GRANTEE PERCEPTION REPORT

Prepared for

Overdeck Family Foundation

November 2021

THE CENTER FOR EFFECTIVE PHILANTHROPY

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.

ASSESSMENTS

PROGRAMMING

RESEARCH

ADVISORY SERVICES

Grantee Survey Population

Survey Fielded	Number of Grantees Surveyed	Responses Received	Response Rate
May and June 2021	120	97	81%
September and October 2019	124	91	73%

Subgroup Analysis

- Reviewed ratings by Portfolio, Grant Lever, Length of Partnership, Respondent Gender, Respondent Person of Color Identity, and Respondents' Intersectional Identities.

Grantee Comparative Dataset

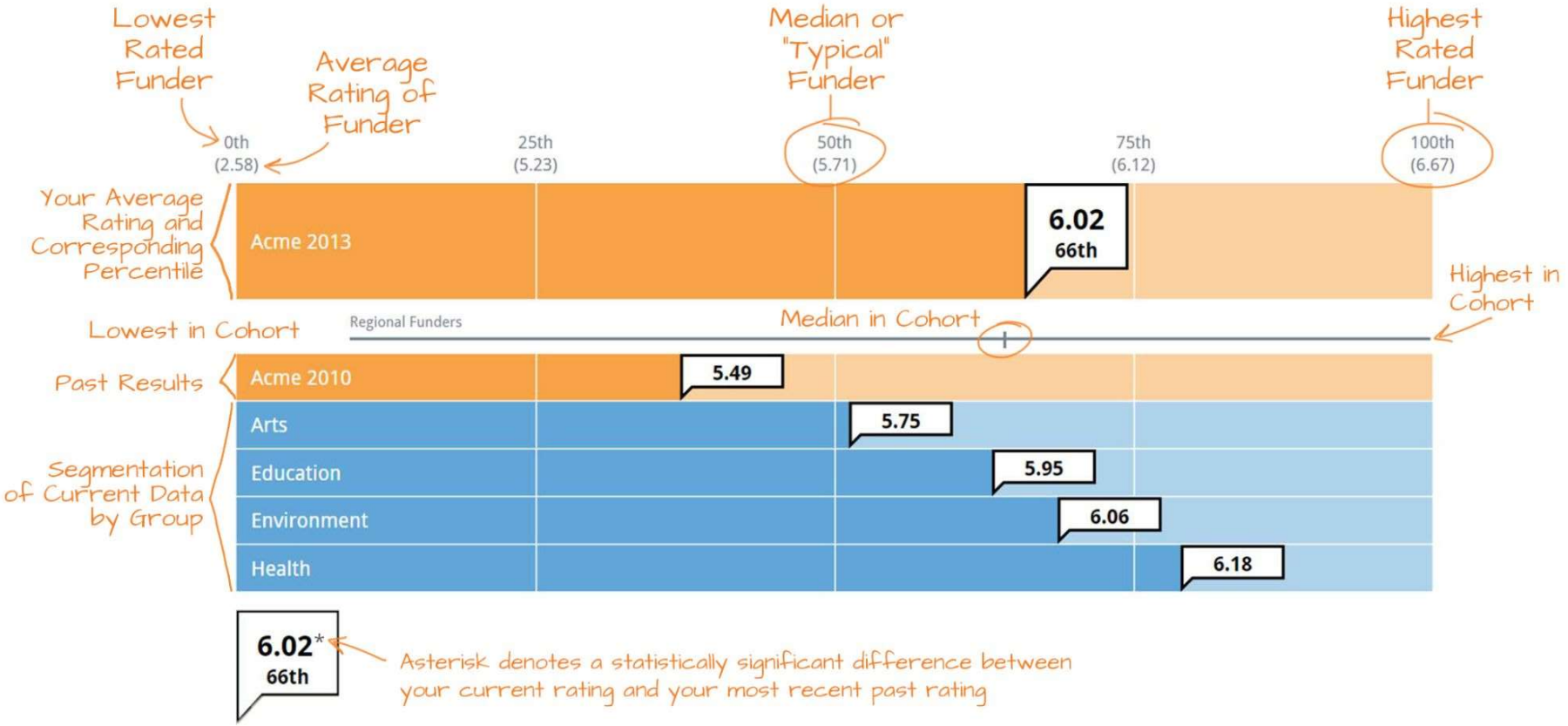
More than 300 foundations

More than 40,000 grantee responses

Custom Cohort	
Barr Foundation	Einhorn Family Charitable Trust
Chan Zuckerberg Initiative	Omidyar Network
Charles and Lynn Schusterman Family Philanthropies	Raikes Foundation
Crown Family Philanthropies	The Jim Joseph Foundation
ECMC Foundation	The Wallace Foundation
William Davidson Foundation	

Interpreting Your Charts

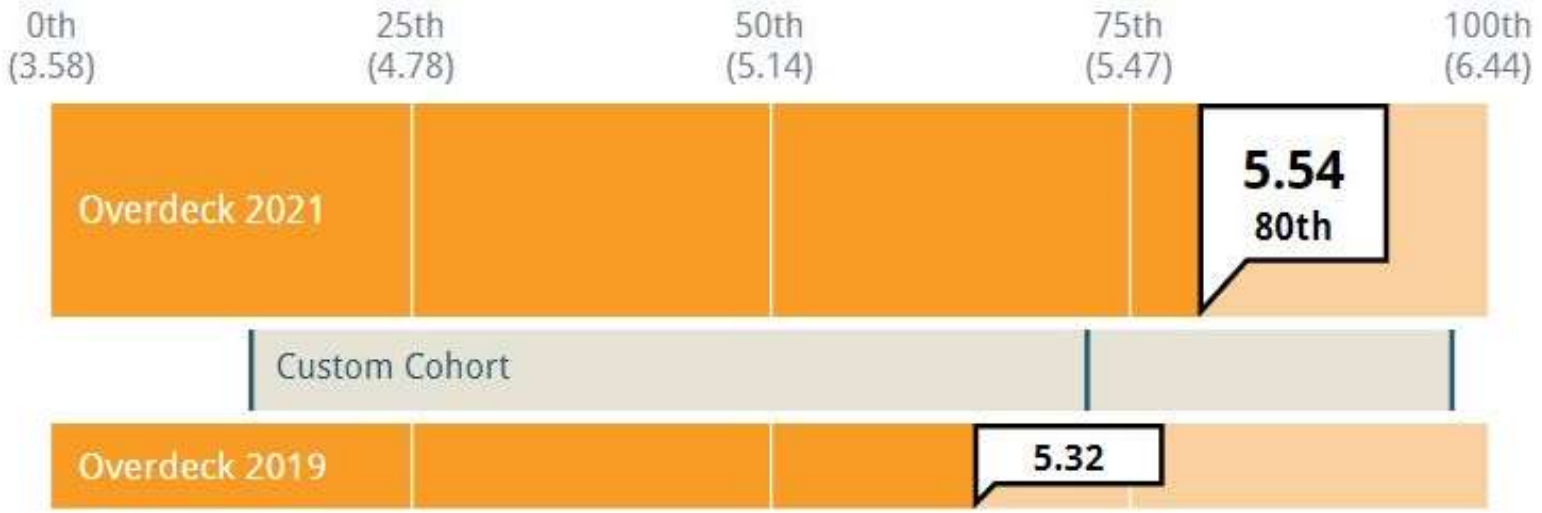
Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.



Impact on Field

"To what extent has the Foundation advanced the state of knowledge in your field?"

1 = Not at all, 7 = Leads the field to new thinking and practice



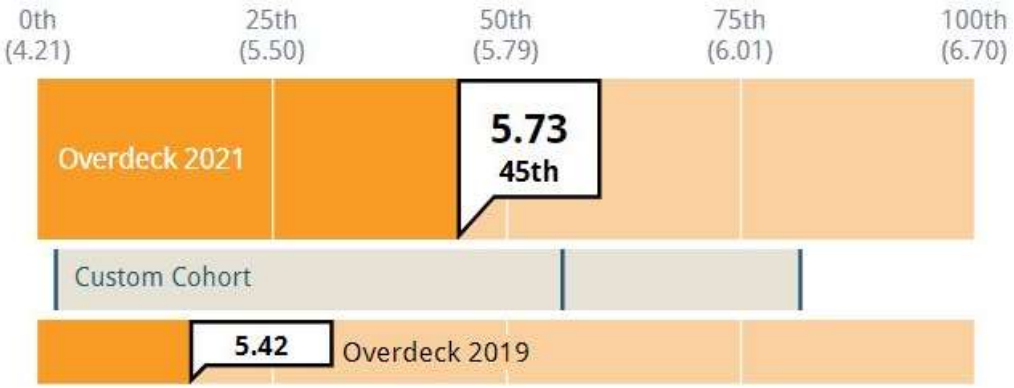
"[OFF] advances research and innovative models that are informing policy and program changes at the national, state, and community-level[s]."

Impact on Field

"Overall, how would you rate the Foundation's impact on your field?"

1 = No impact

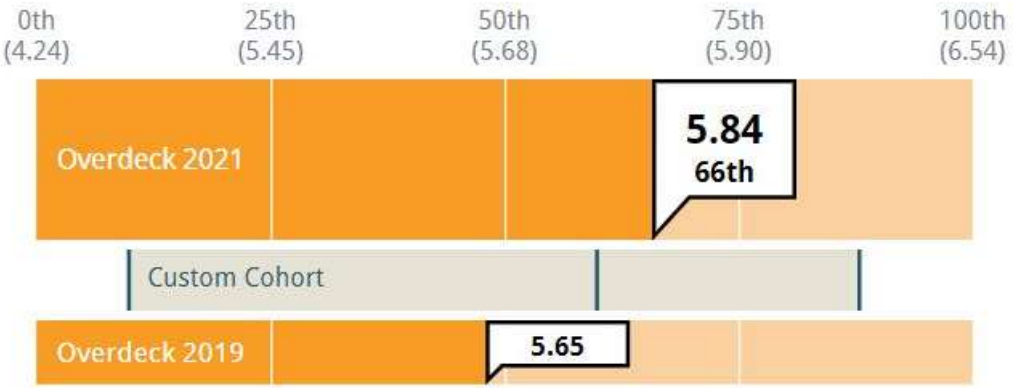
7 = Significant positive impact



"How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?"

1 = Limited understanding

7 = Thorough understanding



Impact on Field

“Through the funding of programs, as well as research, data, and policy efforts, OFF is allowing grantees to create and strengthen ecosystems that support child care and education.... OFF is viewed as a leader in both philanthropy and education and brings considerable leadership, influence, and resources to improve the field.”

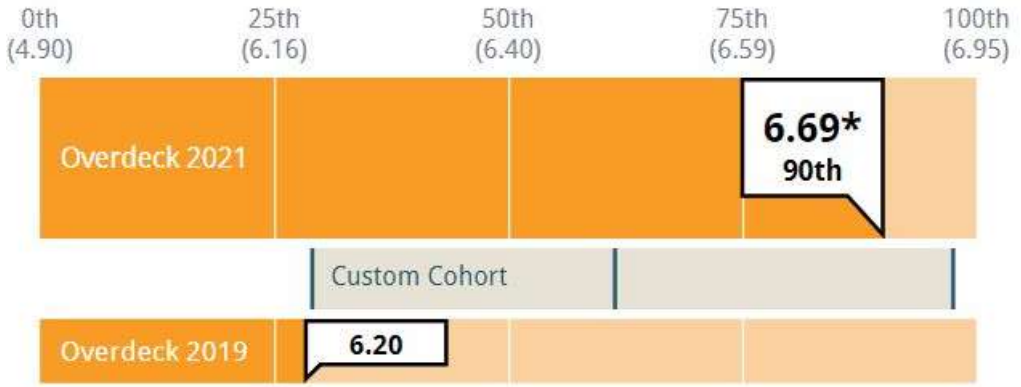
"The Foundation has a big impact on the education field, specifically, supporting K-12 educators from all backgrounds. It's inspiring to see how many programs they are able to support and help advance that go[es] beyond our own reach."

Relationships With Grantees

"Overall, how responsive was Foundation staff?"

1 = Not at all responsive

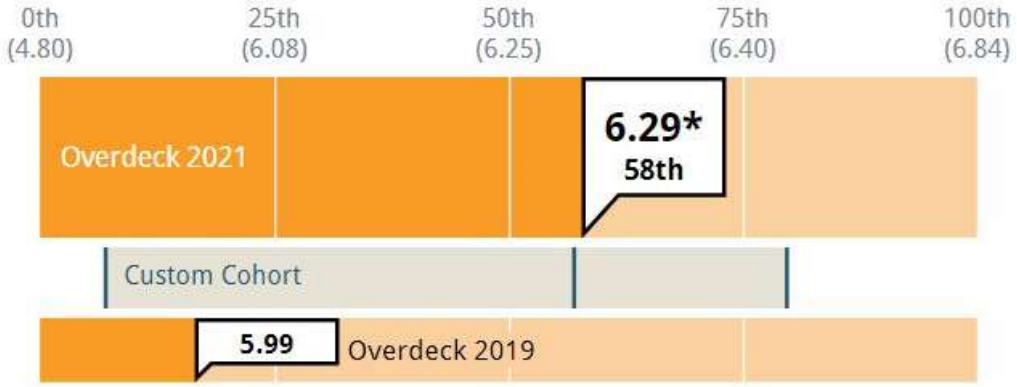
7 = Extremely responsive



"How comfortable do you feel approaching the Foundation if a problem arises?"

1 = Not at all comfortable

7 = Extremely comfortable



Relationships With Grantees

Interaction Patterns

34%

of OFF grantees report interaction monthly or more often

vs.

27%

of grantees at the typical funder report interaction monthly or more often

These grantees offer significantly higher ratings on some measures, including aspects of OFF's understanding and for the extent to which the reporting process is straightforward, adaptable and relevant.

Relationships With Grantees

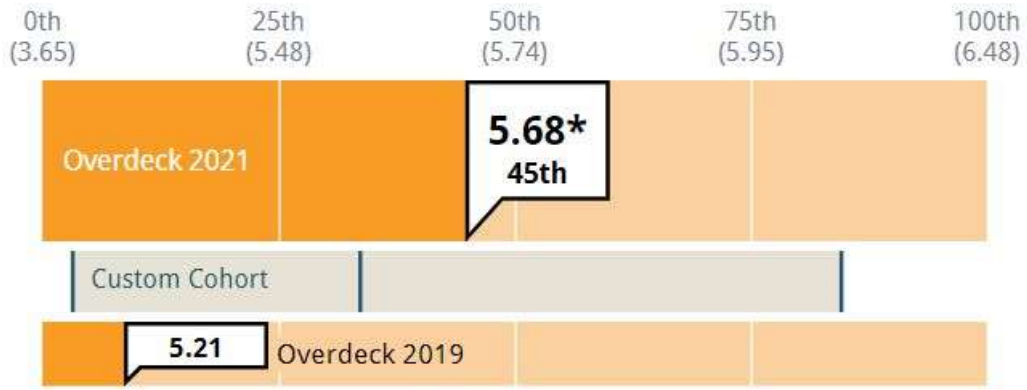
"I always feel like we are truly partnering with Overdeck rather than our work being overseen by them. The tone the staff sets is just wonderful. They care! When we had our virtual convening, I left it PUMPED! And not much had made me feel like that during the pandemic…."

Strategic Clarity

"How clearly has the Foundation communicated its goals and strategy to you?"

1 = Not at all clearly

7 = Extremely clear



"Have you and your program officer discussed the Foundation's new funding model and the implications it has for your work?"

Impact on Organizations

"How aware is the Foundation of the challenges that your organization is facing?"

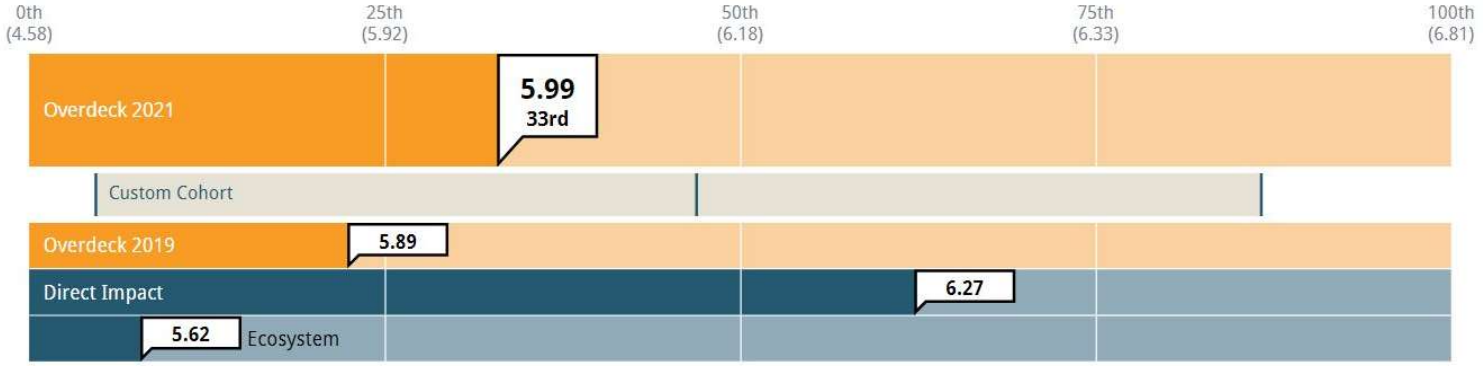
1 = Not at all aware

7 = Extremely aware

"Overall, how would you rate the Foundation's impact on your organization?"

1 = No impact

7 = Significant positive impact



Grantmaking Characteristics

Characteristic	OFF 2021	OFF 2019	Typical Funder	Custom Cohort
Median Grant Size	$350K	$310K	100K	$393.9K
Median Org Budget	$8M	$9M	$1.5M	$4.3M
% Unrestricted Grants	40%	24%	19%	33%
% Multi-year Grants	41%	34%	53%	64%

> *"Multi-year investments that speak to a deeper strategic alignment and longitudinal impact - assessing year-to-year impact can be misleading, and the grant cycle logistics can create a burdensome level of reporting/renewals. Conversely, a 3-year investment could lead to a more strategic partnership that is less transactional and harnesses the full power of the OFF team."*

Non-Monetary Support

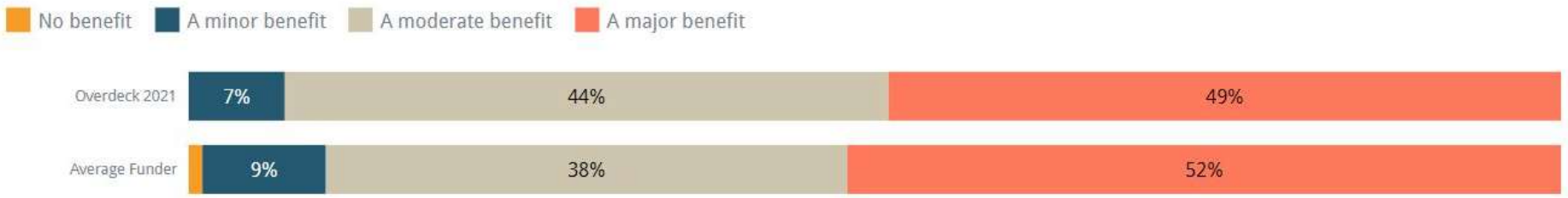
45%

of OFF grantees report receiving non-monetary assistance from the Foundation.

These grantees offer significantly higher ratings on some measures, including OFF's impact on and understanding of their fields and organizations and aspects of OFF's processes.

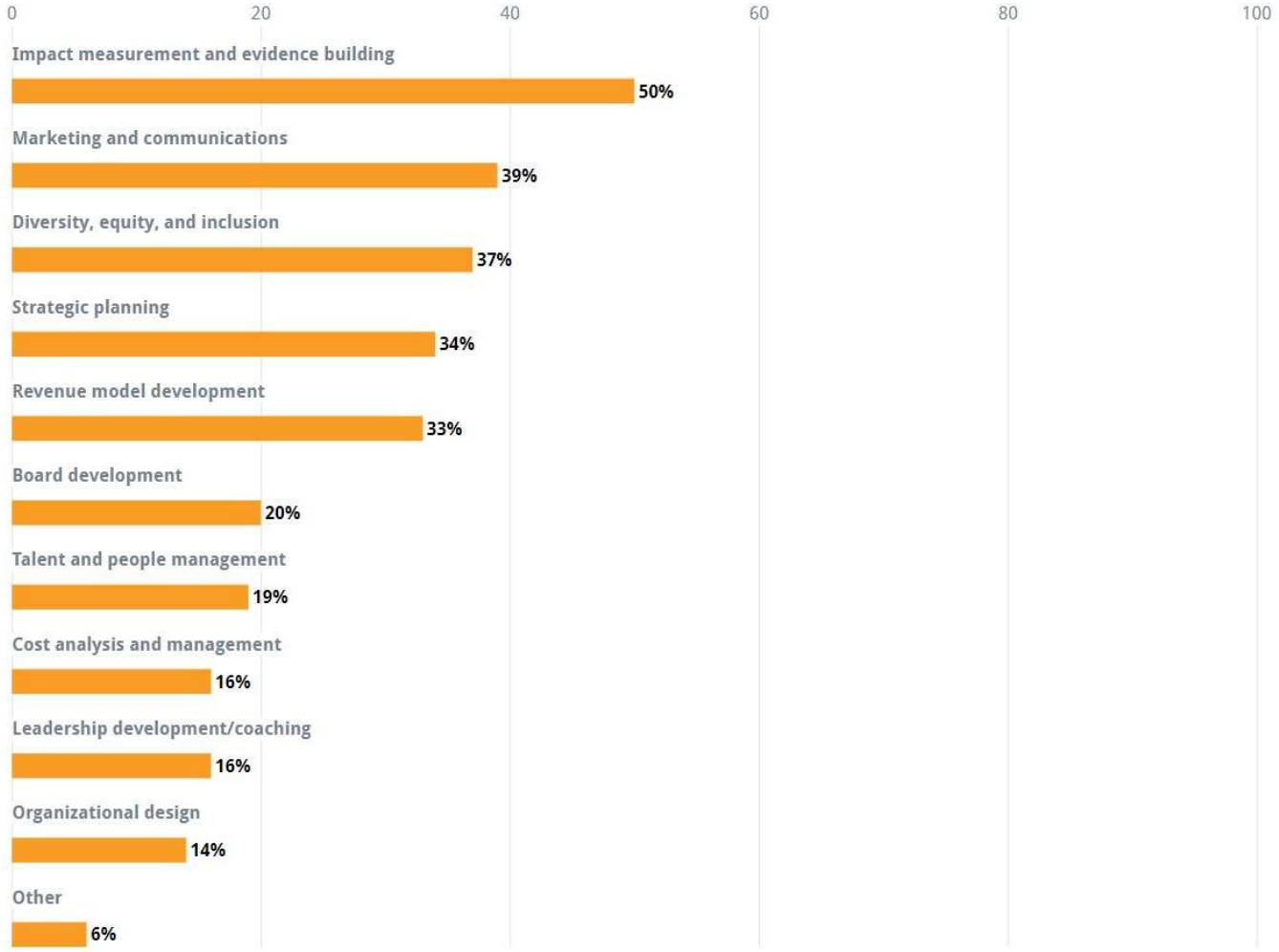
Non-Monetary Support

"How would you describe the benefit - to your organization or work - of any non-monetary support that you received?"



Non-Monetary Support

"Which of these capacities would you prioritize strengthening for your organization? (please select up to 3)"



Grantmaking Processes

"How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?"

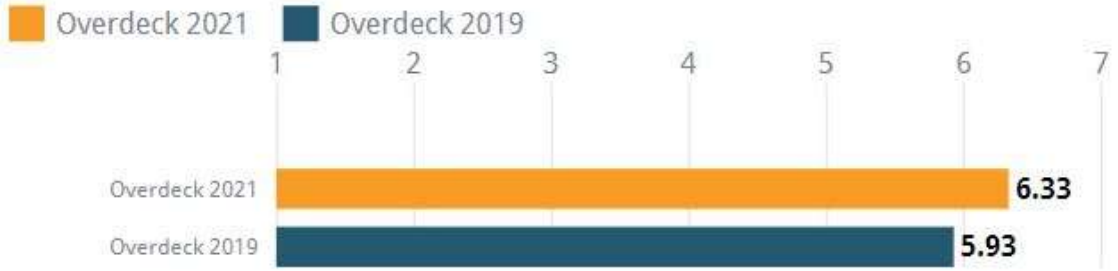
1 = Not at all helpful

7 = Extremely helpful

"How clear do you find Foundation staff's communication about the grantmaking process?"

1 = Not at all clear

7 = Extremely clear

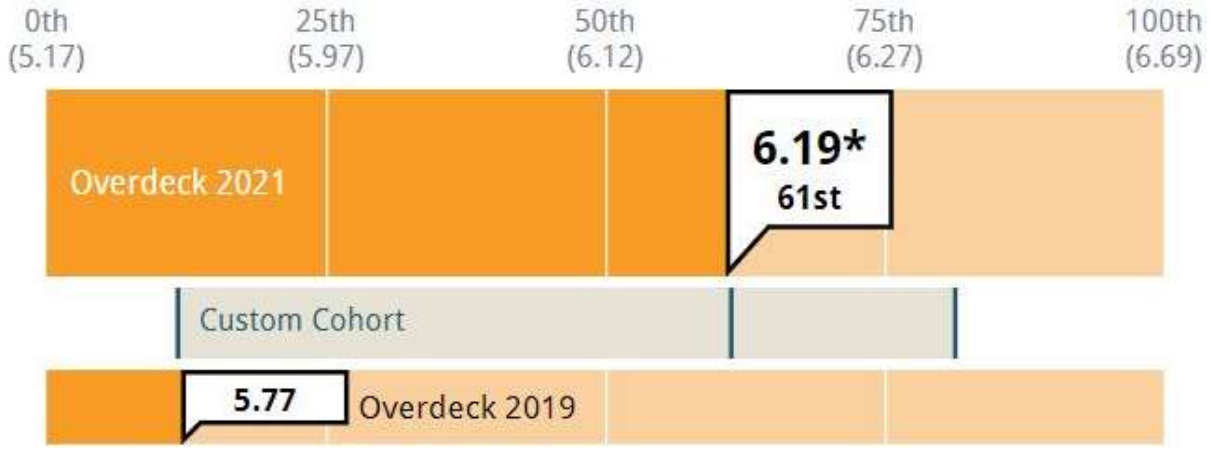


Grantmaking Processes

"To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?"

1 = Not at all

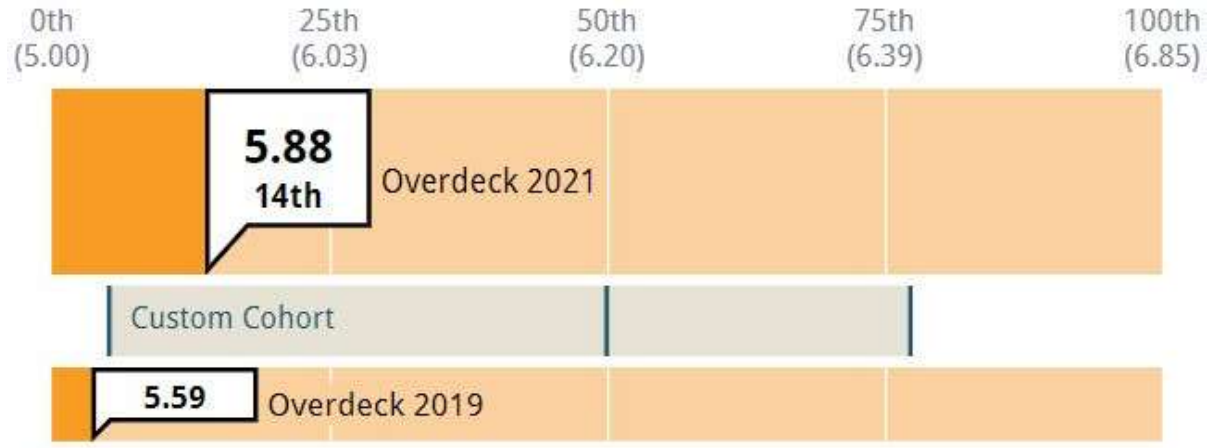
7 = To a great extent



"To what extent was the Foundation's reporting process straightforward?

1 = Not at all

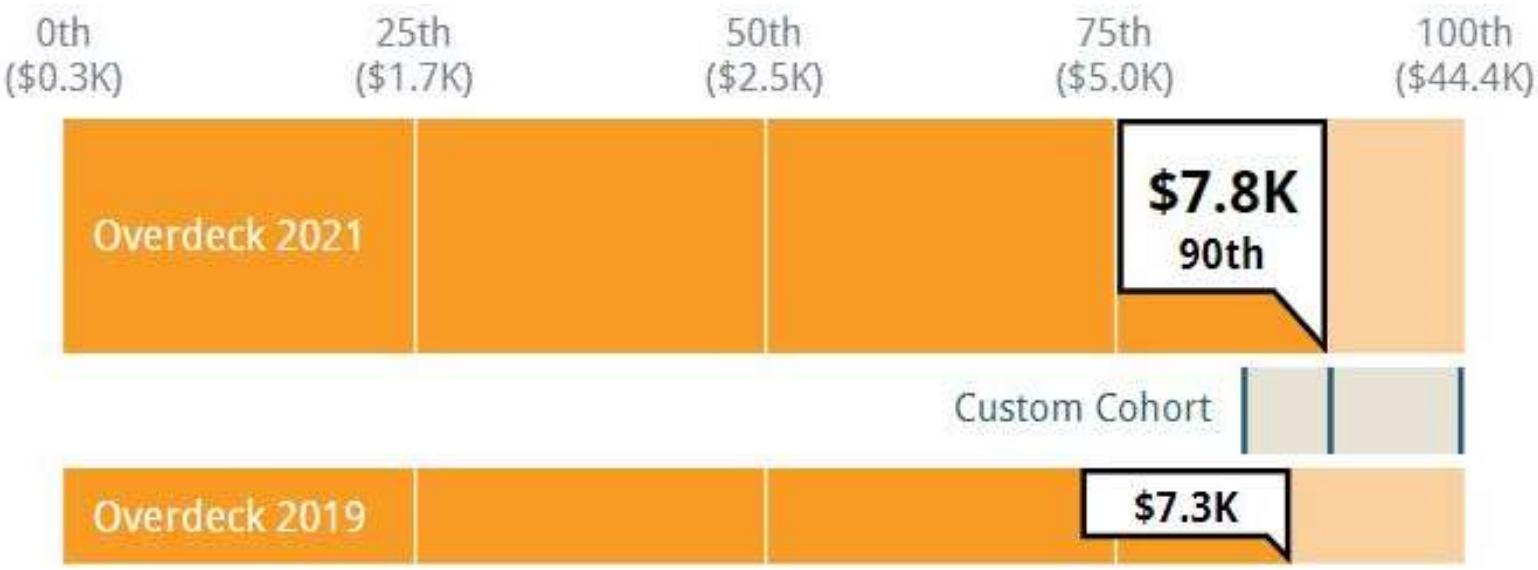
7 = To a great extent



Grantmaking Processes

Dollar Return

Median total grant dollars awarded per total time necessary to fulfill the requirements over the lifetime of the grant



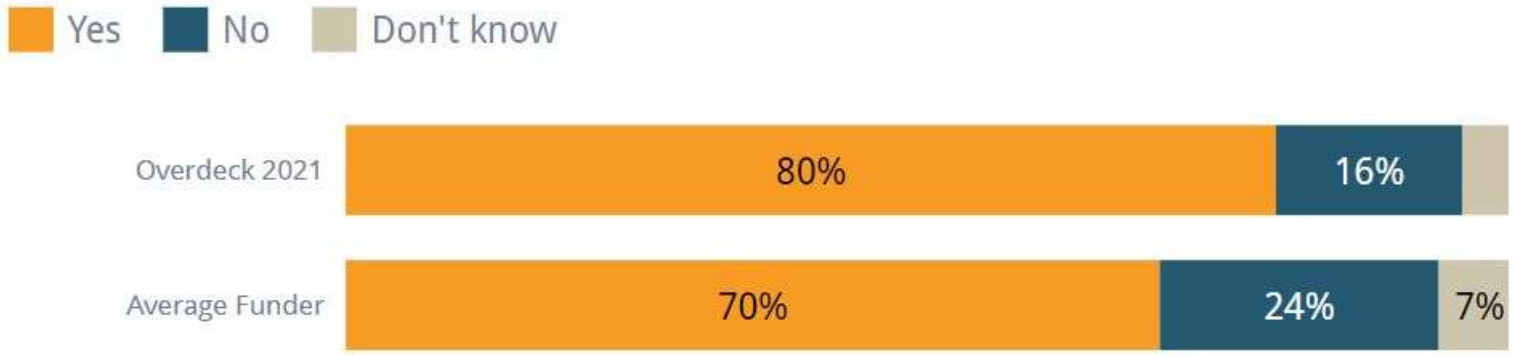
Grantmaking Processes

“Good process with clear expectations and helpful guidelines/requirements. Nice balance between accountability and flexibility.”

"For past grantees, it would be helpful to have a slightly shorter proposal process in order to save a little time to continue our work in the field, perhaps excluding similar questions about the overall organization to ones that were already answered in previous proposals.”

Diversity, Equity, and Inclusion

"Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?"



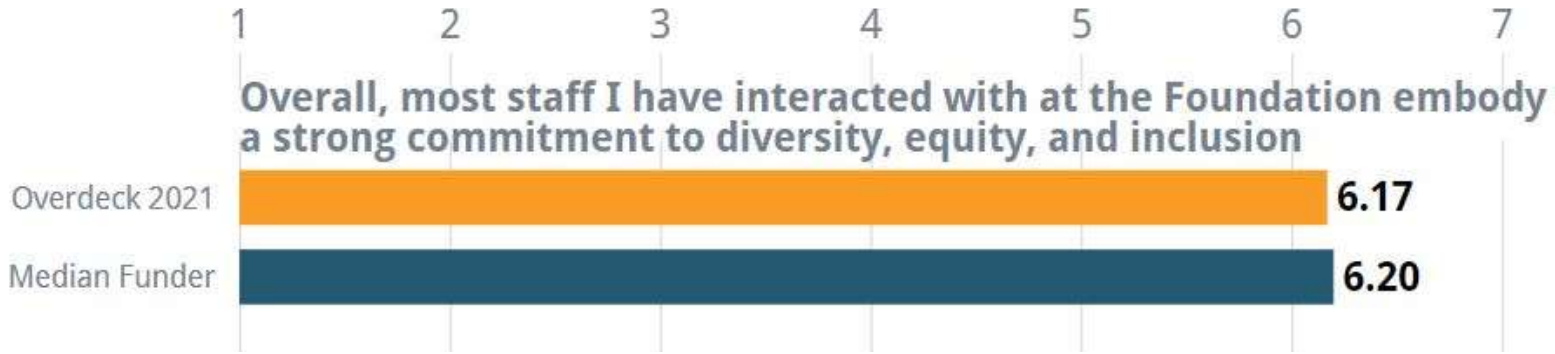
These grantees rate significantly lower on some measures, including OFF's understanding of their intended beneficiaries' needs, and the extent to which OFF is open to grantees' ideas and has clearly communicated what DEI means for its work.

CEP

Diversity, Equity, and Inclusion

"Overall most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity, and inclusion"

1 = Strongly disagree, 4 = Neither agree nor disagree, 7 = Strongly agree



Diversity, Equity, and Inclusion

"Does the CEO/Executive Director of your organization identify as a person of color?"

Does the CEO/Executive Director of your organization identify as a person of color?	Overdeck 2021	Average Funder
Yes	19%	27%
No	72%	67%
Don't know	8%	5%
Prefer not to say	1%	1%

Thank You.