Foundation Philanthropy in 2026

This survey should take approximately 15-25 minutes to complete.
Please complete this survey by **Thursday, May 28**.

Introduction

Thank you for your participation in this research study conducted by the Center for Effective Philanthropy. In this survey, we will be asking you about your experiences leading a foundation and working with grantees in today's context. Please answer the questions in the survey to the best of your ability; there are no right or wrong answers.

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 survey are shared:

- CEP will not reveal the identity of organizations that did or did not participate in this survey.
- All numeric rating responses to this survey will be reported in aggregate (e.g., as averages and percentages), and no individual responses will be reported.
- If we quote part of your response 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 Caroline Gasparini, coordinator, at carolineg@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.

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ABOUT YOUR FOUNDATION

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

2. In what program area(s) does your foundation provide funding? *(Please 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? *(Please select all that apply)*
   - ❑ Local
   - ❑ State
   - ❑ Regional
   - ❑ National
   - ❑ Global

FOUNDATION SUPPORT OF NONPROFITS

DEFINING THE CURRENT CONTEXT

Beginning in 2025, many legislative actions, executive orders, and budget decisions from the U.S. federal government have gone into effect with the potential for wide-ranging effects on philanthropy and nonprofits. In the remainder of this survey, we refer to this set of events as the **"current context."**

4. How effective do you feel your foundation has been in each of the following areas <u>in relation to your grantees</u> in 2025?

	Not at all effective	**Slightly effective**	**Moderately effective**	**Very effective**	**Don't know**	**This is not currently a priority for our foundation**
Communication	❑	❑	❑	❑	❑	❑
Responsiveness	❑	❑	❑	❑	❑	❑

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Willingness to take risks	❑	❑	❑	❑	❑	❑
Understanding challenges that our grantees face	❑	❑	❑	❑	❑	❑
Providing unrestricted support	❑	❑	❑	❑	❑	❑
Providing multiyear support	❑	❑	❑	❑	❑	❑
Providing emergency or rapid response grants	❑	❑	❑	❑	❑	❑

5. *(If respondent selected "Slightly", "Moderately", or "Very" to any of the options in the previous question)* What actions has your foundation taken that you think have been, or will be, most helpful for your grantees?

   _____

   _____

CHANGING GRANTMAKING BUDGETS AND PRIORITIES

6. In your current fiscal year, what will be the approximate payout rate of your foundation (defined as total qualifying distributions—including grants and grantmaking-related administrative expenses, if applicable—divided by the average fair market value of assets)? *(Please enter whole numbers only.)*

   _____ percent

7. *(If respondent answered the previous question/did not leave the previous question blank)* How does the foundation's payout rate for the current fiscal year compare to previous years?
   - ❑ Higher than typical for the foundation
   - ❑ Typical for the foundation
   - ❑ Lower than typical for the foundation
   - ❑ Don't know/Prefer not to say

8. *(If respondent answered Q6/did not leave Q6 blank)* What led to the foundation's decision to implement this payout rate?

   _____

   _____

9. In response to the current context, which of the following **funding allocation** changes, if any, has your foundation made to its programmatic strategies? *(Please select all that apply)*
   - ❑ Reallocated funding across existing initiatives or programs
   - ❑ Increased funding in one or more issue areas

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- ❑ Decreased or eliminated funding in one or more issue areas
- ❑ Added new initiatives or programs
- ❑ Ended existing initiatives or programs
- ❑ Modified the strategy for one or more existing initiatives
- ❑ Narrowed or shifted our geographic focus
- ❑ Narrowed or shifted the communities we prioritize
- ❑ Other *(please specify)* _____
- ❑ None of the above *(Mutually exclusive)*

10. In response to the current context, which of the following **grantmaking-related** changes, if any, has your foundation made to its programmatic strategies? *(Please select all that apply)*
    - ❑ Changed the types of organizations we fund (e.g., grassroots vs. established nonprofits)
    - ❑ Changed the types of projects or activities we fund (e.g., general operating vs. project-based)
    - ❑ Shifted toward more flexible or unrestricted grantmaking
    - ❑ Shortened or lengthened grant cycles
    - ❑ Changed eligibility criteria for funding
    - ❑ Paused new grantmaking temporarily
    - ❑ Accelerated or expedited grantmaking processes
    - ❑ Other *(please specify)* _____
    - ❑ None of the above *(Mutually exclusive)*

11. In response to the current context, which of the following **externally facing** changes, if any, has your foundation made to its programmatic strategies? *(Please select all that apply)*
    - ❑ Joined a funder collaborative or pooled funding effort
    - ❑ Increased engagement in policy or advocacy efforts
    - ❑ Joined or formed new funder coalitions or networks
    - ❑ Publicly communicated our strategic position or values
    - ❑ Other *(please specify)* _____
    - ❑ None of the above *(Mutually exclusive)*

12. *(If respondent selects "Added new initiatives or programs" in Q9)* Please describe the initiatives or programs your foundation has added, and what led to the decision to add them.

    _____

    _____

13. *(If respondent selects "Ended existing initiatives or programs" in Q9)* Please describe the initiatives or programs your foundation has ended, and what led to the decision to end them.

    _____

    _____

ASSISTANCE BEYOND THE GRANT

14. What types of **staffing and governance-related** assistance beyond the grant, if any, has your foundation provided to grantee organizations in response to the current context? *(Please select all that apply)*

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- ❑ Board development and governance support
- ❑ Executive coaching or leadership development
- ❑ Strategic planning support
- ❑ Succession planning or interim leadership support
- ❑ Human resources or talent management support
- ❑ Support with diversity, equity, and inclusion practices
- ❑ Staff wellness and mental health resources
- ❑ Professional development and training
- ❑ Volunteer management and engagement
- ❑ Other (*please specify* _____*)*
- ❑ None of the above *(Mutually exclusive)*

15. What types of **finances and operations-related** assistance beyond the grant has your foundation provided to grantee organizations in response to the current context? *(Please select all that apply)*
    - ❑ Communications, PR, or narrative strategy support
    - ❑ Financial management, accounting, or budgeting support
    - ❑ Cybersecurity and data protection
    - ❑ AI tools and digital transformation
    - ❑ Support with fundraising strategy or donor development
    - ❑ Advocacy, policy engagement, or organizing
    - ❑ Support with coalition or partnership building
    - ❑ Access to research, data, or sector-level intelligence
    - ❑ Other (*please specify* _____*)*
    - ❑ None of the above *(Mutually exclusive)*

16. What types of **risk and crisis planning-related** assistance beyond the grant, if any, has your foundation provided to grantee organizations in response to the current context? *(Please select all that apply)*
    - ❑ General legal counsel
    - ❑ Federal policy, regulatory, or compliance guidance
    - ❑ Nonprofit governance or structural legal support
    - ❑ Assistance with mergers or other organizational consolidations
    - ❑ Guidance for the possibility of grantee organizations closing
    - ❑ Support with crisis communications
    - ❑ Other (*please specify* _____*)*
    - ❑ None of the above *(Mutually exclusive)*

PUBLIC ADVOCACY

17. In the current context, what action(s) has your foundation taken, or is your foundation considering taking, regarding public advocacy? *(Please select all that apply)*
    - ❑ Advocating to government on policy issues affecting grantee organizations
    - ❑ Defending nonprofits
    - ❑ Using our platform to amplify grantees' advocacy
    - ❑ Signing/joining collective statements or coalitions
    - ❑ Taking a stance on diversity, equity, and inclusion (DEI) issues

- ❑ Other (*please specify _____)*
- ❑ None of the above *(Mutually exclusive)*

18. Which of the following philanthropic pledges or campaigns are you aware of? *(Please select all that apply)*
    - ❑ Meet the Moment (Trust-Based Philanthropy Project, Grantmakers for Effective Organizations, and National Center for Family Philanthropy)
    - ❑ A Public Statement from Philanthropy (Council on Foundations)
    - ❑ Level Up Pledge (CHANGE Philanthropy)
    - ❑ National Sign-on Letter: Protect Nonprofit Nonpartisanship (Interfaith Alliance, National Council of Nonprofits, Independent Sector, and others)
    - ❑ Other (*please specify _____)*
    - ❑ None of the above *(mutually exclusive)*

19. *(Display question only if respondent selected "Meet the Moment…" or "A Public Statement from Philanthropy…" or "Level Up Pledge…" or "National Sign-on Letter…" or "Other (please specify)" in Q18. If respondent answered Q18, display only pledges/campaigns that respondent selected in previous question)* For each pledge or campaign you are aware of, has your foundation participated or signed on?

	Yes	**No, but we are considering doing so**	**No, and we are <u>not</u> considering doing so**
Meet the Moment (Trust-Based Philanthropy Project, Grantmakers for Effective Organizations, and National Center for Family Philanthropy)	❑	❑	❑
A Public Statement from Philanthropy (Council on Foundations)	❑	❑	❑
Level Up Pledge (CHANGE Philanthropy)	❑	❑	❑
National Sign-on Letter: Protect Nonprofit Nonpartisanship (Interfaith Alliance, National Council of Nonprofits, Independent Sector, and others)	❑	❑	❑

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Other *(pipe in text from Q18)*	❑	❑	❑

20. *(If respondent selects "No, and we are not considering doing so" for any row in Q19)* For any pledge your foundation chose not to sign, what best describes your reasoning? *(Please select all that apply)*
    - ❑ We did not want to make our foundation a target
    - ❑ The pledge did not align with our foundation's values
    - ❑ We were not ready to make a public commitment at that time
    - ❑ Leadership or board had not reached consensus
    - ❑ We are taking similar actions independently without signing
    - ❑ We did not have enough information to make a decision
    - ❑ Other *(please specify)* _____

OVERALL RESPONSE

21. If your foundation were to adopt/prioritize ONE of the following practices now, which would be the highest priority?
    - ❑ Advocate to government on public policy
    - ❑ Increase grant sizes
    - ❑ Increase foundation payout
    - ❑ Provide more assistance beyond the grant
    - ❑ Provide more multiyear funding
    - ❑ Provide more unrestricted funding
    - ❑ Streamline grant application requirements
    - ❑ Streamline grant reporting requirements
    - ❑ Speak out publicly on issues affecting nonprofits
    - ❑ Other (*please specify* _____*)*

22. How, if at all, has your foundation's response to the current context changed over time?

    _____

    _____

EFFECTIVENESS OF FOUNDATION RESPONSE

23. How effective do you feel that the response to the current context has been from foundation funders?
    - ❑ Not at all effective
    - ❑ Slightly effective
    - ❑ Somewhat effective
    - ❑ Very effective

24. *(If respondent selects an option other than "Very effective" in the previous question)* What barriers or challenges do you believe have made it difficult for foundations to respond to the current context? *(Please select all that apply)*
    - ❑ Slow or complex internal decision-making processes (including planning cycles)

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- ❑ Lack of flexibility in the type, size, or length of grants made
- ❑ Restrictions on endowments or investment policies
- ❑ Competing priorities across grantmaking portfolios
- ❑ Insufficient understanding of the challenges grantees are facing
- ❑ Delayed or inadequate information about changes to policy or context
- ❑ Uncertainty or risk aversion regarding the legal/political implications of responding
- ❑ Board members' desire to remain neutral or mitigate risk
- ❑ Other *(please specify)* _____
- ❑ Don't know/not sure *(Mutually exclusive)*

25. In the current context, how important, if at all, do you believe it is for foundation funders to advocate and speak out publicly on issues affecting the communities they serve?
    - ❑ Not at all important
    - ❑ Slightly important
    - ❑ Somewhat important
    - ❑ Very important

26. How effective do you feel that the response to the current context has been from <u>your own foundation</u>?
    - ❑ Not at all effective
    - ❑ Slightly effective
    - ❑ Somewhat effective
    - ❑ Very effective

27. *(If respondent selects an option other than "Very effective" in the previous question)* What barriers or challenges do you believe have made it difficult for <u>your own foundation</u> to respond to the current context? *(Please select all that apply)*
    - ❑ Slow or complex internal decision-making processes (including planning cycles)
    - ❑ Lack of flexibility in the type, size, or length of grants made
    - ❑ Restrictions on endowments or investment policies
    - ❑ Competing priorities across grantmaking portfolios
    - ❑ Insufficient understanding of the challenges grantees are facing
    - ❑ Delayed or inadequate information about changes to policy or context
    - ❑ Uncertainty or risk aversion regarding the legal/political implications of responding
    - ❑ Board members' desire to remain neutral or mitigate risk
    - ❑ Other *(please specify)* _____
    - ❑ Don't know/not sure *(Mutually exclusive)*

LOOKING AHEAD

28. As a foundation leader, what, if anything, concerns you most about the current context?

    _____

    _____

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29. Do you intend to leave your current role as the Executive Director, CEO, or equivalent of your foundation in the next 12 months?
    - ❑ Yes, I plan to leave my role in the next 12 months
    - ❑ Maybe, I am considering leaving my role in the next 12 months
    - ❑ No, I plan to stay in my role at least through the next 12 months
    - ❑ I am not the Executive Director, CEO, or equivalent

30. Is your foundation currently making major changes to its strategy in response to the current context?
    - ❑ Yes
    - ❑ No, but we are considering major changes
    - ❑ No, and we are <u>not</u> considering major changes

31. *(If respondent selected "Yes" or "No, but we are considering major changes" in the previous question)* Please describe the major changes that your organization is making, or considering making, to its strategy.

    _____
    _____

MORE ABOUT YOU AND YOUR FOUNDATION

The following section asks some demographic questions about you (the person who completed most of the survey) and questions about your foundation. This information will be used to describe the survey population in aggregate and to compare the experiences of different groups. **As with all the questions in this survey, this section is optional and responses will remain confidential.**

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

33. 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

34. How many years have you worked at a grantmaking institution (i.e. your current role and any other roles)?
    - ❑ 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

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- ❑ 10 years or longer

35. Do you have prior experience working for a grant-seeking nonprofit?
    - ❑ No
    - ❑ Yes

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

37. How would you describe your race and/or ethnicity? *(Please select all that apply)*
    - ❑ African American or Black
    - ❑ American Indian, Alaska Native, or Indigenous
    - ❑ Asian or Asian American
    - ❑ Latina, Latino, Latinx or Hispanic
    - ❑ Middle Eastern or North African
    - ❑ Multiracial and/or Multi-ethnic
    - ❑ Pacific Islander or Native Hawaiian
    - ❑ White
    - ❑ Race and/or ethnicity not included above *(optional, please describe)* _____
    - ❑ Prefer not to say *(Mutually exclusive)*

38. How do you describe yourself? *(Please 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)*

39. Are you transgender?
    - ❑ No
    - ❑ Yes
    - ❑ Prefer not to say

40. Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, Queer) community?
    - ❑ No
    - ❑ Yes
    - ❑ Prefer not to say

41. Do you have a disability?
    - ❑ No
    - ❑ Yes
    - ❑ Prefer not to say

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42. Which of the following best describes the composition of your foundation's board?

	No board members **(0%)**	**1-24%** of board members	**25-49%** of board members	**50-99%** of board members	All board members **(100%)**	Don't know/ Prefer not to say
People from the LGBTQ+ community	☐	☐	☐	☐	☐	☐
People of color	☐	☐	☐	☐	☐	☐
People with disabilities	☐	☐	☐	☐	☐	☐
Women	☐	☐	☐	☐	☐	☐

43. This is the last question in the 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?

_____
_____
_____

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