About CEP

CEP provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness.

We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.
GPR: Confidential and Comparative

Grantees have insightful feedback to share

Receiving a grant is inherently positive, so grantee feedback is skewed

Power dynamics inhibit candor, so third-party confidentiality is key

Comparative benchmarking allows for meaningful interpretation of results
Agenda

• Survey Methodology

• Field and Community Impact

• Organizational Impact

• Relationships with Grantees

• Recommendations from CEP
# Grantee Survey Population

<table>
<thead>
<tr>
<th>Survey Fielded</th>
<th>Number of Grantees Surveyed</th>
<th>Responses Received</th>
<th>Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>September and October 2022</td>
<td>140</td>
<td>99</td>
<td>71%</td>
</tr>
<tr>
<td>Average GPR Response Rate</td>
<td></td>
<td></td>
<td>65%</td>
</tr>
</tbody>
</table>

## Subgroup Analysis

- Reviewed ratings by **Grant Type, Annual Organizational Operating Budget, and BIPOC in Leadership**
Grantee Comparative Dataset

More than 300 foundations
More than 50,000 grantee responses

**Custom Cohort**

Blue Cross and Blue Shield of North Carolina Foundation
LOR Foundation
Maine Health Access Foundation
MetroWest Health Foundation
Moses Taylor Foundation
Mt. Sinai Health Care Foundation
Quantum Foundation
REACH Healthcare Foundation
Stolte Family Foundation
Stupski Foundation
The Cameron Foundation
The Denver Foundation
The Healing Trust
Thornburg Foundation
Williamsburg Health Foundation
Wiregrass Foundation
Headwaters Foundation
FIELD AND COMMUNITY IMPACT
“Overall, how would you rate the Foundation’s impact on your field?”

1 = No impact, 7 = Significant positive impact

0th (4.50) 25th (5.59) 50th (5.85) 75th (6.05) 100th (6.70)

Headwaters 2022

6.17 87th

Custom Cohort
“Overall, how would you rate the Foundation’s impact on your local community?”

1 = No impact, 7 = Significant positive impact

0th (3.00) | 25th (5.24) | 50th (5.76) | 75th (6.09) | 100th (6.86)

Headwaters 2022

Custom Cohort

6.31
89th
“How well does the Foundation understand the needs of the people and communities that you serve?”

*1 = Limited understanding, 7 = Thorough understanding*

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>0th (4.00)</td>
<td></td>
</tr>
<tr>
<td>25th (5.47)</td>
<td></td>
</tr>
<tr>
<td>50th (5.69)</td>
<td></td>
</tr>
<tr>
<td>75th (5.86)</td>
<td></td>
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<tr>
<td>100th (6.46)</td>
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</tr>
</tbody>
</table>

Headwaters 2022:

- 5.94 (83rd)

Custom Cohort:

- 

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“To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?”

*1 = Not at all, 7 = To a great extent*

<table>
<thead>
<tr>
<th>Percentile</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>0th (3.77)</td>
<td></td>
</tr>
<tr>
<td>25th (5.35)</td>
<td></td>
</tr>
<tr>
<td>50th (5.59)</td>
<td></td>
</tr>
<tr>
<td>75th (5.85)</td>
<td></td>
</tr>
<tr>
<td>100th (6.45)</td>
<td></td>
</tr>
</tbody>
</table>

Headwaters 2022:

- 6.16 (95th)

Custom Cohort:

- 

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“Headwater's funding of the Zero to Five Statewide office...does such **incredible policy work** that allows for the state level conversations to filter down to community level change.”

“[After] working very closely for many years with a few of the top foundations in the country, the Headwaters Foundation is at the top of the list. Great leadership, open communication, truly focused on making communities better and **understands and appreciates the issues and nuances of each community.**”
ORGANIZATIONAL IMPACT
“Overall, how would you rate the Foundation’s impact on your organization?”

1 = No impact, 7 = Significant positive impact

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“We wish all foundations could be this easy to work with. They keep our needs in mind and align with our priorities, but really let us do the work without any unnecessary interference.”
## Grantmaking Characteristics

<table>
<thead>
<tr>
<th></th>
<th>GO! Grants</th>
<th>Policy/Strategic Initiative Grants</th>
<th>Median Funder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median Grant Size</td>
<td>$8K</td>
<td>$115K</td>
<td>$100K</td>
</tr>
<tr>
<td>Proportion of Multiyear Grants</td>
<td>24%</td>
<td>74%</td>
<td>51%</td>
</tr>
<tr>
<td>Proportion of Unrestricted Grants</td>
<td>55%</td>
<td>48%</td>
<td>21%</td>
</tr>
<tr>
<td>Grant Dollars Per Process Hour Over Lifetime of Grant</td>
<td>$1.7K</td>
<td>$9.6K</td>
<td>$2.8K</td>
</tr>
<tr>
<td>Proportion Receiving Non-Monetary Assistance</td>
<td>24%</td>
<td>68%</td>
<td>38%</td>
</tr>
</tbody>
</table>

“The foundation gives the **financial and emotional support** needed to get our vital community projects off the ground and then helps us think on different ways to become sustainable.”
Non-Monetary Support

34% of Headwaters grantees report receiving non-monetary support vs. 38% of grantees at the typical funder report receiving non-monetary support.

Headwaters grantees who report receiving non-monetary support rate significantly more positively on several survey measures, including relationship measures.
“To what extent was the Foundation’s grant award process a helpful opportunity to strengthen the efforts funded by the grant?”

1 = Not at all, 7 = To a great extent

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<table>
<thead>
<tr>
<th>0th (3.45)</th>
<th>25th (4.90)</th>
<th>50th (5.24)</th>
<th>75th (5.57)</th>
<th>100th (6.49)</th>
</tr>
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<tbody>
<tr>
<td>Headwaters 2022</td>
<td></td>
<td></td>
<td></td>
<td>6.43</td>
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<tr>
<td>Custom Cohort</td>
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</tbody>
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““To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?”

1 = Not at all, 7 = To a great extent

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<table>
<thead>
<tr>
<th>0th (4.56)</th>
<th>25th (5.66)</th>
<th>50th (5.88)</th>
<th>75th (6.09)</th>
<th>100th (6.57)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headwaters 2022</td>
<td></td>
<td></td>
<td></td>
<td>6.55</td>
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<tr>
<td>Custom Cohort</td>
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<td></td>
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</tbody>
</table>
Median hours spent by grantees on funder requirements over grant lifetime

<table>
<thead>
<tr>
<th></th>
<th>0th (5hrs)</th>
<th>25th (20hrs)</th>
<th>50th (30hrs)</th>
<th>75th (50hrs)</th>
<th>100th (304hrs)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>7hrs</strong></td>
<td>Headwaters 2022</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1st</strong></td>
<td>Custom Cohort</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

“We deeply appreciate your staff, your processes, values and consciousness of organization's limited time and resources. You have employed appropriate measures for the integrity of grantees without placing too much burden on them. Thank you!”

“The grant process is the least labor intensive of any grant received. I appreciate that it is not over complicated and that the foundation is diligent about communicating with me.”
RELATIONSHIPS
“How comfortable do you feel approaching the Foundation if a problem arises?”

1 = Not at all comfortable, 7 = Extremely comfortable

<table>
<thead>
<tr>
<th></th>
<th>0th (4.80)</th>
<th>25th (6.12)</th>
<th>50th (6.28)</th>
<th>75th (6.44)</th>
<th>100th (6.84)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headwaters 2022</td>
<td></td>
<td></td>
<td></td>
<td>6.64</td>
<td>95th</td>
</tr>
</tbody>
</table>

To what extent did the Foundation exhibit trust in your organization's staff during this grant?”

1 = Not at all, 7 = To a great extent

<table>
<thead>
<tr>
<th></th>
<th>0th (5.88)</th>
<th>25th (6.26)</th>
<th>50th (6.41)</th>
<th>75th (6.54)</th>
<th>100th (6.83)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headwaters 2022</td>
<td></td>
<td></td>
<td></td>
<td>6.68</td>
<td>91st</td>
</tr>
</tbody>
</table>
“The individuals working for the Headwaters Foundation are super responsive, professional, and engaged. We are very appreciative of their support and that they seem genuinely concerned about our work.”

“Our intent for the grant was understood and backed by the Foundation staff, and they wanted to simply help us get things going with as few complications as possible...We have found the engagement and conversations to give us openings to find further help, advice, and assistance from the Foundation and its staff.”
Interaction Patterns

18% of grantees report their main contact at the Foundation changed in the past six months.

18% of grantees report contact with the Foundation was most frequently grantee initiated.

Grantees in each of these categories rate significantly lower than their counterparts on several survey measures spanning themes of relationships and understanding.
“How clearly has the Foundation communicated its goals and strategy to you?”

1 = Not at all clearly, 7 = Extremely clearly

“I would suggest making a greater effort to tell their story and the outcomes from the community to a broader segment of the population.”
CEP Recommendations

- Consider which aspects of Headwaters Foundation’s values, systems, and structures are contributing to grantees’ strong perceptions. Work to ensure these strengths are reinforced.

- Celebrate and maintain the practices contributing to the Foundation’s strong relationships.

- Continue to identify opportunities to clearly communicate the Foundation’s stories of impact more broadly.
Thank You.