that apply.)*

- My foundation’s board of directors does not support providing this type of support or more of it
- Not a match for my foundation’s original charter
- My foundation would have to let staff go/restructure
- My foundation is worried pre-committing funds for future years could create financial risk
- My foundation is not interested in changing internal processes

- It simply has not been a priority at my foundation
- It would make impact difficult to assess
- My foundation does not believe nonprofit organizations would use this support wisely
- My foundation is interested in supporting programs, not organizations
- My foundation believes this kind of support would undermine nonprofit accountability
- My foundation does not do multi-year budgeting
- Other (*please specify*): _____

22. Would your foundation consider providing grants that have no time limit for spending?

- No
- Yes, we would consider grants with no time limits for spending
- Yes, we already provide grants with no time limits for spending

23. (*Display only if “Yes, would consider” was selected in the previous question.*) What would make your foundation move from considering to providing grants that have no time limit for spending?

24. If large, multiyear, unrestricted grants became more common in the field of philanthropy, how do you believe this would affect funders’ opportunities to engage in conversation about the specific ideas, opportunities, or challenges they see for a nonprofit’s work?

- Funders would have much less opportunity to engage
- Funders would have somewhat less opportunity engage
- Funders would have the same opportunity to engage
- Funders would have somewhat more opportunity to engage
- Funders would have much more opportunity to engage
- Don’t know

25. What aspects of foundations’ work, if any, do you believe would be affected if large, multiyear, unrestricted grants became more common?
