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# GRANTEE PERCEPTION REPORT®

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PREPARED FOR

The David and Lucile Packard Foundation

October 2018



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EFFECTIVE PHILANTHROPY

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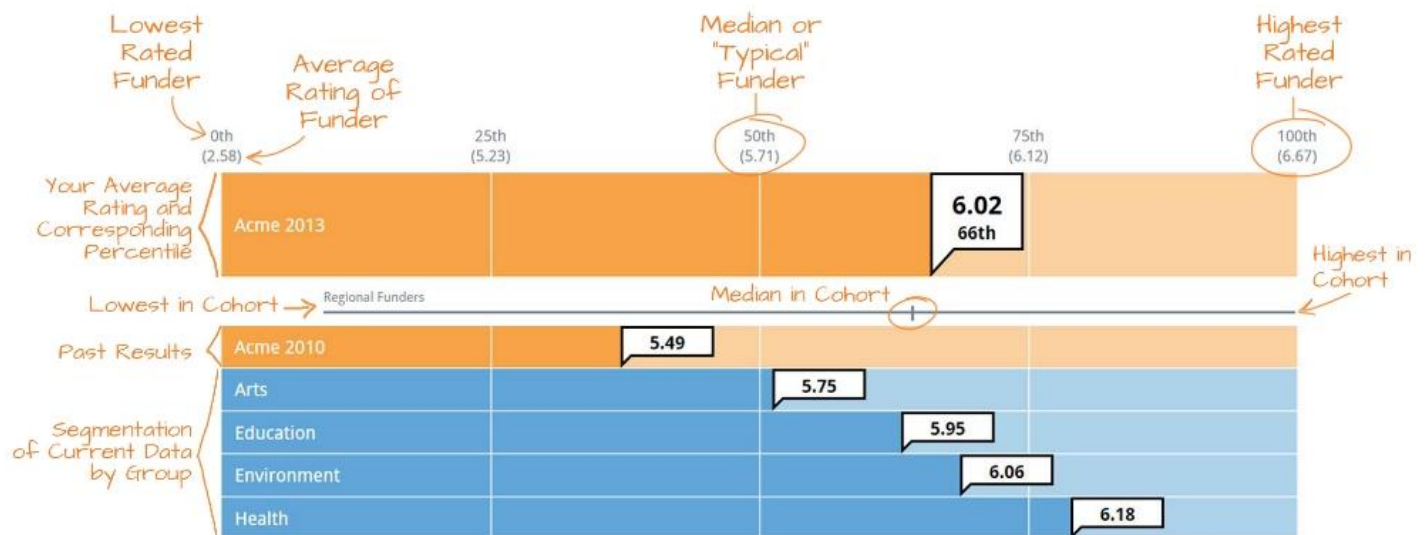
The online version of this report can be accessed at [cep.surveyresults.org](http://cep.surveyresults.org).

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## Interpreting Your Charts

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



Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

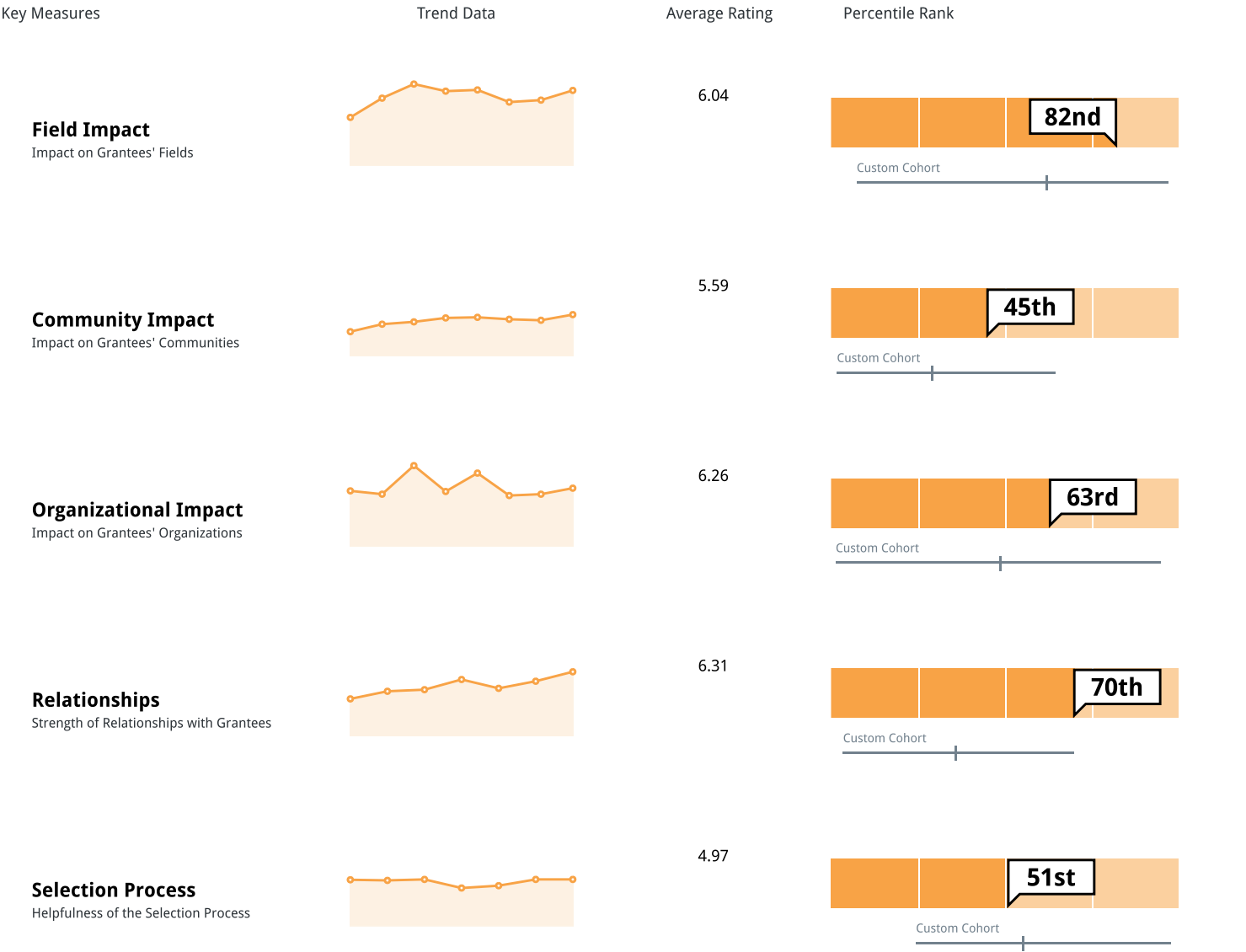
### STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.



# Key Ratings Summary

The following chart highlights a selection of your key results. Each of these data points corresponds to an individual survey measure that is displayed with additional detail in the subsequent pages of this report.



## Word Cloud

Grantees were asked, “At this point in time, what is one word that best describes the Foundation?” In the “word cloud” below, the size of each word indicates the frequency with which it was written by grantees. The color of each word is stylistic and not indicative of its frequency. 60 grantees described Packard as “supportive,” the most commonly used word.



This image was produced using a free tool available at [www.tagxedo.com](http://www.tagxedo.com). Copyright (c) 2006, ComponentAce. <http://www.componentace.com>.

## Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Packard 2018	May and June 2018	1082	629	58%
Packard 2016	May and June 2016	954	608	64%
Packard 2014	May and June 2014	1069	602	56%
Packard 2012	September and October 2012	627	428	68%
Packard 2010	September and October 2010	653	435	67%
Packard 2008	September and October 2008	508	343	68%
Packard 2006	September and October 2006	689	420	61%
Packard 2004	February and March 2004	488	331	68%

Survey Year	Year of Active Grants
Packard 2018	2017
Packard 2016	2015
Packard 2014	2013
Packard 2012	2011
Packard 2010	2009
Packard 2008	2007
Packard 2006	2005
Packard 2004	2003

Throughout this report, The David and Lucile Packard Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 250 funders. The full list of participating funders can be found at <http://cep.org/assessments/grantee-and-applicant-perception-reports/>.

In order to protect the confidentiality of respondents results are not shown when CEP received fewer than five responses to a specific question.

# Comparative Cohorts

## Customized Cohort

Packard selected a set of 23 funders to create a smaller comparison group that more closely resembles Packard in scale and scope.

Custom Cohort
Andrew W. Mellon Foundation
Barr Foundation
Bill & Melinda Gates Foundation
Carnegie Corporation of New York
Conrad N. Hilton Foundation
Ford Foundation
Gordon and Betty Moore Foundation
John D. and Catherine T. MacArthur Foundation
John S. and James L. Knight Foundation
Margaret A. Cargill Foundation
Oak Foundation
Robert Wood Johnson Foundation
The California Endowment
The Children's Investment Fund Foundation
The David and Lucile Packard Foundation
The James Irvine Foundation
The Kresge Foundation
The McKnight Foundation
The Rockefeller Foundation
The Wallace Foundation
The William and Flora Hewlett Foundation
W.K. Kellogg Foundation
Walton Family Foundation

## Standard Cohorts

CEP also included 16 standard cohorts to allow for comparisons to a variety of different types of funders.

## Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	36	Funders with median grant size of \$20K or less
Large Grant Providers	72	Funders with median grant size of \$200K or more
High Touch Funders	32	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	28	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	62	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	60	Funders that make at most 10% of grants by invitation only
International Funders	38	Funders that fund outside of their own country

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	55	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	53	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	140	All private foundations in the GPR dataset
Family Foundations	62	All family foundations in the GPR dataset
Community Foundations	37	All community foundations in the GPR dataset
Health Conversion Foundations	30	All health conversation foundations in the GPR dataset
Corporate Foundations	20	All corporate foundations in the GPR dataset

Other Cohorts

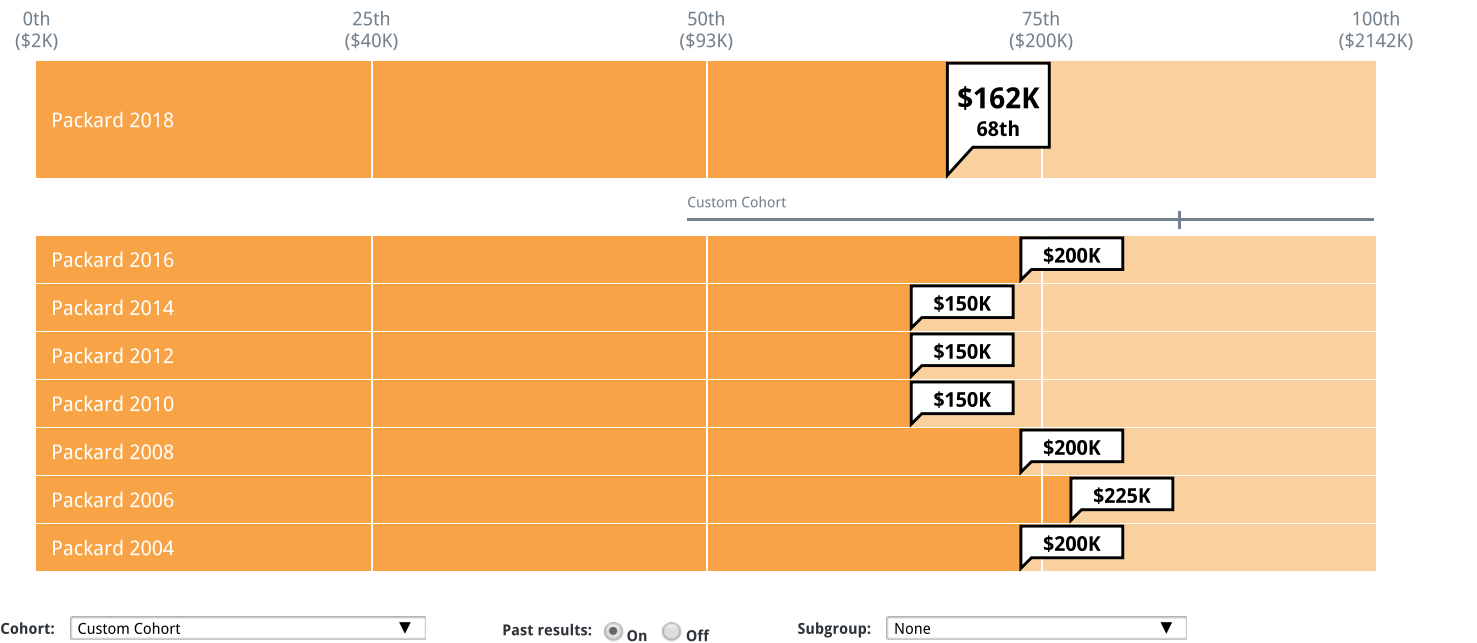
Cohort Name	Count	Description
Funders Outside the United States	22	Funders that are primarily based outside the United States
Recently Established Foundations	60	Funders that were established in 2000 or later



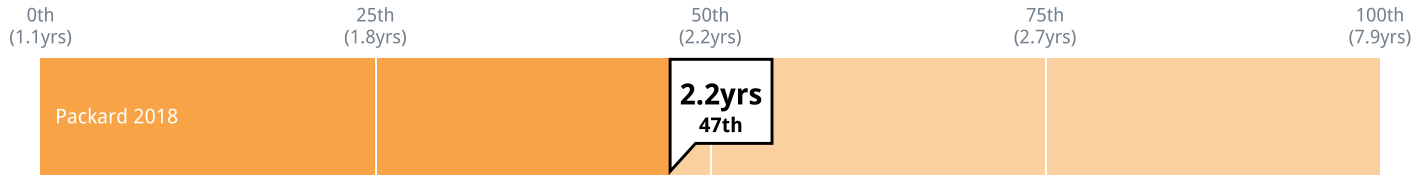
# Grantmaking Characteristics

Foundations make different choices about the ways they organize themselves, structure their grants, and the types of grantees they support. The following charts and tables show some of these important characteristics. The information is based on self-reported data from funders and grantees, and further detail is available in the Contextual Data section of this report.

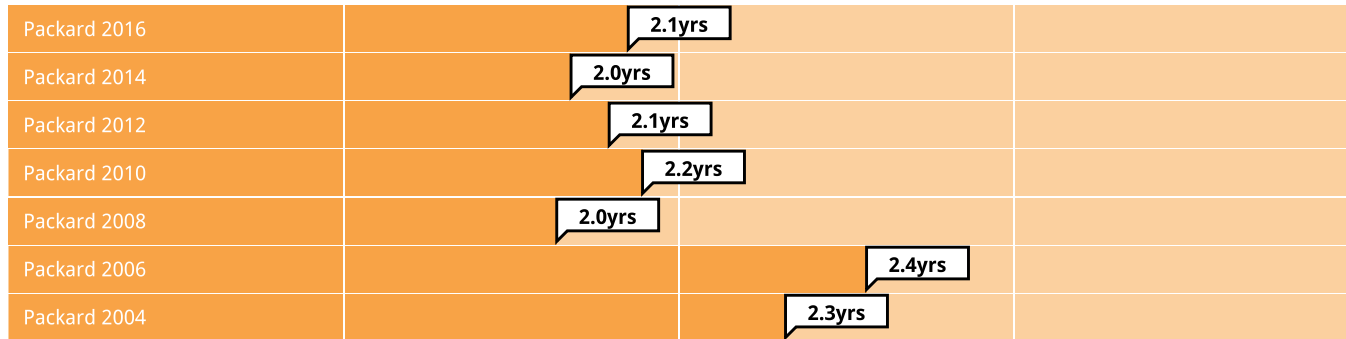
## Median Grant Size



## Average Grant Length



Custom Cohort



Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

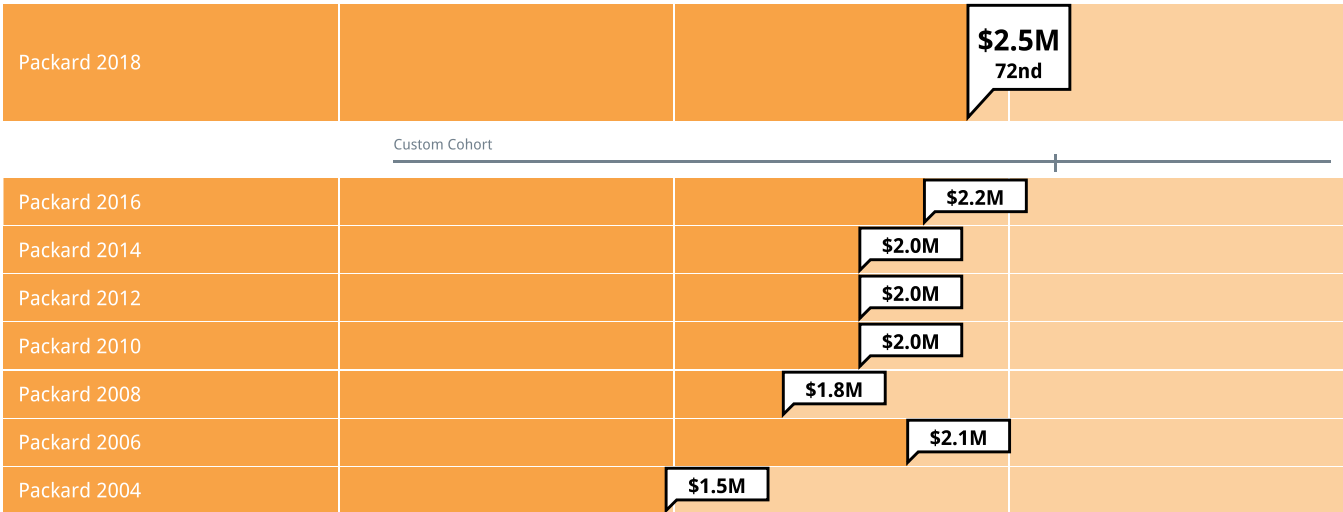
Subgroup: None ▼

Length of Grant Awarded	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
1 year	37%	37%	39%	39%	47%	43%	35%	36%	44%	23%
2 years	48%	46%	42%	38%	33%	33%	30%	28%	25%	35%
3 years	8%	10%	10%	14%	13%	16%	19%	24%	19%	27%
4 years	2%	0%	3%	2%	2%	4%	3%	5%	4%	6%
5 or more years	5%	7%	6%	6%	4%	4%	13%	8%	8%	9%

**Behind the numbers:** Grantees who receive grants that are two years or longer provide significantly more positive ratings on the majority of measures throughout the report, including all measures of impact, Packard's overall understanding of grantees, and the overall quality of their relationship with the Foundation.

Median Organizational Budget

0th (\$0.0M)                      25th (\$0.9M)                      50th (\$1.5M)                      75th (\$2.7M)                      100th (\$30.0M)



Cohort: Custom Cohort      Past results: ☒ On ☐ Off      Subgroup: None

Type of Support	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Average Funder	Custom Cohort
Percent of grantees receiving general operating/core support	28%	24%	25%	25%	21%	20%	14%	22%	18%
Percent of grantees receiving program/project support	67%	66%	65%	65%	74%	71%	77%	65%	73%
Percent of grantees receiving other types of support	5%	10%	10%	10%	5%	9%	9%	14%	10%

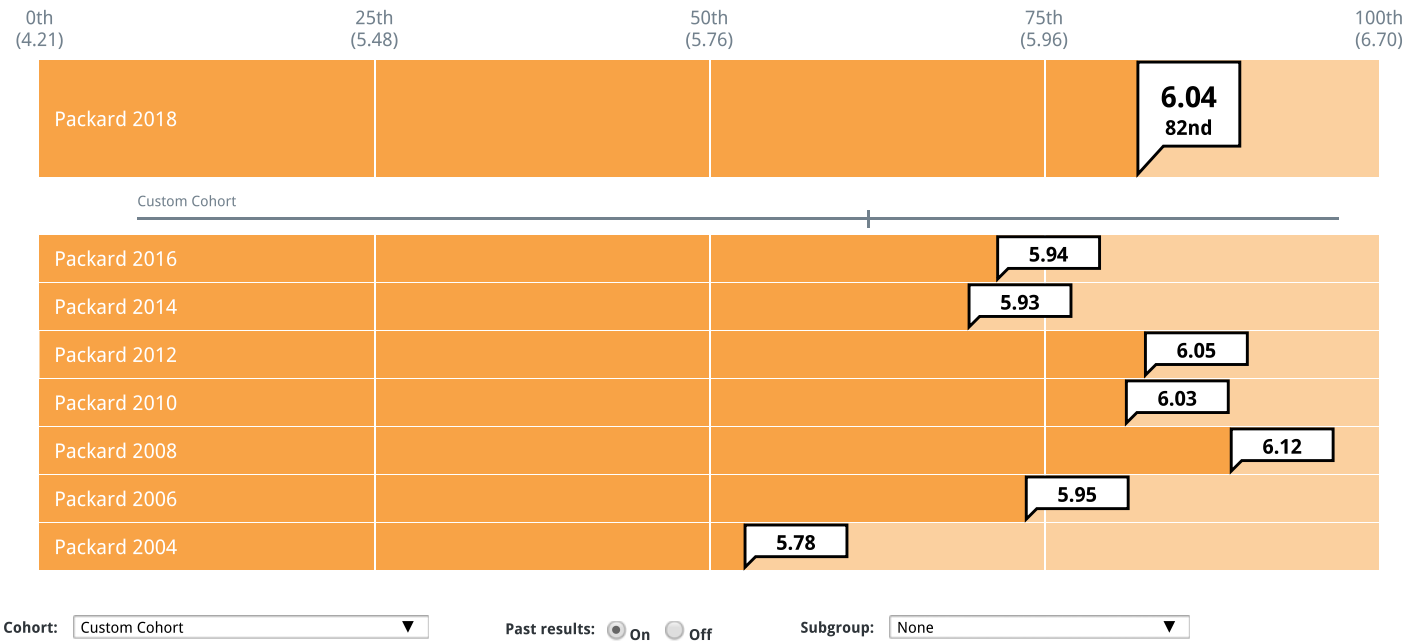
Grant History	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Average Funder	Custom Cohort
Percentage of first-time grants	19%	14%	13%	13%	20%	29%	35%

Program Staff Load	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	\$5.9M	\$6.5M	\$6.3M	\$6.8M	\$6.9M	\$7.7M	\$3.7M	\$5.7M	\$2.7M	\$4.8M
Applications per program full-time employee	16	18	20	18	N/A	20	15	14	29	14
Active grants per program full-time employee	24	31	22	25	28	29	23	24	33	25

Impact on and Understanding of Grantees' Fields

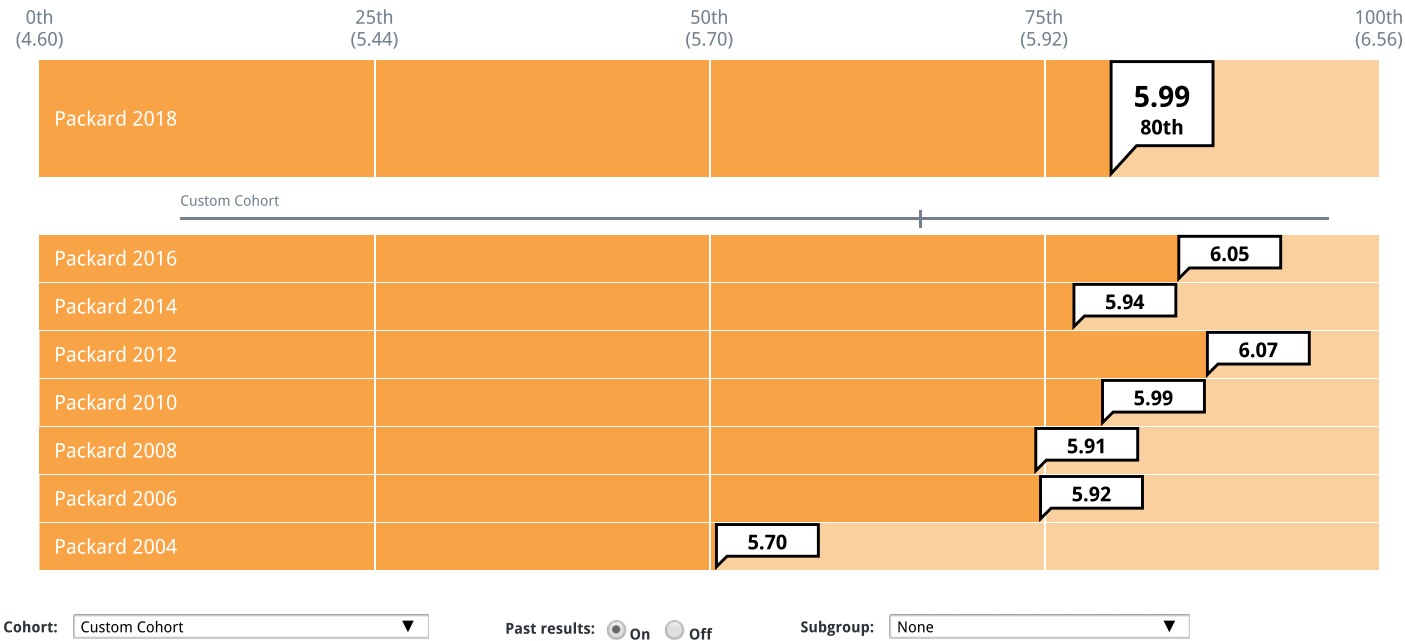
Overall, how would you rate Packard's impact on your field?

1 = No impact    7 = Significant positive impact



How well does Packard understand the field in which you work?

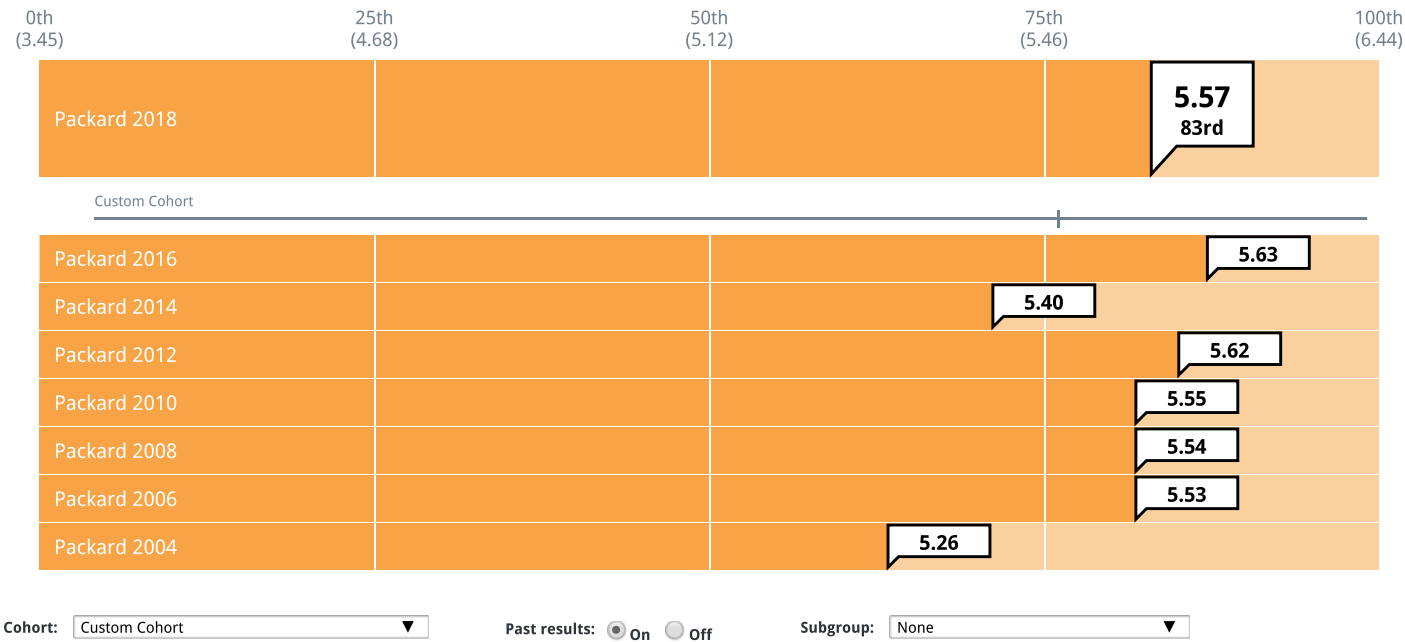
1 = Limited understanding of the field    7 = Regarded as an expert in the field



Advancing Knowledge and Public Policy

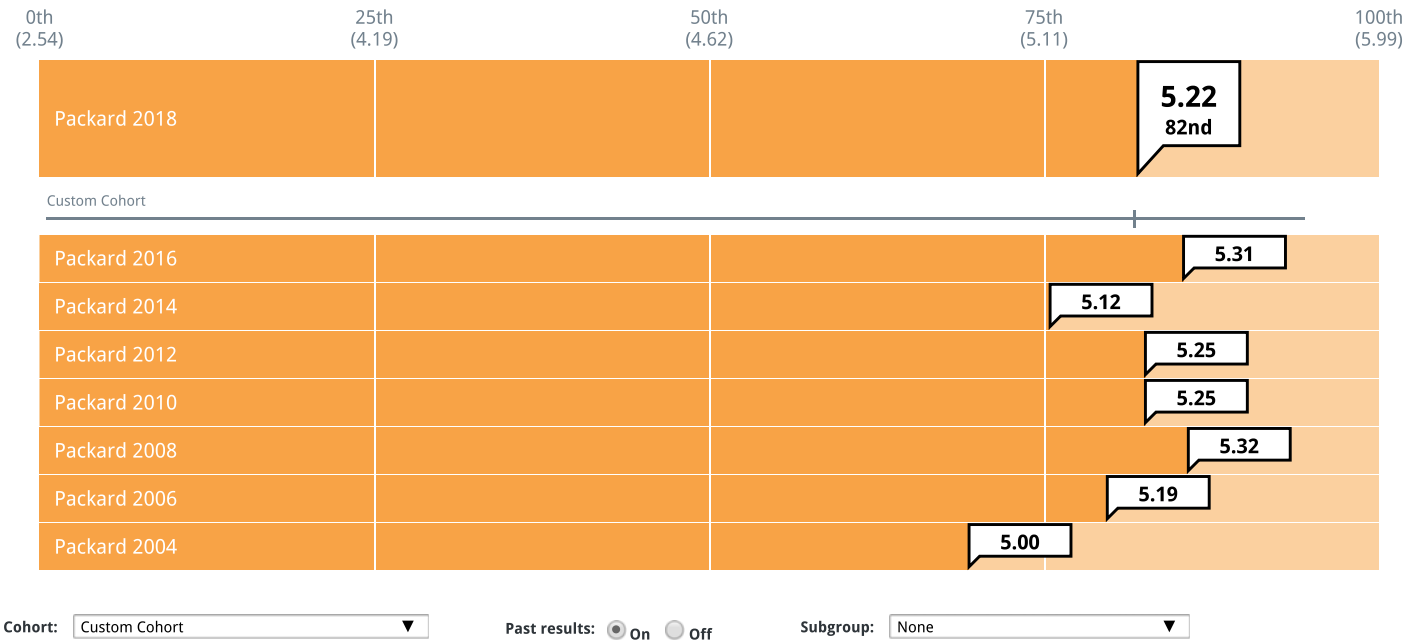
To what extent has Packard advanced the state of knowledge in your field?

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



To what extent has Packard affected public policy in your field?

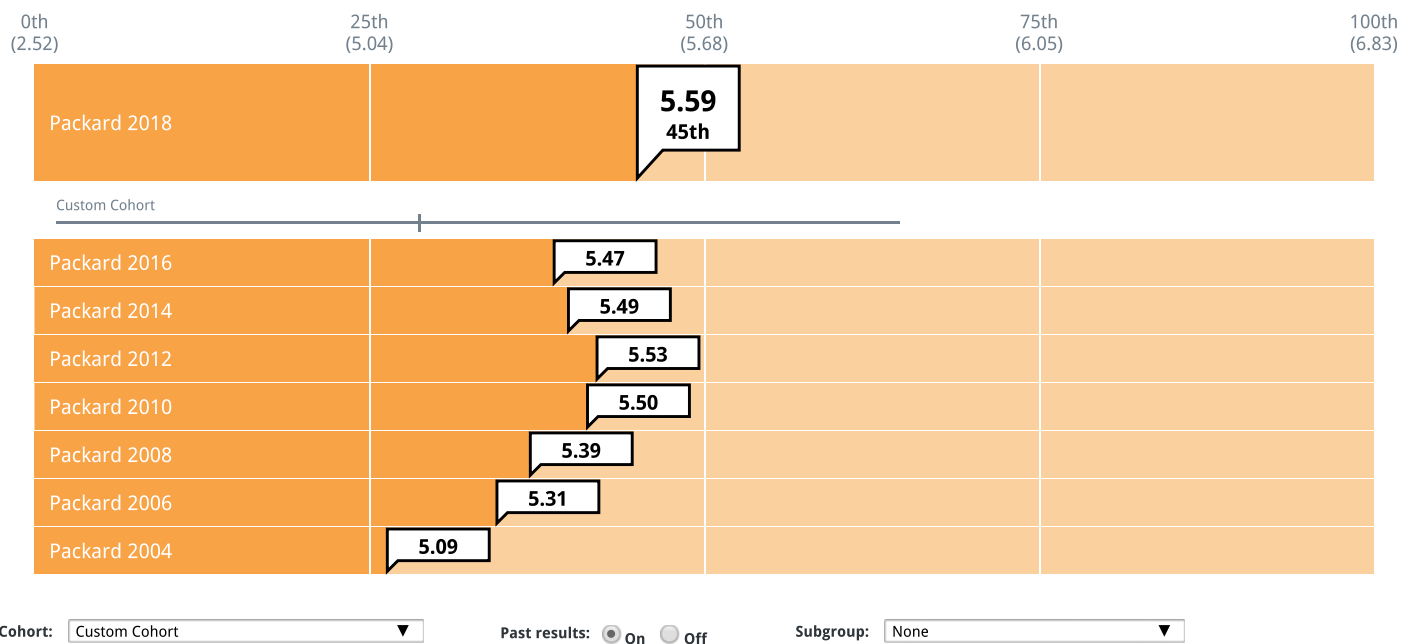
1 = Not at all    7 = Major influence on shaping public policy



## Impact on and Understanding of Grantees' Local Communities

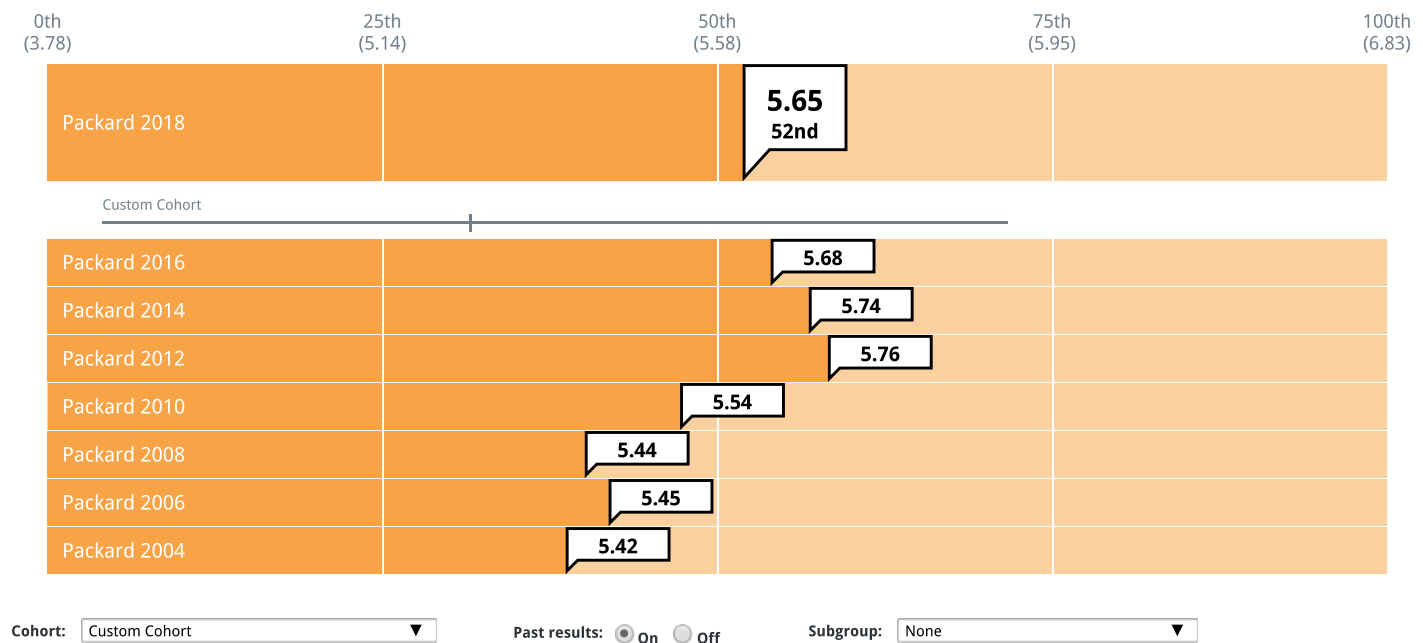
Overall, how would you rate Packard's impact on your local community?

1 = No impact    7 = Significant positive impact



How well does Packard understand the local community in which you work?

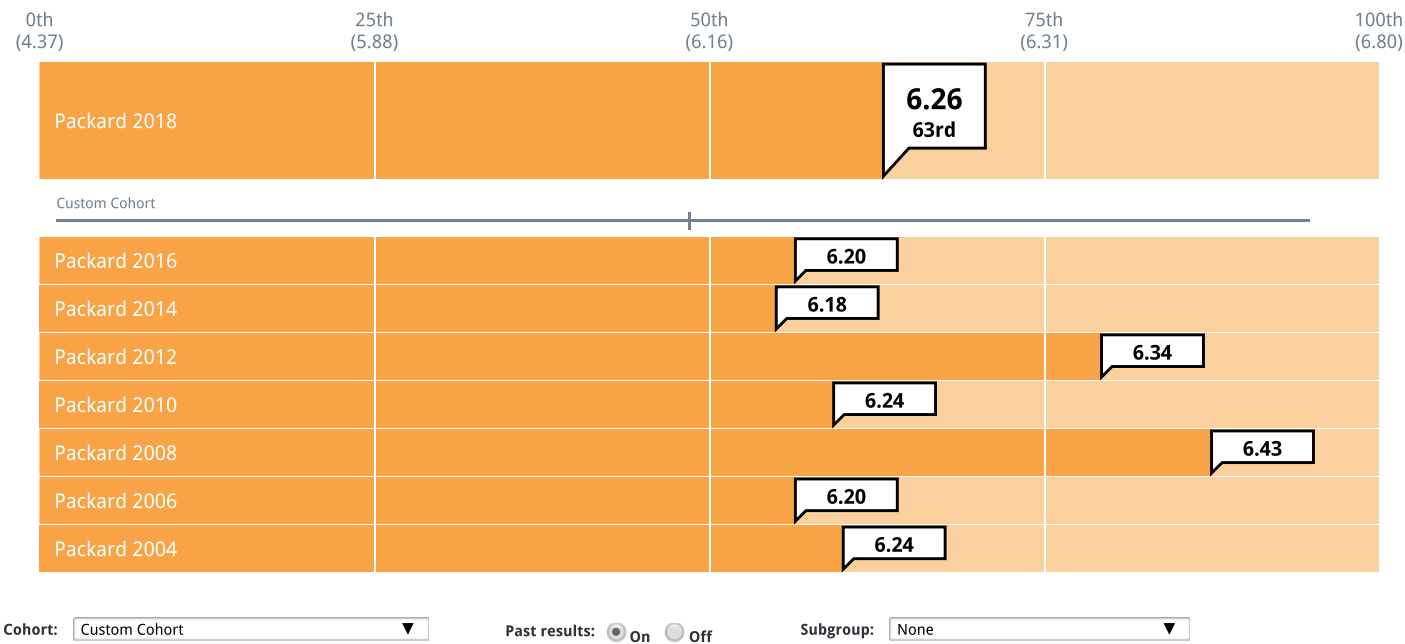
1 = Limited understanding of the community    7 = Regarded as an expert on the community



Impact on and Understanding of Grantees' Organizations

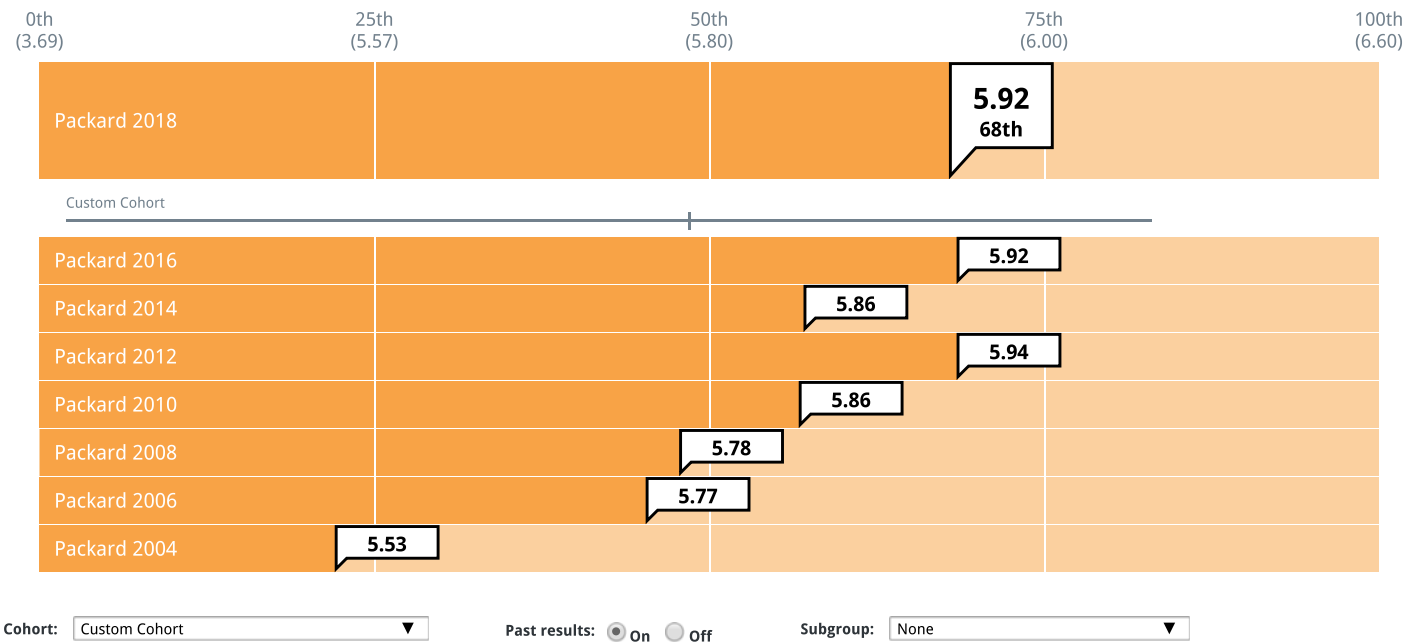
Overall, how would you rate Packard's impact on your organization?

1 = No impact    7 = Significant positive impact



How well does Packard understand your organization's strategy and goals?

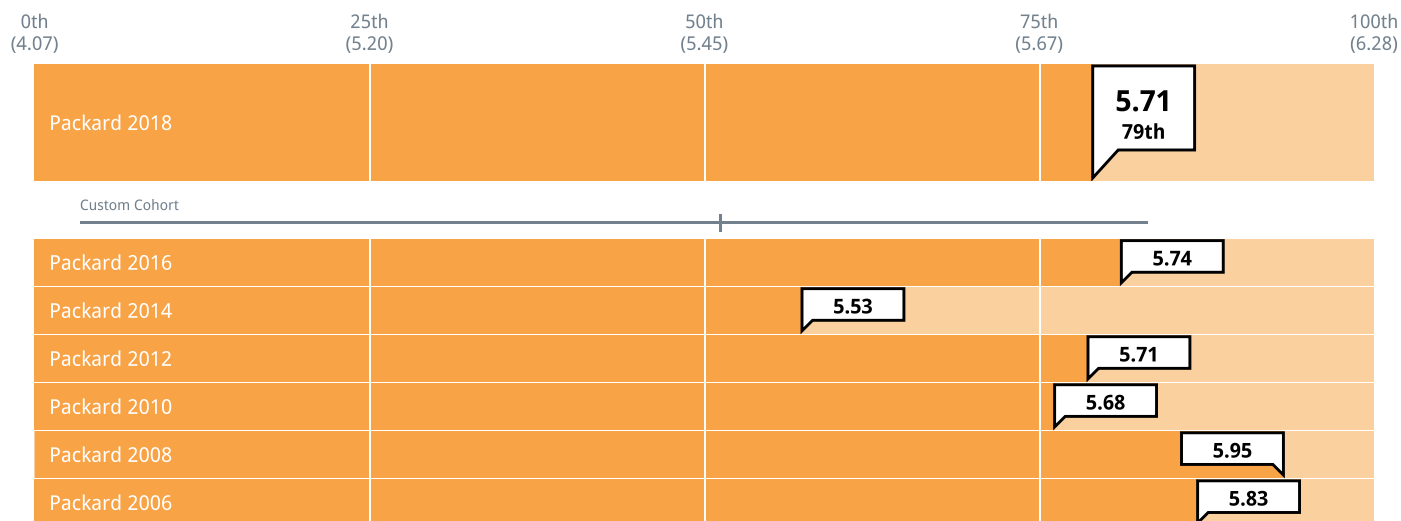
1 = Limited understanding    7 = Thorough understanding





## How much, if at all, did Packard improve your ability to sustain the work funded by this grant in the future?

1 = Did not improve ability    7 = Substantially improved ability



Cohort: Custom Cohort ▼

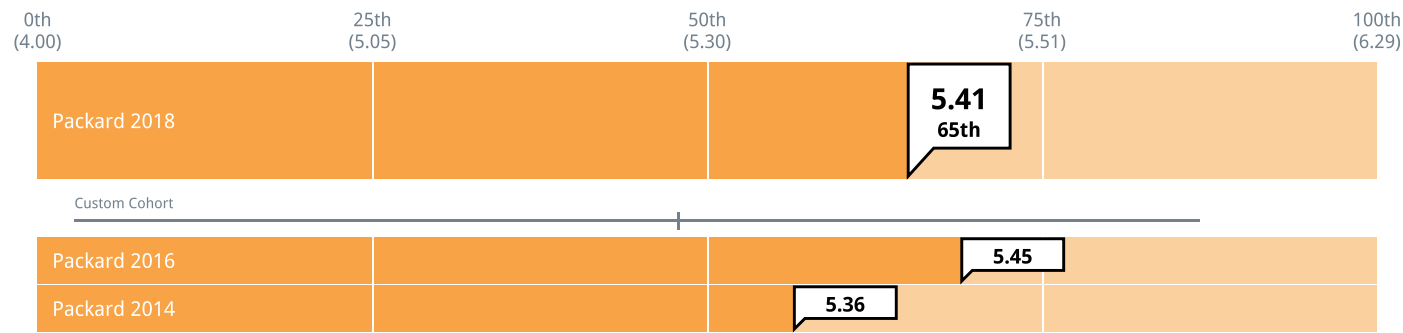
Past results: ☒ On ☐ Off

Subgroup: None ▼

# Grantee Challenges

How aware is Packard of the challenges that your organization is facing?

1 = Not at all aware    7 = Extremely aware



Cohort: Custom Cohort    Past results: ☒ On ☐ Off    Subgroup: None

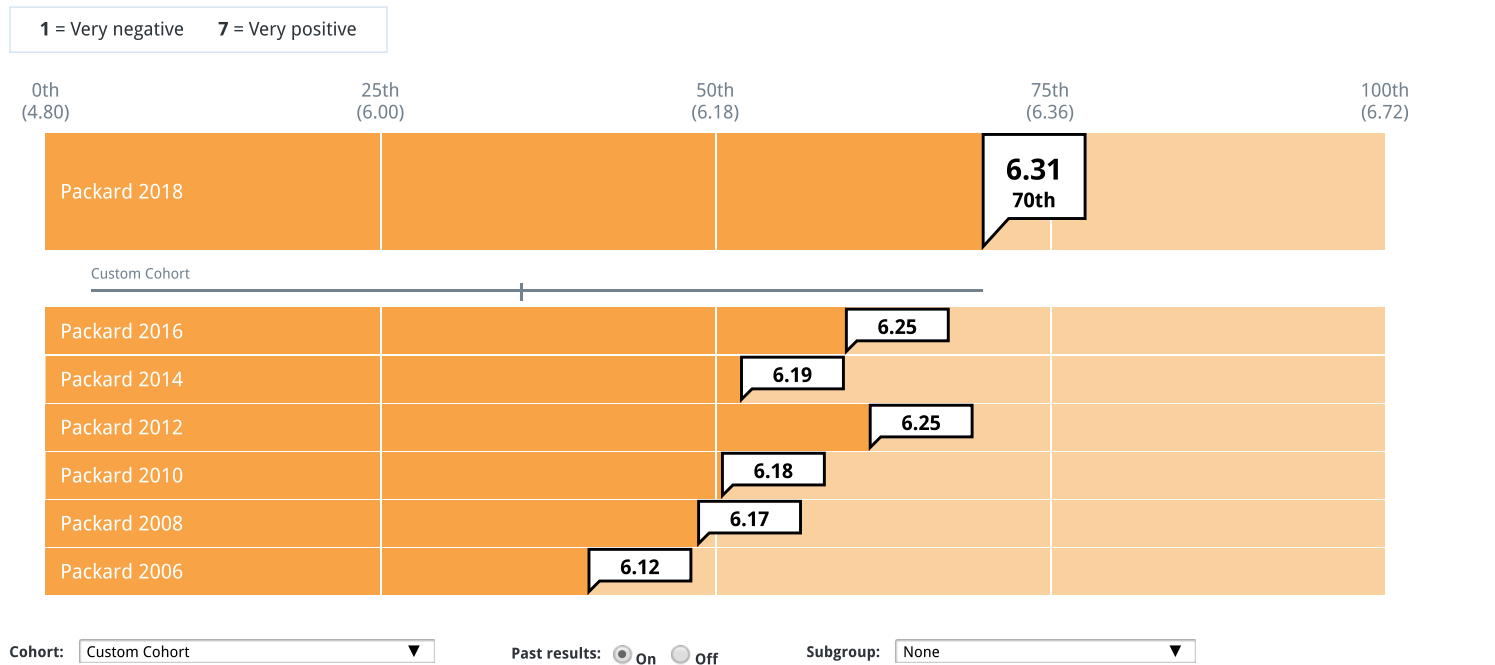
# Funder-Grantee Relationships

## Funder-Grantee Relationships Summary Measure

The quality of interactions and the clarity and consistency of communications together create the larger construct that CEP refers to as “relationships.” The relationships measure below is an average of grantee ratings on the following measures:

- 1. Fairness of treatment by Packard
- 2. Comfort approaching Packard if a problem arises
- 3. Responsiveness of Packard staff
- 4. Clarity of communication of Packard’s goals and strategy
- 5. Consistency of information provided by different communications

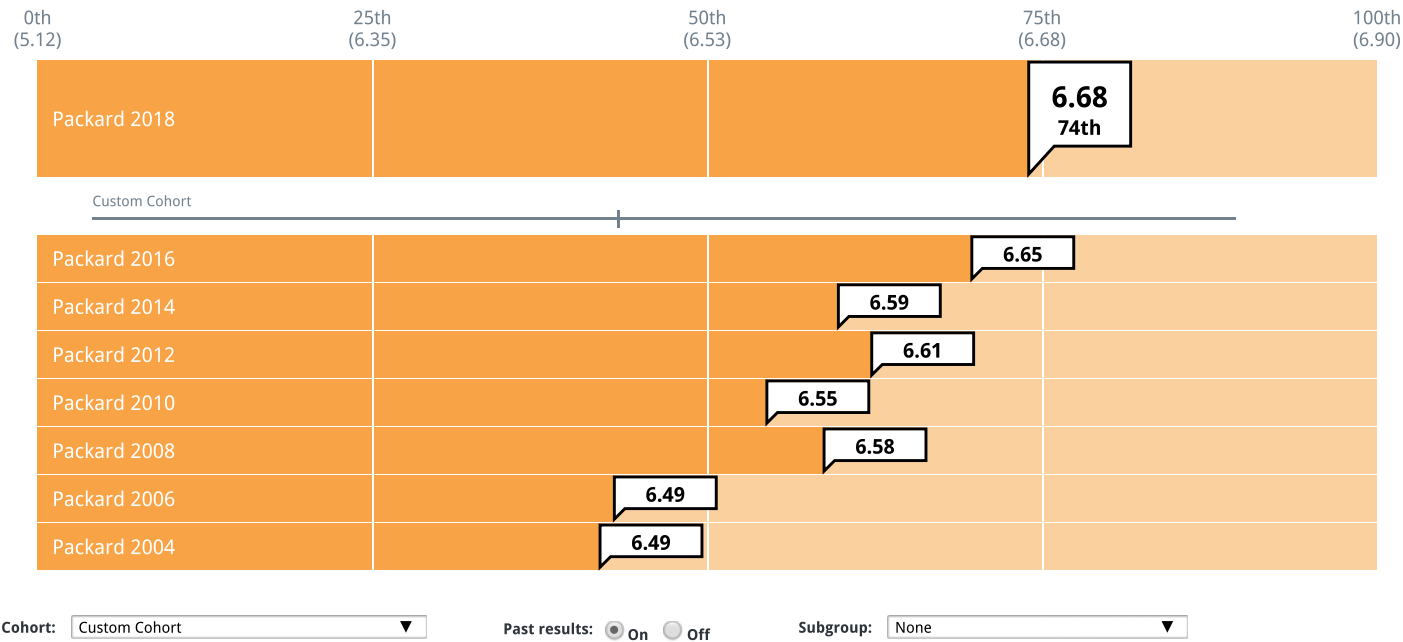
## Funder-Grantee Relationships Summary Measure



Quality of Interactions

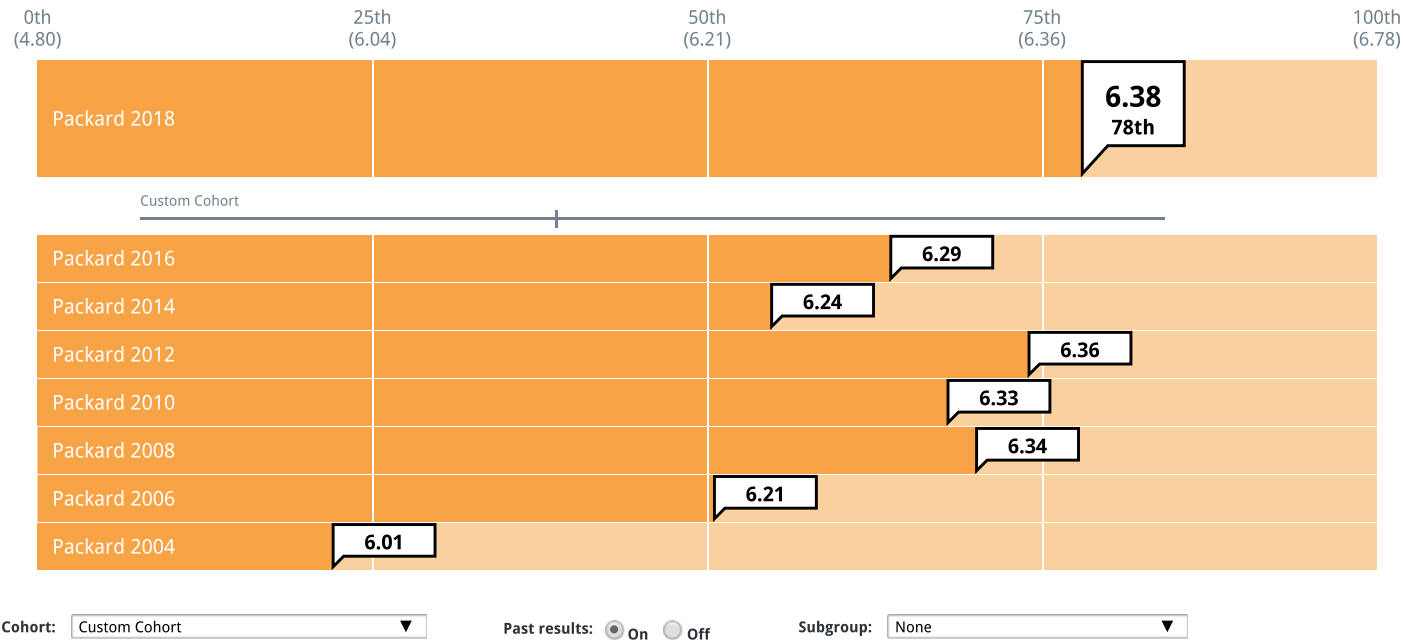
Overall, how fairly did Packard treat you?

1 = Not at all fairly    7 = Extremely fairly



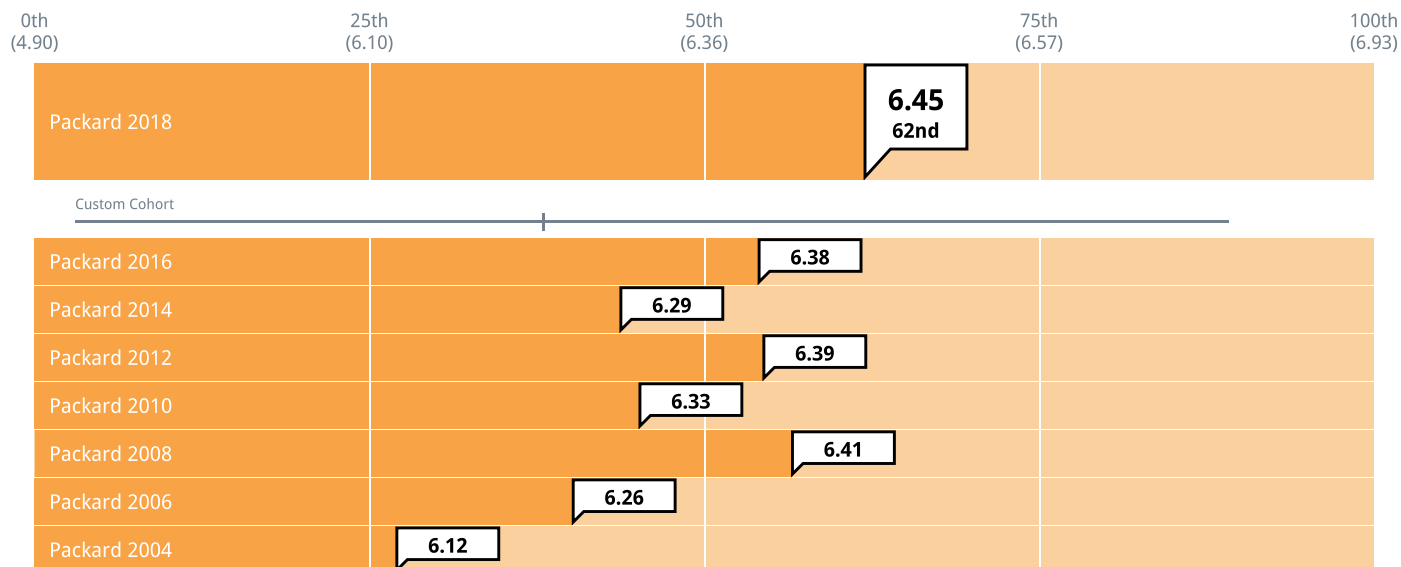
How comfortable do you feel approaching Packard if a problem arises?

1 = Not at all comfortable    7 = Extremely comfortable



## Overall, how responsive was Foundation staff?

1 = Not at all responsive    7 = Extremely responsive



Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

## Interaction Patterns

### "How often do/did you have contact with your program officer during this grant?"

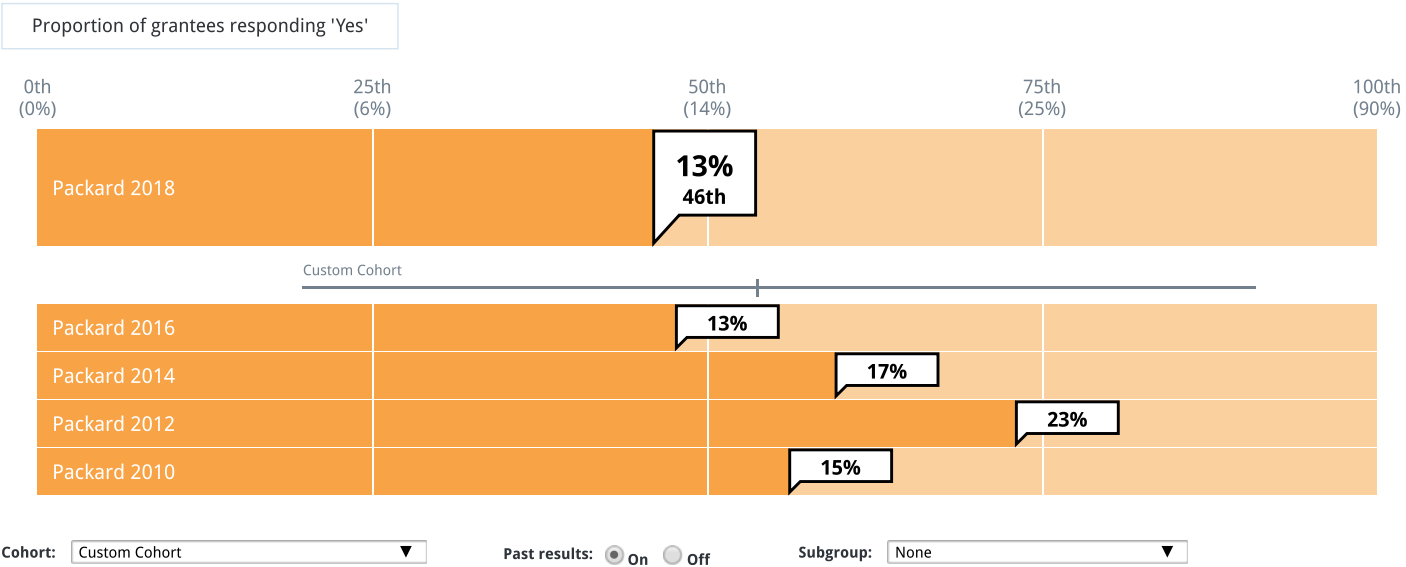
Frequency of Contact with Program Officer	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
Weekly or more often	1%	1%	1%	1%	3%	4%	1%	2%	3%	2%
A few times a month	8%	10%	12%	9%	13%	13%	9%	4%	11%	13%
Monthly	13%	14%	15%	16%	14%	16%	18%	15%	15%	19%
Once every few months	64%	64%	57%	60%	55%	56%	58%	57%	53%	53%
Yearly or less often	15%	11%	15%	13%	14%	12%	13%	22%	18%	12%

### "Who most frequently initiated the contact you had with your program officer?"

Initiation of Contact with Program Officer	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Average Funder	Custom Cohort
Program Officer	12%	13%	12%	11%	12%	11%	10%	15%	12%
Both of equal frequency	54%	51%	50%	54%	57%	55%	54%	50%	51%
Grantee	34%	36%	37%	35%	31%	34%	36%	35%	37%

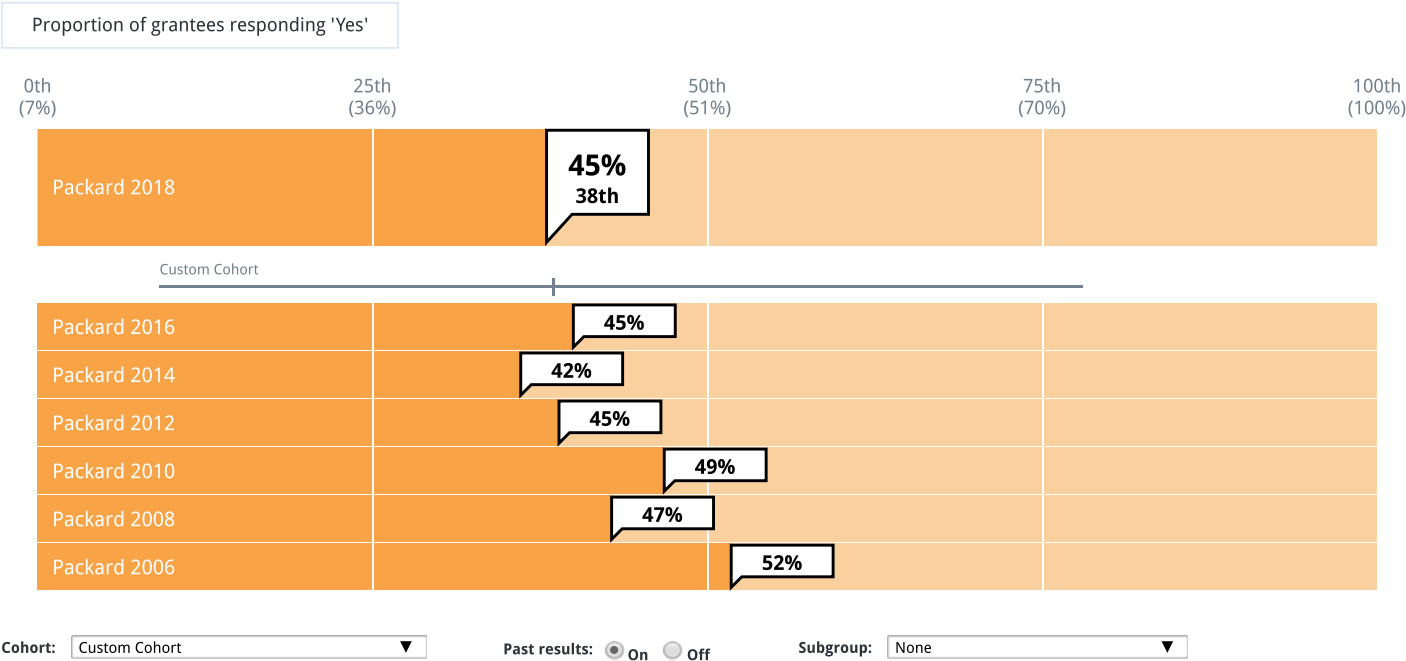
# Contact Change and Site Visits

## Has your main contact at Packard changed in the past six months?



**Behind the numbers:** Grantees who report experiencing a change in primary contact in the past six months rate the Foundation significantly less positively on all survey measures of understanding.

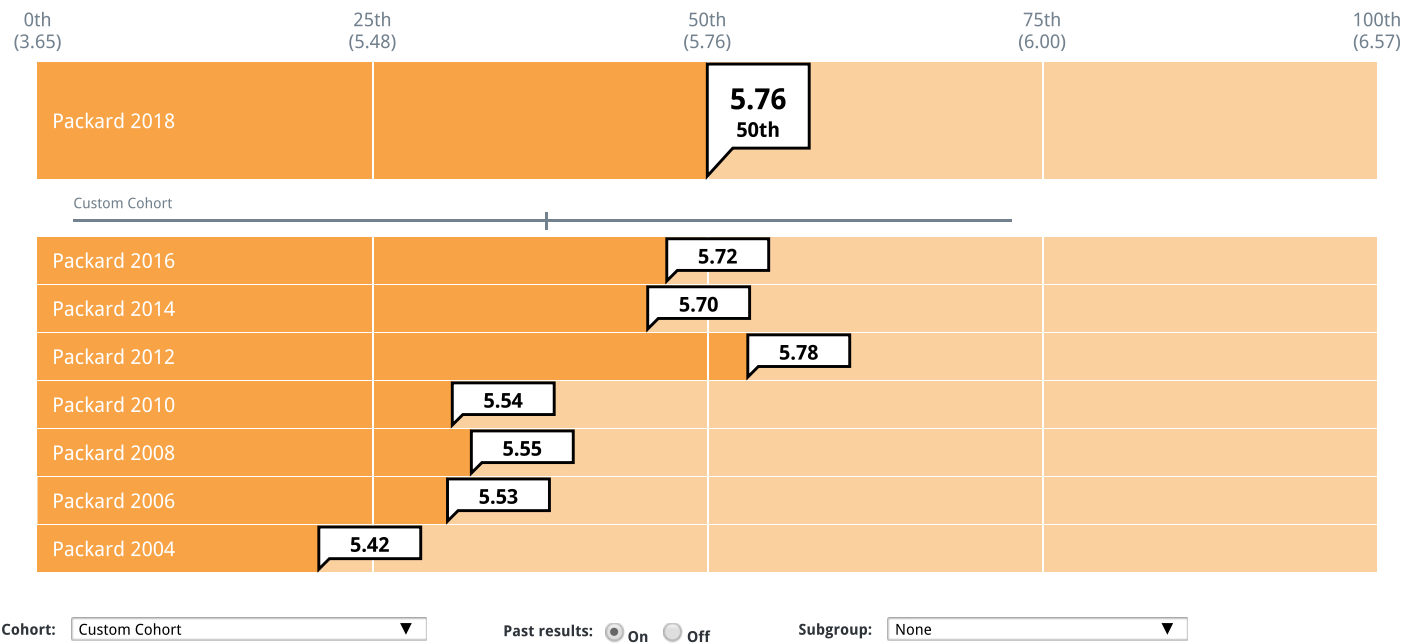
## Did Packard conduct a site visit during the course of this grant?



Foundation Communication

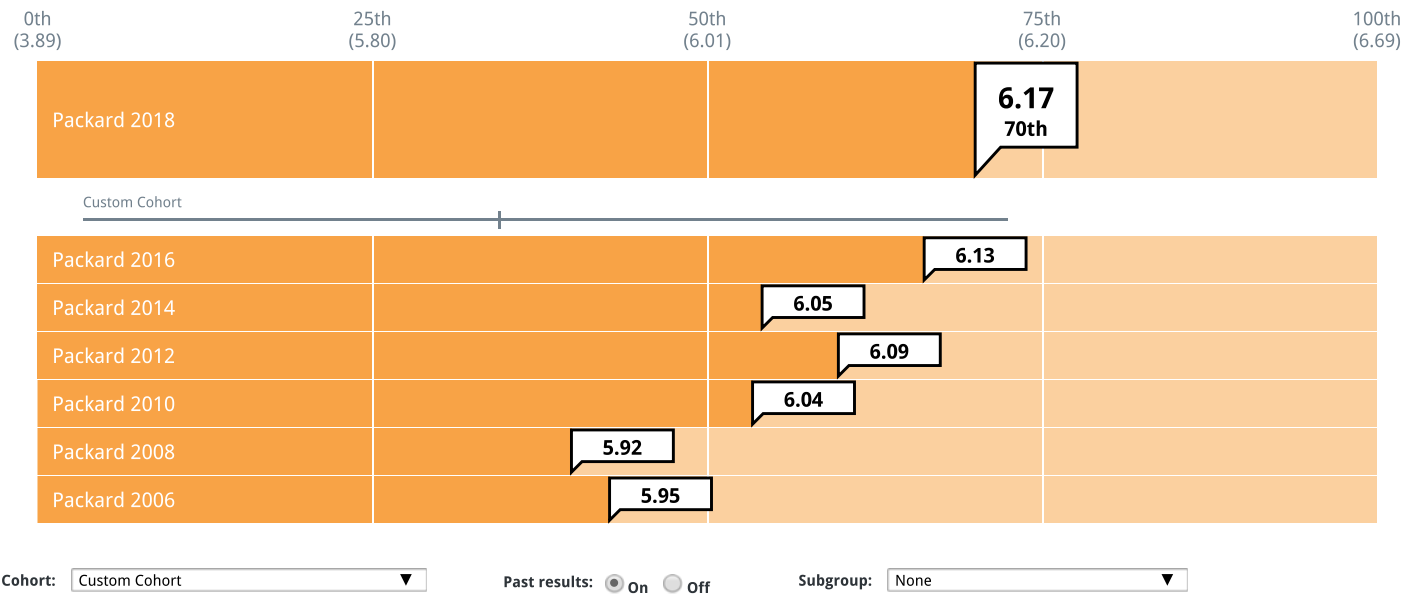
How clearly has Packard communicated its goals and strategy to you?

1 = Not at all clearly    7 = Extremely clearly



How consistent was the information provided by different communication resources, both personal and written, that you used to learn about Packard?

1 = Not at all consistent    7 = Completely consistent



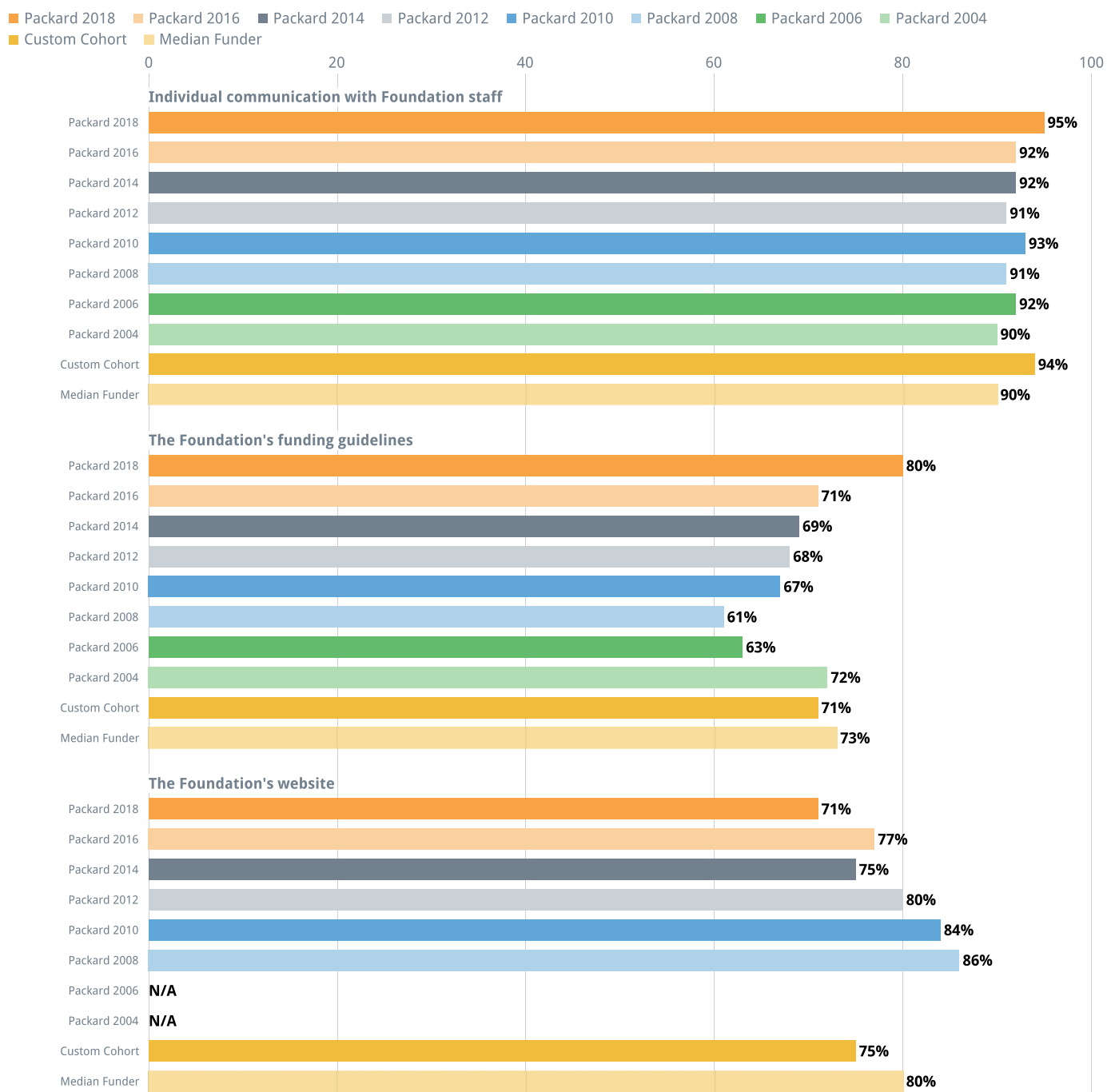


## Communication Resources

Grantees were asked whether they used each of the following communications resources from Packard and how helpful they found each resource. This chart shows the proportion of grantees who have used each resource.

**"Please indicate whether you used any of the following resources, and if so how helpful you found each."**

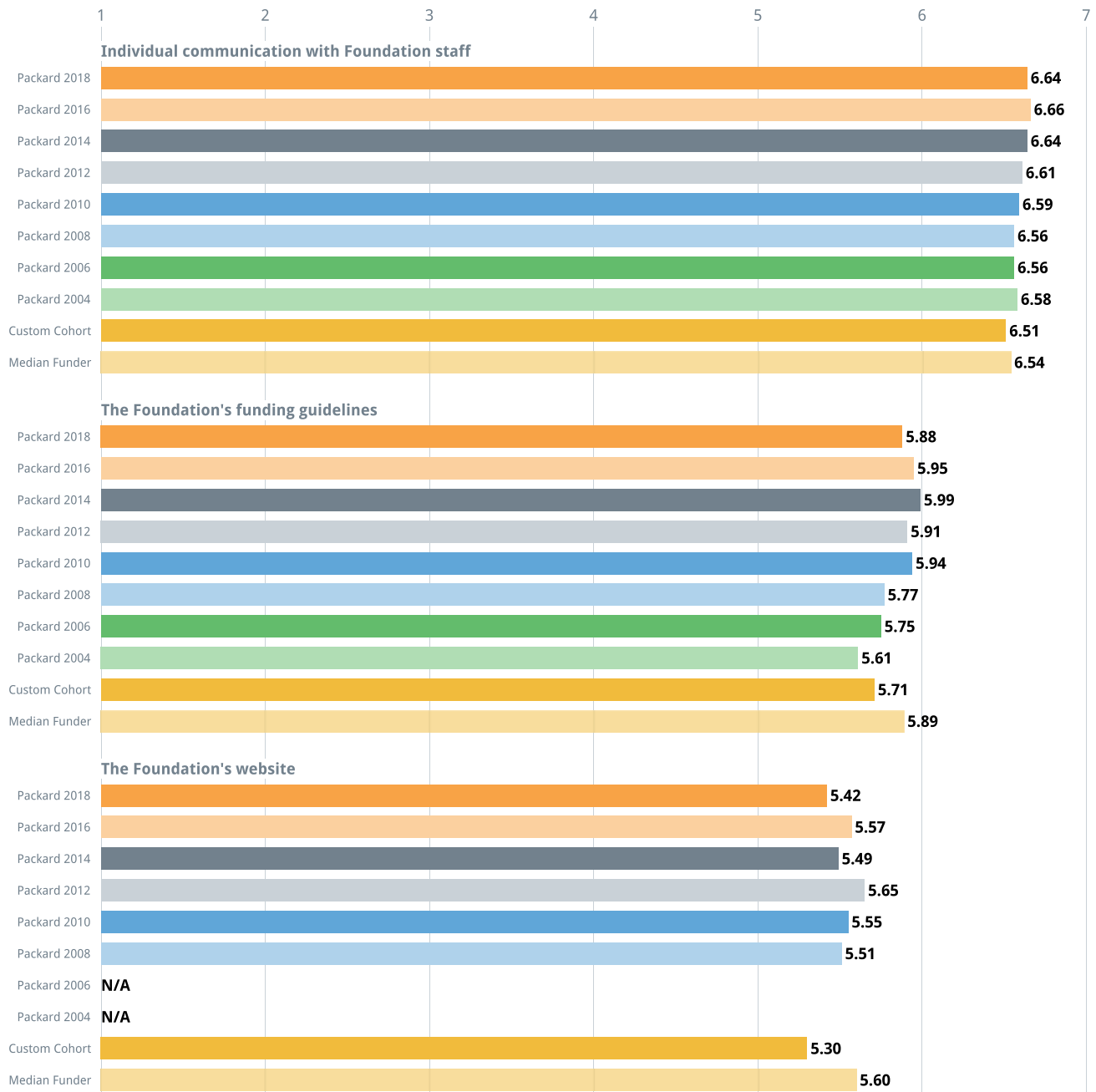
### Usage of Communication Resources



## Helpfulness of Communication Resources

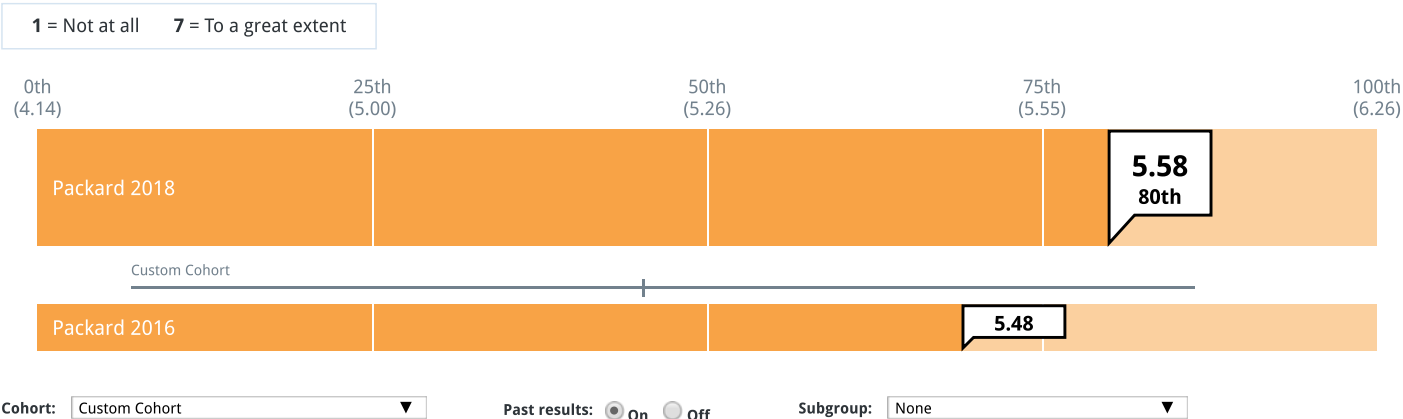
1 = Not at all helpful    7 = Extremely helpful

Packard 2018   Packard 2016   Packard 2014   Packard 2012   Packard 2010   Packard 2008   Packard 2006   Packard 2004  
 Custom Cohort   Median Funder



Openness

To what extent is Packard open to ideas from grantees about its strategy?



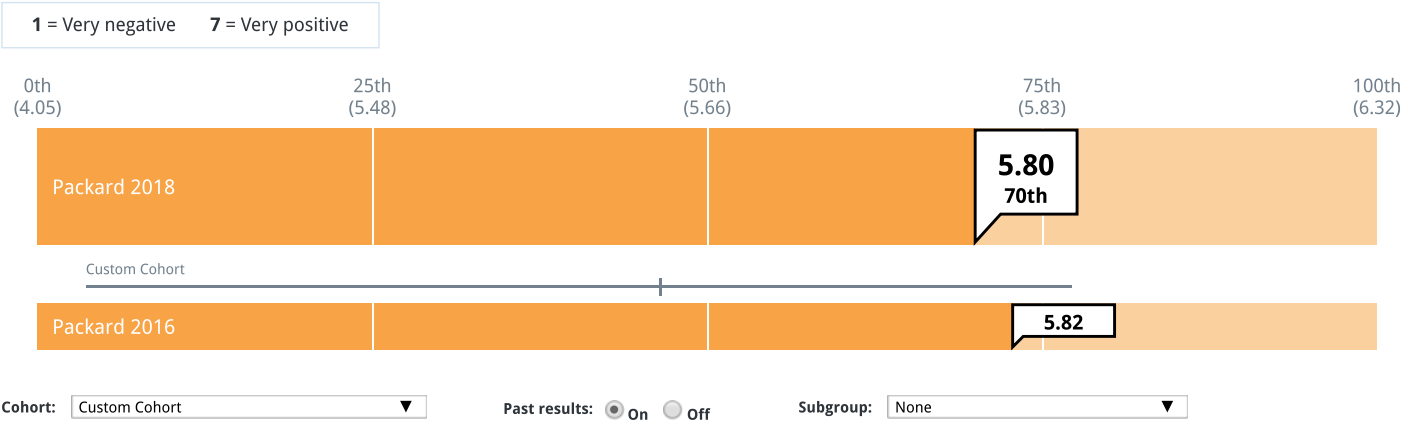
# Top Predictors of Relationships

CEP's research has shown that strongest predictors of the strength of funder-grantee relationships are transparency and understanding.

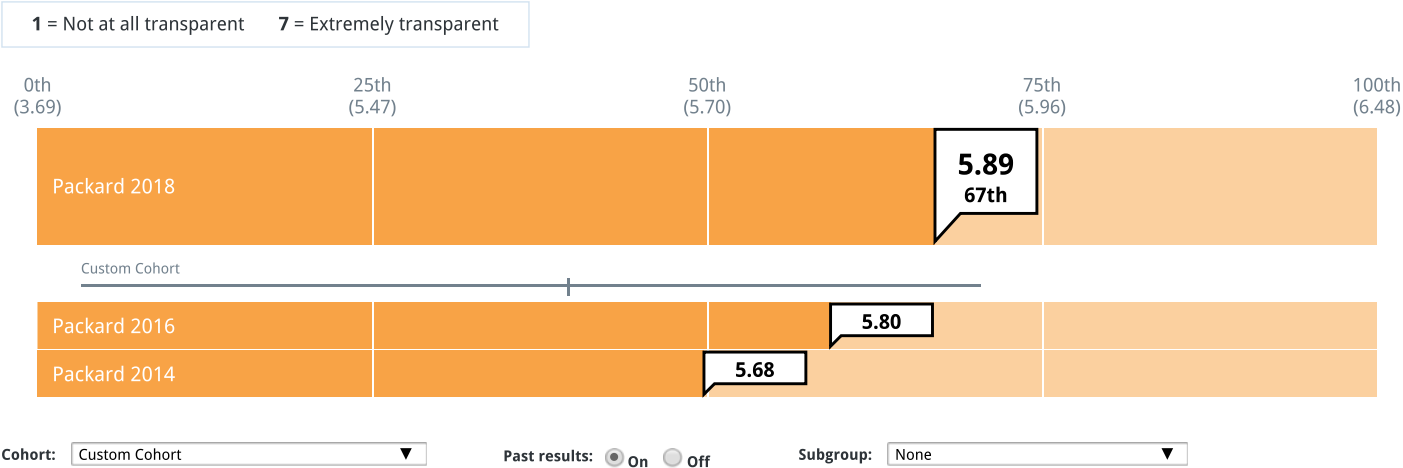
Seven related measures of understanding, together create the larger construct that CEP refers to as "understanding". The understanding measure below is an average of partner ratings on the following measures:

- Packard's understanding of partner organizations' **strategy and goals**
- Packard's awareness of partner **organizations' challenges**
- Packard's understanding of the **fields** in which partners work
- Packard's understanding of partners' **local communities**
- Packard's understanding of the **social, cultural, or socioeconomic factors** that affect partners' work
- Packard's understanding of intended **beneficiaries' needs**
- Extent to which Packard's **funding priorities** reflect a deep understanding of partners' intended beneficiaries' needs

## Understanding Measure



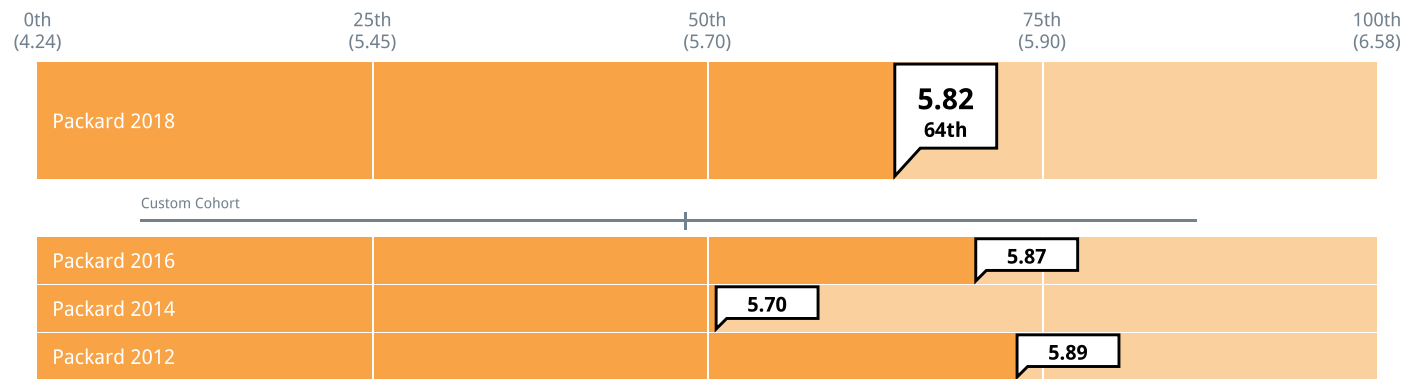
## Overall, how transparent is Packard with your organization?



# Beneficiary and Contextual Understanding

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

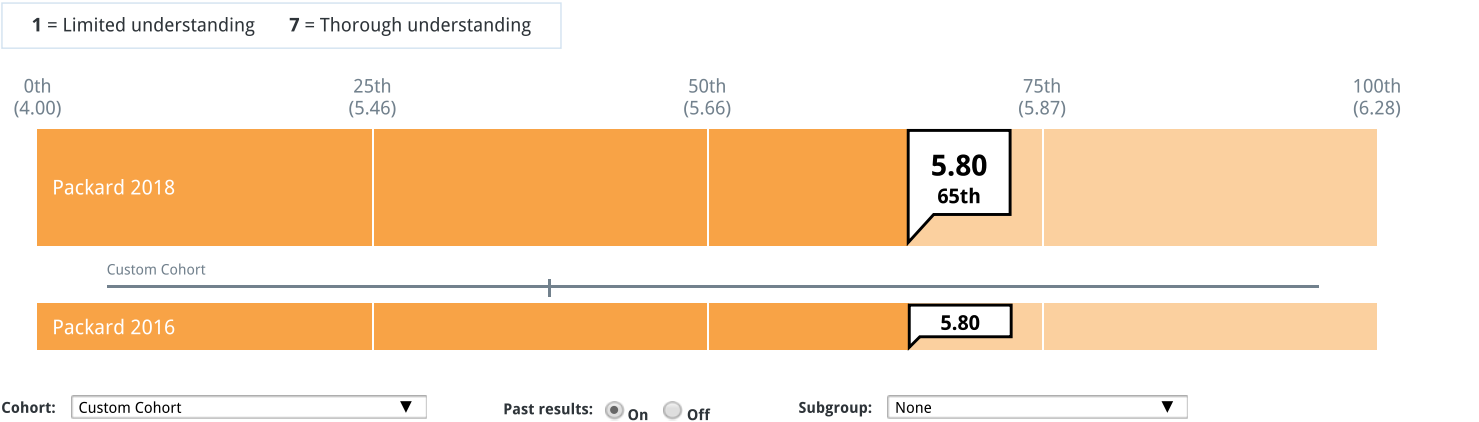
1 = Limited understanding    7 = Thorough understanding



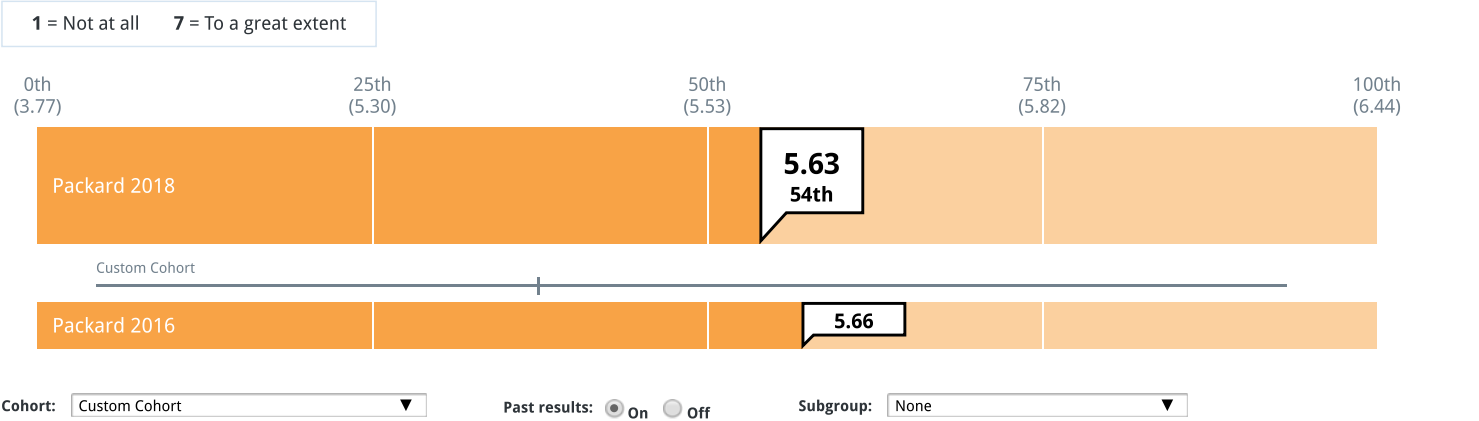
Cohort: Custom Cohort    Past results: ☒ On ☐ Off    Subgroup: None

In the following questions, we use the term "beneficiaries" to refer to those your organization seeks to serve through the services and/or programs it provides. Beneficiaries are often called end users, clients, or participants.

How well does Packard understand your intended beneficiaries' needs?



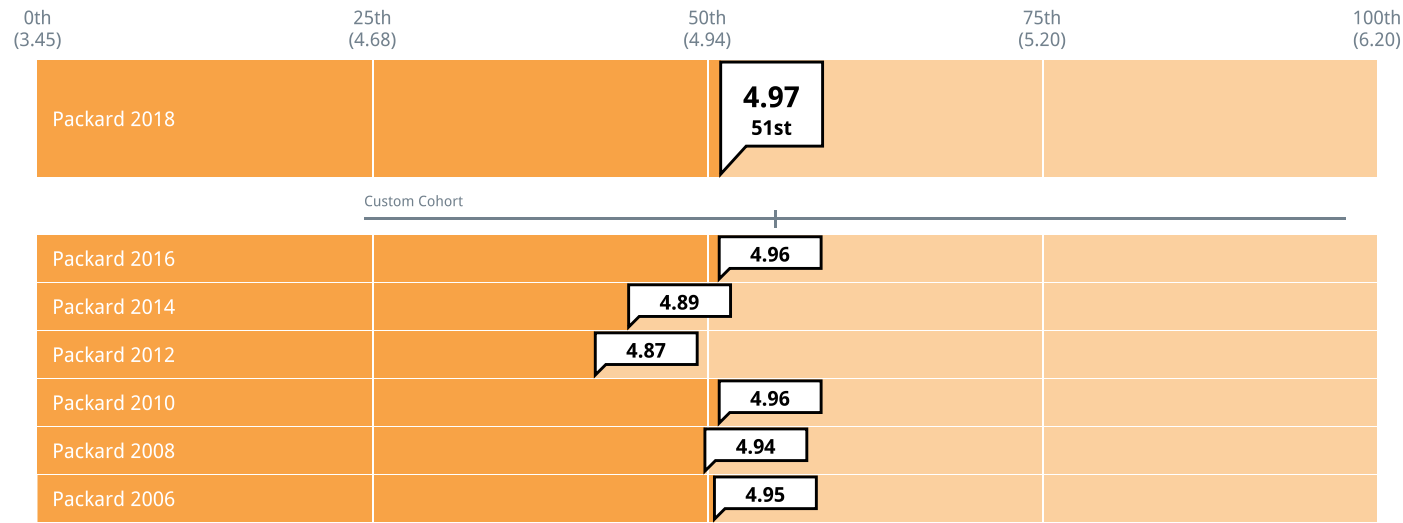
To what extent do Packard's funding priorities reflect a deep understanding of your intended beneficiaries' needs?



Grant Processes

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

1 = Not at all helpful    7 = Extremely helpful



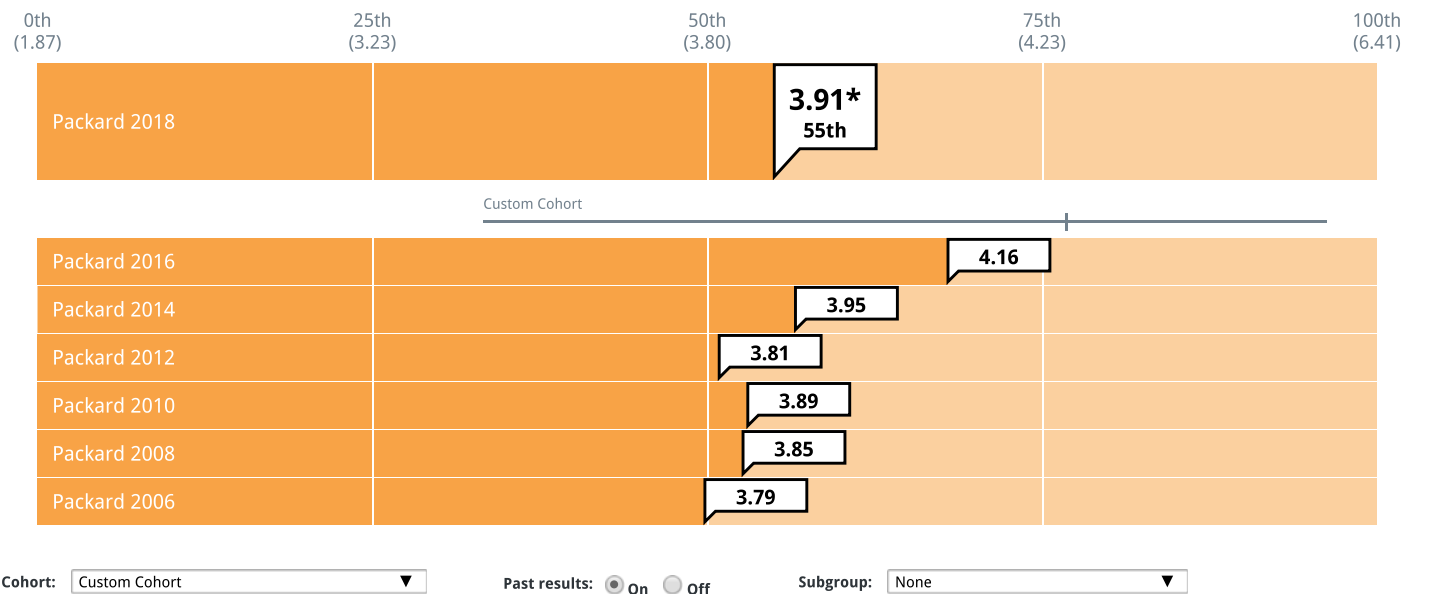
Cohort: Custom Cohort    Past results: ☒ On ☐ Off    Subgroup: None

Selection Process

Did you submit a proposal for this grant?	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
Submitted a Proposal	98%	98%	99%	99%	98%	97%	98%	95%	94%	95%
Did Not Submit a Proposal	2%	2%	1%	1%	2%	3%	2%	5%	6%	5%

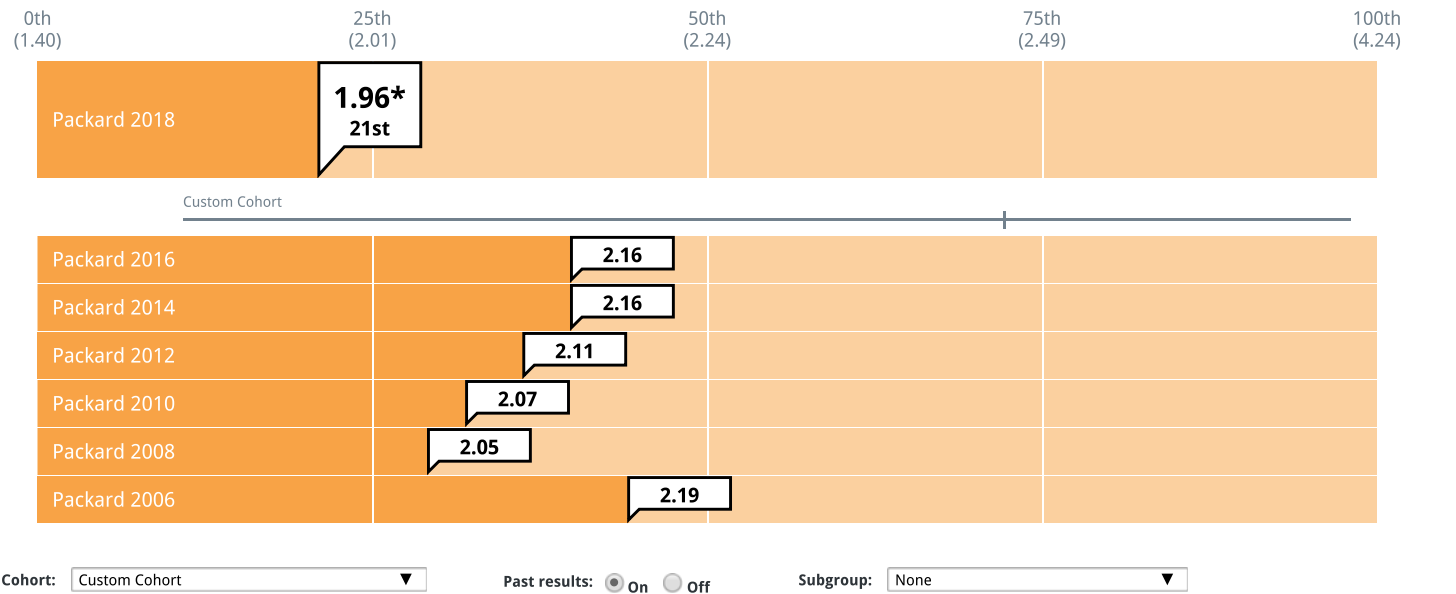
How involved was Foundation staff in the development of your grant proposal?

1 = No involvement    7 = Substantial involvement



As you developed your grant proposal, 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





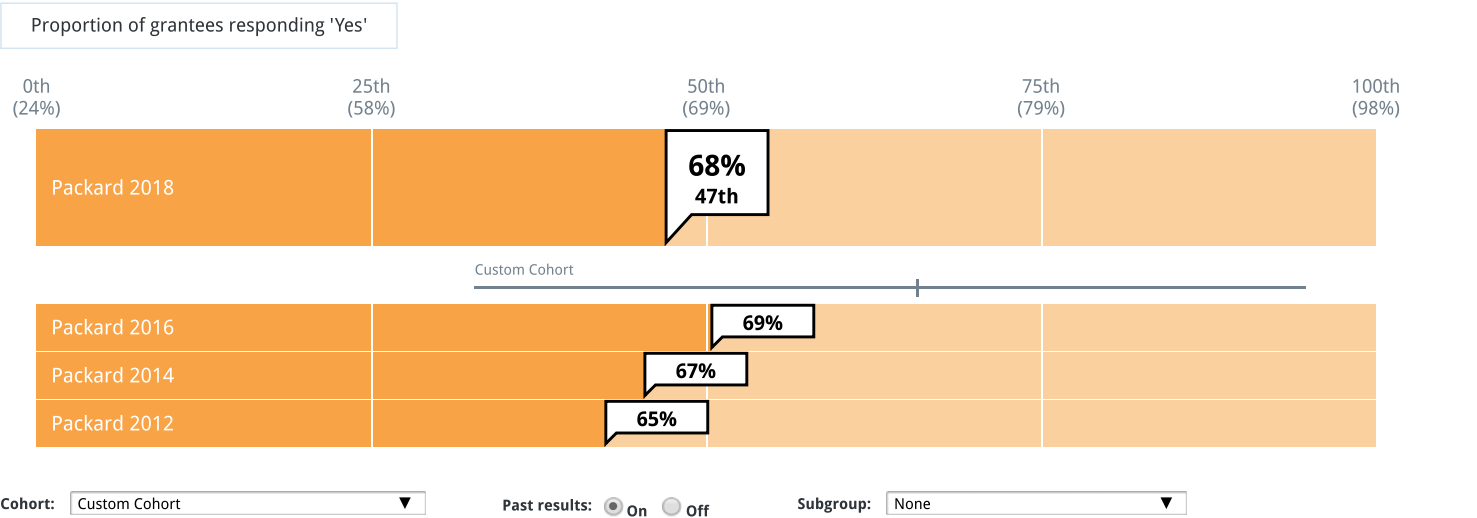
## Time Between Submission and Clear Commitment

**“How much time elapsed from the submission of the grant proposal to clear commitment of funding?”**

Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
Less than 1 month	11%	9%	10%	7%	7%	8%	6%	6%	6%	6%
1 - 3 months	73%	70%	69%	71%	68%	66%	62%	56%	56%	51%
4 - 6 months	14%	18%	18%	19%	22%	22%	26%	30%	29%	30%
7 - 9 months	2%	2%	2%	2%	2%	3%	4%	5%	5%	6%
10 - 12 months	0%	1%	1%	1%	1%	1%	1%	2%	2%	3%
More than 12 months	1%	1%	0%	0%	1%	0%	1%	1%	2%	3%

# Reporting and Evaluation Process

At any point during the application or the grant period, did Packard and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?



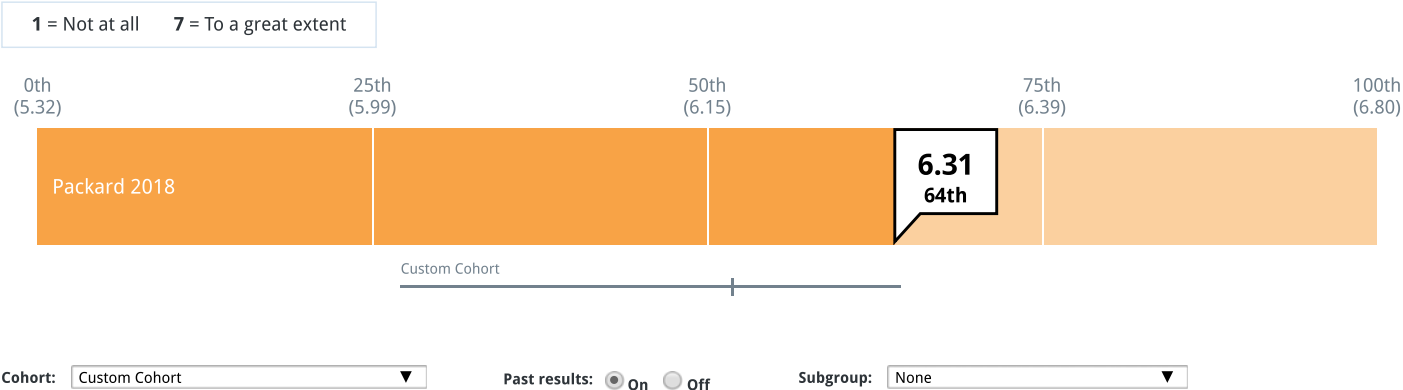
The following questions were recently added to the grantee survey and depict comparative data from fewer than one-third of funders in the dataset.

Participation in Reporting and/or Evaluation Processes	Packard 2018	Average Funder	Custom Cohort
Participated in a reporting process only	66%	56%	61%
Participated in an evaluation process only	0%	1%	1%
Participated in both a reporting and an evaluation process	23%	32%	26%
Participated in neither a reporting nor an evaluation process	11%	12%	12%

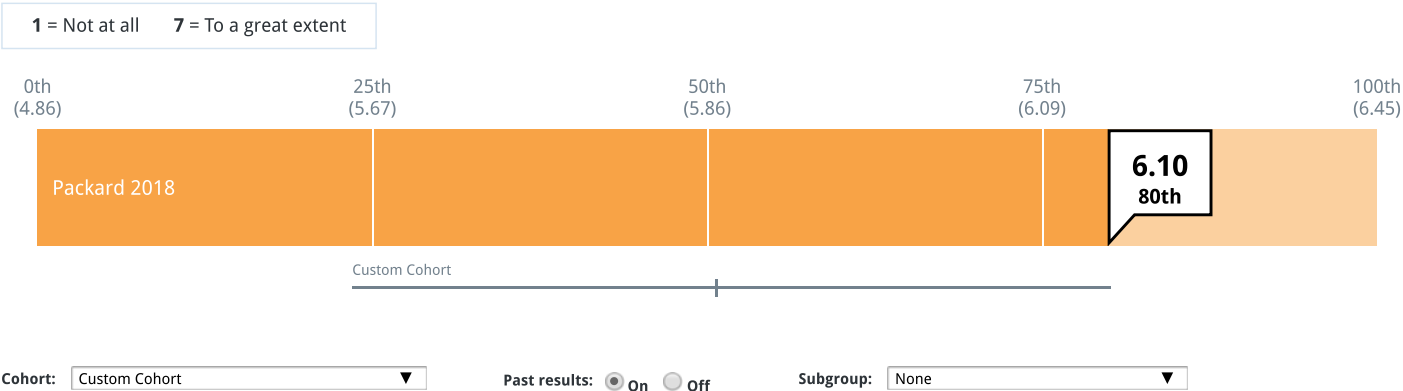
# Reporting Process

The following questions were only asked of grantees that indicated having participated in a reporting process. See the “Reporting and Evaluation Process” page for data on the proportion of grantees participating in this process.

## To what extent was Packard's reporting process straightforward?

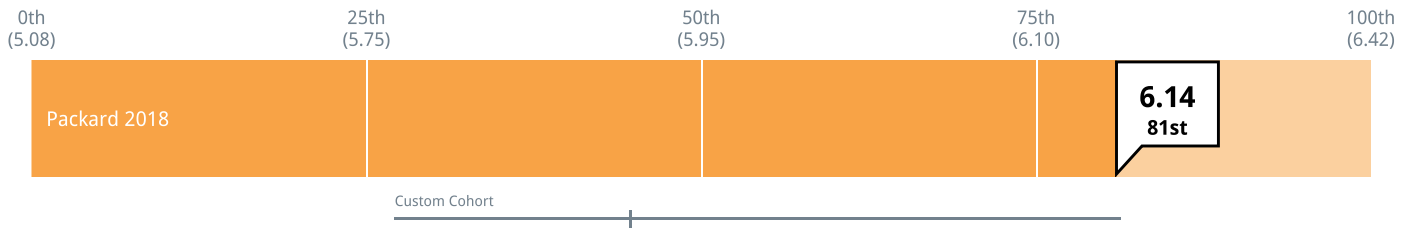


## To what extent was Packard's reporting process adaptable, if necessary, to fit your circumstances?



### To what extent was Packard's reporting process aligned appropriately to the timing of your work?

1 = Not at all    7 = To a great extent



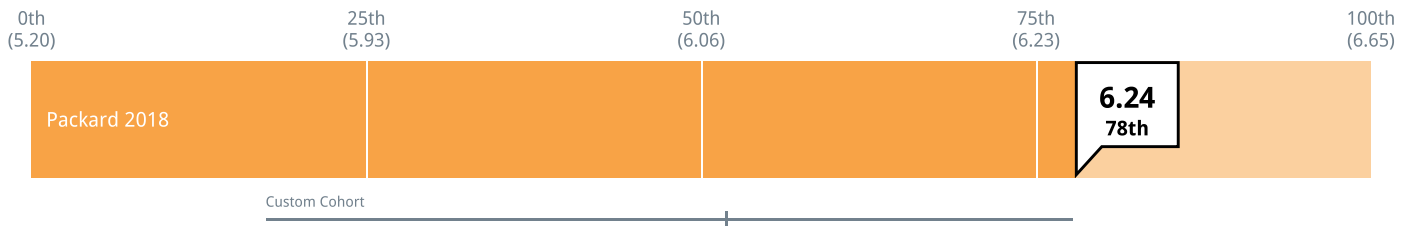
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

### To what extent was Packard'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



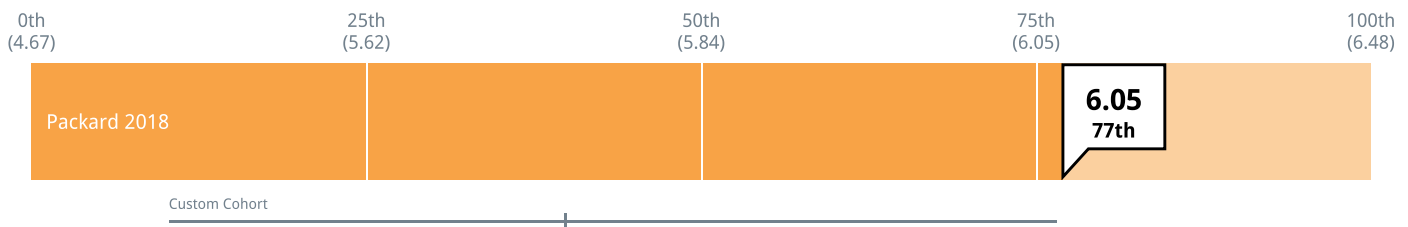
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

### To what extent was Packard's reporting process a helpful opportunity for you to reflect and learn?

1 = Not at all    7 = To a great extent



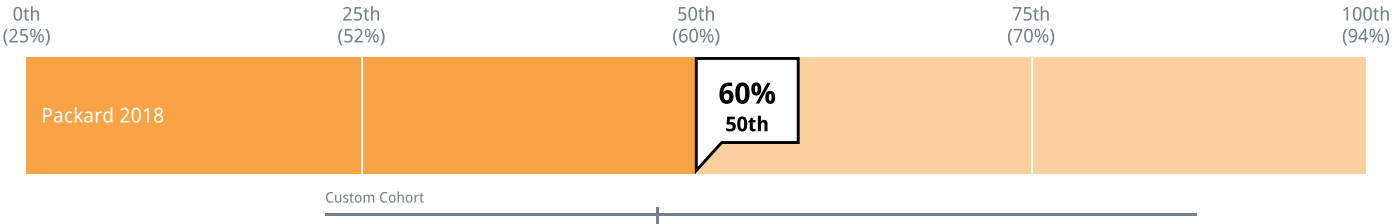
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

At any point have you had a substantive discussion with Packard about the report(s) you or your colleagues submitted as part of the reporting process?

Proportion of grantees responding 'Yes'



Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

## Evaluation Process

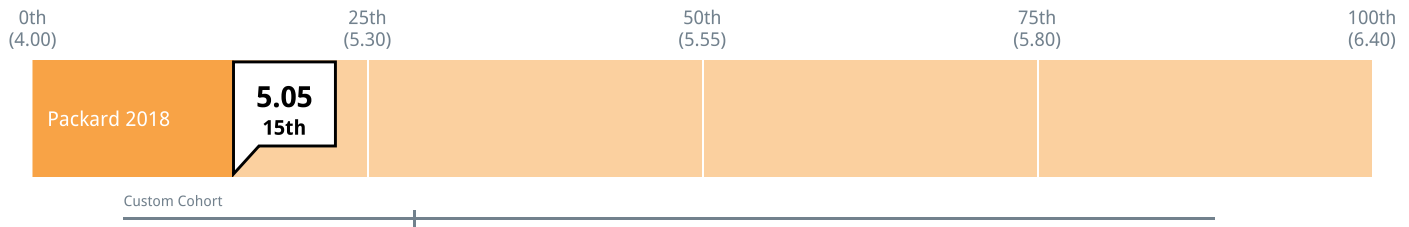
The following questions were only asked of grantees that indicated having participated in an evaluation process. See the “Reporting and Evaluation Process” page for data on the proportion of grantees participating in this process.

"Who was primarily responsible for carrying out the evaluation?"	Packard 2018	Average Funder	Custom Cohort
Evaluation staff at Packard	27%	21%	20%
Evaluation staff at your organization	40%	51%	35%
External evaluator, chosen by Packard	26%	14%	30%
External evaluator, chosen by your organization	7%	14%	15%

"Did Packard provide financial support for the evaluation?"	Packard 2018	Average Funder	Custom Cohort
Yes, the evaluation's costs were fully funded by Packard	45%	34%	50%
Yes, the evaluation's costs were partially funded by Packard	19%	17%	17%
No, the evaluation's costs were not funded by Packard	36%	49%	34%

### To what extent did the evaluation incorporate input from your organization in the design of the evaluation?

1 = Not at all    7 = To a great extent



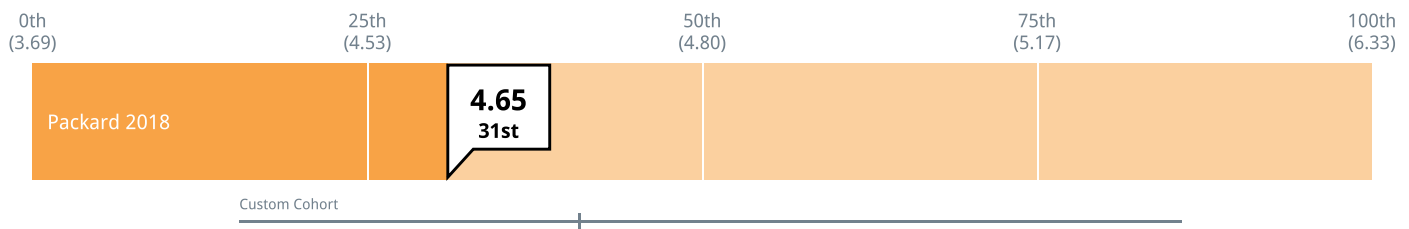
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

### To what extent did the evaluation result in your organization making changes to the work that was evaluated?

1 = Not at all    7 = To a great extent



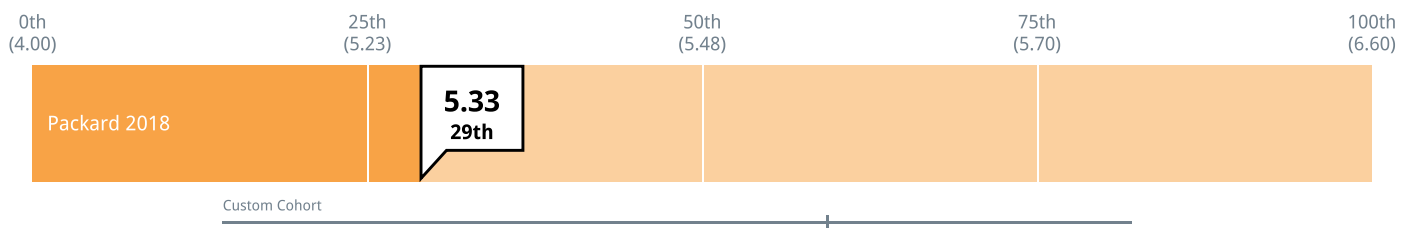
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

### To what extent did the evaluation generate information that you believe will be useful for other organizations?

1 = Not at all    7 = To a great extent



Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: None ▼

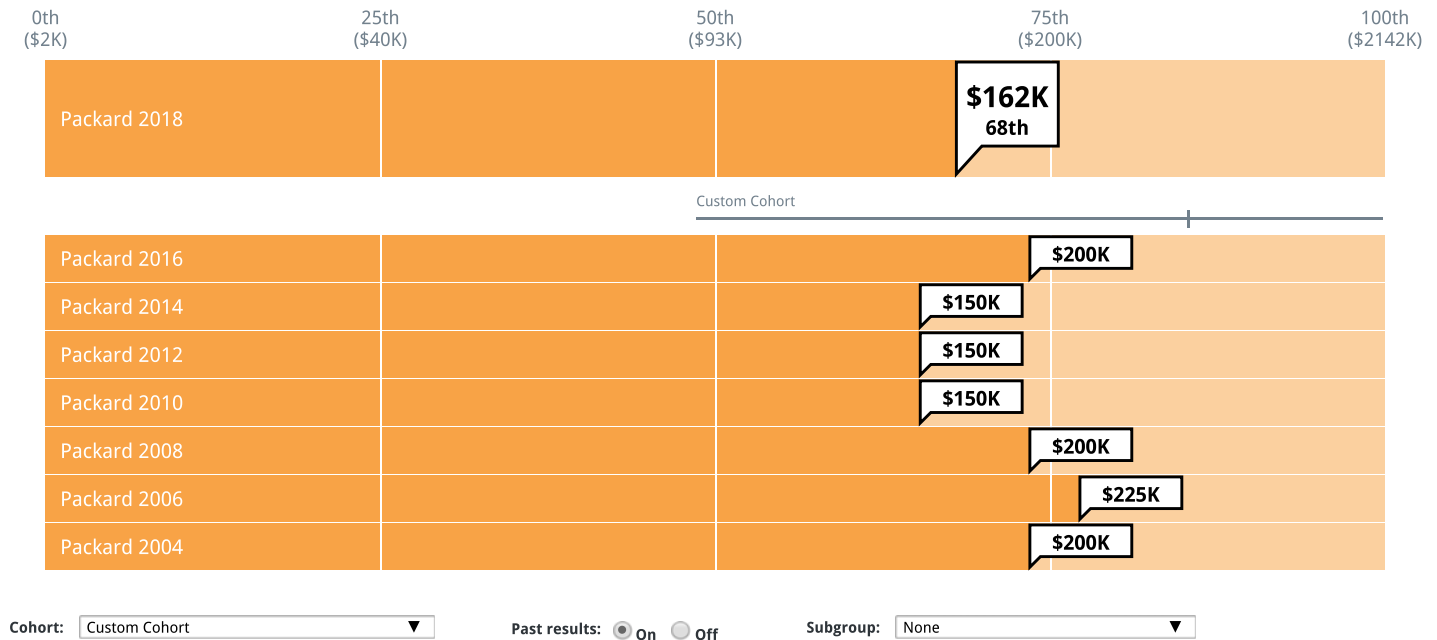
## Dollar Return and Time Spent on Processes

### Dollar Return: Median grant dollars awarded per process hour required

Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant

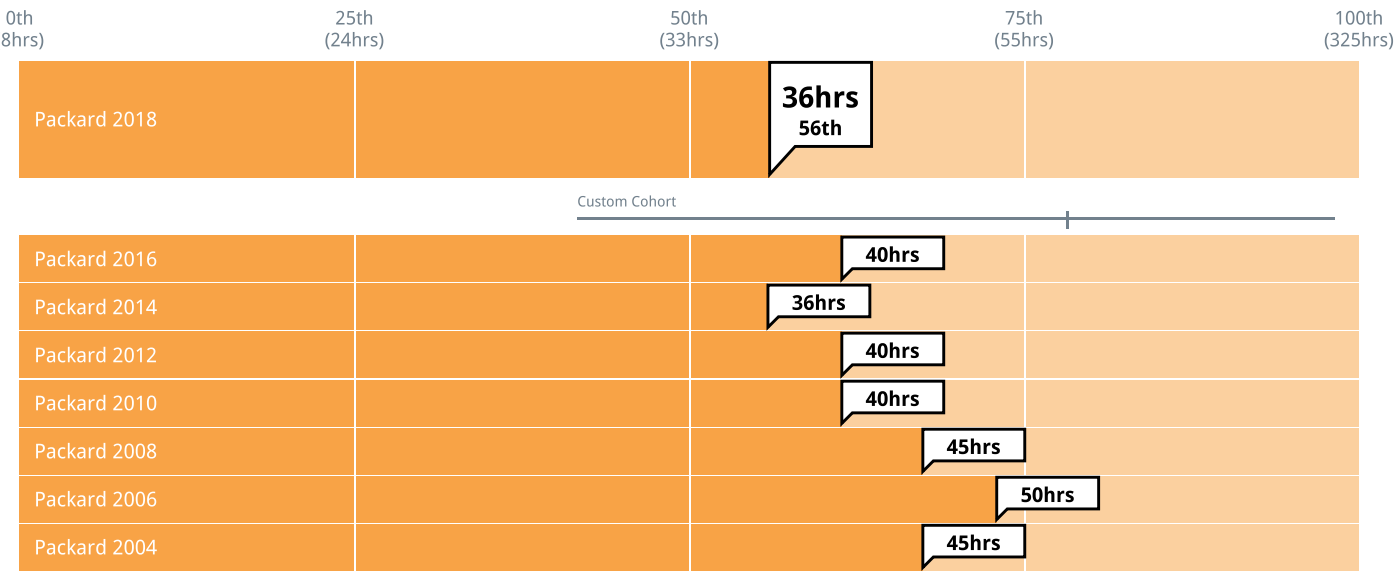


### Median Grant Size





Median hours spent by grantees on funder requirements over grant lifetime



Cohort: 

Custom Cohort

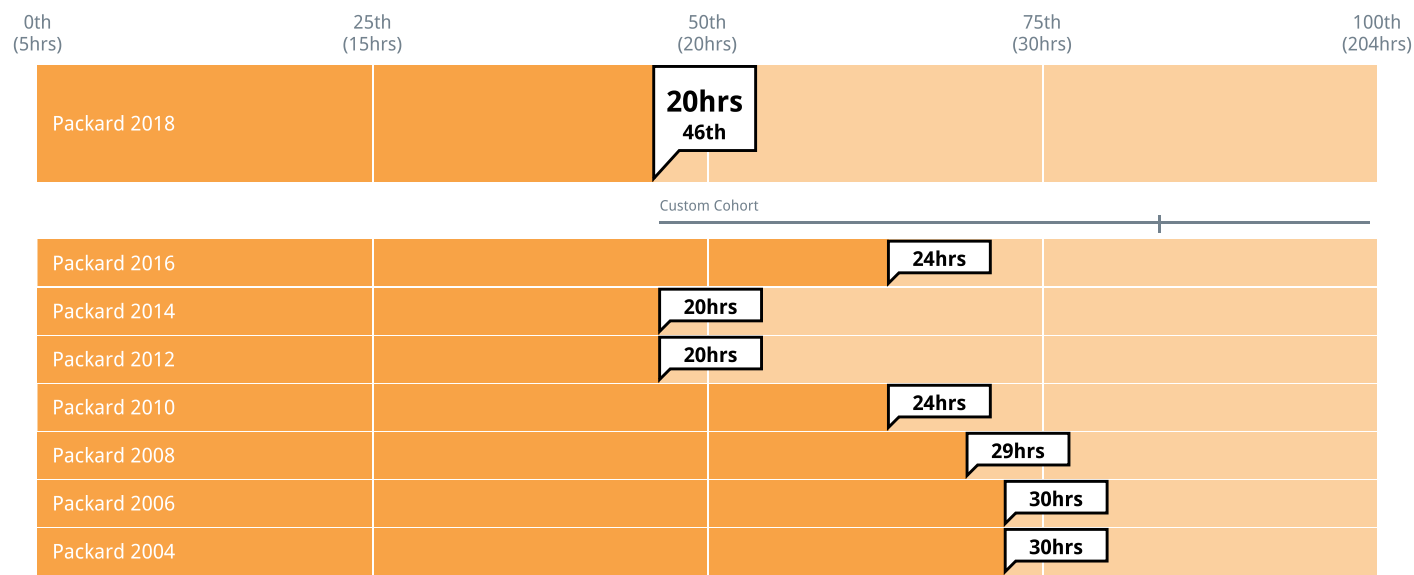
Past results: ☒ On ☐ Off

Subgroup: 

None

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



Cohort: Custom Cohort

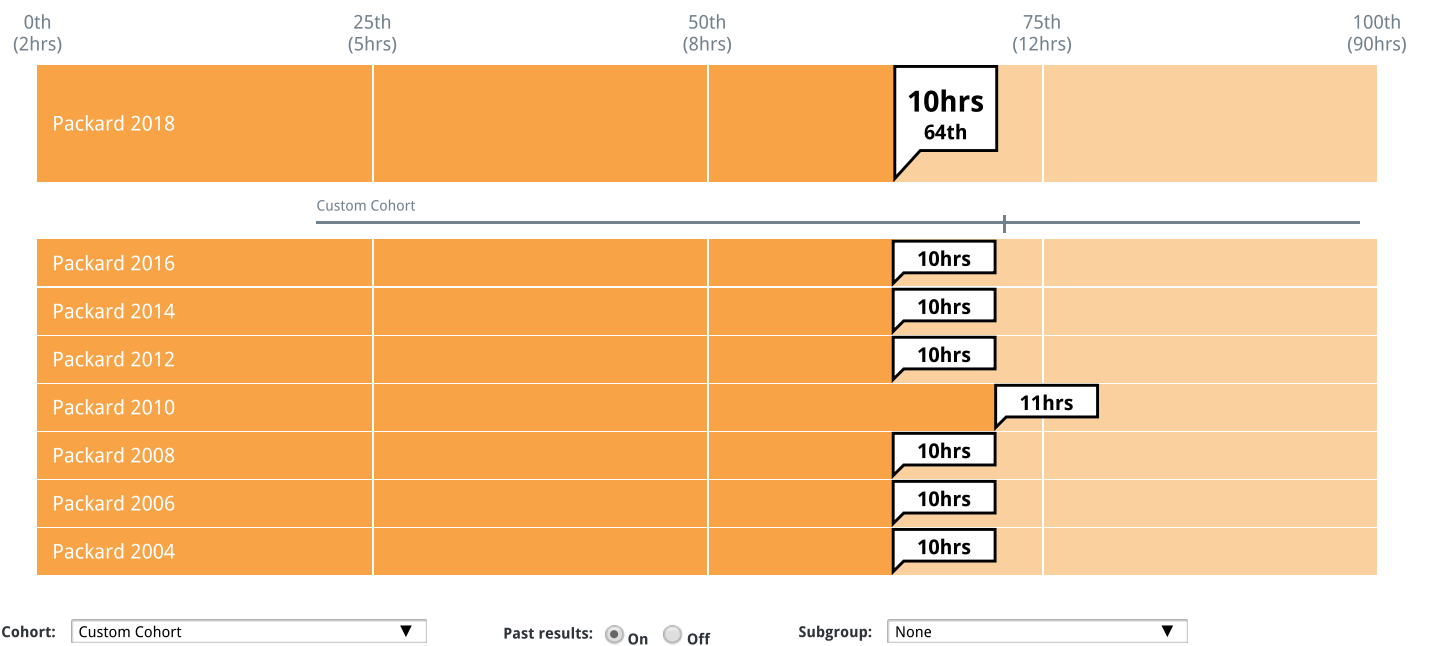
Past results: ☒ On ☐ Off

Subgroup: None

Time Spent On Proposal And Selection Process	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
1 to 9 hours	19%	13%	19%	18%	15%	15%	12%	10%	20%	10%
10 to 19 hours	22%	22%	20%	20%	19%	17%	19%	21%	21%	14%
20 to 29 hours	19%	19%	22%	22%	19%	18%	15%	18%	18%	16%
30 to 39 hours	6%	9%	9%	7%	8%	9%	8%	8%	8%	8%
40 to 49 hours	13%	16%	13%	14%	16%	15%	14%	12%	12%	15%
50 to 99 hours	13%	14%	9%	13%	15%	15%	18%	17%	11%	17%
100 to 199 hours	5%	5%	5%	3%	6%	8%	10%	10%	6%	12%
200+ hours	2%	2%	3%	2%	2%	2%	4%	4%	4%	8%

Time Spent on Reporting and Evaluation Process

Median Hours Spent on Monitoring, Reporting and Evaluation Process Per Year



Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
1 to 9 hours	48%	44%	50%	48%	40%	39%	41%	45%	52%	41%
10 to 19 hours	23%	20%	19%	18%	23%	25%	25%	27%	20%	23%
20 to 29 hours	13%	14%	13%	14%	10%	13%	12%	9%	11%	13%
30 to 39 hours	3%	4%	3%	5%	6%	5%	7%	2%	4%	5%
40 to 49 hours	4%	7%	7%	5%	9%	6%	5%	5%	4%	4%
50 to 99 hours	7%	7%	3%	7%	6%	4%	3%	7%	5%	7%
100+ hours	3%	4%	4%	3%	6%	6%	6%	5%	5%	6%

## Non-Monetary Assistance

Grantees were asked to indicate whether they had received any of the following fourteen types of assistance provided directly or paid for by Packard.

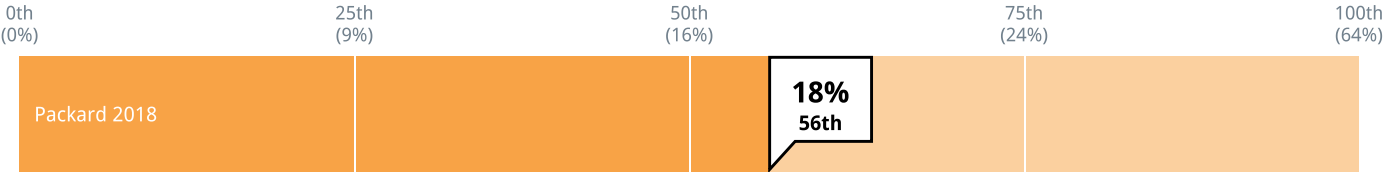
Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/publicity assistance
Development of performance measures	Provided research or best practices	Use of Packard facilities
	Provided seminars/forums/convenings	Staff/management training

Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.

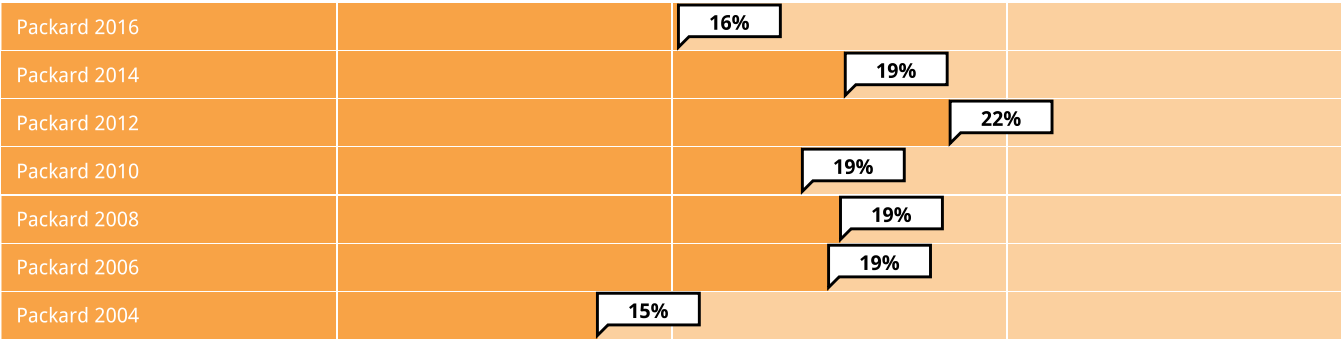


Non-Monetary Assistance Patterns	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
Comprehensive	4%	4%	8%	6%	7%	4%	6%	8%	7%	5%
Field-focused	14%	12%	12%	16%	12%	15%	13%	7%	11%	15%
Little	40%	44%	43%	40%	38%	34%	39%	42%	40%	41%
None	43%	39%	37%	38%	43%	47%	42%	43%	42%	39%

Proportion of grantees that received field-focused or comprehensive assistance



Custom Cohort



Cohort: Custom Cohort ▼

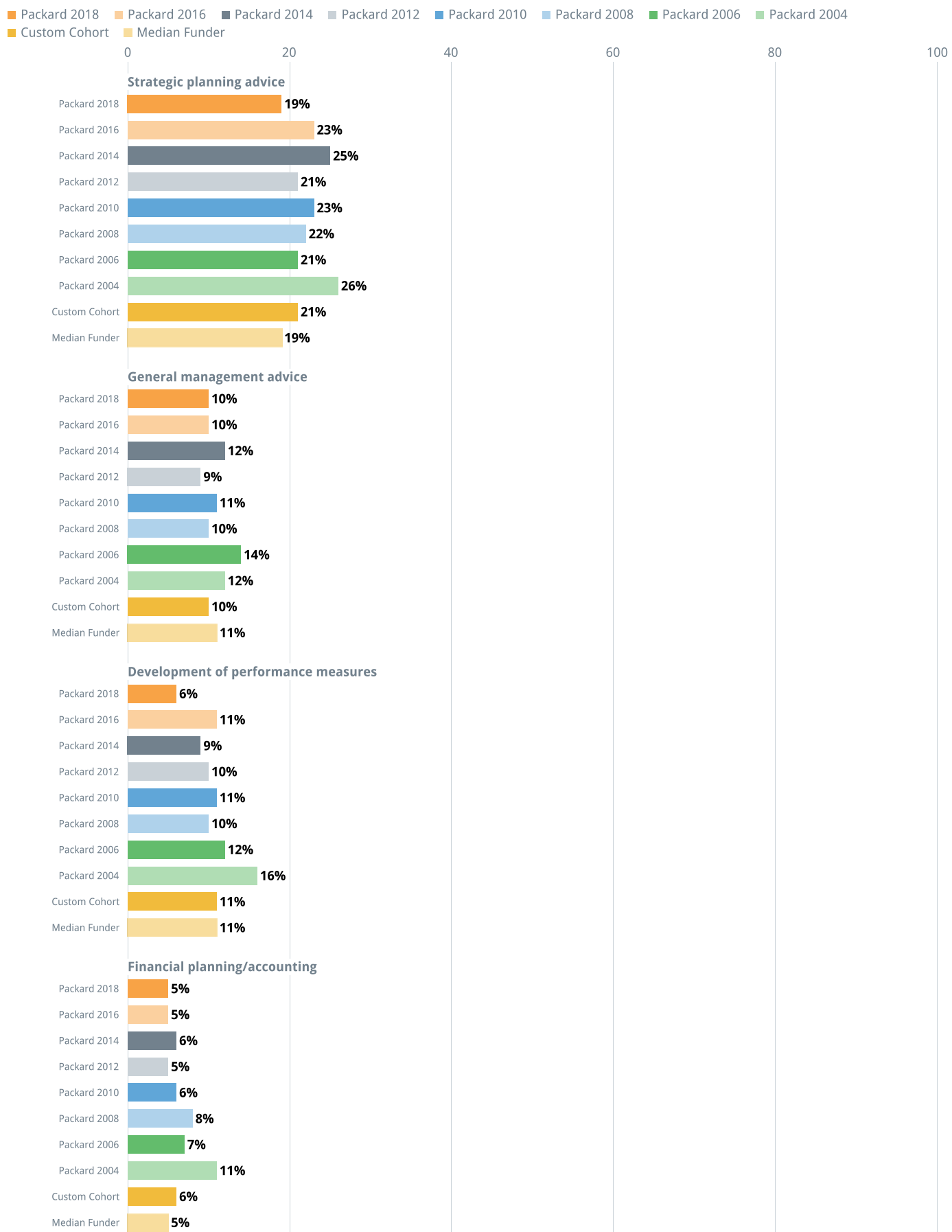
Past results: ☒ On ☐ Off

Subgroup: None ▼

# Management Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by Packard) associated with this funding."

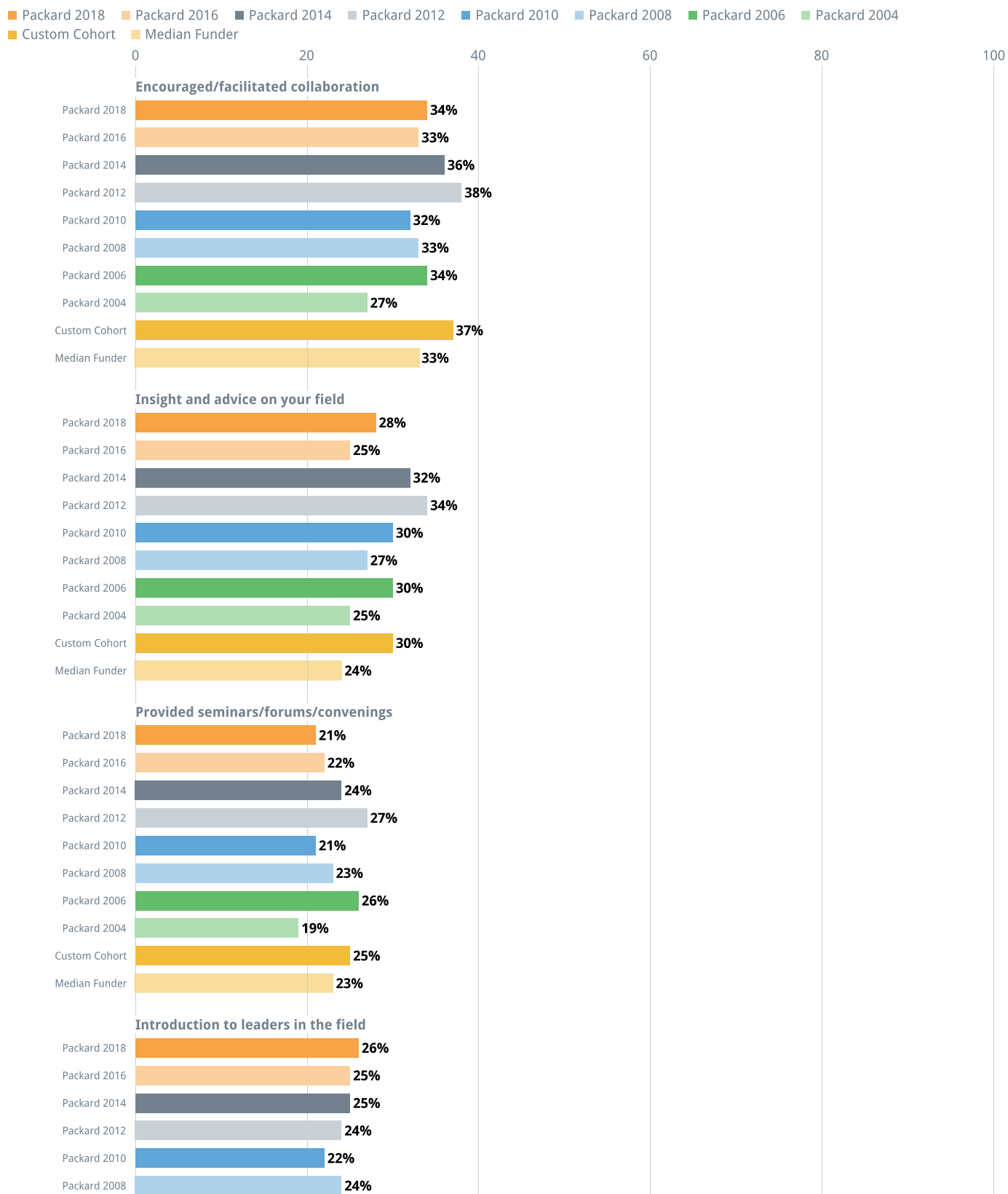
Percentage of Grantees that Received Management Assistance



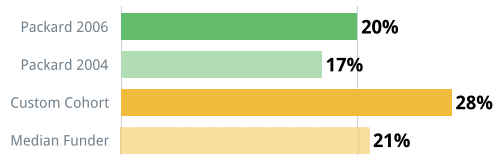
## Field-Related Assistance Activities

"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by Packard) associated with this funding."

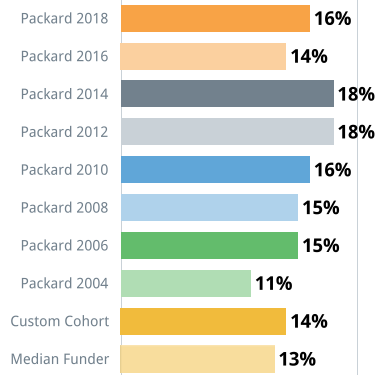
### Percentage of Grantees that Received Field-Related Assistance







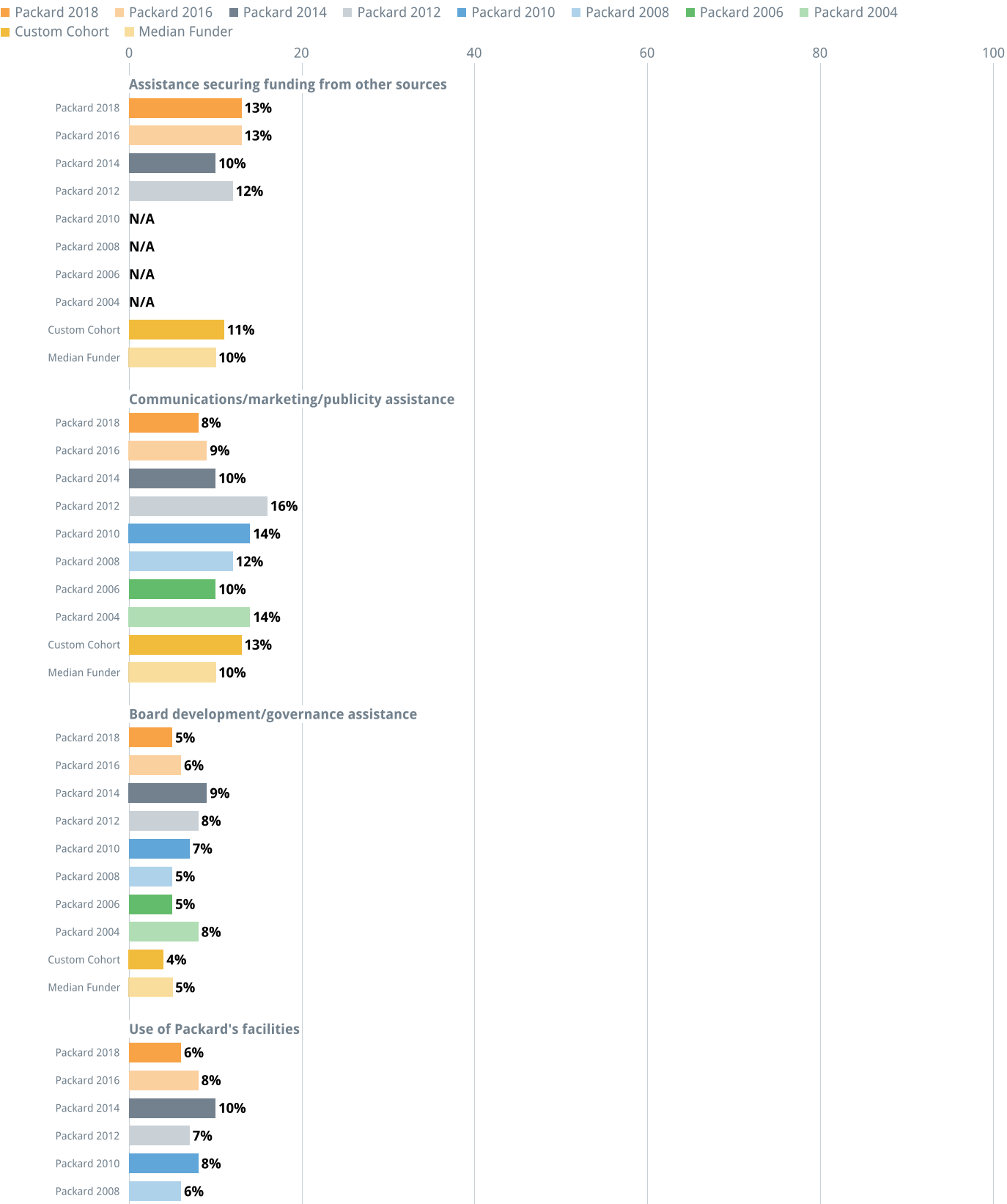
**Provided research or best practices**

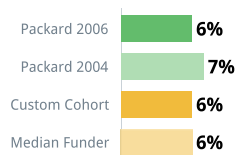


Other Assistance Activities

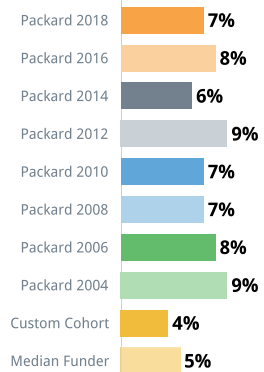
"Please indicate all types of non-monetary assistance, if any, you received (from staff or a third party paid for by Packard) associated with this funding."

Percentage of Grantees that Received Other Assistance

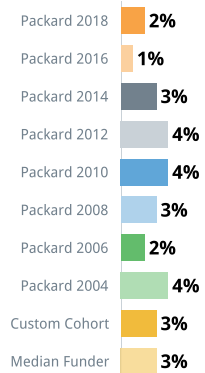




#### Staff/management training



#### Information technology assistance



Packard-Specific Questions

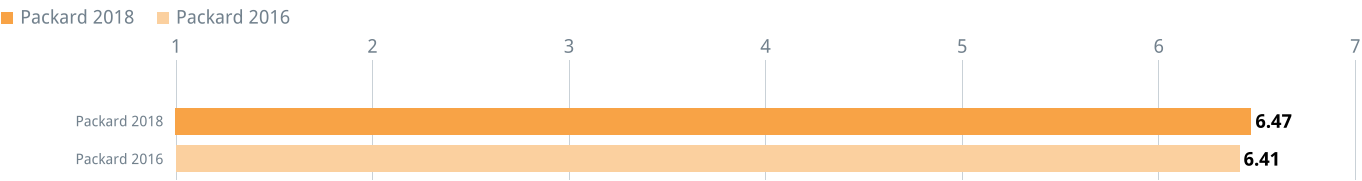
"Did you receive Organizational Effectiveness support during this grant period?"

Organizational Effectiveness support	Packard 2018	Packard 2016	Packard 2014
Yes	21%	23%	32%
No	79%	77%	68%

**Behind the numbers:** Grantees who report receiving an organizational effectiveness grant rate the Foundation significantly higher than other grantees for its impact on and understanding of their organizations, the extent to which they perceive the Foundation is responsible for strengthening their organization, and the strength of Packard’s relationships with grantees, among other measures.

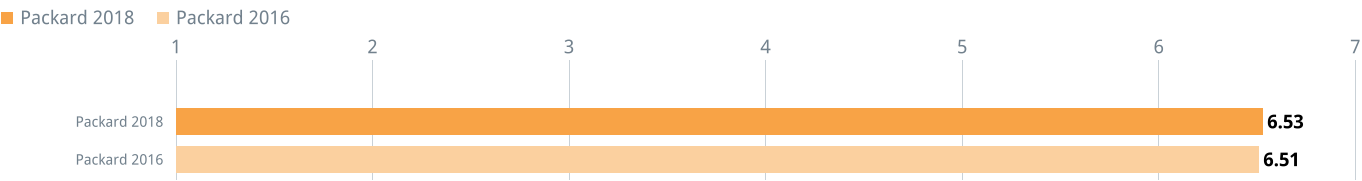
"Overall, how would you rate the Foundation's Organizational Effectiveness grant's impact on your organization?" - Overall

1 = No impact    7 = Significant positive impact



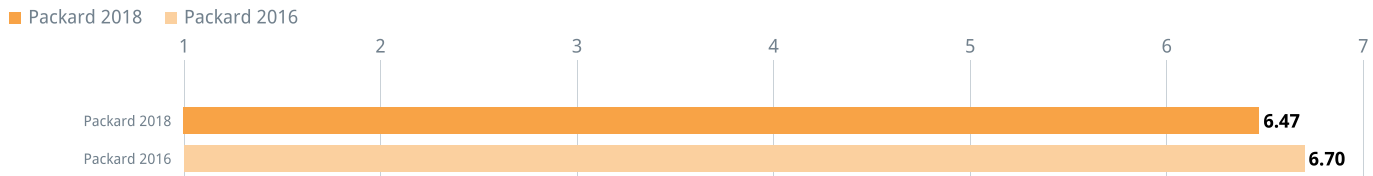
"How comfortable do you feel approaching the Foundation's Organizational Effectiveness team if a problem arises?" - Overall

1 = Not at all comfortable    7 = Extremely comfortable



## "Overall, how responsive were the Foundation's Organizational Effectiveness staff?" - Overall

1 = Not at all responsive    7 = Extremely responsive

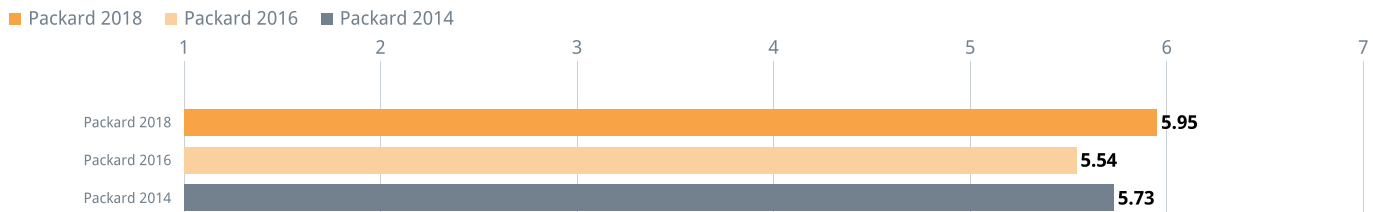


## "Did you receive support from a consultant or local/regional advisor working for the Packard Foundation?"

Consultant or Local/Regional Advisor Support	Packard 2018	Packard 2016	Packard 2014
Yes	24%	18%	17%
No	76%	82%	83%

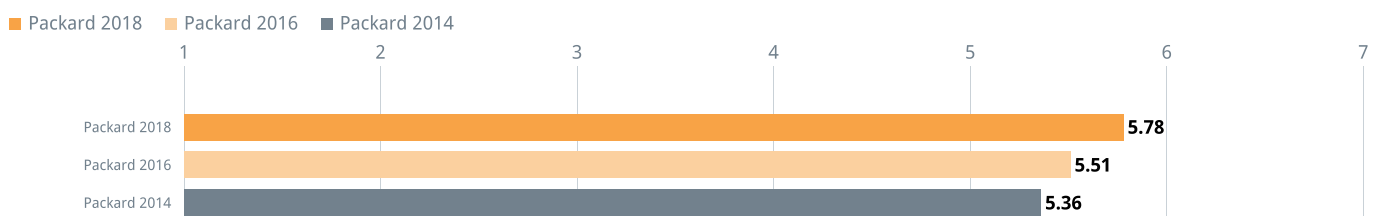
## "How clearly did this advisor explain the Foundation's grantmaking guidelines to you?" - Overall

1 = Not at all clearly    7 = Extremely clearly



## "How helpful was this advisor in helping you communicate with the Packard Foundation headquarters in Los Altos, California?" - Overall

1 = Not at all helpful    7 = Extremely helpful



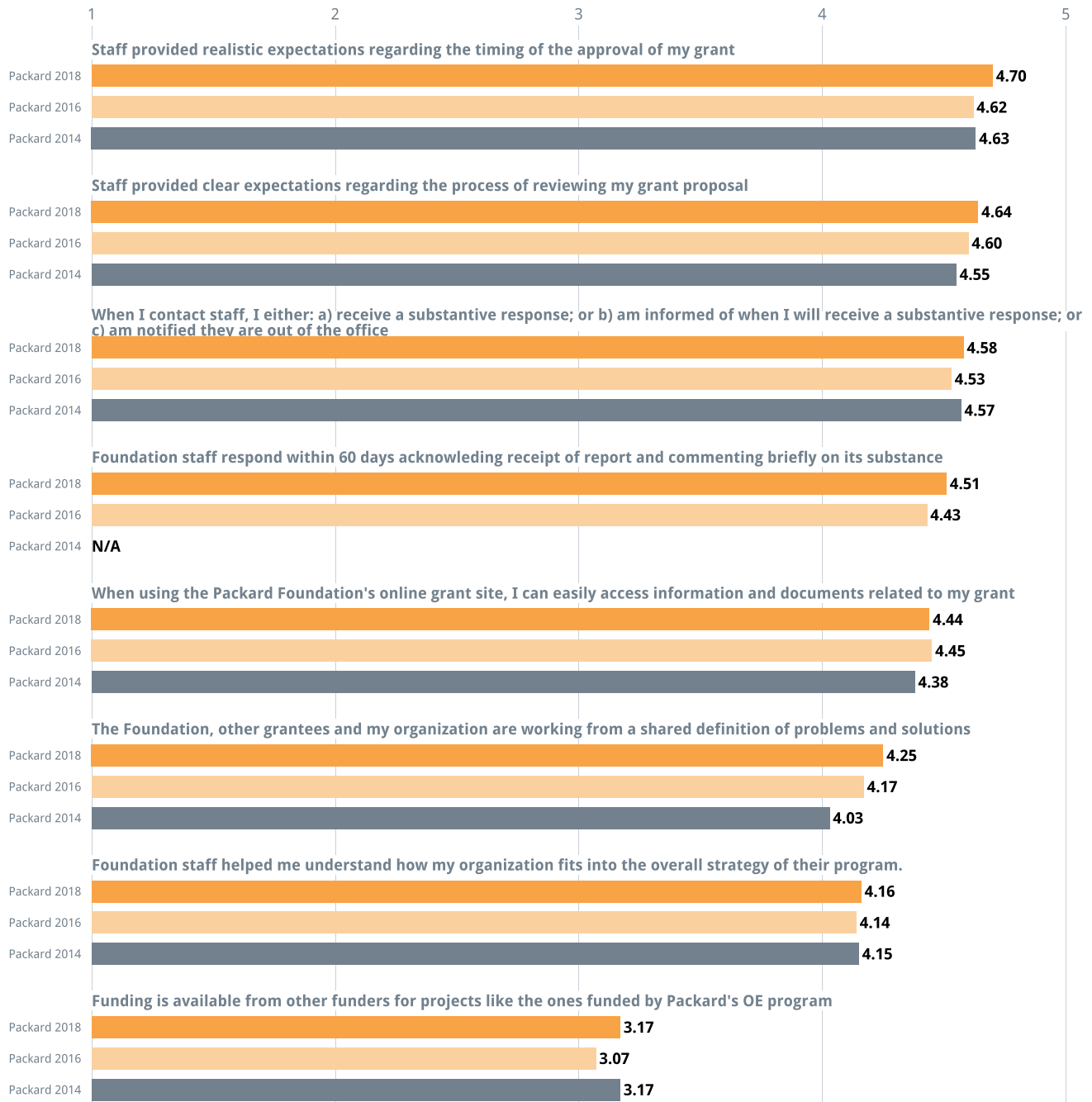
**"How often do you see the Foundation supporting projects that have a high risk of failure but, which if successful, could result in significant progress toward important goals?"**

Frequency	Packard 2018
Never	6%
Rarely	22%
Sometimes	58%
Often	14%

**Thinking about the Packard Foundation, please indicate how strongly you agree with each of the following statements**

1 = Strongly disagree    2 = Disagree    3 = Neither agree nor disagree    4 = Agree    5 = Strongly agree

■ Packard 2018    ■ Packard 2016    ■ Packard 2014

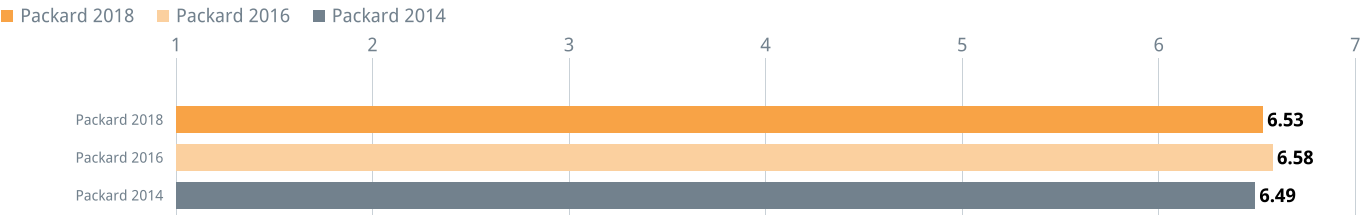


"In addition to your main contact for this grant, did you also interact with members of the Packard Foundation's program support staff who support the main contact (e.g., a program associate?)"

Interaction with Members of Packard's Program Support Staff	Packard 2018	Packard 2016	Packard 2014
Yes	85%	78%	75%
No	15%	18%	19%

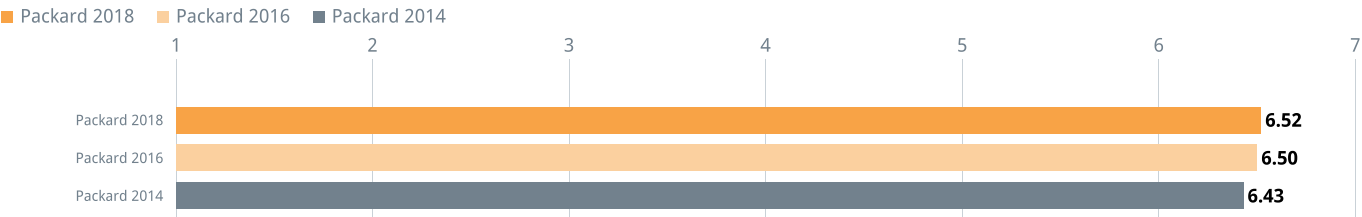
"How responsive was the program support staff?" - Overall

1 = Not at all responsive    7 = Extremely responsive



"How helpful was your interaction with program support staff?" - Overall

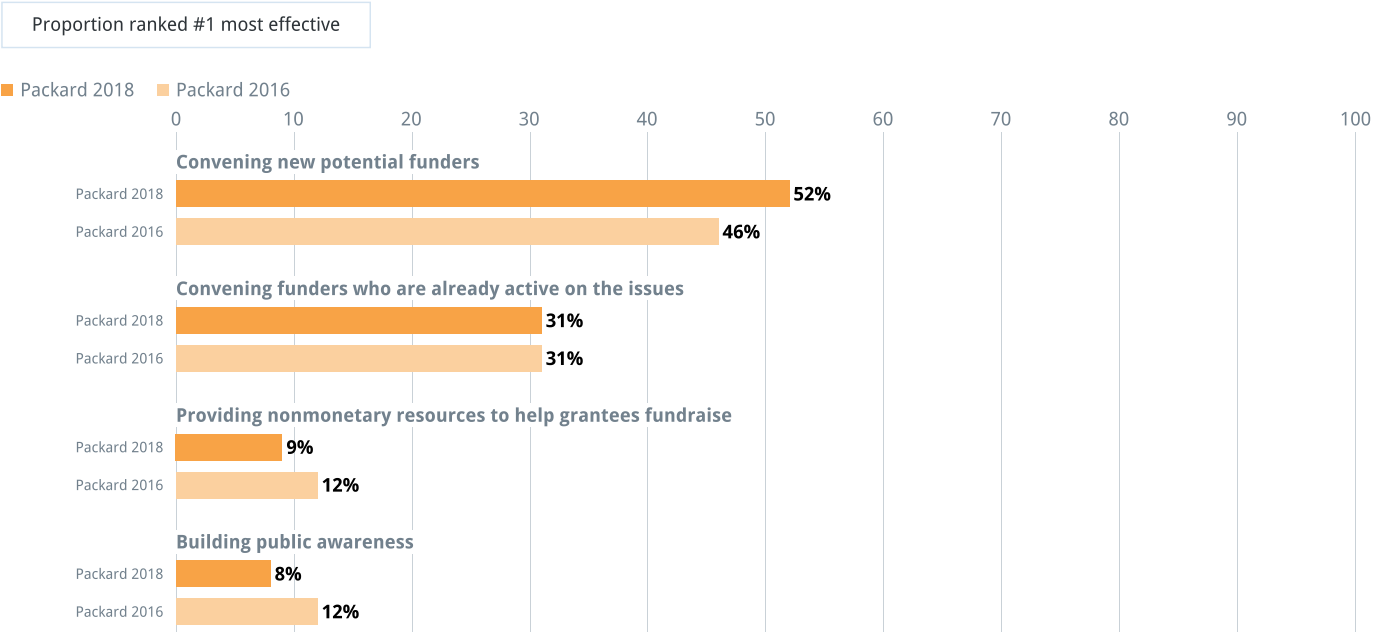
1 = Not at all helpful    7 = Extremely helpful



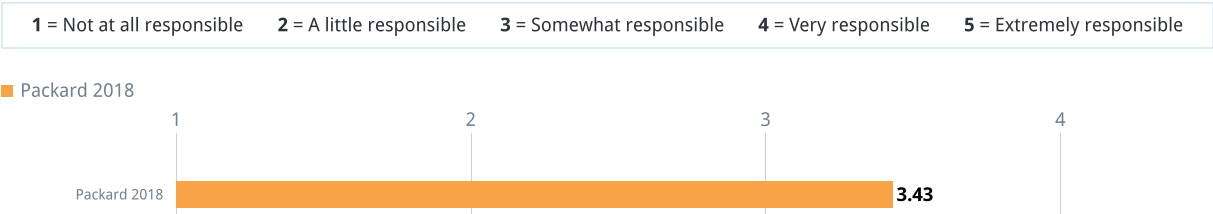


"Below are some potential ways that the Packard Foundation could use its voice and profile to influence other private and public funders to provide more or better monetary support for the issues you work on. Please rank these approaches in terms of how effective you think they would be in attracting new funders and/or strengthening existing funding."

Overall



Currently, how responsible do you believe Packard feels for strengthening your organization?

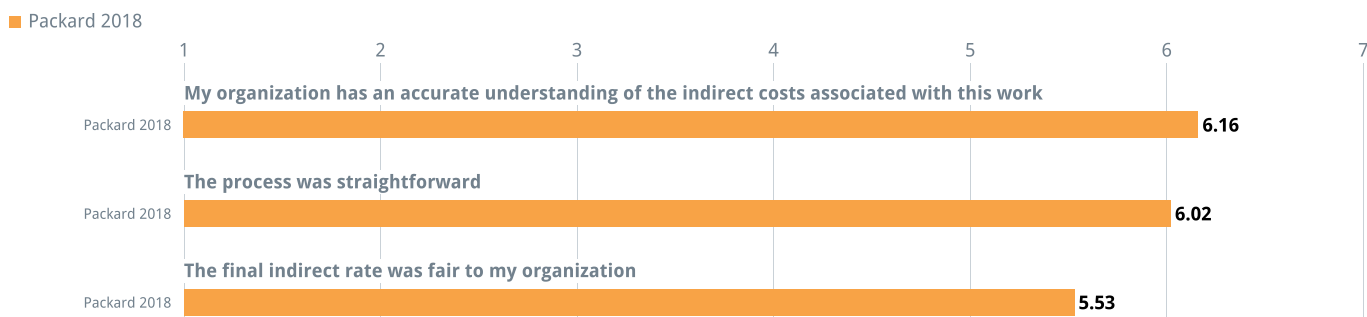


**"Which best describes the process used to set an indirect cost rate for this project?"**

Process used to set an indirect cost rate	Packard 2018
We provided an indirect rate, which the Foundation accepted	46%
The Foundation provided an indirect rate, without opportunity for discussion	16%
We settled on an indirect rate in discussion with Foundation staff	13%
In determining grant amount, we did not specifically address indirect costs	25%

**How strongly do you agree or disagree with the following statements about how indirect and direct costs were set?**

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



**"To what extent did the grant cover the full costs of the work it was meant to fund (or the costs of its share of work in a multi-funder project?)"**

Extent to which the grant covered the full costs of the work	Packard 2018
The grant covered its direct and indirect costs plus extra that allows the organization to thrive over the long term (e.g., additions to reserves, assets, working capital, etc.).	9%
The grant covered direct and indirect costs, but no more.	43%
The grant covered the direct costs of the work, but not all indirect costs.	36%
This grant did not cover even the direct costs of the work.	13%

## Grantees' Open-Ended Comments

In the Grantee Perception Report survey, CEP asks three open-ended questions:

1. "Please comment on the quality of Packard's processes, interactions, and communications. Your answer will help us better understand what it is like to work with Packard."
2. "Please comment on the impact Packard is having on your field, community, or organization. Your answer will help us to better understand the nature of Packard's impact."
3. "What specific improvements would you suggest that would make Packard a better funder?"

### **CEP's Qualitative Analysis**

CEP thoroughly reviews each comment submitted and conducts comprehensive qualitative analysis on two of these questions in the GPR.

The following pages outline the results of CEP's analyses.

# Quality of Processes, Interactions and Communications

Grantees were asked to comment on the quality of Packard's processes, interactions, and communications. Their comments were then categorized by the nature of their content, specifically whether the content is positive, neutral or constructive.

For a comment to be categorized as constructive, there must have been at least one constructive topic in its content.

Positivity of Comments about the Quality of Packard's Processes, Interactions, and Communications	Packard 2018	Packard 2016	Average Funder	Custom Cohort
Positive comment	78%	77%	72%	71%
Comment with at least one constructive theme	22%	23%	28%	29%

# Grantees' Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. A random sample of these suggestions were categorized by CEP and grouped into the topics below. CEP conducted a random sample of these suggestions, stratified by program area to ensure representation across groups.

Overall, CEP coded a total of 250 grantee comments. Of these 250, 160 grantees provided 216 distinct suggestions and 90 grantees did not provide constructive feedback. These suggestions were thematically categorized by CEP and grouped into the topics below. All proportions quoted are with respect to the 216 distinct coded suggestions.

## Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Grantmaking Characteristics	25%
Non-Monetary Assistance	20%
Interactions with Grantees	13%
Reporting and Evaluation Processes	7%
Impact on and Understanding of Grantees' Fields	6%
Impact on and Understanding of Grantees' Communities	5%
Foundation Communications	4%
Proposal and Selection Process	4%
Impact on and Understanding of Grantees' Organizations	3%
Other	13%

## Selected Comments

### Grantmaking Characteristics (25% N=55)

- Grant Length (N = 25)
  - "The Foundation tends to give one year grants; however, the option for multi-year grants could make grantee's work more effective."
  - "Multi-year grants in excess of two years."
  - "For us, having a multi-year funding agenda would be helpful as it is difficult to execute our work in a single year."
- Grant Type (N = 13)
  - "Give more general support grants and not be so program driven. A strong infrastructure is a solid foundation for programs."
  - "To the extent they can, providing core support to organizations or partnerships allows for more nimble responses to rapidly changing political, environmental and social conditions."
  - "Obviously increased general funding, increased funding which can be used for data collection and evaluation and targeted on-going funding which can be utilized for establishing and expanding social media tools."
- Grant Size (N = 12)
  - "My #1 far and away suggestion (relevant to this grant and others we receive) is to ruthlessly evaluate the portfolio in particular subject areas for impact, and double, triple or quadruple down on those organizations and strategies that are proving most effective. Making 1-4 multi-million grants under a particular strategy will likely pay greater dividends than multiple \$100 - \$1 million grants (with most in the \$250,000 range)."
  - "As a pilot project with Packard, we would appreciate the funds allocated for expansion to be higher. An expansion requires additional support in all areas. Limiting the funding limits the support required to make this successful."
  - "During the last few grant cycles we have experienced increasing costs of projects and costs of living, but have not received incremental increase in cost of living changes. Packard appears to have a set amount for each org and that does not change from grant to grant, irrespective of the need."
- More Responsive Grantmaking (N = 3)
  - "Like most large funders, Packard has limited their scope of funding to limit risk. This limits their impact, particularly in low income and marginalized communities, and also limits their ability to respond to new and important initiatives in their chosen areas of focus. As funders ourselves, we have found that dedicating time and effort to understand new issues and respond is ultimately high risk, but also high reward."
- Other (N = 2)

### Non-Monetary Assistance (20% N=44)

- Capacity Building (N = 13)
  - "A more proactive strategy of providing capacity support to grantees, even those based outside of California: providing opportunities for leadership training, communications training, board development and engagement, technology support, convening meetings/workshops with other NGOs engaged in similar issues and strategies."
  - "As a small organization, we would definitely welcome support with management, developing our board, external communications (promotion of us) and connections to other donors."
  - "Project funding should make adequate provision for capacity building and M&E activities."
- Collaboration with Other Grantees (N = 13)
  - "Assist with networking with organizations that do similar work or doing something innovative."
  - "The inherent competition for limited funding among grantees is often overlooked, and very few examples of successful collaborations are available for grantees to regard as models. It would be helpful for Packard to communicate more about "strategic collaboration" more than emphasizing collaboration overall (what comes across as collaboration simply for collaboration's sake) to minimize competition, refocus the conversation on complementarity, and hopefully help identify additional examples of successful collaborations."
  - "Perhaps getting non-profits together who are funded/supported by Packard to provide a bigger picture and give us an opportunity to collaborate together."
- Assistance Securing Funding from Other Sources (N = 8)
  - "Going forward, it would be helpful to find ways to share knowledge to expand [our] impact and increase access to care. For example, we could work together with Packard to identify other possible funders and to get suggestions/leads on how to raise our organizational profile and reach in the community."
  - "One area which we have discussed with the program staff a number of times, but neither party has had sufficient time and capacity to really explore, is the Foundation's ability to leverage wider funding for particular areas of work that they support. Recognising that this is not the Foundation's primary role, and requires the input for grantees to effectively implement, utilising the Foundation's experience and contacts in this way would be enormously beneficial."
  - "The Foundation could make introductions and help build relationships between its grantees and other funders working the field. It would be very helpful if the Foundation could play a leading role in helping their grantees diversify funding sources and ensure sustainability."
- Convenings (N = 7)
  - "I really benefit from the occasional grantee networking days Packard hosts. I think that making these events a little more regular would benefit our work a lot."
  - "I would love to see a biannual gathering of grantees in our particular portfolio."
  - "I have seen how the convenings at the MBI have been quite influential, and I have often mused that the very different disciplines and the approach to the players that are brought together there (from chefs to scientists and reporters, etc) could be usefully replicated across some of the other issue areas in which you work."
- Other (N = 3)

### Interactions with Grantees (13% N=29)

- More Frequent Communications (N = 9)
  - "Broader interaction, oversight and discussion with the entire leadership of the organization."
  - "Our limitations with the Foundation played out in limits to the ability to interact with the team."
  - "It would be helpful to have thought partnership from Foundation staff in a more intentional and consistent way throughout the grant period. Given the need to schedule Foundation staff many weeks ahead of time (and often for only short meetings), it can be very challenging when staff request written materials or updates in advance but then do not review these in advance of the meeting time."
- Staff Responsiveness (N = 7)
  - "Might need more staffing so the response time is better and the staff aren't so busy."
  - "At times, my program officer can be very busy which results in slow email responses to questions/inquiries."
  - "Faster response time. I know Packard has developed some maximum amount of time for responding to emails and phone calls in response to this CEP survey in the past, but I did not experience this rapid response. Some emails (requesting a phone meeting) went completely unanswered for example."
- Site Visits (N = 6)
  - "We would love the opportunity to host more of Packard's staff for program/site visits."
  - "In my tenure in my position at this organization, no one from Packard has come to do a site visit or observe any of our programs - this might help them better understand what they are funding."
- More Reciprocal Partnership (N = 3)
  - "The opportunity to build a relationship with a program staff person is key. How can that person be a thought partner and advisor to us, and how can we reciprocate by offering expertise or insights that the Foundation might not have in-house?"
- Contact Changes (N = 1)
- Staff Approachability (N = 1)
- Other (N = 2)

#### **Reporting and Evaluation Processes (7% N=15)**

- Discussion of Reports (N = 5)
  - "I have now participated in two full funding cycles with Packard, and I have never received feedback on any of the reports (interim or final) that I have completed. I'm not even sure anyone read them, which is frustrating because the reporting requirements are extensive. I would love to see a reporting process that feels more collaborative, or relies less heavily on written reporting in favor of a conversation designed by both the foundation and the grantee. But I'm not always sure if I am clearly communicating my organization's strategy, thought process, intentions, successes, and challenges to Packard because the process right now only goes one way. I find the reporting process helpful as a strategic planning and reflection exercise for myself and my organization, but as such, it is somewhat of a missed opportunity for building trust and relationship with Packard."
  - "Recently, nobody contacted us anymore regarding our last report or experience, and hard for us to follow up for the future work if nobody respond any emails."
- Discussion of How to Assess Results (N = 4)
  - "Continue to view your grantees as your community partners. Work together to develop goals and outcome measures."
  - "It would be great if Packard could work with its fundees to help implement evaluation metrics that are useful for funders."
- Increased Flexibility Around Requirements (N = 3)
  - "Less prescriptive reporting requirements that better allow reporting on the full scope and impact of grant-funded work and do not require shoe-horning the work into narrow pre-set outcomes."
- Other (N = 3)

#### **Impact on and Understanding of Grantees' Fields (6% N=12)**

- Orientation Change (N = 7)
  - "If they were less tied to specific geographies and more aligned with contributing to efforts at a global level to move the field, their impact could be greater."
  - "More focus on the range of groups leading federal efforts, especially those that are achieving successes."
  - "Programmatically, I would like to see Packard take on immigration as a key area of focus for all grant making, not just in their disaster response."
- Public Policy (N = 3)
  - "Be willing to advocate or lead policy changes that help align with their vision and systems."
- Advance Knowledge (N = 1)
- Understanding of Grantees' Field (N = 1)

#### **Impact on and Understanding of Grantees' Communities (5% N=11)**

- Understanding of Grantees' Communities (N = 7)
  - "The movement is changing drastically and it is helpful to better understand those changes and align with programs being funded by Packard."
  - "Packard should engage in period review of the prevailing country context to allow flexibility in addressing emerging challenges and needs."
  - "Any NGO funding is to pilot best practices so that government with its development partners scales up to reach out to millions of farmers for impact. It is therefore essential that any donor knows the operational system and development directions of the country and align the development assistance with that."

- Orientation Change (N = 4)
  - "I wish the Foundation would re-invest more resources in California-based organizations and efforts. It is vital that California maintain its role as a leader in the reproductive movement and a beacon of what is possible - particularly in the political, cultural, and legal environment."
  - "Be less prescriptive in the geographic areas of their grantees' work."

#### **Foundation Communications (4% N=9)**

- Clarity of Communications (N = 6)
  - "Clearer and more well-articulated goals."
  - "I think we are still trying to get a better understanding of their strategic vision and longer-term priorities."
- Transparency of Communications (N = 2)
  - "Improved transparency on: Packard's grant delivery mechanism and relationship with intermediary organizations such as ClimateWorks Foundation and CLUA to help grantees understand better which process (direct or indirect) they should go through for specific portfolio/program."
- Consistency of Communications (N = 1)

#### **Proposal and Selection Process (4% N=8)**

- Clarity of Guidelines (N = 1)
- Streamline Process (N = 2)
- Time Between Application Submission and Receipt of Funding (N = 1)
- Other (N = 4)

#### **Impact on and Understanding of Grantees' Organizations (3% N=6)**

- Discussion of Organization's Strategy (N = 2)
  - "Besides a strong strategy that is widely consulted to independent and neutral parties, the staff managing and making decisions of the grants are important catalyst in ensuring the strategy is implemented to yield expected impacts. Improvement on those two aspects would make Packard a better funder."
- Orientation Change (N = 2)
  - "At the moment, with Packard it feels like smaller organisations are permitted to take the crumbs from the table, after the big NGOs have already feasted. I suggest that Packard looks beyond the wealthy large international NGOs and forms some strategic partnerships with smaller organisations that are usually doing the more interesting and important work."
- Understanding of Grantees' Organizations (N = 2)
  - "It would be great if they would reach out to me and ask 'What else can we do to help you succeed?'"

#### **Other (13% N=27)**

- Sharing Impact (N = 8)
  - "A sharing of how the Agriculture, Livelihoods, and Conservation program is going - is the new program meeting their expectations, etc. Since this is still an exploratory program, it would be nice to hear what they are finding from the field and the impact on these issues."
  - "Sharing of other grantees' work."
  - "Packard Foundation is a big organization with good visibility. we like to: 1. jointly work on resource motivation, 2. share most significant changes and best practices globally using local and international medias."
- Bridging Program Areas (N = 5)
  - "On occasion, we have found that while some staff are aware of our work in a key area, others are not, even when that work may intersect with grantees or geographies in their portfolio."
  - "Also, encouraging projects that bridge across Packard's more silo-ed programs could accomplish efficient synergies and new strategies."
- Collaboration with Other Funders (N = 5)
  - "Invest in development of additional funding sources or grouped investment into programs and services."
  - "Continue to strive for better alignment with funders who have similar grant opportunities (we know this can be challenging just as NGO coordination is as well)."
- Innovative Funding (N = 5)
  - "Continue to look for new developments and innovation and fund these to help advance the entire field."
- Other (N = 4)



## Contextual Data

### Grantmaking Characteristics

Length of Grant Awarded	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Average grant length	2.2 years	2.1 years	2 years	2.1 years	2.2 years	2 years	2.4 years	2.3 years	2.2 years	2.5 years

Type of Grant Awarded	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Average Funder	Custom Cohort
Program / Project Support	67%	66%	65%	65%	74%	71%	77%	65%	73%
General Operating / Core Support	28%	24%	25%	25%	21%	20%	14%	22%	18%
Capital Support: Building / Renovation / Endowment Support / Other	0%	2%	2%	1%	1%	3%	3%	5%	2%
Technical Assistance / Capacity Building	3%	6%	5%	7%	3%	5%	4%	4%	4%
Scholarship / Fellowship	1%	1%	1%	1%	0%	1%	2%	2%	2%
Event / Sponsorship Funding	1%	1%	1%	0%	0%	0%	0%	2%	1%

## Grant Size

Grant Amount Awarded	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Median grant size	\$162.4K	\$200K	\$150K	\$150K	\$150K	\$200K	\$225K	\$200K	\$93K	\$340K

Grant Amount Awarded	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
Less than \$10K	0%	1%	1%	0%	3%	4%	2%	3%	9%	1%
\$10K - \$24K	2%	3%	7%	4%	7%	6%	6%	8%	12%	2%
\$25K - \$49K	9%	9%	15%	12%	8%	8%	8%	10%	13%	5%
\$50K - \$99K	16%	18%	16%	16%	15%	15%	13%	12%	15%	9%
\$100K - \$149K	16%	11%	10%	15%	15%	11%	10%	8%	10%	8%
\$150K - \$299K	24%	23%	24%	25%	25%	23%	23%	25%	16%	20%
\$300K - \$499K	11%	12%	10%	9%	10%	13%	11%	9%	9%	16%
\$500K - \$999K	12%	14%	9%	12%	8%	11%	11%	8%	8%	17%
\$1MM and above	8%	9%	8%	7%	10%	10%	17%	17%	9%	22%

Median Percent of Budget Funded by Grant (Annualized)	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	4%	4%	4%	4%	4%	5%	5%	5%	4%	5%

## Grantee Characteristics

Operating Budget of Grantee Organization	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Median Budget	\$2.5M	\$2.2M	\$2M	\$2M	\$2M	\$1.8M	\$2.1M	\$1.5M	\$1.5M	\$3M

Operating Budget of Grantee Organization	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
<\$100K	2%	2%	5%	4%	3%	4%	4%	3%	8%	3%
\$100K - \$499K	10%	12%	15%	14%	16%	14%	14%	22%	19%	12%
\$500K - \$999K	14%	13%	15%	16%	16%	14%	14%	14%	13%	11%
\$1MM - \$4.9MM	34%	36%	32%	31%	31%	34%	29%	35%	30%	30%
\$5MM - \$24MM	23%	22%	20%	21%	22%	20%	19%	14%	18%	22%
>=\$25MM	16%	15%	14%	14%	12%	13%	19%	13%	11%	22%

## Funding Relationship

Pattern of Grantees' Funding Relationship with Packard	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Average Funder	Custom Cohort
First grant received from Packard	19%	14%	13%	13%	20%	29%	35%
Consistent funding in the past	67%	70%	70%	73%	65%	53%	45%
Inconsistent funding in the past	14%	16%	17%	14%	15%	18%	20%

Funding Status and Grantees Previously Declined Funding	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from Packard	88%	86%	83%	88%	85%	89%	75%	78%	82%	86%
Percent of grantees previously declined funding by Packard	19%	20%	23%	26%	27%	31%	36%	33%	30%	23%

## Grantee Demographics

Job Title of Respondents	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Average Funder	Custom Cohort
Executive Director	52%	48%	47%	45%	50%	44%	40%	53%	47%	39%
Other Senior Management	18%	16%	15%	16%	17%	15%	17%	12%	16%	21%
Project Director	12%	13%	14%	15%	10%	14%	16%	10%	13%	19%
Development Director	8%	6%	8%	9%	8%	8%	5%	8%	8%	8%
Other Development Staff	10%	7%	7%	7%	8%	10%	9%	6%	7%	6%
Volunteer	1%	1%	2%	0%	1%	0%	0%	0%	1%	0%
Other	0%	9%	7%	9%	7%	9%	13%	11%	8%	7%

Gender of Respondents	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Average Funder	Custom Cohort
Female	63%	62%	59%	63%	61%	60%	59%	62%	55%
Male	34%	36%	39%	36%	37%	40%	41%	35%	41%
Prefer to self-identify	0%	0%	0%	0%	0%	0%	0%	0%	0%
Prefer not to say	3%	2%	2%	1%	3%	0%	0%	3%	3%

Race/Ethnicity of Respondents	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Average Funder	Custom Cohort
African-American/Black	5%	2%	3%	4%	2%	3%	7%	7%
American Indian/Alaskan Native	0%	0%	0%	0%	0%	0%	1%	1%
Asian (incl. Indian subcontinent)	6%	8%	9%	8%	5%	11%	4%	5%
Caucasian/White	76%	79%	69%	75%	80%	72%	80%	75%
Hispanic/Latino	9%	7%	11%	8%	8%	8%	5%	6%
Multi-racial	3%	2%	3%	2%	2%	2%	3%	3%
Pacific Islander	0%	1%	1%	2%	0%	1%	0%	0%
Race/Ethnicity not included above	1%	1%	2%	2%	1%	2%	1%	1%

## Funder Characteristics

Financial Information	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Total assets	\$7102.4M	\$7025.8M	\$6456.6M	\$5797.4M	\$5699.2M	\$6594.4M	\$5788.5M	\$5982.5M	\$227.6M	\$3948.6M
Total giving	\$319M	\$307.3M	\$294.7M	\$265.1M	\$282.8M	\$307.9M	\$150.1M	\$277.9M	\$16.3M	\$168.8M

Funder Staffing	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010	Packard 2008	Packard 2006	Packard 2004	Median Funder	Custom Cohort
Total staff (FTEs)	127	120	114	97	92	81	84	49	15	90
Percent of staff who are program staff	42%	39%	41%	40%	45%	49%	49%	100%	41%	42%

Grantmaking Processes	Packard 2018	Packard 2016	Packard 2014	Packard 2008	Median Funder	Custom Cohort
Proportion of grants that are proactive	70%	70%	70%	N/A	43%	95%
Proportion of grantmaking dollars that are proactive	80%	80%	80%	0%	60%	97%

## Additional Survey Information

On many questions in the grantee survey, grantees are allowed to select “don’t know” or “not applicable” if they are not able to provide an alternative answer. In addition, some questions in the survey are only displayed to a select group of grantees for which that question is relevant based on a previous response.

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Packard’s grantee survey was 629.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your field?	591
How well does the Foundation understand the field in which you work?	582
To what extent has the Foundation advanced the state of knowledge in your field?	514
To what extent has the Foundation affected public policy in your field?	436
Overall, how would you rate the Foundation's impact on your local community?	446
How well does the Foundation understand the local community in which you work?	472
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	574
How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?	579
How well does the Foundation understand your organization's strategy and goals?	596
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	587
Who most frequently initiated the contact you had with your program officer during this grant?	624
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	586
Has your main contact at the Foundation changed in the past six months?	603
Did you submit a proposal to the Foundation for this grant?	627
As you developed your grant proposal, 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?	615
How involved was Foundation staff in the development of your grant proposal?	609
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	588
Have you ever been declined funding from the Foundation?	501
Are you currently receiving funding from the Foundation?	625
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	614
How well does the Foundation understand your intended beneficiaries' needs?	553
To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	559
Have you participated in a reporting or evaluation process?	599
To what extent was the Foundation's reporting process...Adaptable, if necessary, to fit your circumstances?	461
To what extent was the Foundation's reporting process...A helpful opportunity for you to reflect and learn?	508
To what extent was the Foundation's reporting process...Relevant, with questions and measures pertinent to the work funded by this grant?	504
To what extent was the Foundation's reporting process...Straightforward?	506
To what extent was the Foundation's reporting process...Aligned appropriately to the timing of your work ?	506
Did the Foundation provide financial support for the evaluation?	102
To what extent did the evaluation...Result in you making changes to the work that was evaluated?	120
To what extent did the evaluation...Incorporate your input in the design of the evaluation?	117
To what extent did the evaluation...Generate information that you believe will be useful for other organizations?	118
Funder-Grantee Relationships Summary Measure	570
Understanding Measure	524

Did your organization receive Organizational Effectiveness support during this period?	559
Did you receive support from a local/regional advisor working for the Packard Foundation?	539
Staff provided clear expectations regarding the process of reviewing my grant proposal	595
Staff provided realistic expectations regarding the timing of the approval of my grant	594
When I contact staff, I either: a) receive a substantive response; or b) am informed of when I will receive a substantive response; or c) am notified they are out of the office	587
Foundation staff helped me understand how my organization fits into the overall strategy of their program.	575
Foundation staff respond within 60 days acknowledging receipt of report and commenting briefly on its substance	476
The Foundation, other grantees and my organization are working from a shared definition of problems and solutions	543
Funding is available from other funders for projects like the ones funded by Packard's OE program	458
When using the Packard Foundation's online grant site, I can easily access information and documents related to my grant	540
In addition to your main contact for this grant, did you also interact with members of the Packard Foundation's program support staff who support the main contact?	574
Which best describes the process used to set an indirect cost rate for this project?	342
How strongly do you agree or disagree with the following statements about how indirect and direct costs were set? The final indirect rate was fair to my organization	289
How strongly do you agree or disagree with the following statements about how indirect and direct costs were set? The process was straightforward	293
How strongly do you agree or disagree with the following statements about how indirect and direct costs were set? My organization has an accurate understanding of the indirect costs associated with this work	322
To what extent did the grant cover the full costs of the work it was meant to fund (or the costs of its share of work in a multi-funder project)?	364

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## About CEP and Contact Information

### Mission:

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

### Vision:

We seek a world in which pressing social needs are more effectively addressed.

We believe improved performance of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

## About the GPR

Since 2003, the Grantee Perception Report® (GPR) has provided funders with comparative, candid feedback based on grantee perceptions. The GPR is the only grantee survey process that provides comparative data, and is based on extensive research and analysis. Hundreds of funders of all types and sizes have commissioned the GPR, and tens of thousands of grantees have provided their perspectives to help funders improve their work. CEP has surveyed grantees in more than 150 countries and in 8 different languages.

The GPR's quantitative and qualitative data helps foundation leaders evaluate and understand their grantees' perceptions of their effectiveness, and how that compares to their philanthropic peers.

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