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.
## 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>May and June 2021</td>
<td>120</td>
<td>97</td>
<td>81%</td>
</tr>
<tr>
<td>September and October</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>124</td>
<td>91</td>
<td>73%</td>
</tr>
</tbody>
</table>

### 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*

<table>
<thead>
<tr>
<th>Custom Cohort</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Barr Foundation</td>
<td>Einhorn Family Charitable Trust</td>
</tr>
<tr>
<td>Chan Zuckerberg Initiative</td>
<td>Omidyar Network</td>
</tr>
<tr>
<td>Charles and Lynn Schusterman Family Philanthropies</td>
<td>Raikes Foundation</td>
</tr>
<tr>
<td>Crown Family Philanthropies</td>
<td>The Jim Joseph Foundation</td>
</tr>
<tr>
<td>ECMC Foundation</td>
<td>The Wallace Foundation</td>
</tr>
<tr>
<td>William Davidson Foundation</td>
<td></td>
</tr>
</tbody>
</table>
Interpreting Your Charts

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

Asterisk denotes a statistically significant difference between your current rating and your most recent past rating.
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].”
“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.
“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?”

<table>
<thead>
<tr>
<th>0th (3.65)</th>
<th>25th (5.48)</th>
<th>50th (5.74)</th>
<th>75th (5.95)</th>
<th>100th (6.48)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overdeck 2021</strong></td>
<td></td>
<td><strong>5.68</strong>* 45th</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Custom Cohort</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>5.21</strong> Overdeck 2019</td>
<td></td>
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</tbody>
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**CEP**
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

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

“We 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?”

- Overdeck 2021:
  - No benefit: 7%
  - A minor benefit: 44%
  - A moderate benefit: 49%

- Average Funder:
  - No benefit: 9%
  - A minor benefit: 38%
  - A moderate benefit: 52%
Non-Monetary Support

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

- Impact measurement and evidence building: 50%
- Marketing and communications: 39%
- Diversity, equity, and inclusion: 37%
- Strategic planning: 34%
- Revenue model development: 33%
- Board development: 20%
- Talent and people management: 19%
- Cost analysis and management: 16%
- Leadership development/coaching: 16%
- Organizational design: 14%
- Other: 6%
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

0th (3.45)   25th (4.77)   50th (5.09)   75th (5.33)   100th (6.25)

Overdeck 2021

Custom Cohort

Overdeck 2019

“How clear do you find Foundation staff’s communication about the grantmaking process?”

1 = Not at all clear
7 = Extremely clear

Overdeck 2021

Overdeck 2019

6.33

5.93
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

<table>
<thead>
<tr>
<th>Overdeck 2021</th>
<th>0th (5.17)</th>
<th>25th (5.97)</th>
<th>50th (6.12)</th>
<th>75th (6.27)</th>
<th>100th (6.69)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Cohort</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.19*</td>
<td>61st</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Overdeck 2019 | 5.77       |

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

1 = Not at all
7 = To a great extent

<table>
<thead>
<tr>
<th>Overdeck 2021</th>
<th>0th (5.00)</th>
<th>25th (6.03)</th>
<th>50th (6.20)</th>
<th>75th (6.39)</th>
<th>100th (6.85)</th>
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<tbody>
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<td>Custom Cohort</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.88</td>
<td>14th</td>
<td></td>
<td></td>
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</tbody>
</table>

| Overdeck 2019 | 5.59       |
Grantmaking Processes

Dollar Return

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

- 0th ($0.3K)
- 25th ($1.7K)
- 50th ($2.5K)
- 75th ($5.0K)
- 100th ($44.4K)

Overdeck 2021

- $7.8K
- 90th

Overdeck 2019

- $7.3K

Custom Cohort
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?”

- **Yes**: 80%
- **No**: 16%
- **Don't know**: 7%

Overdeck 2021

- **Yes**: 70%
- **No**: 24%
- **Don't know**: 7%

Average Funder

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.
“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

- Overdeck 2021: 6.17
- Median Funder: 6.20
“Does the CEO/Executive Director of your organization identify as a person of color?”

<table>
<thead>
<tr>
<th>Does the CEO/Executive Director of your organization identify as a person of color?</th>
<th>Overdeck 2021</th>
<th>Average Funder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>No</td>
<td>72%</td>
<td>67%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Thank You.