About CEP

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

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

ASSESSMENTS

RESEARCH

PROGRAMMING

ADVISORY SERVICES

YOUTHTRUTH
## Grantee Survey Population

<table>
<thead>
<tr>
<th>Survey Fielded</th>
<th>Responses Received</th>
<th>Response Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>May and June 2023</td>
<td>74</td>
<td>59%</td>
</tr>
<tr>
<td>August and September 2022 (Pulse)</td>
<td>85</td>
<td>65%</td>
</tr>
<tr>
<td>May and June 2021</td>
<td>97</td>
<td>81%</td>
</tr>
<tr>
<td>September and October 2019</td>
<td>91</td>
<td>73%</td>
</tr>
</tbody>
</table>

Results broken down by: Lever, First Grant Approved Date, Funding Type, and Capacity-Building Support
Grantee Comparative Dataset

More than 300 foundations
More than 50,000 grantee responses

Custom Cohort

Ascendium Education Philanthropy
Barr Foundation
Chan Zuckerberg Initiative
Charles and Lynn Schusterman Family Philanthropies
Crown Family Philanthropies
ECMC Foundation
Einhorn Collaborative
Heising-Simons Foundation
Overdeck Family Foundation, Inc.

Imaginable Futures
Lumina Foundation for Education, Inc.
Raikes Foundation
Robin Hood Foundation
The Jim Joseph Foundation
The Robertson Foundation
The Wallace Foundation
William Davidson Foundation
Interpreting Charts

- **Lowest Rated Funder**
  - 0th (3.00)

- **Median or “Typical” Funder**
  - 50th (5.76)

- **Average Rating of Typical Funder**
  - 75th (6.09)

- **Highest Rated Funder**
  - 100th (6.86)

Your Average Rating and Corresponding Percentile
- **The Foundation 2023**
  - 5.97
  - 66th

Lowest in Cohort
- **Private Foundations**
  - Median in Cohort

Past Results
- **The Foundation 2018**
  - 6.00

Segmentation of Current Data by Group
- **Arts**
  - 6.09
- **Education**
  - 6.12
- **Environment**
  - 5.50
- **Health**
  - 6.17

Asterisk denotes a statistically significant difference between your current rating and your most recent past rating.
“Overall, how would you rate the Foundation’s impact on your field?”

1 = No impact, 7 = Significant positive impact

“The OFF team is knowledgeable about new innovations, research, and trends in the field -- leveraging their position to advance core priorities. They support promising early stage initiatives and sustain projects with strong evidence... They help advance best practices and new models in the field.”
“How well does the Foundation understand the field in which you work?”
1 = Limited understanding of the field,
7 = Regarded as an expert in the field

“To what extent has the Foundation affected public policy in your field?”
1 = Not at all,
7 = Major influence on shaping policy
ORGANIZATIONAL IMPACT & ASSISTANCE BEYOND THE GRANT CHECK
“Overall, how would you rate the Foundation’s impact on your organization?”

1 = No impact,
7 = Significant positive impact

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

1 = Limited understanding,
7 = Thorough understanding
Non-Monetary Assistance

80% of OFF grantees report receiving non-monetary assistance vs. 59% of grantees at the typical funder.

These grantees rate **significantly more positively** on many survey measures, including OFF’s impact on their fields and organizations, and aspects of OFF’s understanding of their work contexts.
“Please rate the extent to which you agree with the following statements about the non-monetary support you received from the Foundation:”

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

- I felt the Foundation would be open to feedback about the non-monetary support it provided
  - Overdeck 2023: 6.10
  - Median Funder: 6.11

- The Foundation's non-monetary support was a worthwhile use of the time required of us
  - Overdeck 2023: 6.02
  - Median Funder: 6.15

- The support I received met an important need for my organization and/or program
  - Overdeck 2023: 5.98
  - Median Funder: 6.09

“...Please rate the extent to which you agree or disagree with the following statements about this capacity-building support”

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

- My organization had a genuine interest in receiving the specific capacity-building support(s) OFF provided
  - Overdeck 2023: 6.29

- My organization felt pressure to accept/participate in capacity-building support(s) that we would not have otherwise asked for from OFF
  - Overdeck 2023: 2.14
“The Foundation serve as a thought leader, convenor, connector, and accelerator of the work in our field.”

“The Foundation is very well-connected with educators, government officials and universities who are leaders in the field. The Foundation has served as a connector to expertise in a number of areas and has provided us with resources that helped inform direction for our organization....”

“How much impact did the Foundation’s efforts have on your ability to obtain additional funding from other sources?”

1 = No impact, 7 = Significant positive impact

<table>
<thead>
<tr>
<th>Year</th>
<th>Impact Score</th>
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</thead>
<tbody>
<tr>
<td>Overdeck 2023</td>
<td>4.64 *</td>
</tr>
<tr>
<td>Overdeck 2022</td>
<td>5.19</td>
</tr>
<tr>
<td>Overdeck 2021</td>
<td>4.99</td>
</tr>
</tbody>
</table>
“OFF program officers are consistently transparent, supportive, and all-around amazing partners in our work together.”

“Overall, how responsive was Foundation staff?”
1 = Not at all responsive, 7 = Extremely responsive

“How would you describe the amount of time and focus you receive from your primary Foundation contact?”

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would prefer to receive significantly less time and focus</td>
<td>1%</td>
</tr>
<tr>
<td>I would prefer to receive slightly less time and focus</td>
<td>0%</td>
</tr>
<tr>
<td>I receive the appropriate amount of time and focus</td>
<td>89%</td>
</tr>
<tr>
<td>I would prefer to receive slightly more time and focus</td>
<td>10%</td>
</tr>
<tr>
<td>I would prefer to receive significantly more time and focus</td>
<td>0%</td>
</tr>
</tbody>
</table>
“To what extent did the Foundation exhibit trust in your organization’s staff during this grant?”

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

“To what extent did the Foundation exhibit candor about the Foundation's perspectives on your work during this grant?”

1 = Not at all,
4 = Somewhat,
7 = To a great extent
“How much pressure did you feel to modify your organization’s priorities in order to create a grant proposal that was likely to receive funding?”

1 = No pressure,
7 = Significant pressure

“To what extent is the Foundation open to ideas from grantees about its strategy?”

1 = Not at all,
7 = To a great extent
“How clearly has the Foundation communicated its goals and strategy to you?”

1 = Not at all clearly, 7 = Extremely clearly

- Overdeck 2023: 5.86 (62nd)
- Custom Cohort: 5.85
- Overdeck 2022: 5.85
- Overdeck 2021: 5.68
- Overdeck 2019: 5.21
- Direct Impact: 6.05
- Ecosystem: 5.61

“It could be helpful to have a clearer idea of the long-term goals of the Foundation and what aspects of our programs help them meet those goals.”
“How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?”

1 = Limited understanding, 7 = Thorough understanding

<table>
<thead>
<tr>
<th>Distribution</th>
<th>0th (4.25)</th>
<th>25th (5.24)</th>
<th>50th (5.44)</th>
<th>75th (5.65)</th>
<th>100th (6.32)</th>
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<tbody>
<tr>
<td>Overdeck 2023</td>
<td>40th</td>
<td></td>
<td>5.35</td>
<td></td>
<td></td>
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<tr>
<td>Custom Cohort</td>
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<tr>
<td>Overdeck 2021</td>
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<td>5.51</td>
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<tr>
<td>Direct Impact</td>
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<td>5.60</td>
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<tr>
<td>Ecosystem</td>
<td>4.97</td>
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</tbody>
</table>
“To what extent was the Foundation’s reporting process straightforward?”
1 = Not at all,
7 = To a great extent

“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
“To what extent was the Foundation’s selection process a helpful opportunity to strengthen the efforts funded by the grant?”

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

Median hours spent by grantees on funder requirements over grant lifetime
“To what extent was the Foundation clear and transparent about the selection process requirements and timelines?”

\[ 1 = \text{Not at all, } 7 = \text{To a great extent} \]

<table>
<thead>
<tr>
<th></th>
<th>0th (5.37)</th>
<th>25th (6.11)</th>
<th>50th (6.24)</th>
<th>75th (6.46)</th>
<th>100th (6.83)</th>
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<tr>
<td>Overdeck 2023</td>
<td>6.13</td>
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<td></td>
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<tr>
<td></td>
<td>29th</td>
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<td>Before 2020</td>
<td>5.83</td>
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<tr>
<td>2020 &amp; 2021</td>
<td>6.10</td>
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<td></td>
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</tr>
<tr>
<td>2022 &amp; 2023</td>
<td>6.93</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

“OFF is a wonderful foundation. Their communications are outstanding and their staff is enthusiastic…. We are honestly proud to be one of their grantees. The only issue is… the proposal process. The proposal asks important questions that help us clarify our goals and our definitions of success; however, the application itself is one of the hardest we have ever worked on, with many repetitive components that ask for the same information over and over in different ways.”
Dollar Return:
Median grant dollars awarded per process hour required

- **Overdeck 2023**
  - 0th: $0.3K
  - 25th: $1.8K
  - 50th: $3.3K
  - 75th: $12.5K
  - 100th: $62.5K

- **Overdeck 2021**
  - 0th: $7.3K
  - 25th: $7.8K

- **Overdeck 2019**
  - 0th: $7.7K
  - 25th: $7.3K

*Custom Cohort*
Thank You.