The David and Lucile Packard Foundation 2020 Grantee Perception Report - Public

Generated on July 13, 2021

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.

Key Measures	Trend Data	Average Rating	Percentile Rank
Field Impact Impact on Grantees' Fields		6.16	88th Custom Cohort
Community Impact Impact on Grantees' Communities		5.61	44th Custom Cohort
Organizational Impact Impact on Grantees' Organizations		6.39	82nd Custom Cohort
Relationships Strength of Relationships with Grantees		6.32	69th Custom Cohort
Selection Process Helpfulness of the Selection Process		5.24	70th Custom Cohort

Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.
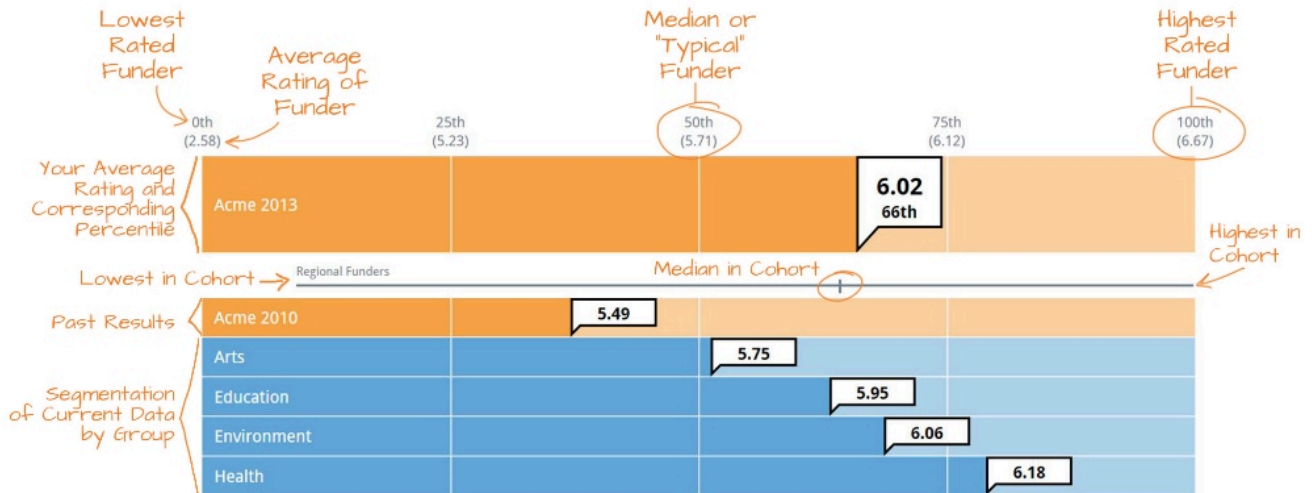
Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

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.

5.81*
60th

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Packard 2020	August and September 2020	1283	750	58%
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 2020	June 2019 - June 2020
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, 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 300 funders. The full list of participating funders can be found at https://cep.org/gpr-participants/.

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	40	Funders with median grant size of $20K or less
Large Grant Providers	90	Funders with median grant size of $200K or more
High Touch Funders	36	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	42	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	82	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	100	Funders that make at most 10% of grants by invitation only

| International Funders | 55 | Funders that fund outside of their own country |
| European Funders | 25 | Funders that are headquartered in Europe |

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than $5 Million	58	Funders with annual giving of less than $5 million
Funders Giving $50 Million or More	70	Funders with annual giving of $50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	158	All private foundations in the GPR dataset
Family Foundations	76	All family foundations in the GPR dataset
Community Foundations	34	All community foundations in the GPR dataset
Health Conversion Foundations	29	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	39	Funders that are primarily based outside the United States
Recently Established Foundations	78	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	29	Funders who surveyed grantees during COVID-19 (GPR only)

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.

Note: The data on this page and in the Contextual Data section are self-reported by grantees and may not match the data in the Foundation's FLUXX system.

Median Grant Size

	0th ($2K)	25th ($40K)	50th ($100K)	75th ($224K)	100th ($3300K)
Packard 2020				$200K 71st	
Custom Cohort					
Packard 2018			$162K		
Packard 2016				$200K	
Packard 2014			$150K		
Packard 2012			$150K		
Packard 2010			$150K		
Packard 2008				$200K	
Packard 2006				$225K	
Packard 2004				$200K	
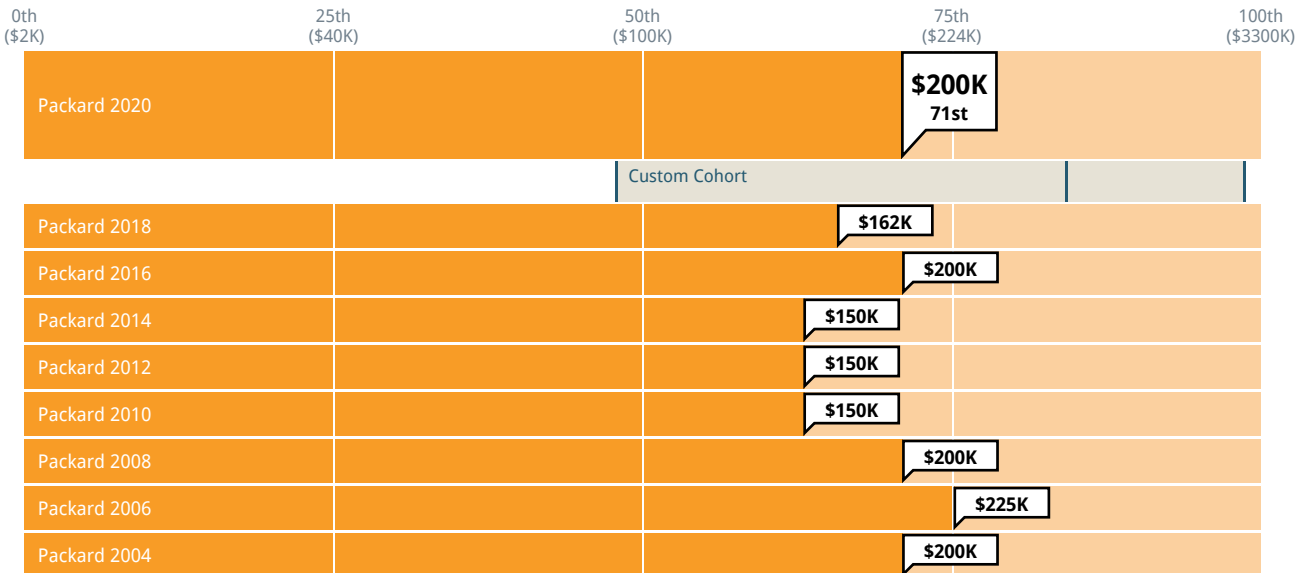
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Average Grant Length

	0th (1.0yrs)	25th (1.8yrs)	50th (2.2yrs)	75th (2.7yrs)	100th (7.9yrs)
Packard 2020		2.0yrs 37th			
Custom Cohort					
Packard 2018			2.2yrs		
Packard 2016			2.1yrs		
Packard 2014			2.0yrs		
Packard 2012			2.1yrs		
Packard 2010			2.2yrs		
Packard 2008			2.0yrs		
Packard 2006				2.4yrs	
Packard 2004			2.3yrs		
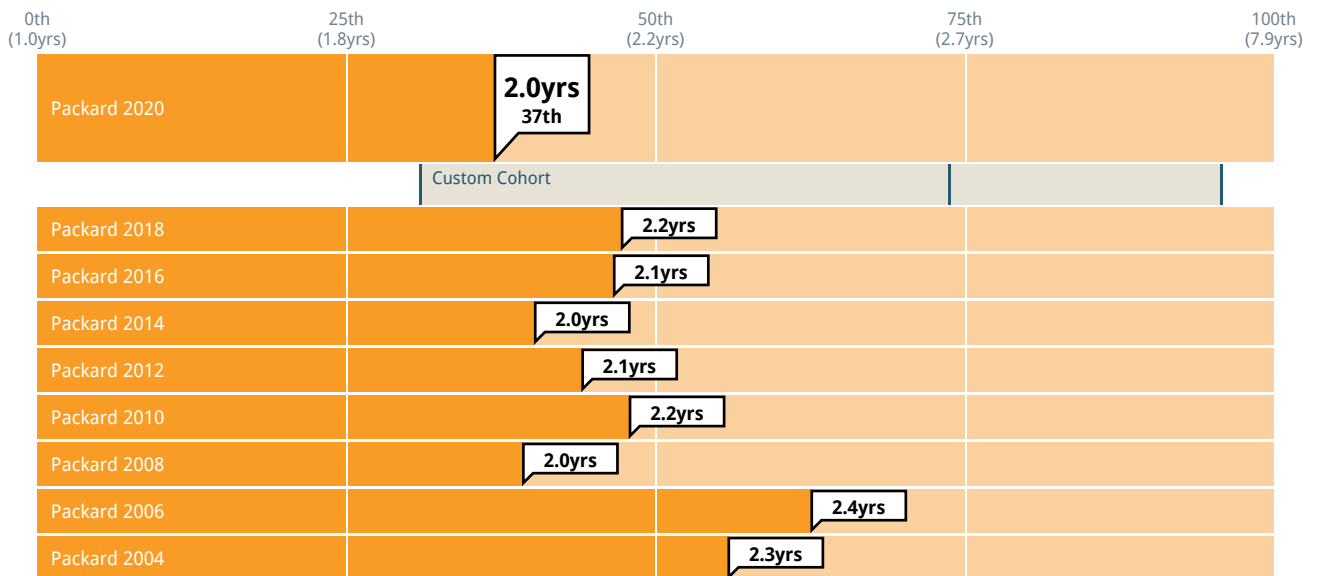
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Median Organizational Budget

	0th ($0.0M)	25th ($0.9M)	50th ($1.5M)	75th ($3.0M)	100th ($30.0M)

Packard 2020 — **$2.2M** 66th

Custom Cohort

Packard 2018 — $2.5M
Packard 2016 — $2.2M
Packard 2014 — $2.0M
Packard 2012 — $2.0M
Packard 2010 — $2.0M
Packard 2008 — $1.8M
Packard 2006 — $2.1M
Packard 2004 — $1.5M
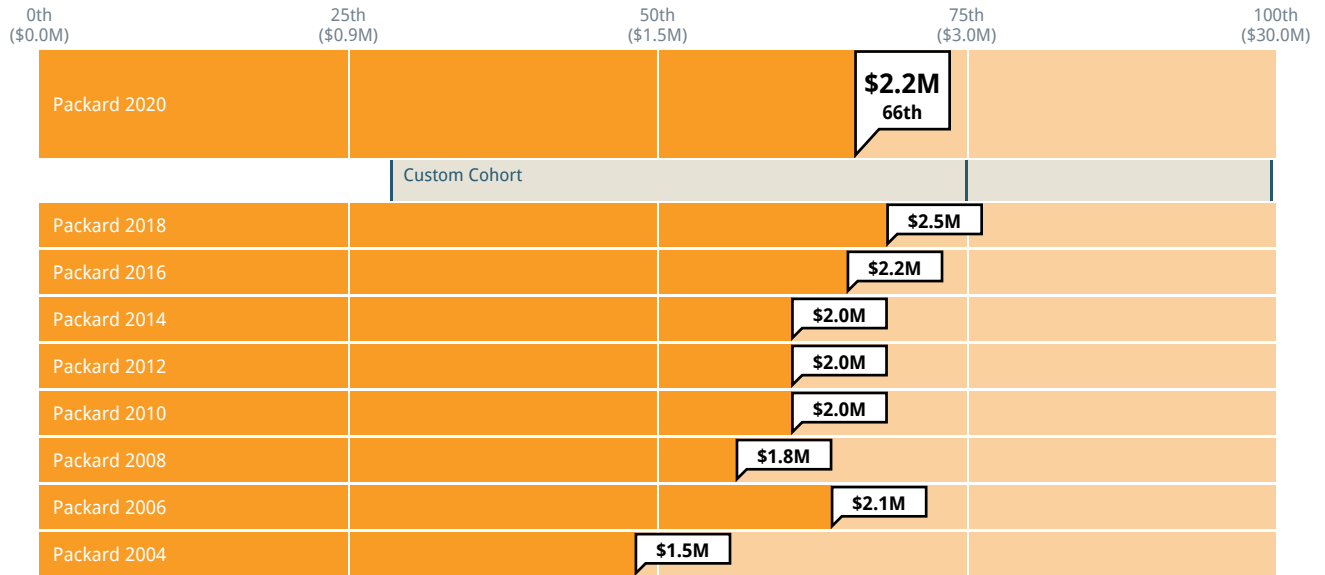
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Selected Cohort: Custom Cohort

Grant History	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Percentage of first-time grants	13%	19%	14%	13%	13%	20%

Selected Cohort: Custom Cohort

Program Staff Load	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Dollars awarded per program staff full-time employee	$5.1M	$5.9M	$6.5M	$6.3M	$6.8M	$6.9M
Applications per program full-time employee	13	16	18	20	18	N/A
Active grants per program full-time employee	46	24	31	22	25	28

Proportion of Unrestricted Funding

Proportion of grantees responding 'No, this funding was not restricted to a specific use (i.e. general operating, core support)'
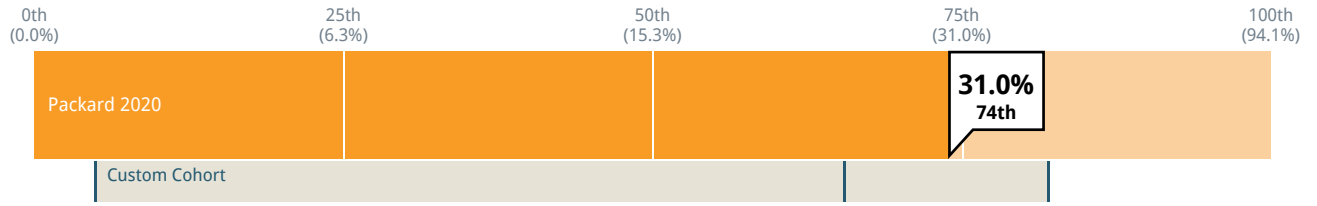
0th (0.0%)	25th (6.3%)	50th (15.3%)	75th (31.0%)	100th (94.1%)

Packard 2020

31.0%
74th

Custom Cohort

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Impact on and Understanding of Grantees' Fields

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

1 = No impact   **7** = Significant positive impact

	0th (4.21)	25th (5.49)	50th (5.78)	75th (5.99)	100th (6.70)
Packard 2020					6.16* 88th
Custom Cohort					
Packard 2018				6.04	
Packard 2016			5.94		
Packard 2014			5.93		
Packard 2012				6.05	
Packard 2010				6.03	
Packard 2008				6.12	
Packard 2006			5.95		
Packard 2004			5.78		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

	0th (4.60)	25th (5.46)	50th (5.71)	75th (5.94)	100th (6.63)
Packard 2020					6.17* 92nd
Custom Cohort					
Packard 2018				5.99	
Packard 2016				6.05	
Packard 2014				5.94	
Packard 2012				6.07	
Packard 2010				5.99	
Packard 2008				5.91	
Packard 2006				5.92	
Packard 2004			5.70		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Advancing Knowledge and Public Policy

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

	0th (3.45)	25th (4.75)	50th (5.14)	75th (5.46)	100th (6.44)
Packard 2020					5.73* 92nd
Custom Cohort					
Packard 2018				5.57	
Packard 2016				5.63	
Packard 2014			5.40		
Packard 2012				5.62	
Packard 2010				5.55	
Packard 2008				5.54	
Packard 2006				5.53	
Packard 2004			5.26		
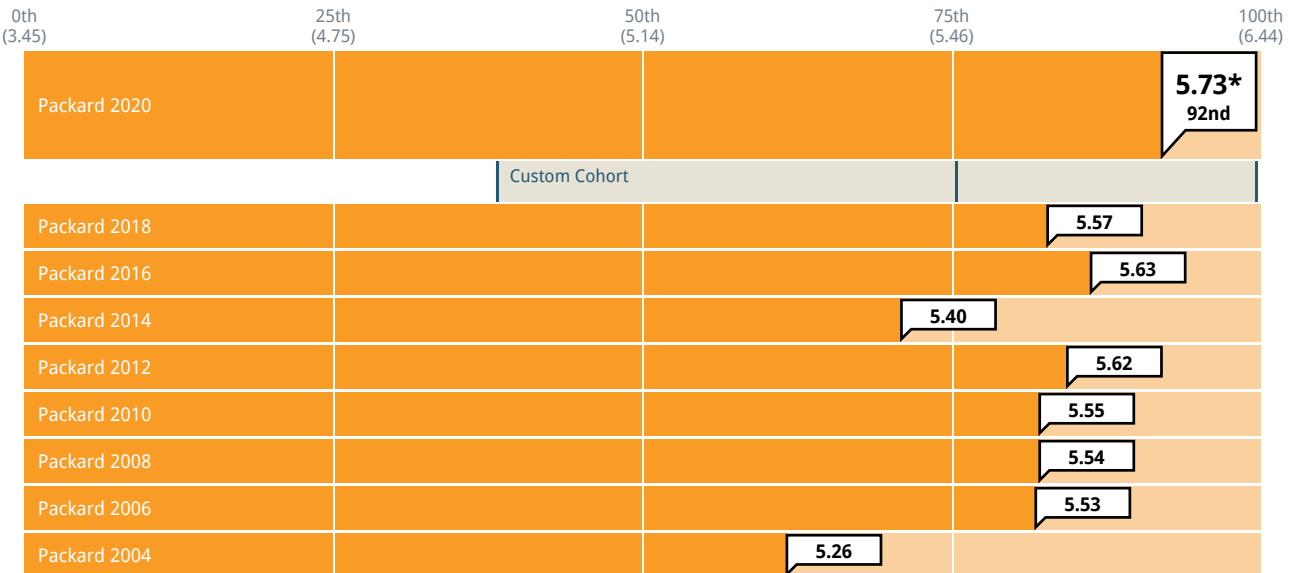
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent has the Foundation affected public policy in your field?

1 = Not at all   7 = Major influence on shaping public policy
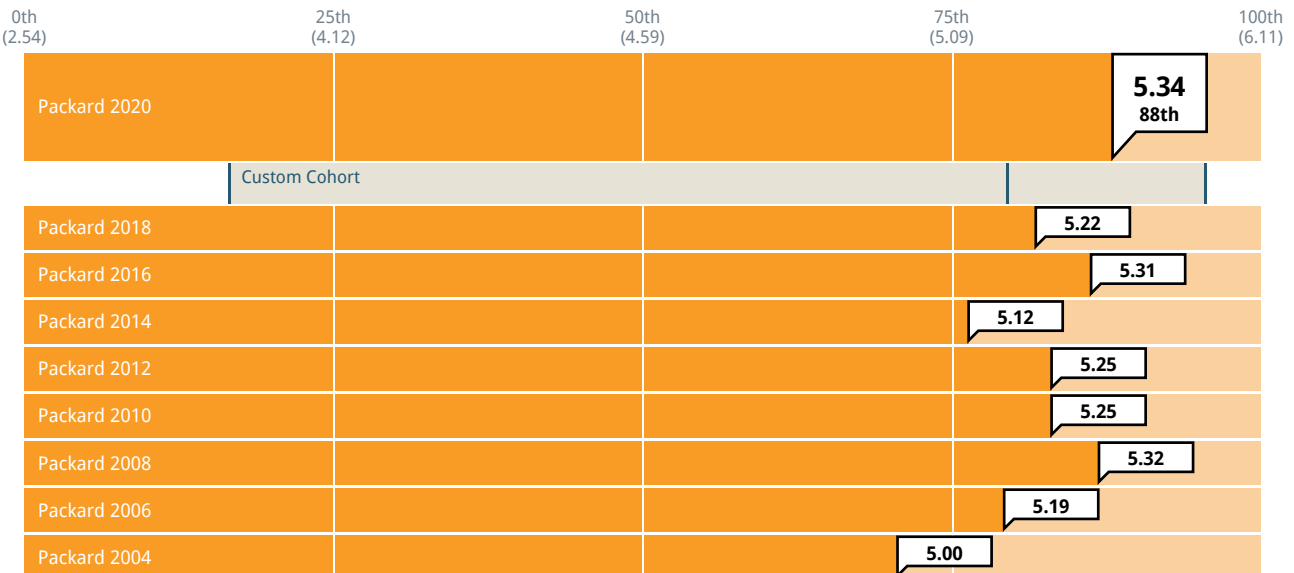
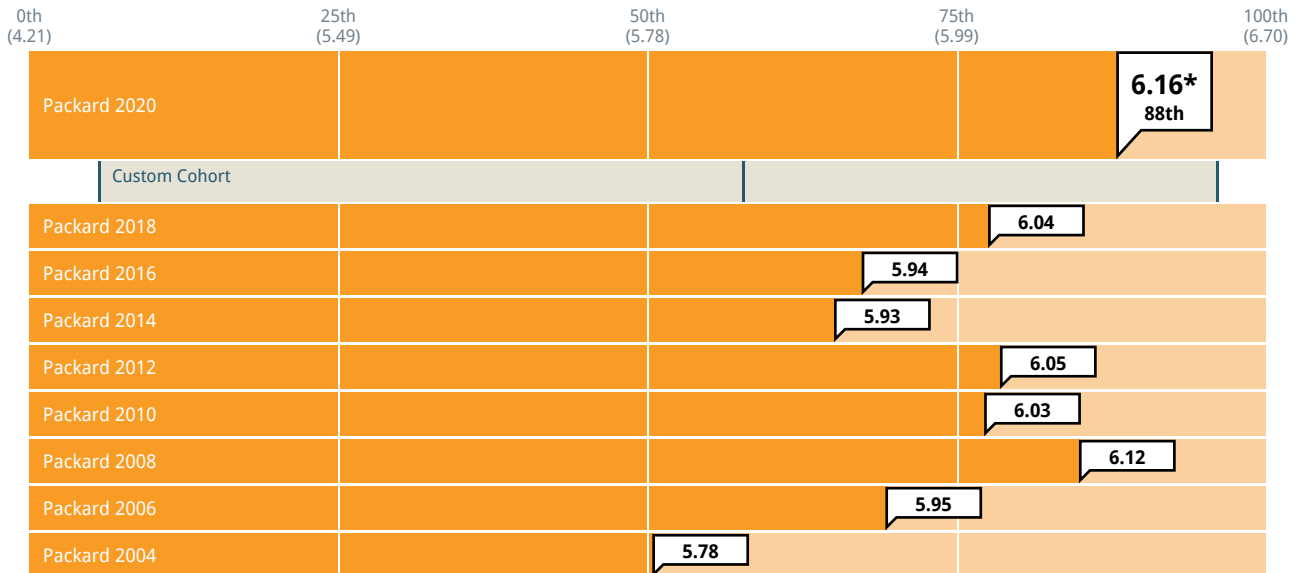|	0th (2.54)	25th (4.12)	50th (4.59)	75th (5.09)	100th (6.11)
Packard 2020					5.34 88th
Custom Cohort					
Packard 2018				5.22	
Packard 2016				5.31	
Packard 2014				5.12	
Packard 2012				5.25	
Packard 2010				5.25	
Packard 2008				5.32	
Packard 2006				5.19	
Packard 2004			5.00		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Impact on and Understanding of Grantees' Local Communities

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

1 = No impact   **7** = Significant positive impact

0th (2.52)	25th (5.16)	50th (5.71)	75th (6.06)	100th (6.69)

Packard 2020 — **5.61** 44th

Custom Cohort

Packard 2018 — 5.59
Packard 2016 — 5.47
Packard 2014 — 5.49
Packard 2012 — 5.53
Packard 2010 — 5.50
Packard 2008 — 5.39
Packard 2006 — 5.31
Packard 2004 — 5.09

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

1 = Limited understanding of the community   **7** = Regarded as an expert on the community
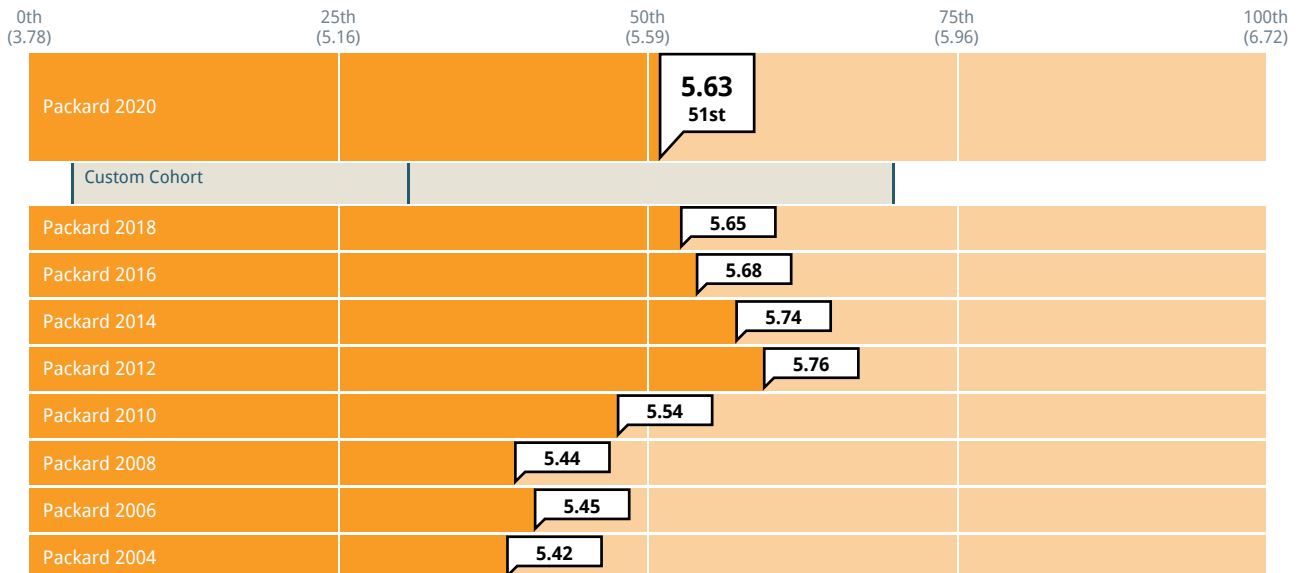
0th (3.78)	25th (5.16)	50th (5.59)	75th (5.96)	100th (6.72)

Packard 2020 — **5.63** 51st

Custom Cohort

Packard 2018 — 5.65
Packard 2016 — 5.68
Packard 2014 — 5.74
Packard 2012 — 5.76
Packard 2010 — 5.54
Packard 2008 — 5.44
Packard 2006 — 5.45
Packard 2004 — 5.42

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Impact on and Understanding of Grantees' Organizations

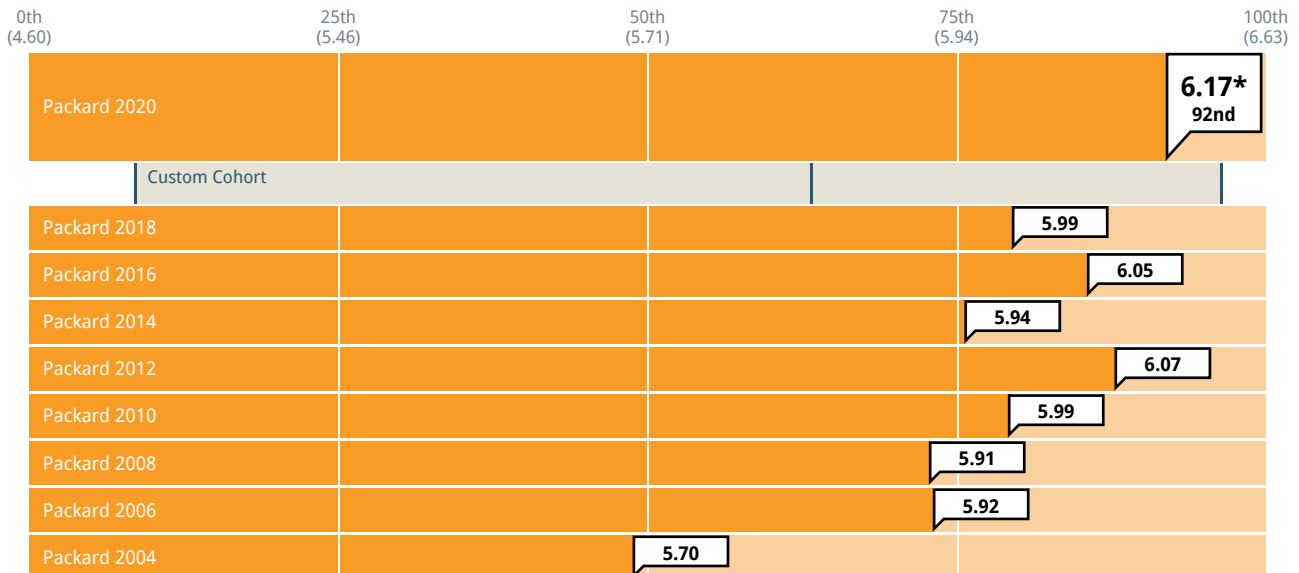## Overall, how would you rate the Foundation's impact on your organization?
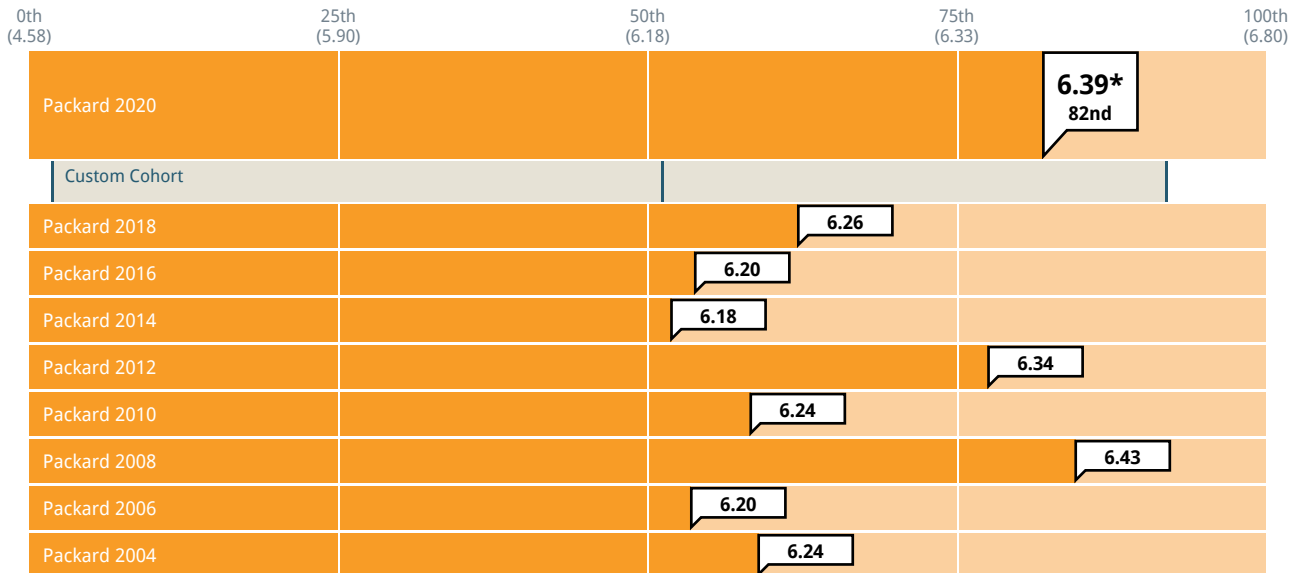
1 = No impact	**7** = Significant positive impact

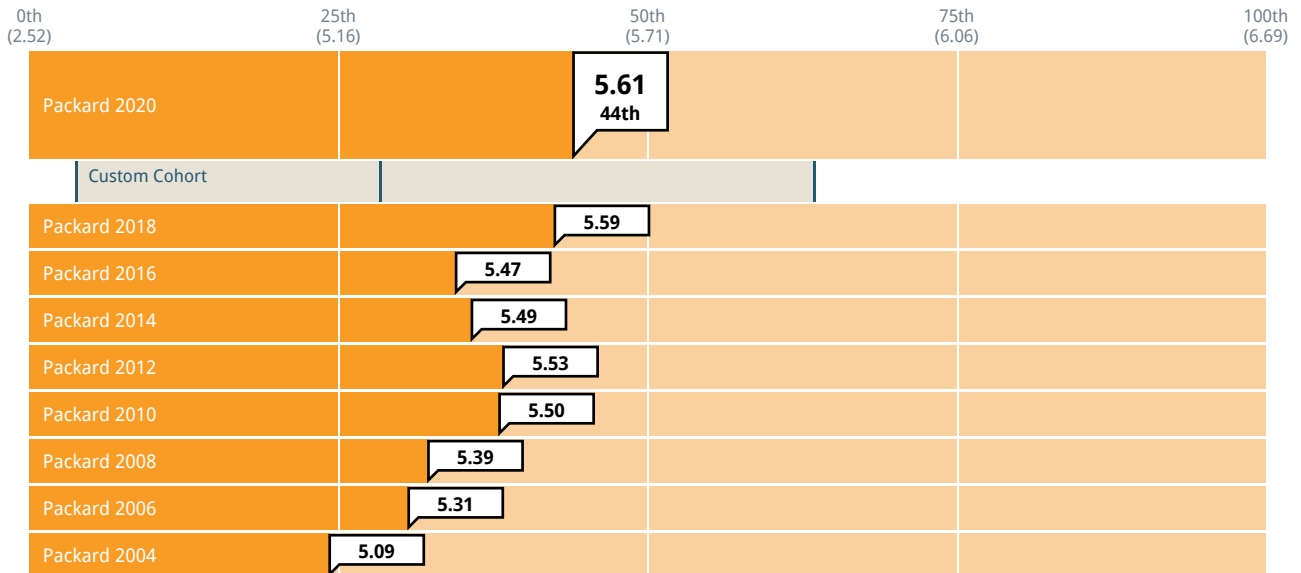|	0th (4.58)	25th (5.90)	50th (6.18)	75th (6.33)	100th (6.80)
Packard 2020				6.39* 82nd	
Custom Cohort					
Packard 2018			6.26		
Packard 2016			6.20		
Packard 2014			6.18		
Packard 2012				6.34	
Packard 2010			6.24		
Packard 2008				6.43	
Packard 2006			6.20		
Packard 2004			6.24		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

1 = Limited understanding	**7** = Thorough understanding

	0th (3.69)	25th (5.59)	50th (5.79)	75th (6.00)	100th (6.60)
Packard 2020				5.96 71st	
Custom Cohort					
Packard 2018				5.92	
Packard 2016				5.92	
Packard 2014			5.86		
Packard 2012				5.94	
Packard 2010			5.86		
Packard 2008			5.78		
Packard 2006			5.77		
Packard 2004		5.53			
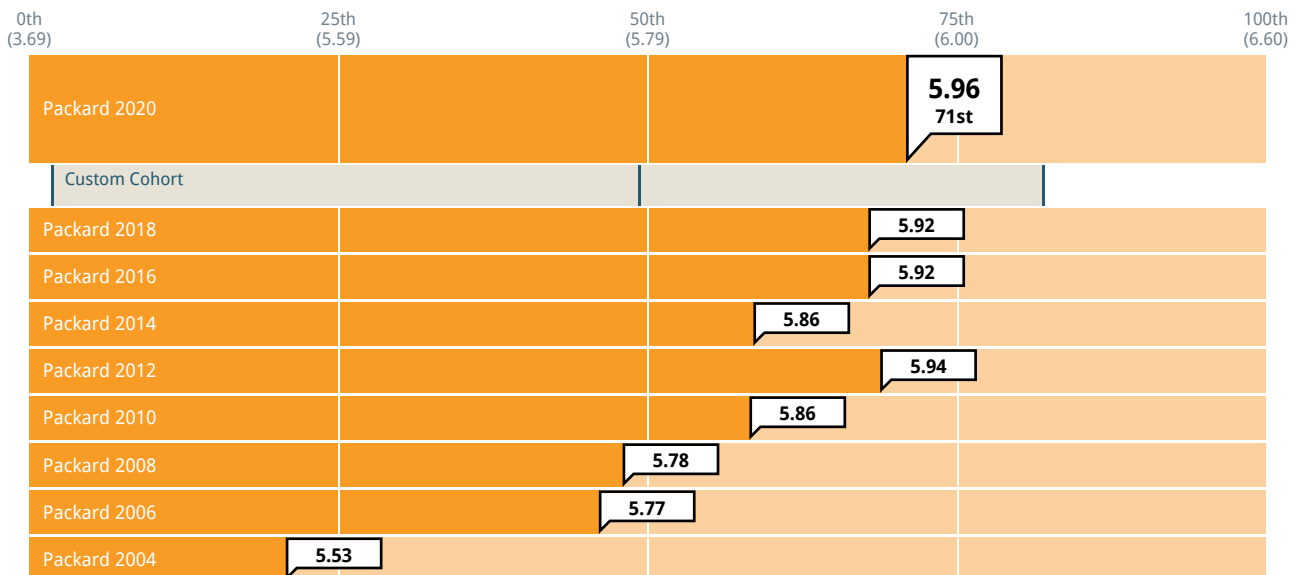
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Grantee Challenges

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

1 = Not at all aware   **7** = Extremely aware

	0th (4.00)	25th (5.05)	50th (5.31)	75th (5.53)	100th (6.29)

Packard 2020 — 5.53 / 74th

Custom Cohort

Packard 2018 — 5.41

Packard 2016 — 5.45

Packard 2014 — 5.36
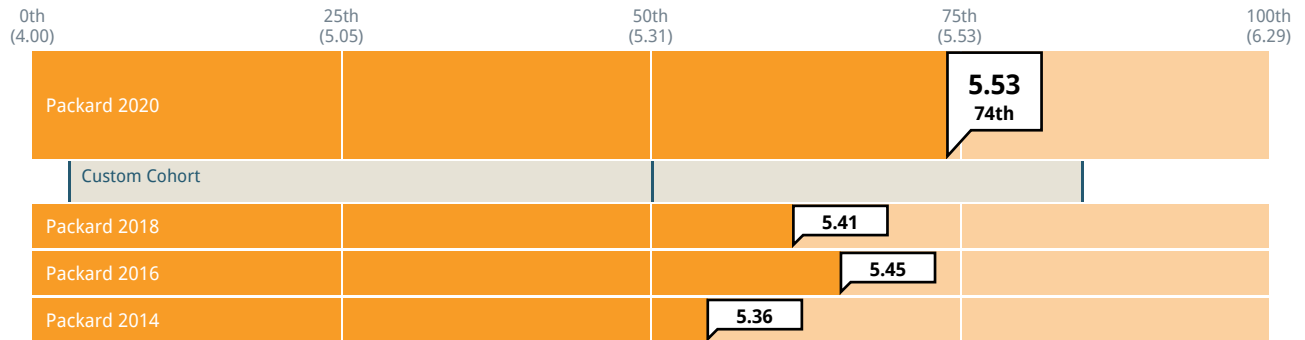
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

1 = Very negative   **7** = Very positive

	0th (4.80)	25th (6.02)	50th (6.20)	75th (6.37)	100th (6.72)
Packard 2020				6.32 / 69th	
Custom Cohort					
Packard 2018				6.31	
Packard 2016			6.25		
Packard 2014			6.19		
Packard 2012			6.25		
Packard 2010			6.18		
Packard 2008			6.17		
Packard 2006			6.12		
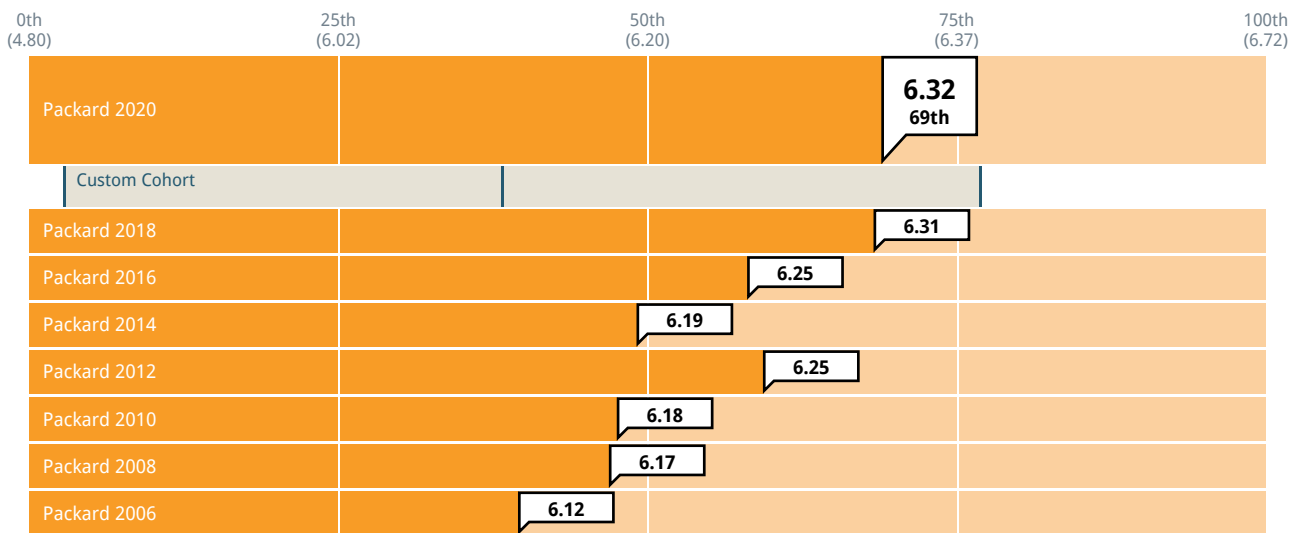
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Quality of Interactions

Overall, how fairly did the Foundation treat you?

1 = Not at all fairly	**7** = Extremely fairly

	0th (5.12)	25th (6.39)	50th (6.55)	75th (6.68)	100th (6.95)
Packard 2020					**6.74*** **85th**
Custom Cohort					
Packard 2018				6.68	
Packard 2016				6.65	
Packard 2014			6.59		
Packard 2012			6.61		
Packard 2010			6.55		
Packard 2008			6.58		
Packard 2006		6.49			
Packard 2004		6.49			
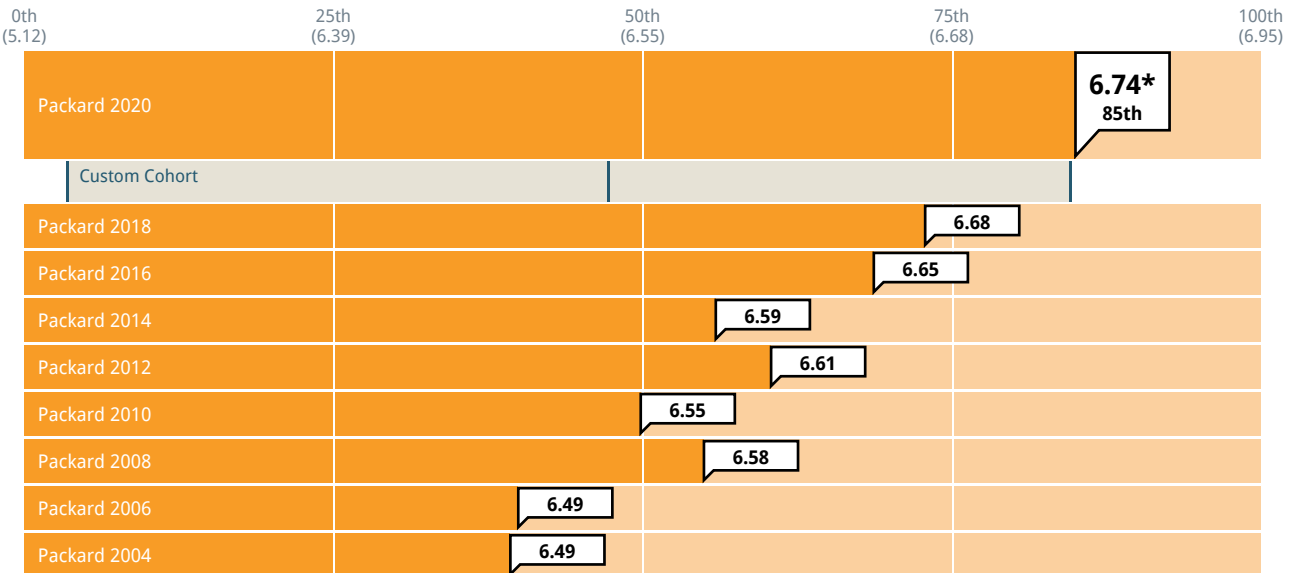
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

1 = Not at all comfortable	**7** = Extremely comfortable

	0th (4.80)	25th (6.06)	50th (6.24)	75th (6.40)	100th (6.84)
Packard 2020					**6.43** **81st**
Custom Cohort					
Packard 2018				6.38	
Packard 2016			6.29		
Packard 2014			6.24		
Packard 2012			6.36		
Packard 2010			6.33		
Packard 2008			6.34		
Packard 2006		6.21			
Packard 2004	6.01				
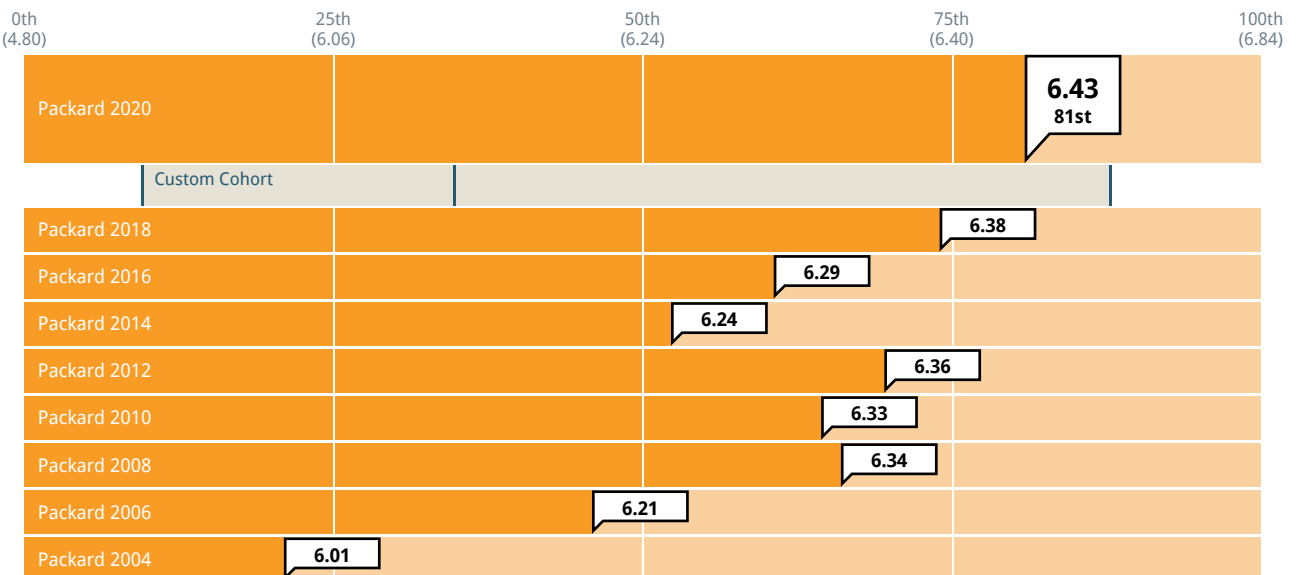
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Overall, how responsive was Foundation staff?

1 = Not at all responsive   **7** = Extremely responsive
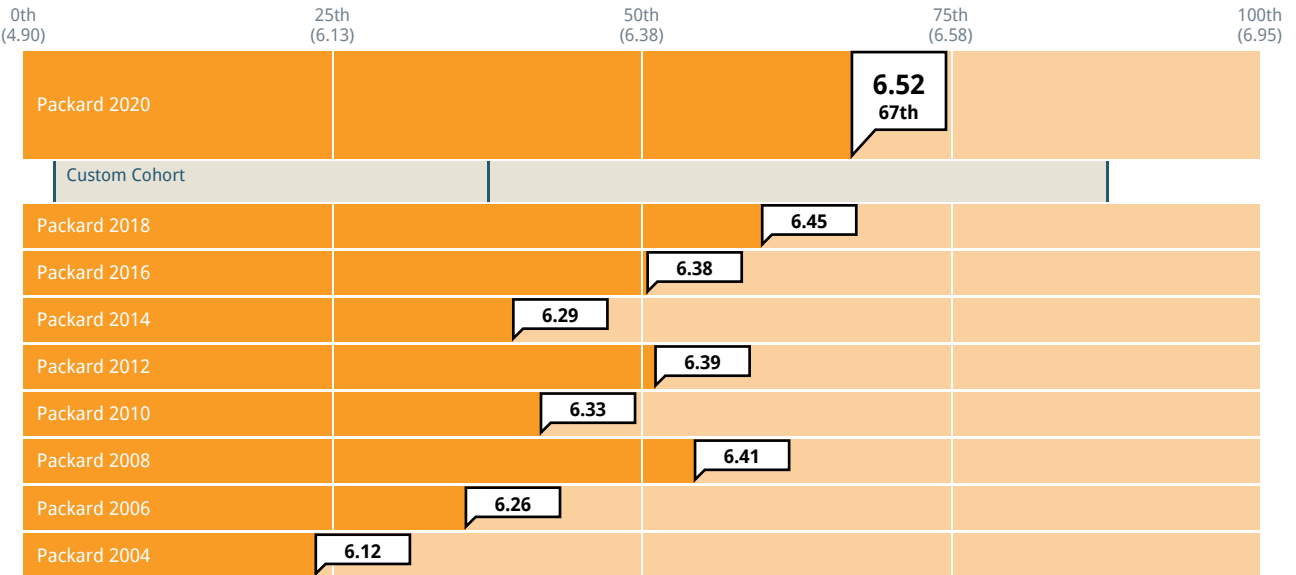
0th (4.90)	25th (6.13)	50th (6.38)	75th (6.58)	100th (6.95)

Packard 2020 — **6.52** 67th

Custom Cohort

Packard 2018 — 6.45
Packard 2016 — 6.38
Packard 2014 — 6.29
Packard 2012 — 6.39
Packard 2010 — 6.33
Packard 2008 — 6.41
Packard 2006 — 6.26
Packard 2004 — 6.12

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent did the Foundation exhibit trust in your organization's staff during this grant?
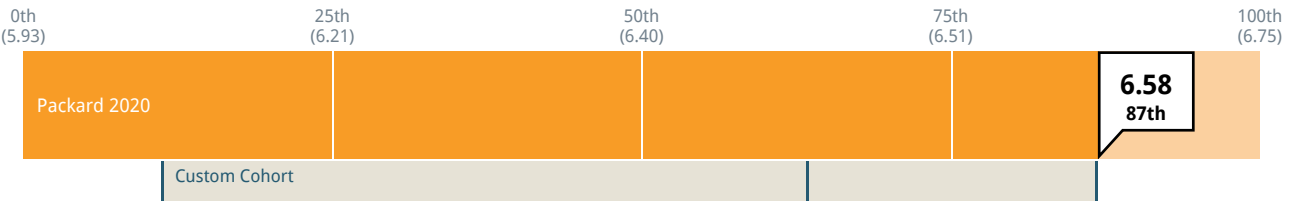
1 = Not at all   **4** = Somewhat   **7** = To a great extent

0th (5.93)	25th (6.21)	50th (6.40)	75th (6.51)	100th (6.75)

Packard 2020 — **6.58** 87th

Custom Cohort

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent did the Foundation exhibit candor about the Foundation's perspectives on your work during this grant?
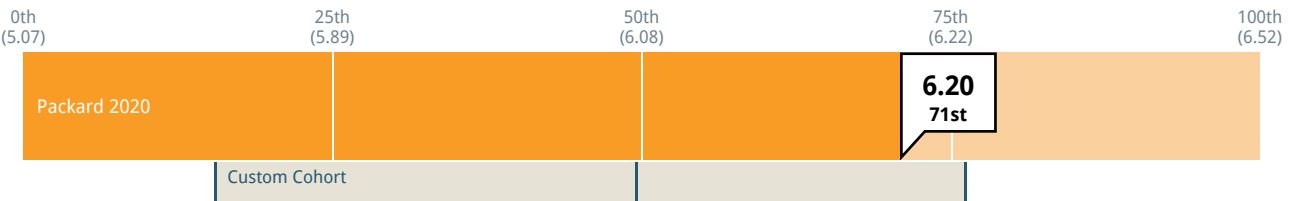
1 = Not at all   **4** = Somewhat   **7** = To a great extent

0th (5.07)	25th (5.89)	50th (6.08)	75th (6.22)	100th (6.52)

Packard 2020 — **6.20** 71st

Custom Cohort

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent did the Foundation exhibit respectful interaction during this grant?
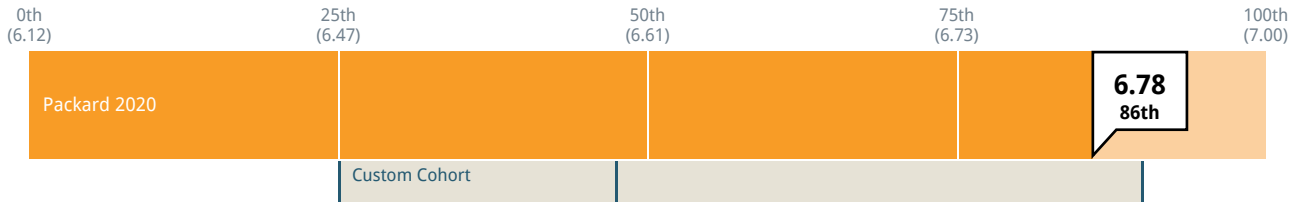
1 = Not at all   4 = Somewhat   7 = To a great extent

0th (6.12)	25th (6.47)	50th (6.61)	75th (6.73)	100th (7.00)

Packard 2020

6.78
86th

Custom Cohort

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent did the Foundation exhibit compassion for those affected by your work during this grant?

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

0th (5.41)	25th (6.24)	50th (6.42)	75th (6.58)	100th (6.94)

Packard 2020

6.59
77th
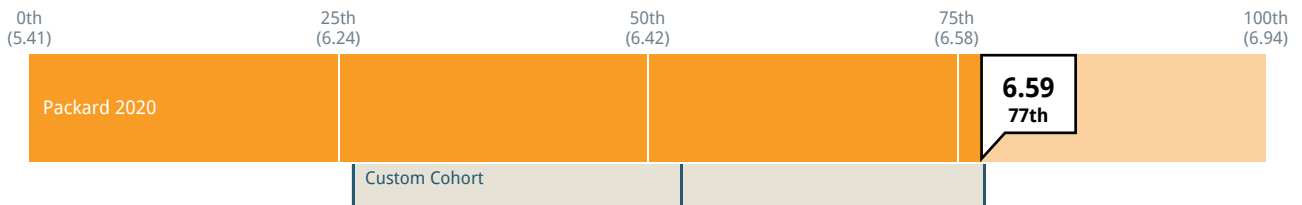
Custom Cohort

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Interaction Patterns

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

■ Yearly or less often ■ Once every few months ■ Monthly or more often

	Yearly or less often	Once every few months	Monthly or more often
Packard 2020	13%	67%	20%
Packard 2018	15%	64%	21%
Packard 2016	11%	64%	25%
Packard 2014	15%	57%	28%
Packard 2012	13%	60%	26%
Packard 2010	14%	55%	30%
Packard 2008	12%	56%	32%
Packard 2006	13%	58%	28%
Packard 2004	22%	57%	21%
Custom Cohort	12%	56%	32%
Average Funder	18%	55%	27%
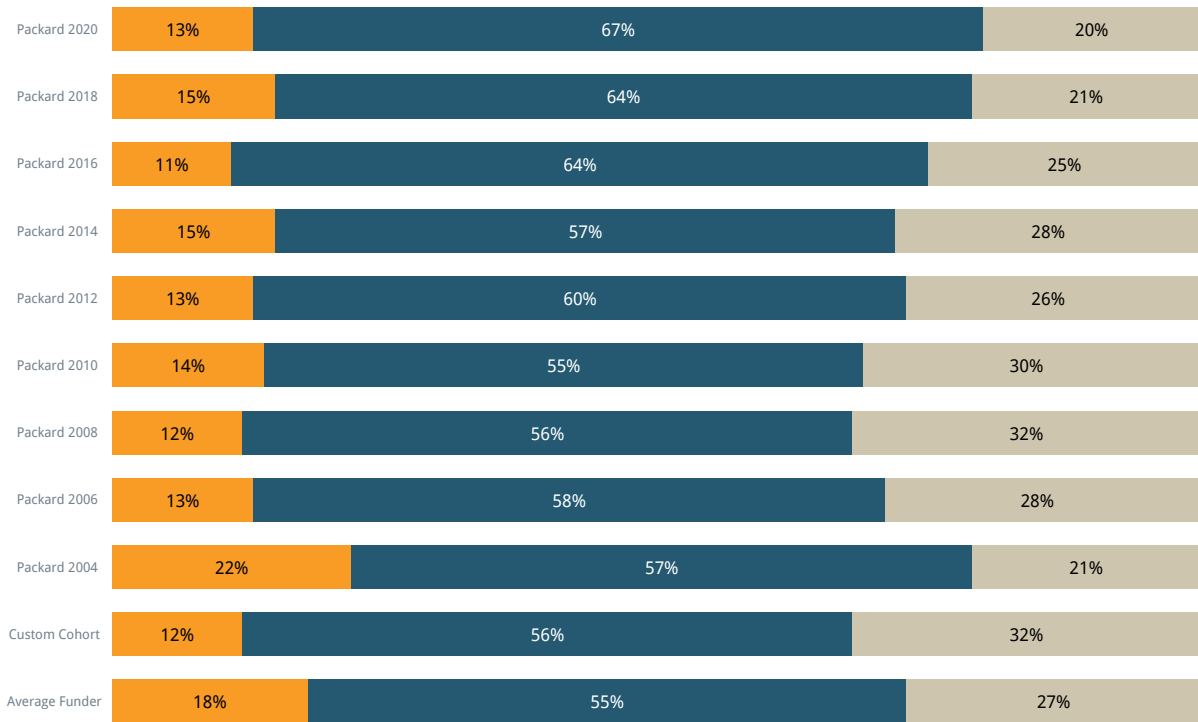
Cohort: Custom Cohort   **Past results:** on

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

■ Program Officer ■ Both of equal frequency ■ Grantee

	Program Officer	Both of equal frequency	Grantee
Packard 2020	17%	53%	27%
Packard 2018	12%	51%	32%
Packard 2016	12%	49%	35%
Packard 2014	12%	48%	36%
Packard 2012	11%	51%	34%
Packard 2010	12%	55%	30%
Packard 2008	11%	53%	32%
Packard 2006	10%	51%	34%
Custom Cohort	13%	50%	33%
Average Funder	15%	48%	31%
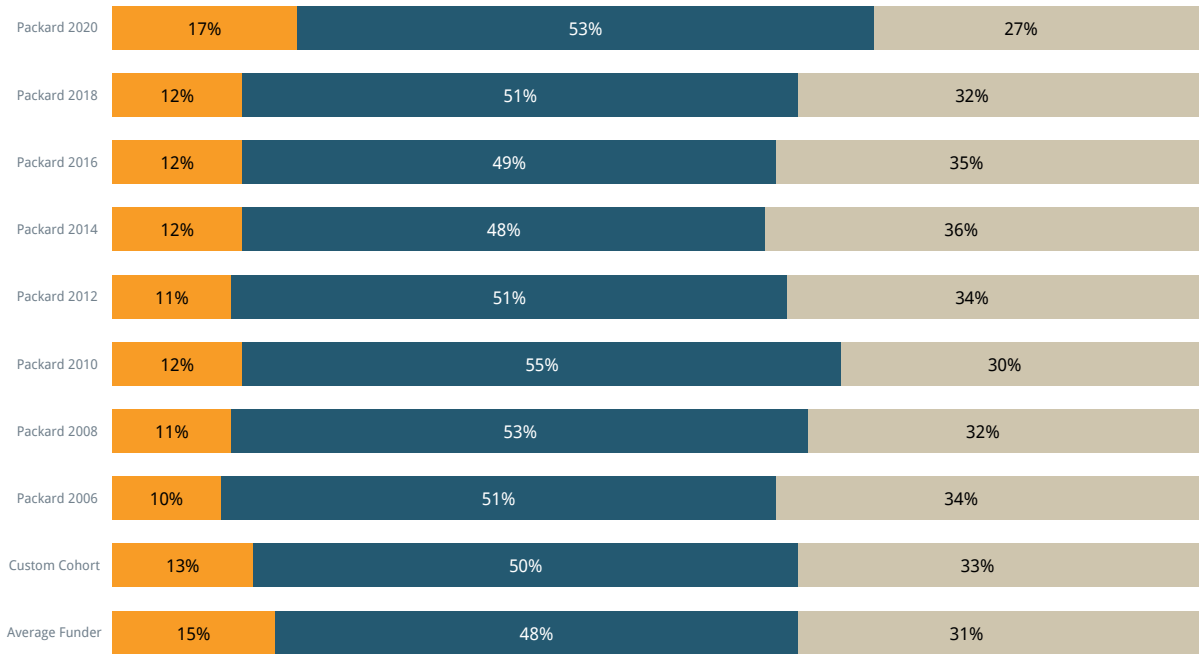
Cohort: Custom Cohort   **Past results:** on

Contact Change and Site Visits

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

Proportion of grantees responding 'Yes'

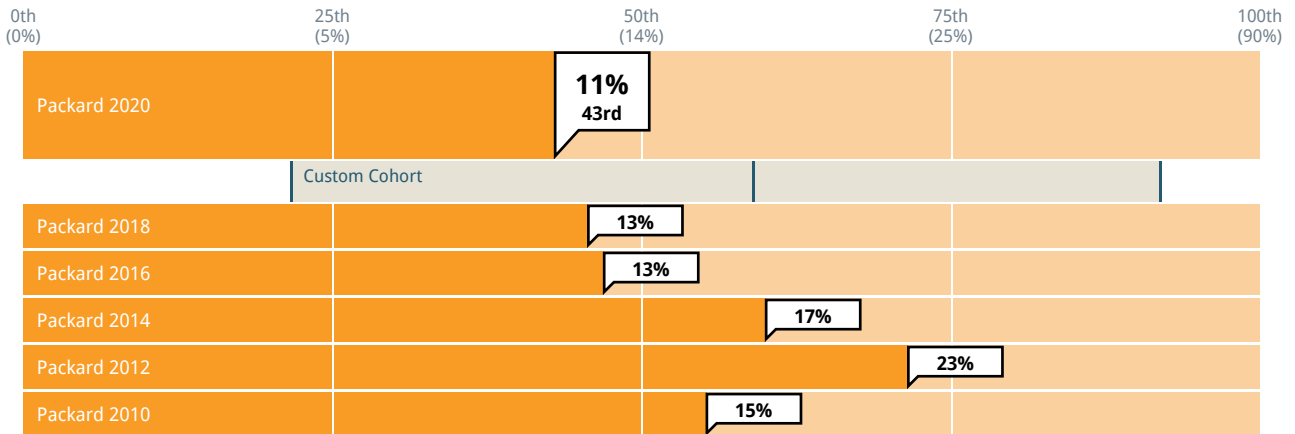|	0th (0%)	25th (5%)	50th (14%)	75th (25%)	100th (90%)

Packard 2020 — 11% — 43rd

Custom Cohort

Packard 2018 — 13%
Packard 2016 — 13%
Packard 2014 — 17%
Packard 2012 — 23%
Packard 2010 — 15%

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

Proportion of grantees responding 'Yes'

	0th (5%)	25th (36%)	50th (49%)	75th (69%)	100th (100%)

Packard 2020 — 34%* — 22nd

Custom Cohort

Packard 2018 — 45%
Packard 2016 — 45%
Packard 2014 — 42%
Packard 2012 — 45%
Packard 2010 — 49%
Packard 2008 — 47%
Packard 2006 — 52%
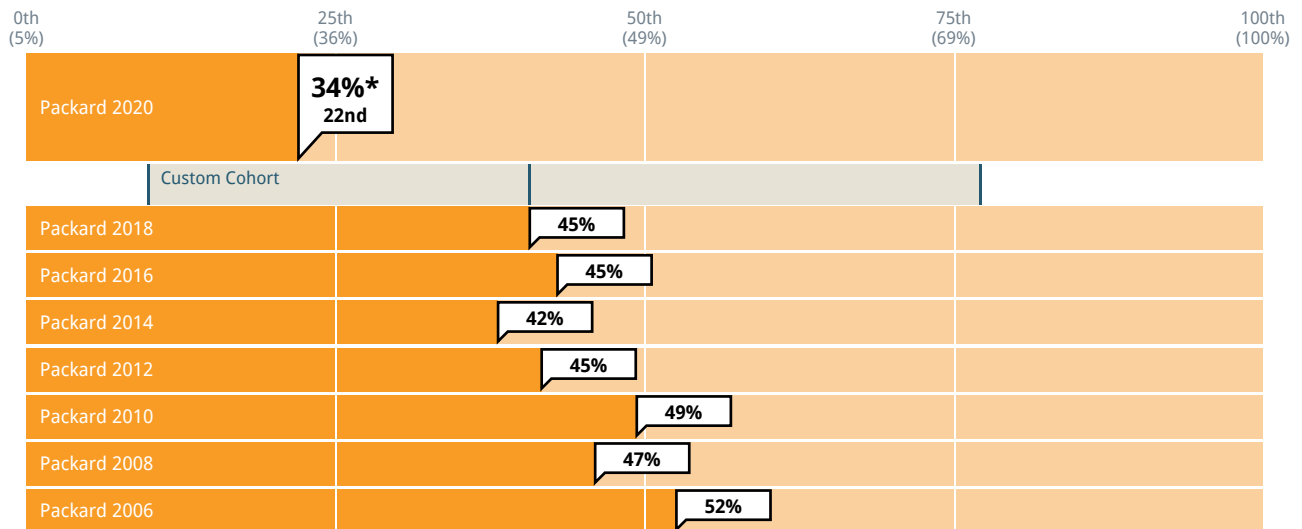
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Communication

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

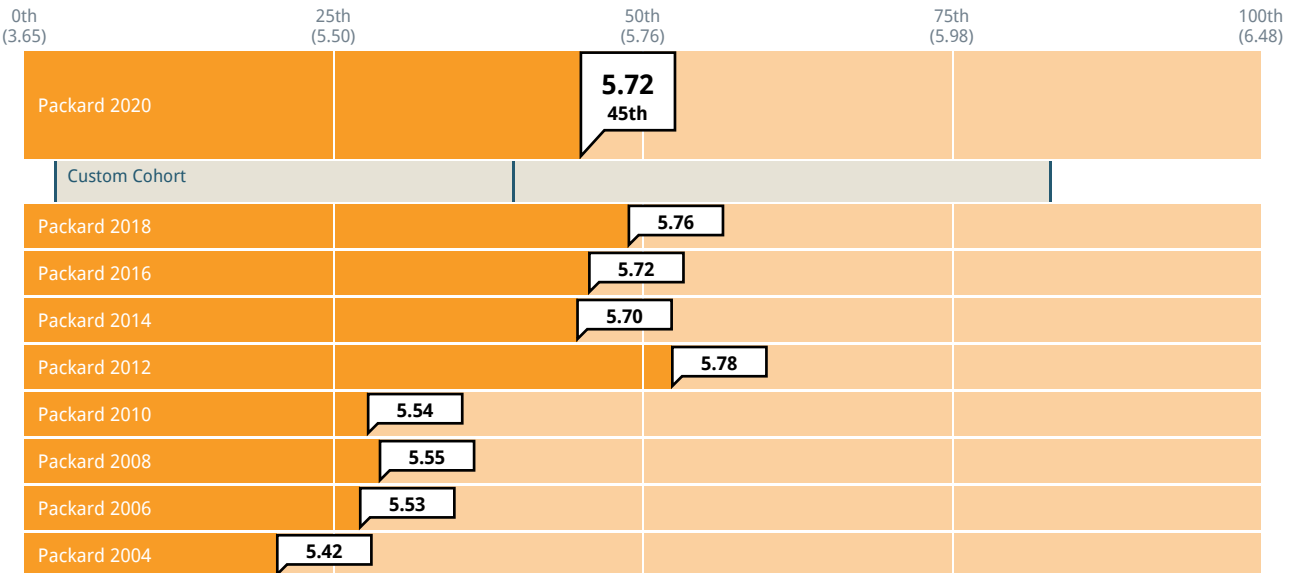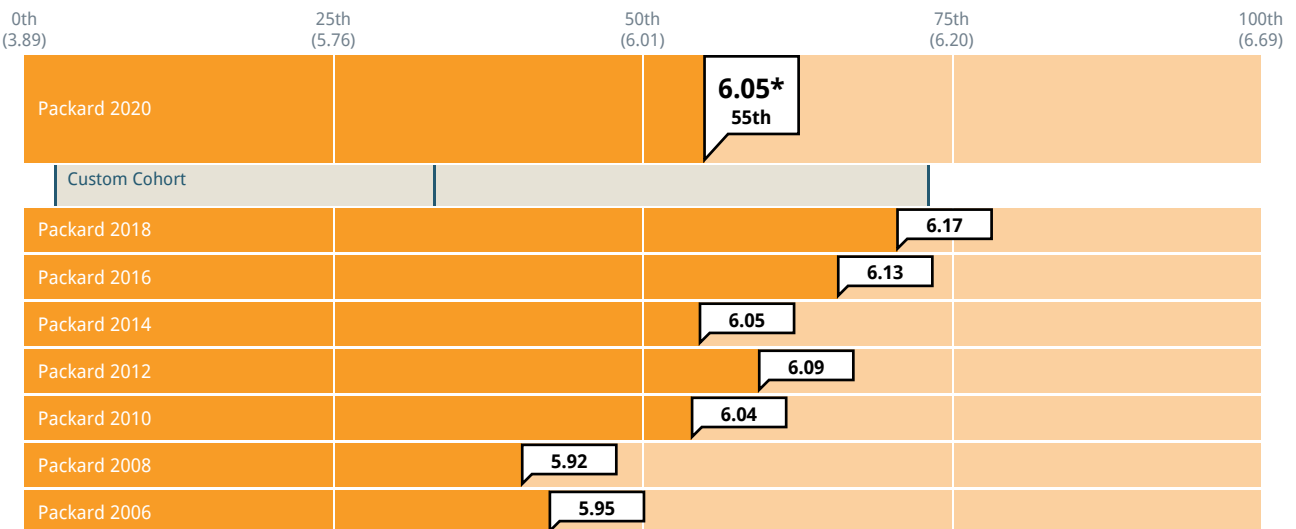1 = Not at all clearly   7 = Extremely clearly

	0th (3.65)	25th (5.50)	50th (5.76)	75th (5.98)	100th (6.48)
Packard 2020			**5.72** 45th		
Custom Cohort					
Packard 2018			5.76		
Packard 2016			5.72		
Packard 2014			5.70		
Packard 2012			5.78		
Packard 2010		5.54			
Packard 2008		5.55			
Packard 2006		5.53			
Packard 2004	5.42				

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

1 = Not at all consistent   7 = Completely consistent

	0th (3.89)	25th (5.76)	50th (6.01)	75th (6.20)	100th (6.69)
Packard 2020			**6.05*** 55th		
Custom Cohort					
Packard 2018				6.17	
Packard 2016				6.13	
Packard 2014			6.05		
Packard 2012			6.09		
Packard 2010			6.04		
Packard 2008		5.92			
Packard 2006		5.95			

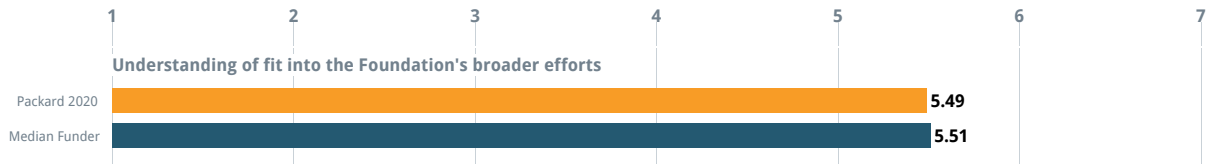**Cohort:** Custom Cohort   **Past results:** on   **Subgroup:** None

The following question was recently added to the grantee survey and depicts comparative data from 30 funders in the grantee dataset.

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
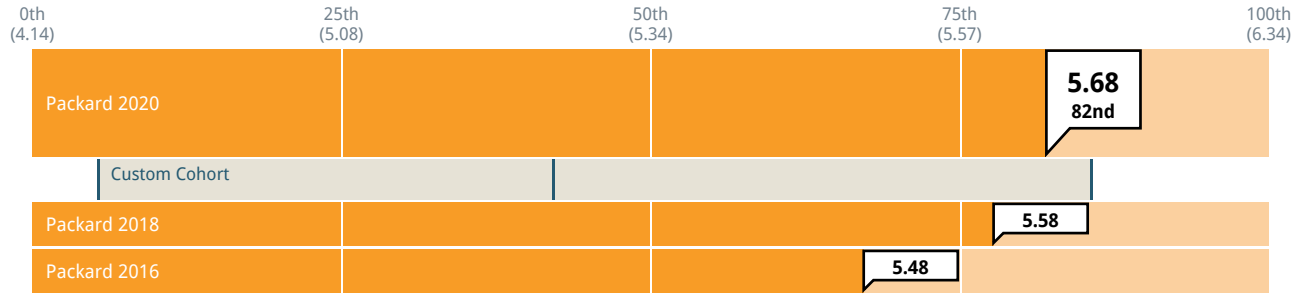
■ Packard 2020   ■ Median Funder

Understanding of fit into the Foundation's broader efforts

Packard 2020	5.49
Median Funder	5.51

Cohort: None   **Past results:** on

Openness

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

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

0th (4.14)	25th (5.08)	50th (5.34)	75th (5.57)	100th (6.34)

Packard 2020 — **5.68** 82nd

Custom Cohort

Packard 2018 — **5.58**

Packard 2016 — **5.48**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None
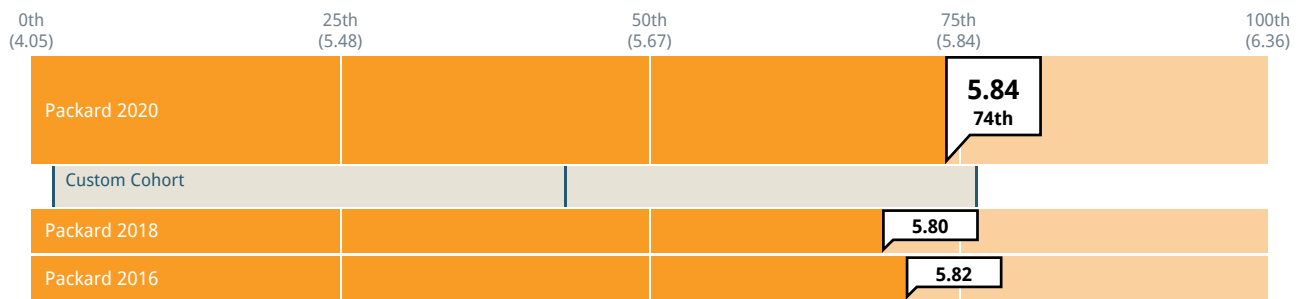
Top Predictors of Relationships

CEP's research has shown that the 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 summary measure below is an average of 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
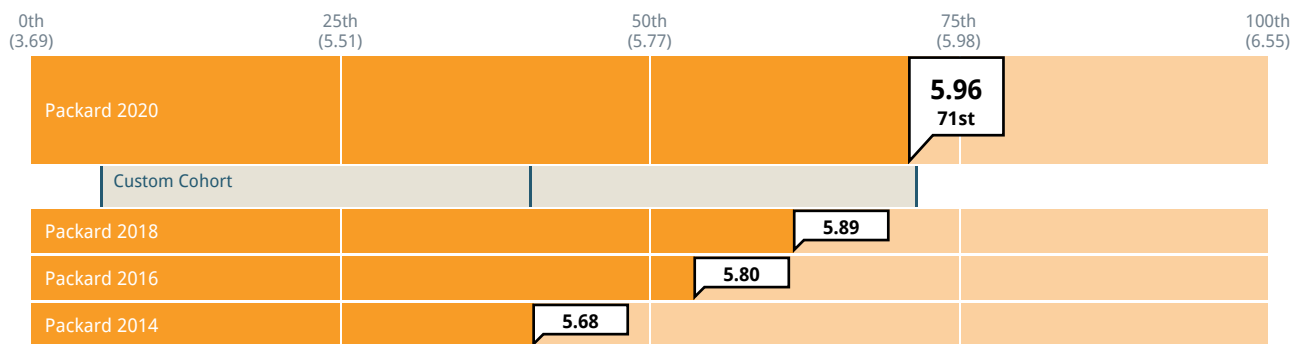
Understanding Summary Measure

1 = Very negative	**7** = Very positive

0th (4.05)	25th (5.48)	50th (5.67)	75th (5.84)	100th (6.36)

Packard 2020 — **5.84** 74th

Custom Cohort

Packard 2018 — 5.80

Packard 2016 — 5.82

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Overall, how transparent is the Foundation with your organization?

1 = Not at all transparent	**7** = Extremely transparent

0th (3.69)	25th (5.51)	50th (5.77)	75th (5.98)	100th (6.55)

Packard 2020 — **5.96** 71st

Custom Cohort

Packard 2018 — 5.89

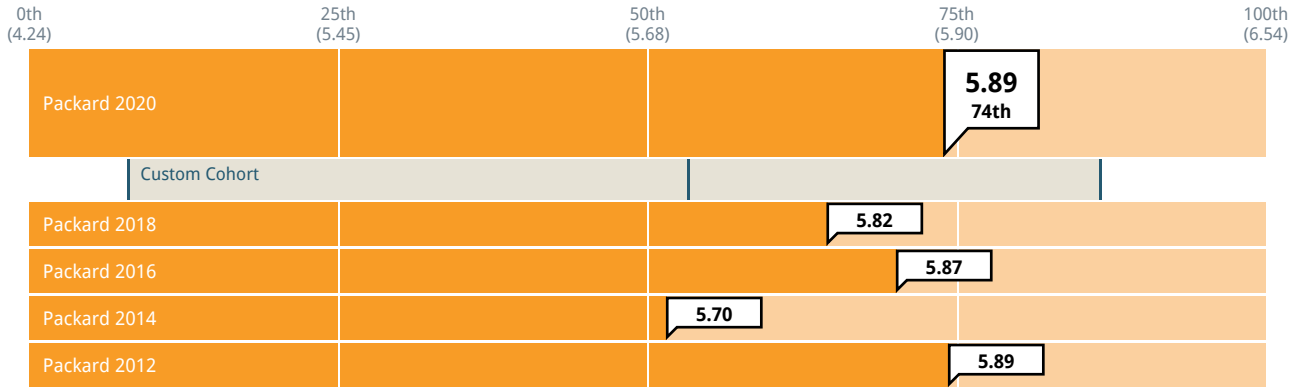Packard 2016 — 5.80

Packard 2014 — 5.68

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Beneficiaries and DEI

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

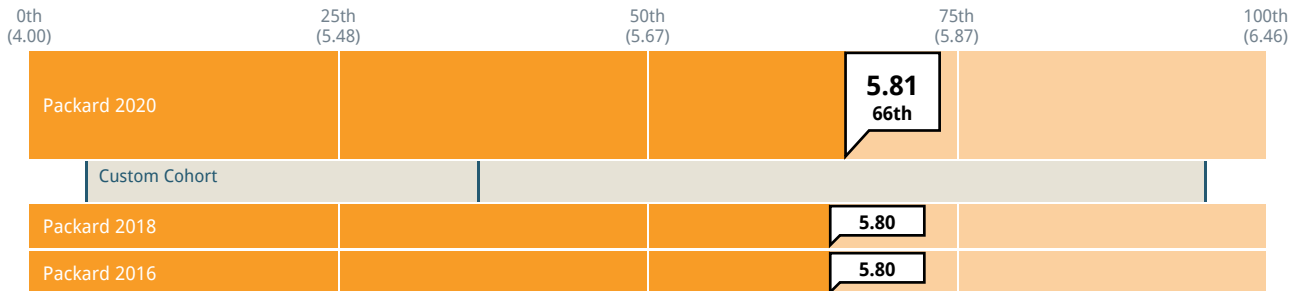**1** = Limited understanding   **7** = Thorough understanding

0th (4.24)	25th (5.45)	50th (5.68)	75th (5.90)	100th (6.54)

Packard 2020 — **5.89** 74th

Custom Cohort

Packard 2018 — 5.82

Packard 2016 — 5.87

Packard 2014 — 5.70

Packard 2012 — 5.89

Cohort: Custom Cohort   **Past results:** on   **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, constituents, or participants.

How well does the Foundation understand your intended beneficiaries' needs?

1 = Limited understanding   **7** = Thorough understanding

0th (4.00)	25th (5.48)	50th (5.67)	75th (5.87)	100th (6.46)

Packard 2020 — **5.81** 66th

Custom Cohort

Packard 2018 — 5.80

Packard 2016 — 5.80

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

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

0th (3.77)	25th (5.35)	50th (5.57)	75th (5.82)	100th (6.45)

Packard 2020   **5.68** **59th**

Custom Cohort

Packard 2018   **5.63**

Packard 2016   **5.66**
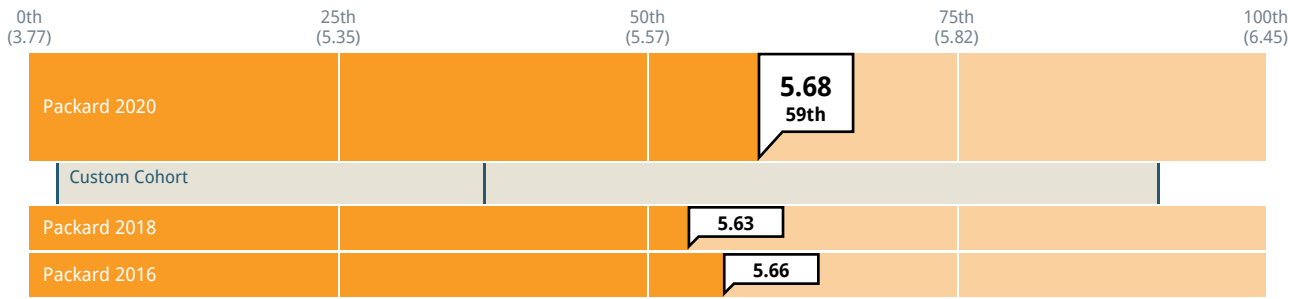
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

The remaining questions in this section were recently added to the grantee survey and do not yet have comparative data.

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

■ Yes ■ No ■ Don't know

Packard 2020	58%	34%	8%

Cohort: None   **Past results:** on

Only asked of grantees who answered ''Yes' to the question above.

Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant?

■ Yes ■ No ■ Don't know

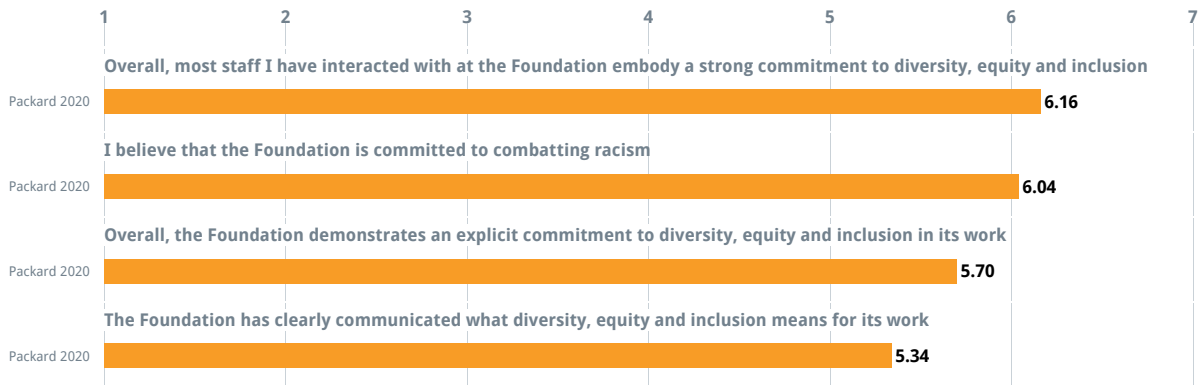| Packard 2020	75%	19%	6%

Cohort: None   **Past results:** on

Please rate the extent to which you agree or disagree with the following statements about diversity, equity and inclusion:

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

◼ Packard 2020

	1	2	3	4	5	6	7

Overall, most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity and inclusion
Packard 2020 ▬▬▬▬▬▬▬▬▬ **6.16**

I believe that the Foundation is committed to combatting racism
Packard 2020 ▬▬▬▬▬▬▬▬▬ **6.04**

Overall, the Foundation demonstrates an explicit commitment to diversity, equity and inclusion in its work
Packard 2020 ▬▬▬▬▬▬▬▬ **5.70**

The Foundation has clearly communicated what diversity, equity and inclusion means for its work
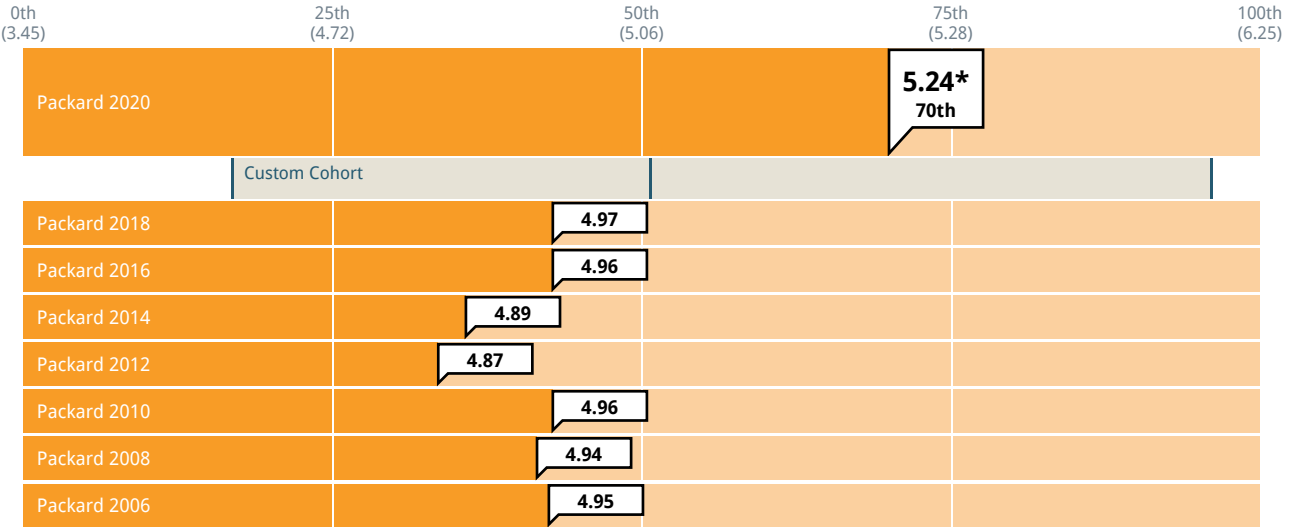Packard 2020 ▬▬▬▬▬▬▬▬ **5.34**

Cohort: None   **Past results:** on

Grant Processes

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

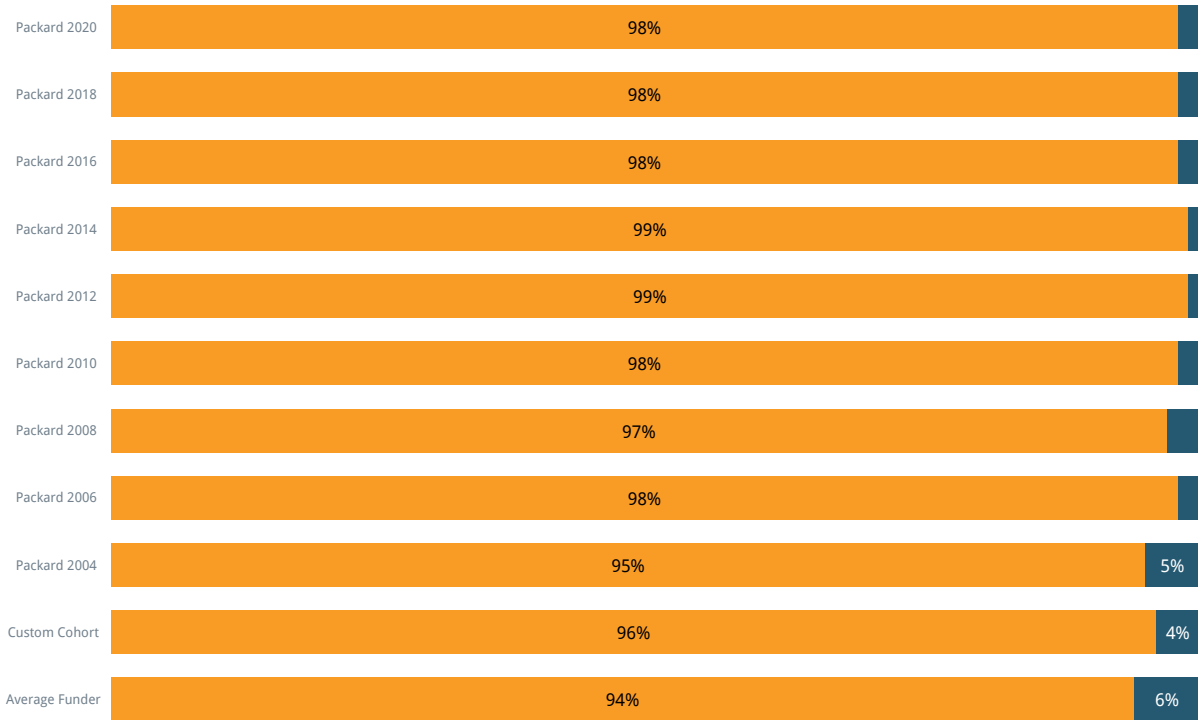**1** = Not at all helpful   **7** = Extremely helpful

	0th (3.45)	25th (4.72)	50th (5.06)	75th (5.28)	100th (6.25)
Packard 2020				**5.24*** 70th	
Custom Cohort					
Packard 2018			4.97		
Packard 2016			4.96		
Packard 2014		4.89			
Packard 2012		4.87			
Packard 2010			4.96		
Packard 2008			4.94		
Packard 2006			4.95		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Selection Process

Did you submit a proposal for this grant?

■ Submitted a proposal   ■ Did not submit a proposal

	Submitted a proposal	Did not submit a proposal
Packard 2020	98%	
Packard 2018	98%	
Packard 2016	98%	
Packard 2014	99%	
Packard 2012	99%	
Packard 2010	98%	
Packard 2008	97%	
Packard 2006	98%	
Packard 2004	95%	5%
Custom Cohort	96%	4%
Average Funder	94%	6%

Cohort: Custom Cohort   **Past results:** on

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

	0th (1.32)	25th (2.01)	50th (2.25)	75th (2.49)	100th (4.24)
Packard 2020		2.08 32nd			
Custom Cohort					
Packard 2018	1.96				
Packard 2016		2.16			
Packard 2014		2.16			
Packard 2012		2.11			
Packard 2010		2.07			
Packard 2008		2.05			
Packard 2006		2.19			
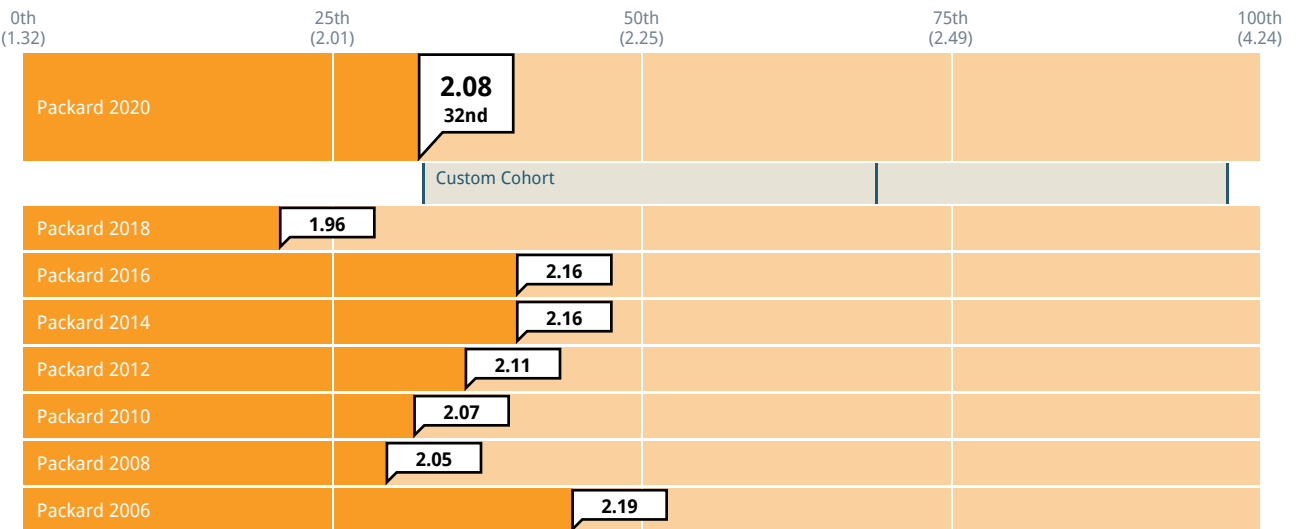
Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Time Between Submission and Clear Commitment

"How much time elapsed from the submission of the grant proposal to clear commitment of funding?"

Selected Cohort: Custom Cohort

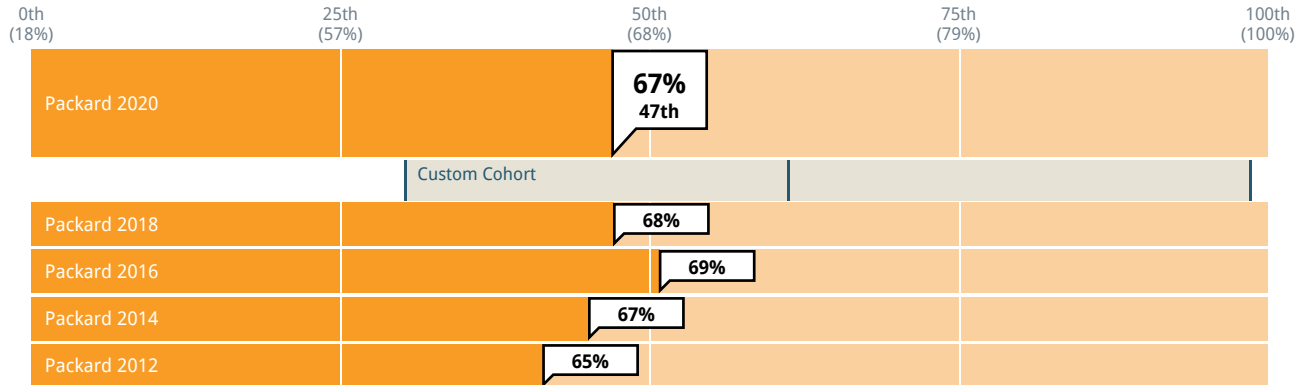| Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Less than 3 months	83%	84%	79%	79%	78%	75%
4 - 6 months	16%	14%	18%	18%	19%	22%
7 - 12 months	1%	2%	3%	3%	3%	2%
More than 12 months	0%	1%	1%	0%	0%	1%

Reporting and Evaluation Process

Definition of Reporting and Evaluation

- "Reporting" - Packard's standard oversight, monitoring, and grant reporting.
- "Evaluation" - formal activities *beyond reporting* undertaken by Packard to assess or learn about a grant, a program, or Packard's efforts.

> **At any point during the application or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?**
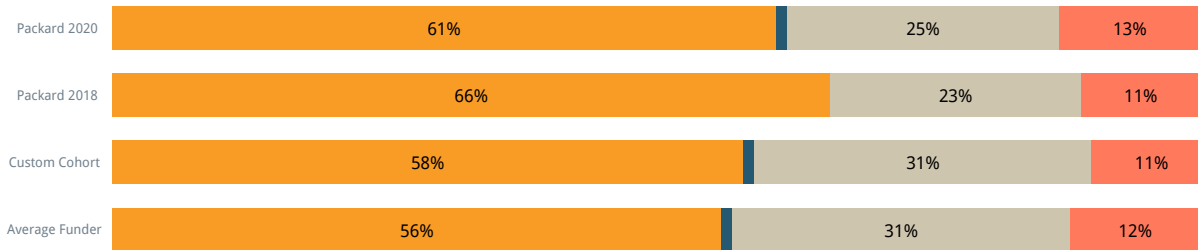
Proportion of grantees responding 'Yes'

	0th (18%)	25th (57%)	50th (68%)	75th (79%)	100th (100%)

Packard 2020 — **67%** 47th

Custom Cohort

Packard 2018 — 68%

Packard 2016 — 69%

Packard 2014 — 67%

Packard 2012 — 65%

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

> **Participation in Reporting and/or Evaluation Processes**

- Participated in a reporting process only
- Participated in an evaluation process only
- Participated in both a reporting and an evaluation process
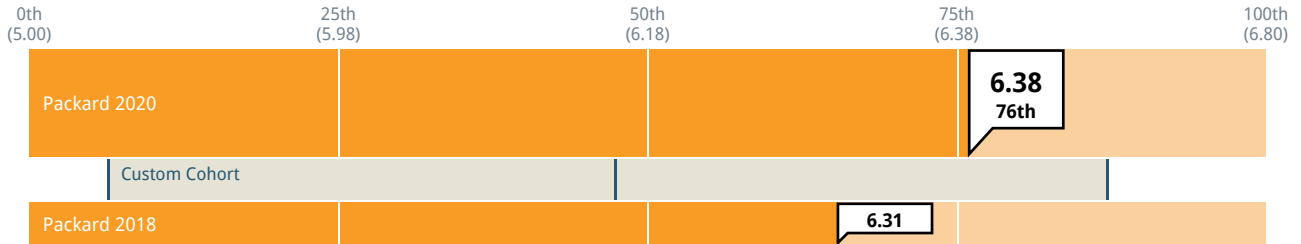- Participated in neither a reporting nor an evaluation process

	Reporting only	Evaluation only	Both	Neither
Packard 2020	61%		25%	13%
Packard 2018	66%		23%	11%
Custom Cohort	58%		31%	11%
Average Funder	56%		31%	12%

Cohort: Custom Cohort   **Past results:** on

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.

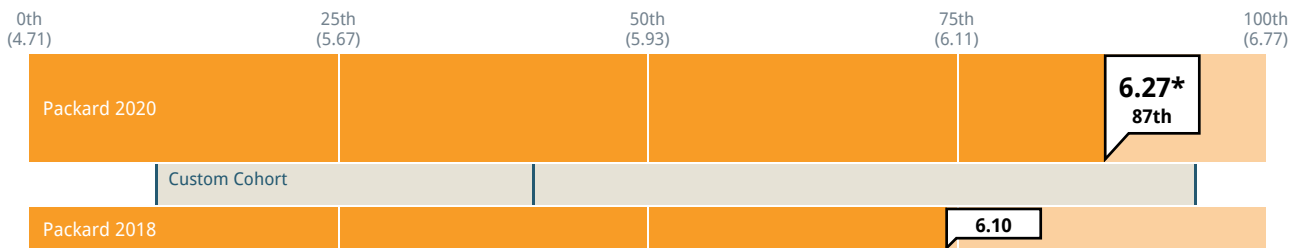## To what extent was the Foundation's reporting process straightforward?

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

0th (5.00)	25th (5.98)	50th (6.18)	75th (6.38)	100th (6.80)

Packard 2020 — **6.38** 76th

Custom Cohort

Packard 2018 — **6.31**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?
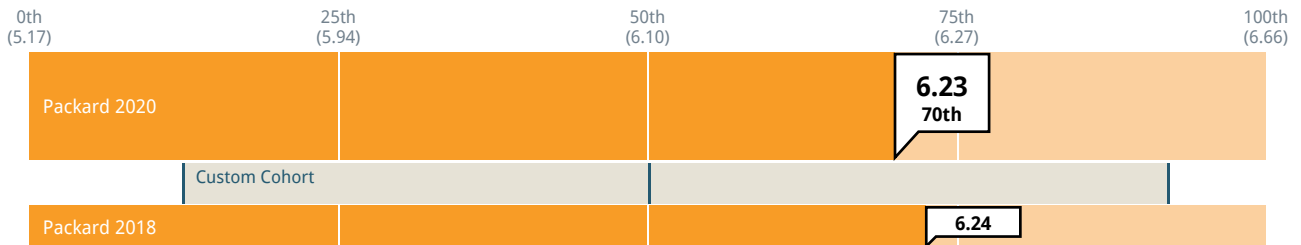
1 = Not at all   **7** = To a great extent

0th (4.71)	25th (5.67)	50th (5.93)	75th (6.11)	100th (6.77)

Packard 2020 — **6.27*** 87th

Custom Cohort

Packard 2018 — **6.10**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?
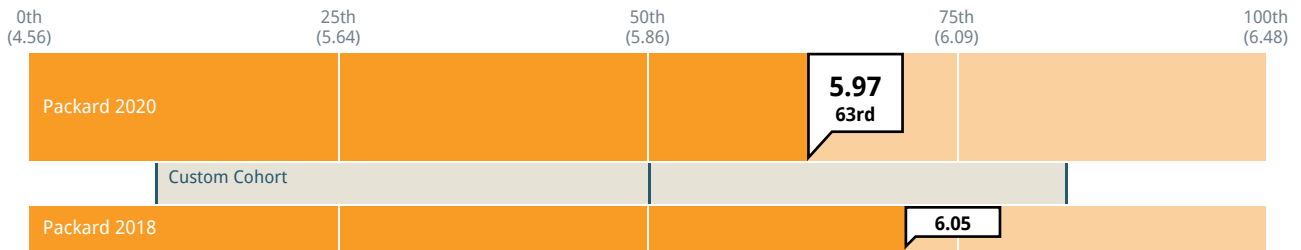
1 = Not at all   **7** = To a great extent

0th (5.17)	25th (5.94)	50th (6.10)	75th (6.27)	100th (6.66)

Packard 2020 — **6.23** 70th

Custom Cohort

Packard 2018 — **6.24**

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

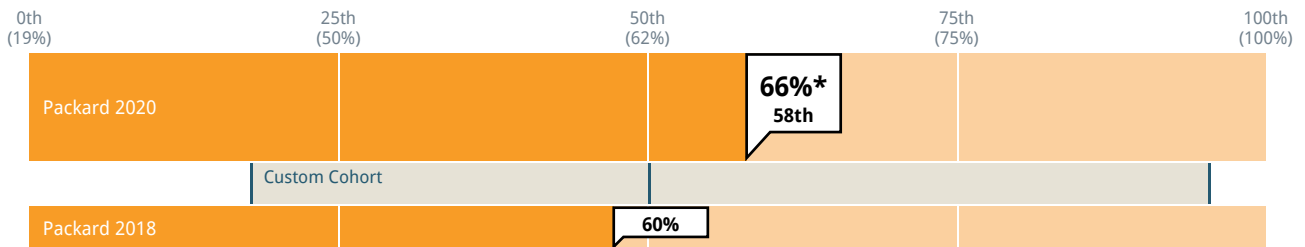**To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?**

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

0th (4.56)	25th (5.64)	50th (5.86)	75th (6.09)	100th (6.48)

Packard 2020 — **5.97** 63rd

Custom Cohort

Packard 2018 — 6.05

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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

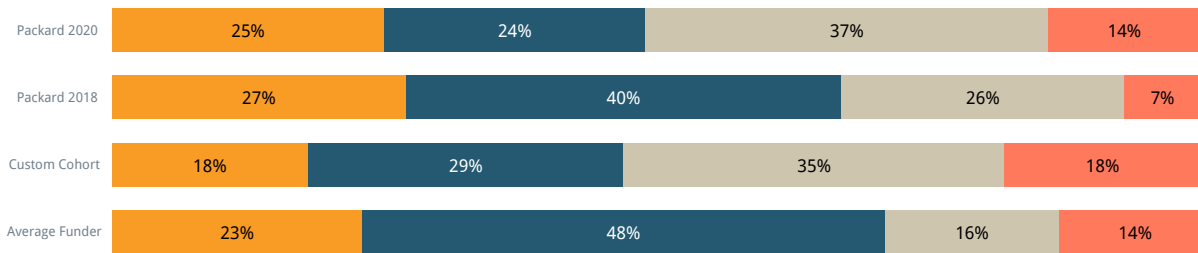Proportion of grantees responding 'Yes'

0th (19%)	25th (50%)	50th (62%)	75th (75%)	100th (100%)

Packard 2020 — **66%*** 58th

Custom Cohort

Packard 2018 — 60%

Cohort: Custom Cohort   **Past results:** on   **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?

- Evaluation staff at the Foundation
- Evaluation staff at your organization
- External evaluator, chosen by the Foundation
- External evaluator, chosen by your organization

Packard 2020	25%	24%	37%	14%
Packard 2018	27%	40%	26%	7%
Custom Cohort	18%	29%	35%	18%
Average Funder	23%	48%	16%	14%

Cohort: Custom Cohort   **Past results:** on

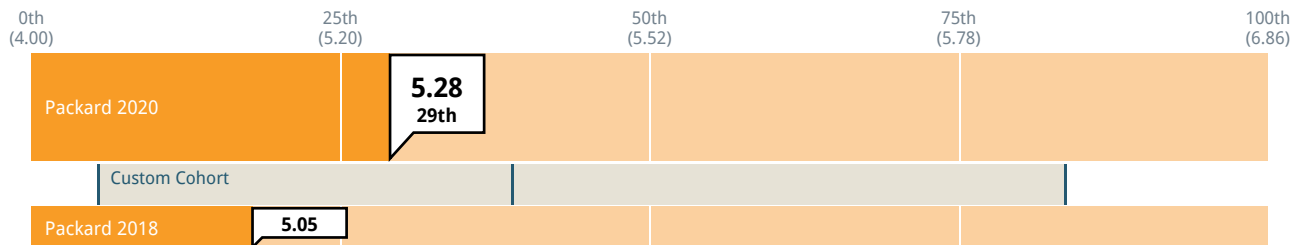## Did the Foundation provide financial support for the evaluation?

- Yes, the evaluation's costs were fully funded by the Foundation
- Yes, the evaluation's costs were partially funded by the Foundation
- No, the evaluation's costs were not funded by the Foundation

Packard 2020	55%	18%	27%
Packard 2018	45%	19%	36%
Custom Cohort	60%	15%	25%
Average Funder	38%	16%	45%
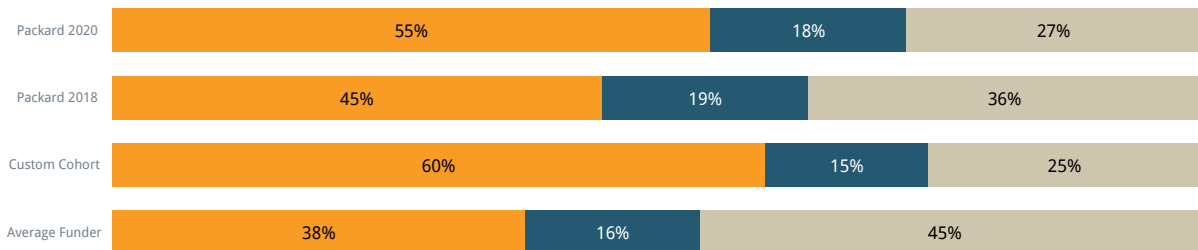
Cohort: Custom Cohort   **Past results:** on

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
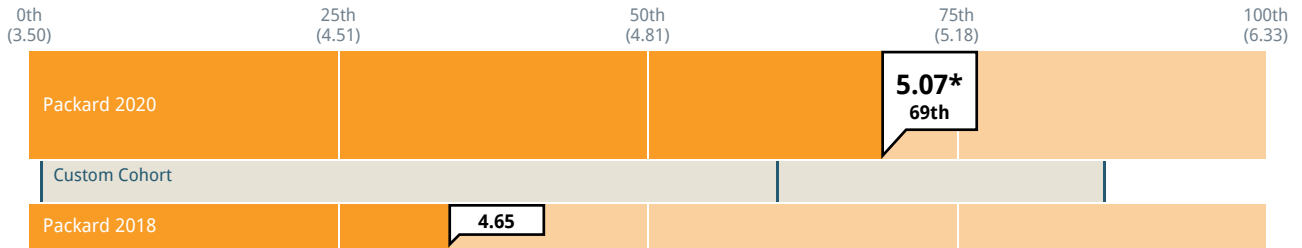
0th (4.00)	25th (5.20)	50th (5.52)	75th (5.78)	100th (6.86)

Packard 2020 — **5.28** 29th

Custom Cohort

Packard 2018 — 5.05

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

To what extent did the evaluation result in your organization making changes to the work that was evaluated?
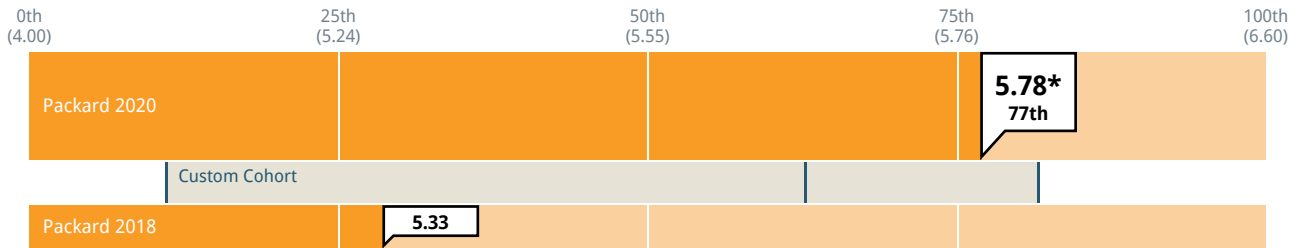
1 = Not at all   7 = To a great extent

0th (3.50)	25th (4.51)	50th (4.81)	75th (5.18)	100th (6.33)

Packard 2020 — **5.07*** 69th

Custom Cohort

Packard 2018 — 4.65

Cohort: Custom Cohort   **Past results:** on   **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

0th (4.00)	25th (5.24)	50th (5.55)	75th (5.76)	100th (6.60)

Packard 2020 — **5.78*** 77th

Custom Cohort

Packard 2018 — 5.33

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None
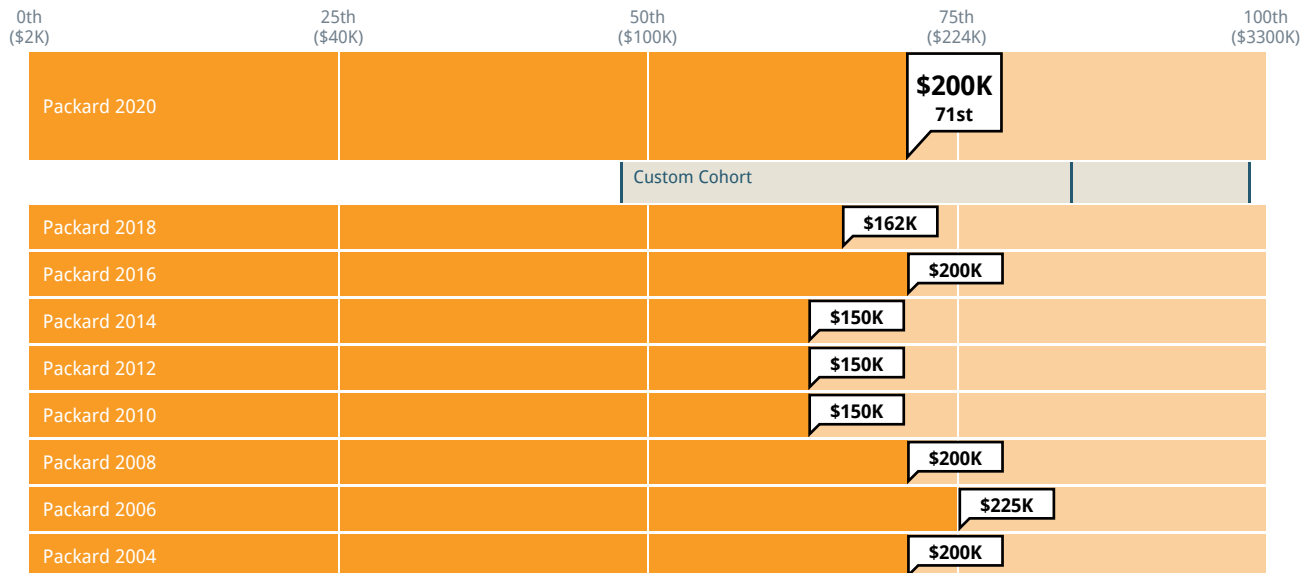
Dollar Return and Time Spent on Processes

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
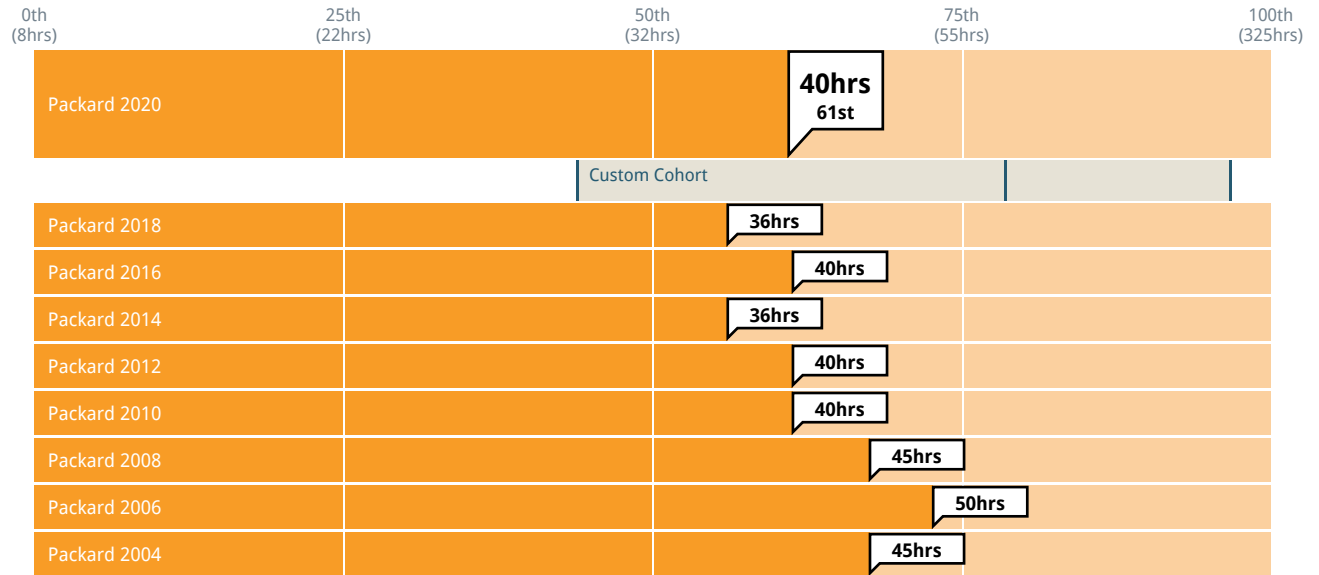
	0th ($0.1K)	25th ($1.6K)	50th ($2.5K)	75th ($4.7K)	100th ($24.5K)
Packard 2020				**$5.6K** 81st	
			Custom Cohort		
Packard 2018				$4.2K	
Packard 2016				$4.4K	
Packard 2014				$3.8K	
Packard 2012			$3.5K		
Packard 2010			$3.6K		
Packard 2008			$3.5K		
Packard 2006			$3.8K		
Packard 2004			$3.6K		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Median Grant Size

	0th ($2K)	25th ($40K)	50th ($100K)	75th ($224K)	100th ($3300K)
Packard 2020				**$200K** 71st	
			Custom Cohort		
Packard 2018				$162K	
Packard 2016				$200K	
Packard 2014			$150K		
Packard 2012			$150K		
Packard 2010			$150K		
Packard 2008				$200K	
Packard 2006				$225K	
Packard 2004				$200K	

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Median hours spent by grantees on funder requirements over grant lifetime

	0th (8hrs)	25th (22hrs)	50th (32hrs)	75th (55hrs)	100th (325hrs)

Packard 2020 — **40hrs** 61st

Custom Cohort

Packard 2018 — 36hrs

Packard 2016 — 40hrs

Packard 2014 — 36hrs

Packard 2012 — 40hrs

Packard 2010 — 40hrs

Packard 2008 — 45hrs

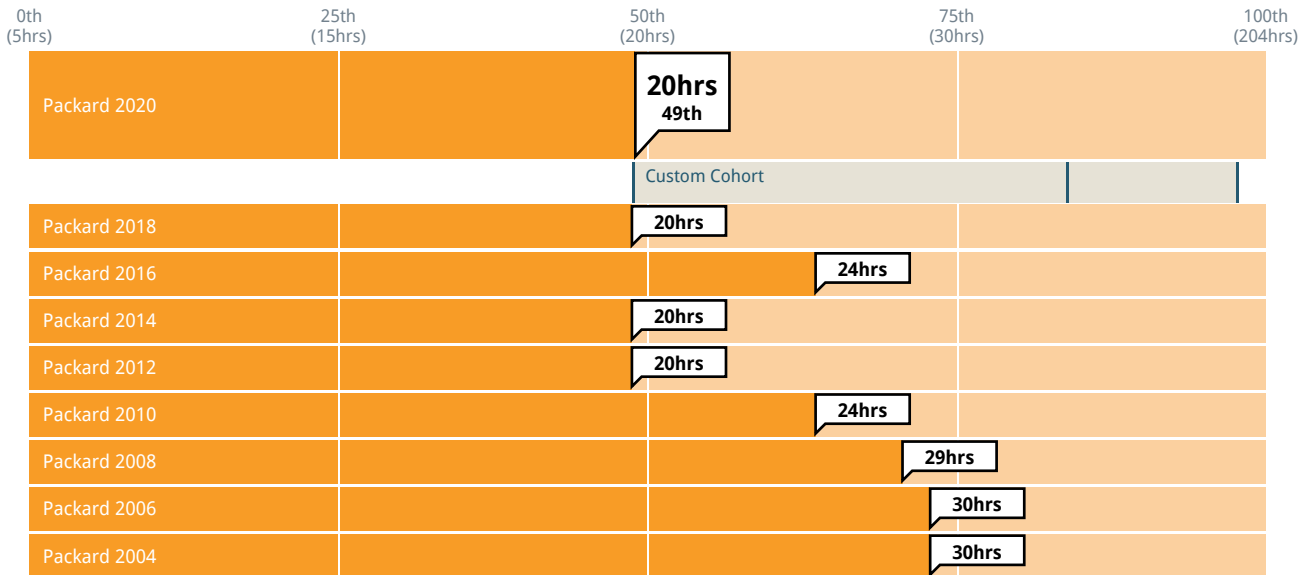**Packard 2006** — 50hrs

Packard 2004 — 45hrs

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Time Spent on Selection Process
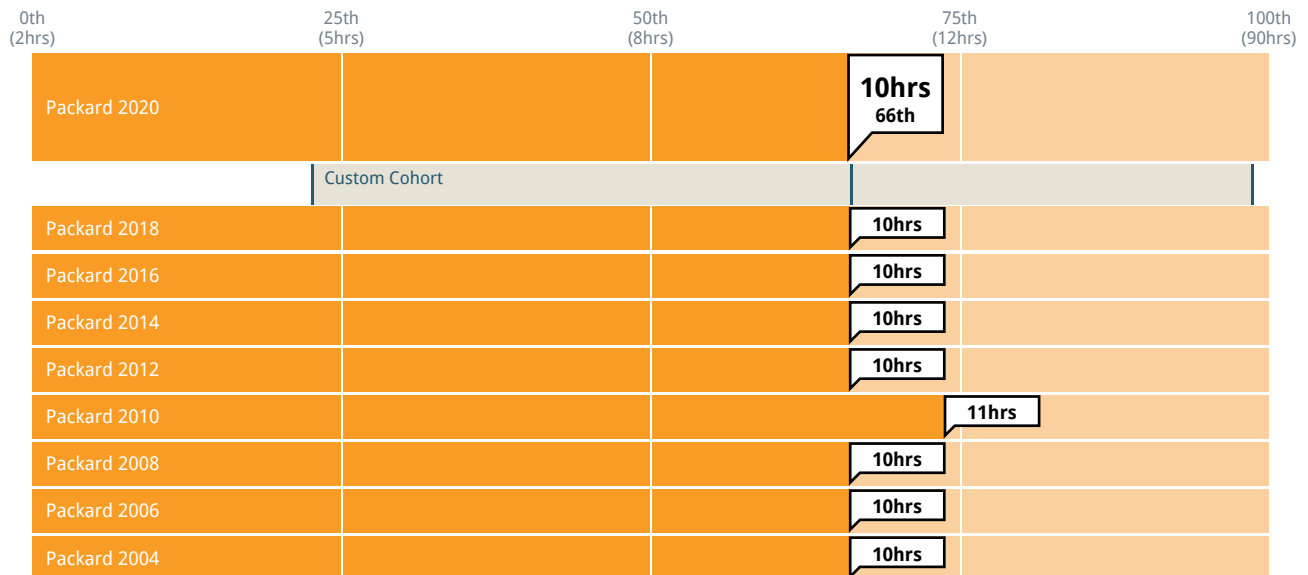
Median Hours Spent on Proposal and Selection Process

	0th (5hrs)	25th (15hrs)	50th (20hrs)	75th (30hrs)	100th (204hrs)

Packard 2020 — **20hrs 49th**

Custom Cohort

Packard 2018 — 20hrs
Packard 2016 — 24hrs
Packard 2014 — 20hrs
Packard 2012 — 20hrs
Packard 2010 — 24hrs
Packard 2008 — 29hrs
Packard 2006 — 30hrs
Packard 2004 — 30hrs

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

Selected Cohort: Custom Cohort

Time Spent On Proposal And Selection Process	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
1 to 9 hours	22%	19%	13%	19%	18%	15%
10 to 19 hours	20%	22%	22%	20%	20%	19%
20 to 29 hours	18%	19%	19%	22%	22%	19%
30 to 39 hours	10%	6%	9%	9%	7%	8%
40 to 49 hours	12%	13%	16%	13%	14%	16%
50 to 99 hours	10%	13%	14%	9%	13%	15%
100 to 199 hours	6%	5%	5%	5%	3%	6%
200+ hours	2%	2%	2%	3%	2%	2%

Time Spent on Reporting and Evaluation Process

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

	0th (2hrs)	25th (5hrs)	50th (8hrs)	75th (12hrs)	100th (90hrs)

Packard 2020 — **10hrs 66th**

Custom Cohort

Packard 2018 — 10hrs

Packard 2016 — 10hrs

Packard 2014 — 10hrs

Packard 2012 — 10hrs

Packard 2010 — 11hrs

Packard 2008 — 10hrs

Packard 2006 — 10hrs

Packard 2004 — 10hrs

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

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Selected Cohort: Custom Cohort

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
1 to 9 hours	45%	48%	44%	50%	48%	40%
10 to 19 hours	25%	23%	20%	19%	18%	23%
20 to 29 hours	12%	13%	14%	13%	13%	10%
30 to 39 hours	4%	3%	4%	3%	5%	6%
40 to 49 hours	5%	4%	7%	7%	5%	9%
50 to 99 hours	5%	7%	7%	3%	7%	6%
100+ hours	3%	3%	4%	4%	3%	6%

Non-Monetary Assistance

Grantees were asked to indicate whether they had received any of the following sixteen types of assistance provided directly or paid for by Packard.
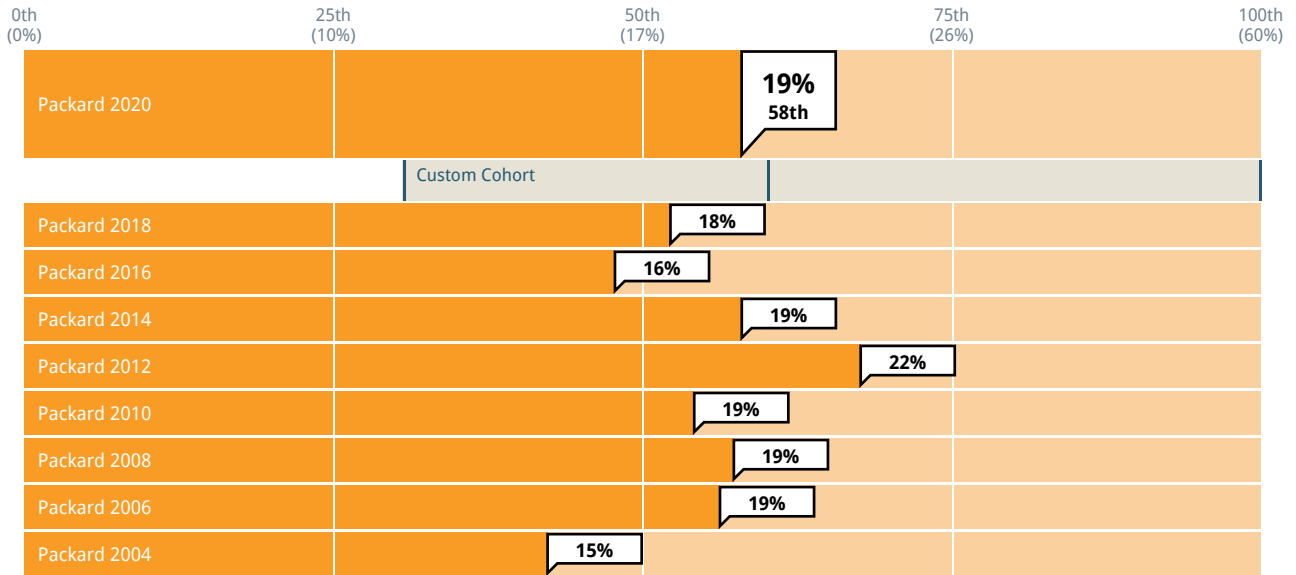
Management Assistance	Field-Related Assistance	Other Assistance
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions 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
		Fundraising support
		Diversity, equity, and inclusion assistance

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.
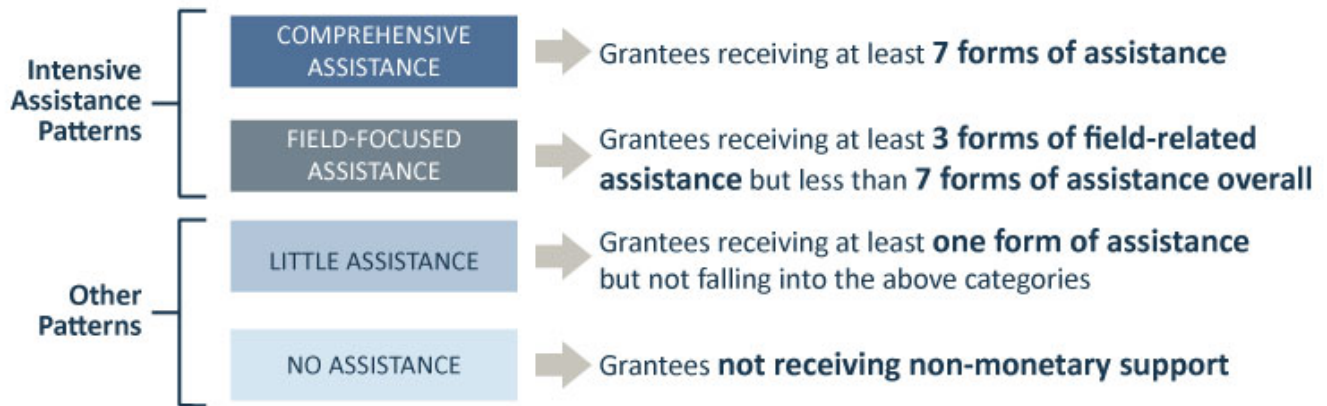
Selected Cohort: Custom Cohort						
Non-Monetary Assistance Patterns	**Packard 2020**	**Packard 2018**	**Packard 2016**	**Packard 2014**	**Packard 2012**	**Packard 2010**
Comprehensive	5%	4%	4%	8%	6%	7%
Field-focused	14%	14%	12%	12%	16%	12%
Little	44%	40%	44%	43%	40%	38%
None	37%	43%	39%	37%	38%	43%

Proportion of grantees that received field-focused or comprehensive assistance

	0th (0%)	25th (10%)	50th (17%)	75th (26%)	100th (60%)
Packard 2020			**19%** 58th		
Custom Cohort					
Packard 2018			18%		
Packard 2016			16%		
Packard 2014			19%		
Packard 2012				22%	
Packard 2010			19%		
Packard 2008			19%		
Packard 2006			19%		
Packard 2004			15%		

Cohort: Custom Cohort   **Past results:** on   **Subgroup:** None

The following question was recently added to the grantee survey and depicts comparative data from 93 funders in the dataset.

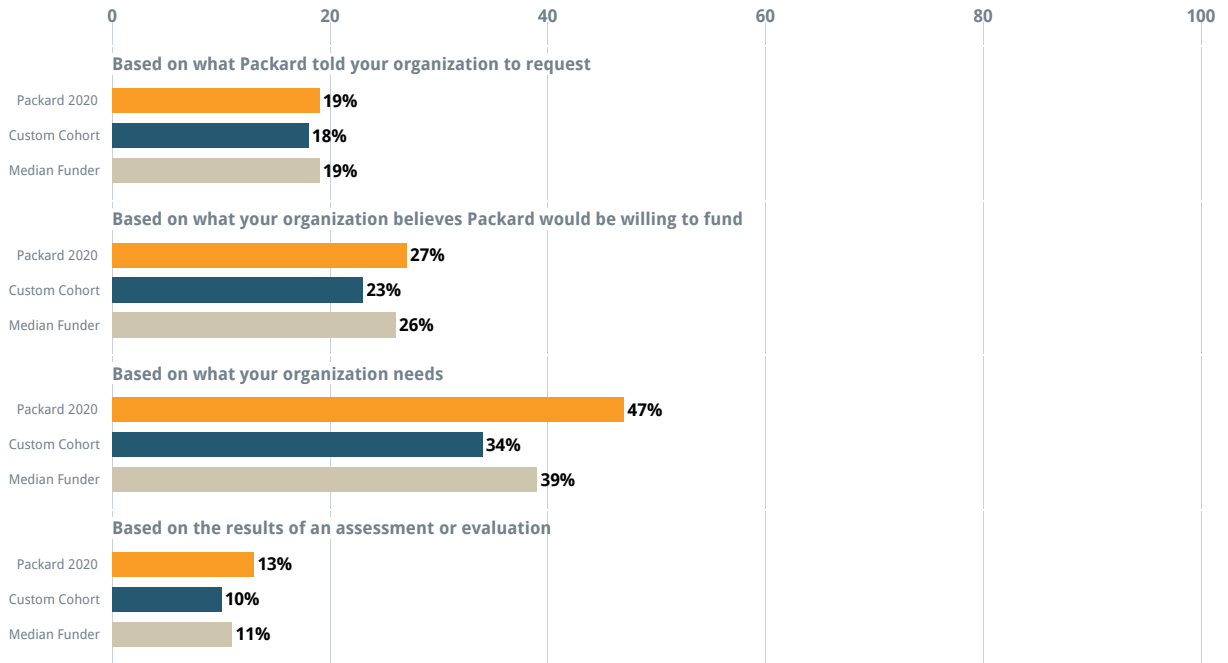## Have you ever requested support from the Foundation to help strengthen your organization?

■ Packard 2020   ■ Custom Cohort   ■ Median Funder

I have never requested support from Packard to strengthen my organization

	0	20	40	60	80	100
Packard 2020			37%			
Custom Cohort			50%			
Median Funder			44%			
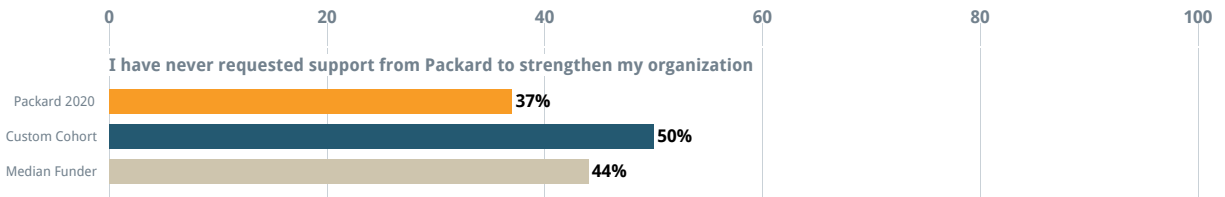
Cohort: Custom Cohort   **Past results:** on

If you have ever requested support from the Foundation to help strengthen your organization, how did you determine what specific support to ask for?
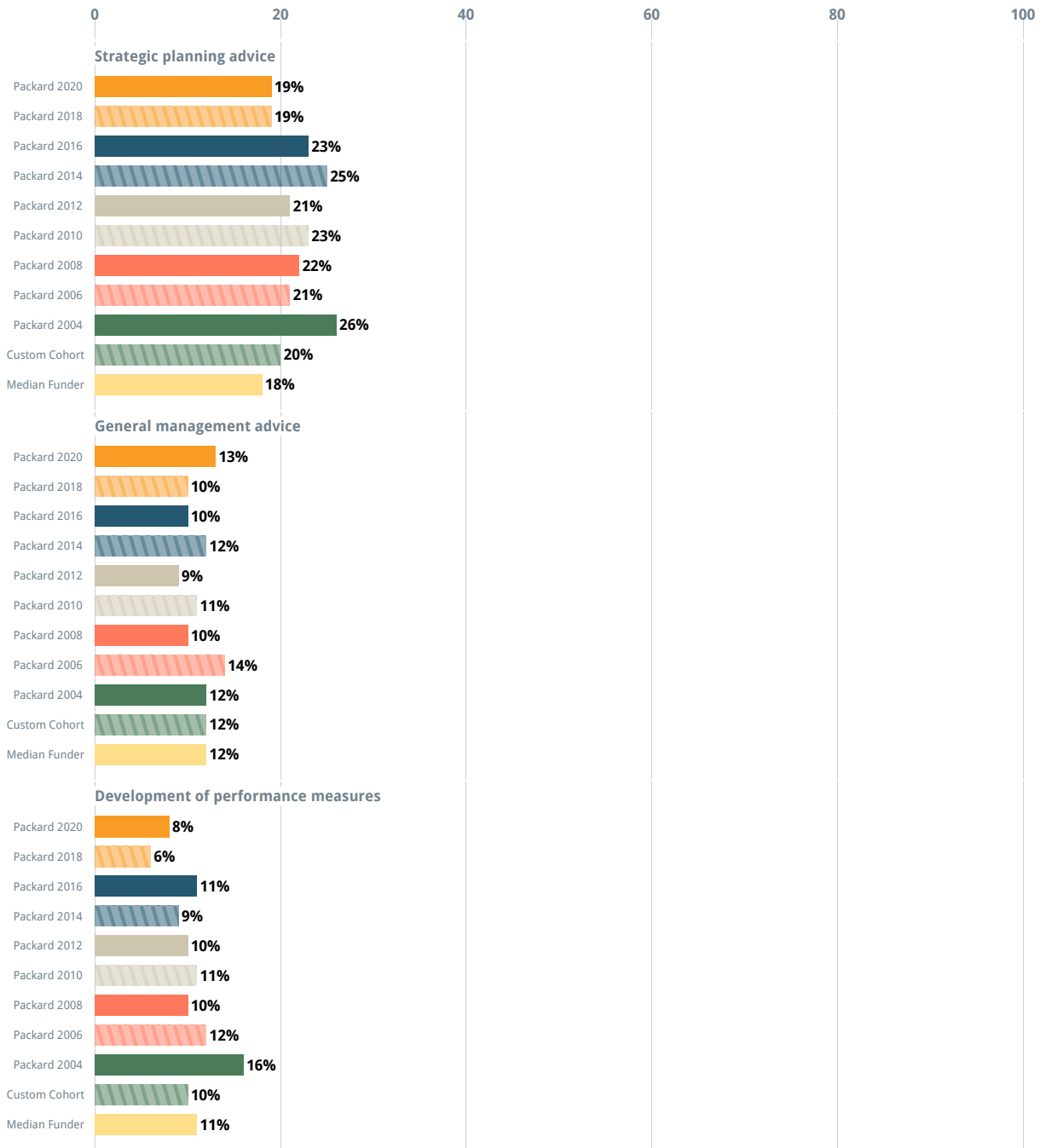
🟧 Packard 2020   🟦 Custom Cohort   ⬜ Median Funder

Based on what Packard told your organization to request

Packard 2020	19%
Custom Cohort	18%
Median Funder	19%

Based on what your organization believes Packard would be willing to fund

Packard 2020	27%
Custom Cohort	23%
Median Funder	26%

Based on what your organization needs

Packard 2020	47%
Custom Cohort	34%
Median Funder	39%

Based on the results of an assessment or evaluation

Packard 2020	13%
Custom Cohort	10%
Median Funder	11%

Cohort: Custom Cohort   **Past results:** on

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."

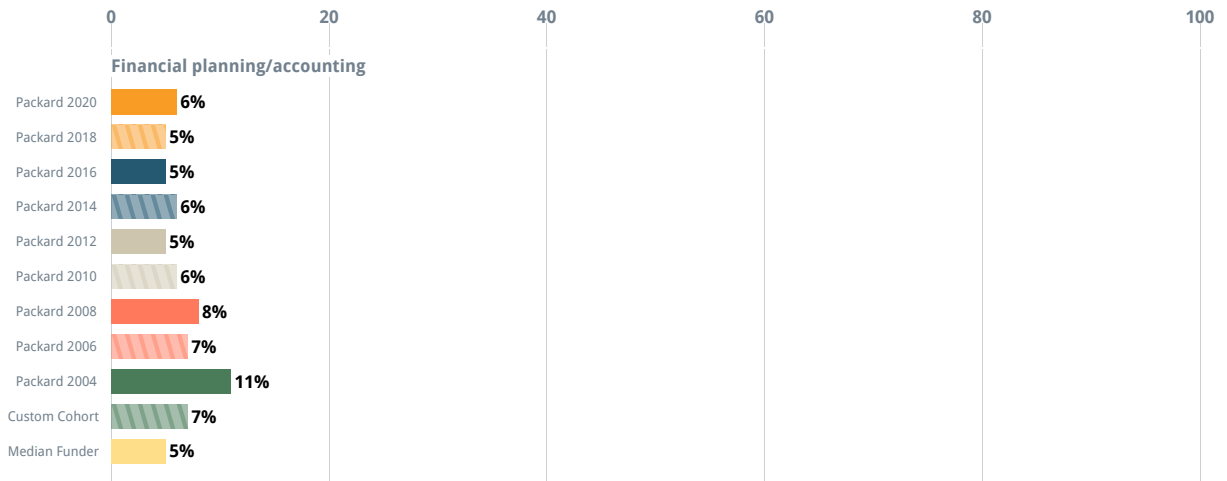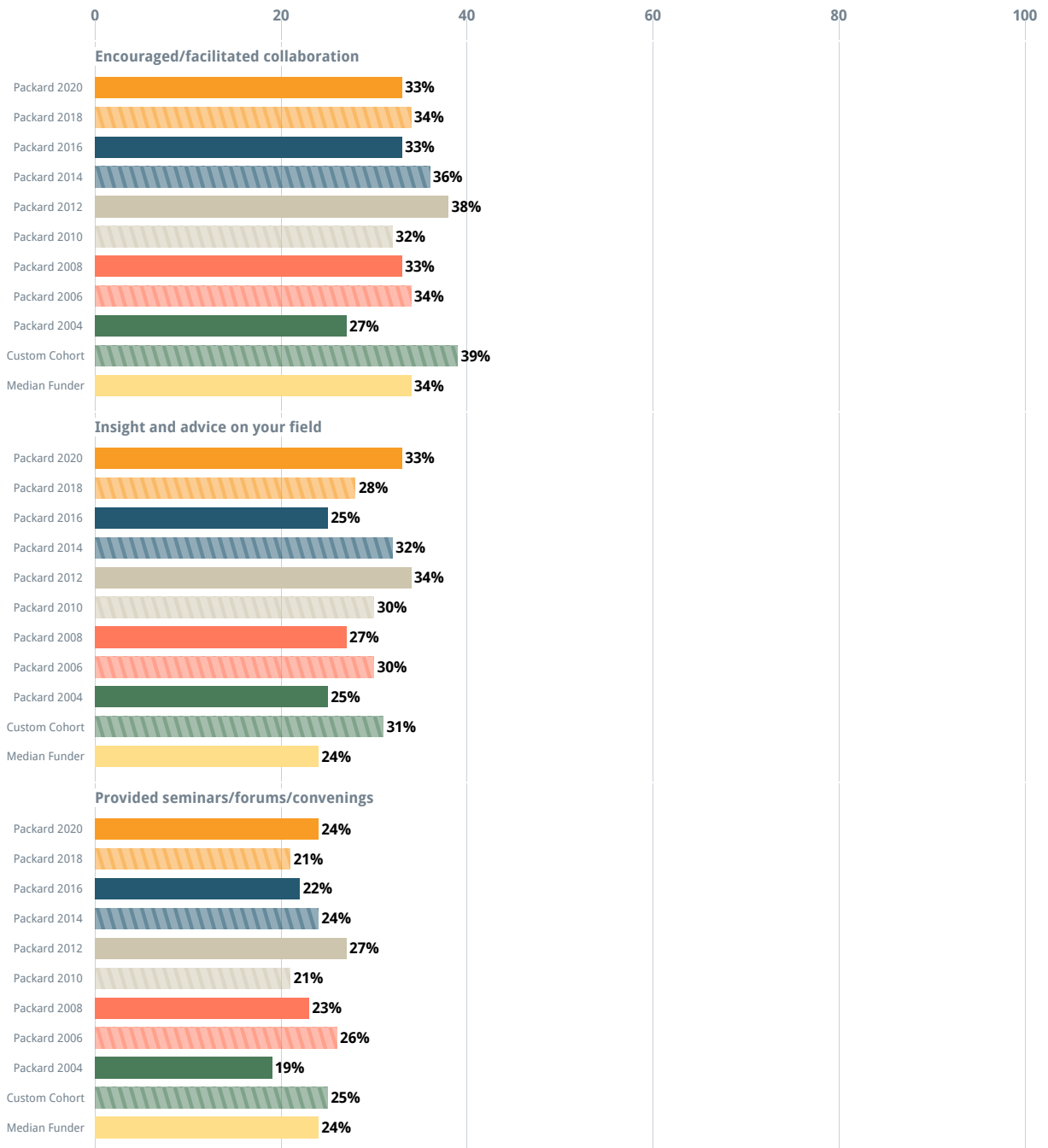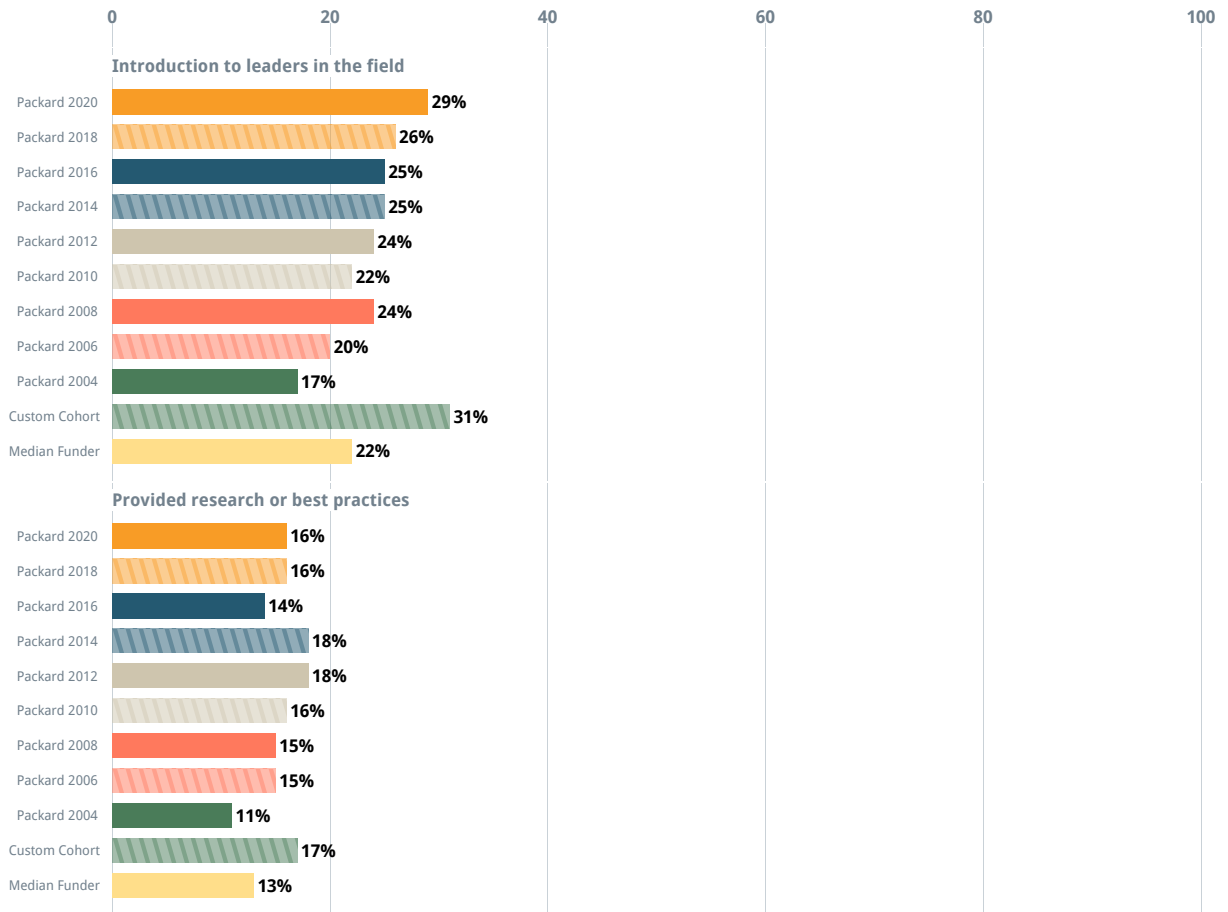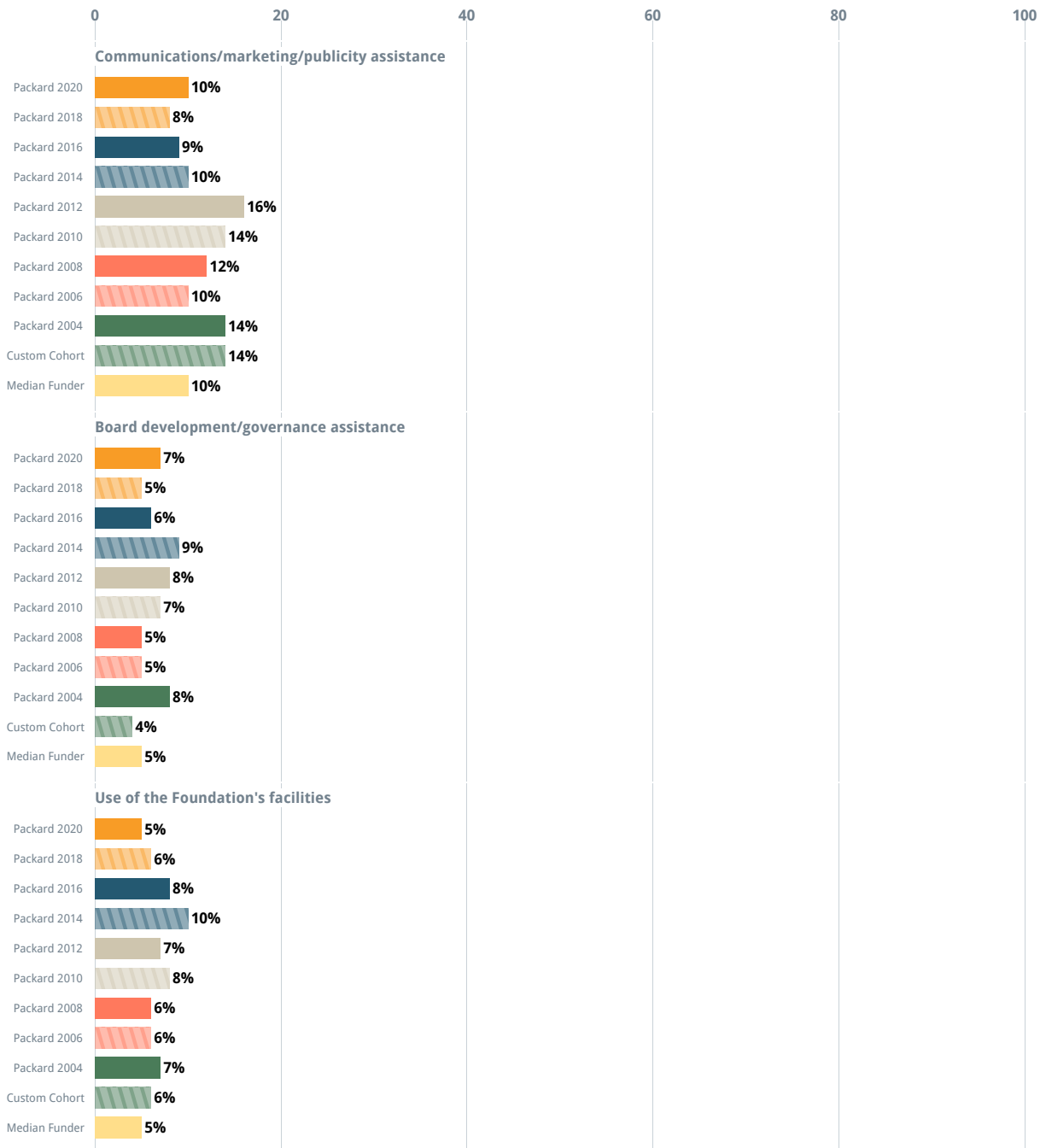## Percentage of Grantees that Received Management Assistance

Legend: Packard 2020 | Packard 2018 | Packard 2016 | Packard 2014 | Packard 2012 | Packard 2010 | Packard 2008 | Packard 2006 | Packard 2004 | Custom Cohort | Median Funder

Strategic planning advice

Cohort	Value
Packard 2020	19%
Packard 2018	19%
Packard 2016	23%
Packard 2014	25%
Packard 2012	21%
Packard 2010	23%
Packard 2008	22%
Packard 2006	21%
Packard 2004	26%
Custom Cohort	20%
Median Funder	18%

General management advice

Cohort	Value
Packard 2020	13%
Packard 2018	10%
Packard 2016	10%
Packard 2014	12%
Packard 2012	9%
Packard 2010	11%
Packard 2008	10%
Packard 2006	14%
Packard 2004	12%
Custom Cohort	12%
Median Funder	12%

Development of performance measures

Cohort	Value
Packard 2020	8%
Packard 2018	6%
Packard 2016	11%
Packard 2014	9%
Packard 2012	10%
Packard 2010	11%
Packard 2008	10%
Packard 2006	12%
Packard 2004	16%
Custom Cohort	10%
Median Funder	11%

Cohort: Custom Cohort   **Past results:** on

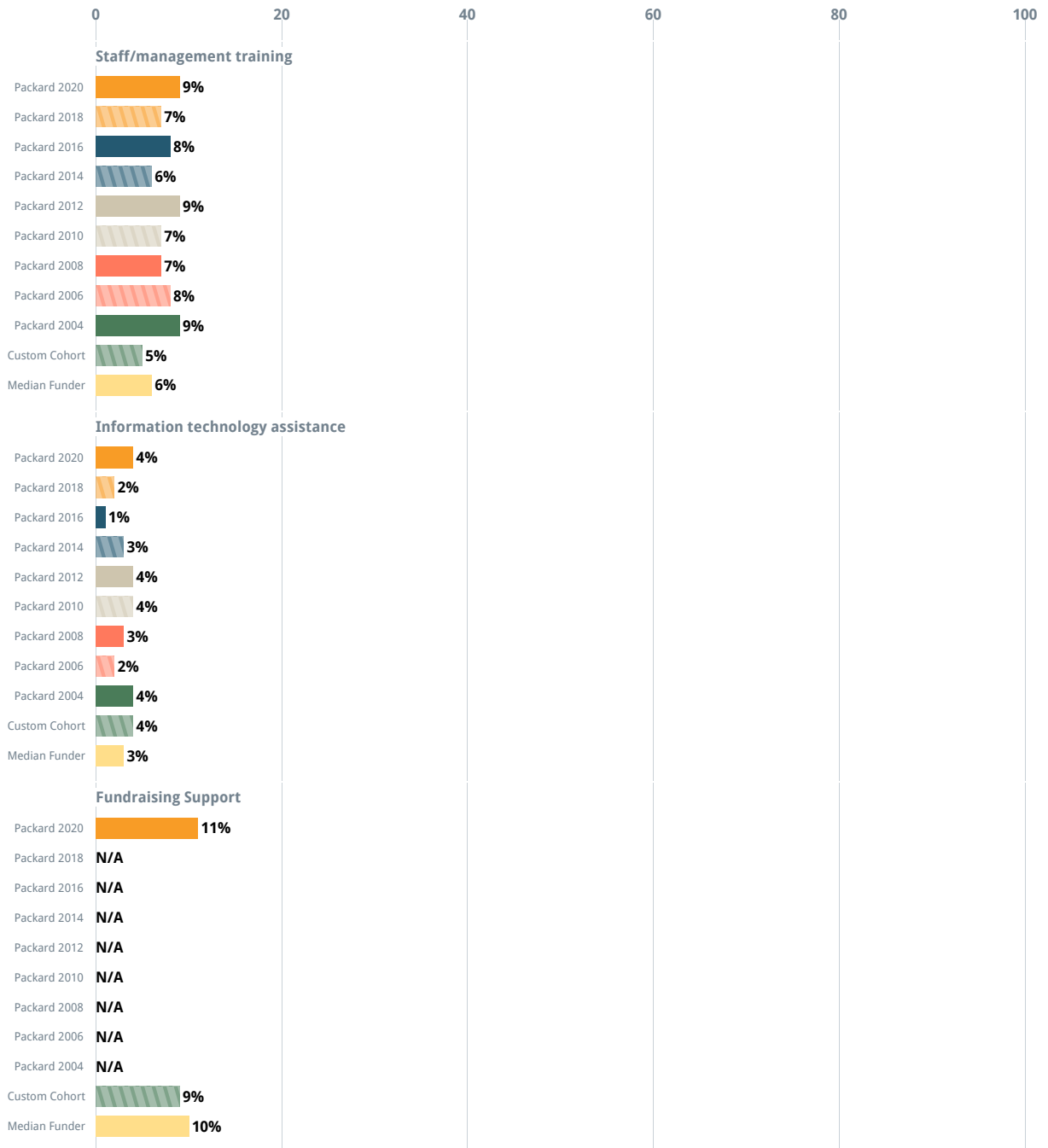## Percentage of Grantees that Received Management Assistance (cont.)

■ Packard 2020 ▨ Packard 2018 ▨ Packard 2016 ▨ Packard 2014 ▨ Packard 2012 ▨ Packard 2010 ▨ Packard 2008 ▨ Packard 2006
■ Packard 2004 ▨ Custom Cohort ■ Median Funder

Financial planning/accounting

Packard 2020	6%
Packard 2018	5%
Packard 2016	5%
Packard 2014	6%
Packard 2012	5%
Packard 2010	6%
Packard 2008	8%
Packard 2006	7%
Packard 2004	11%
Custom Cohort	7%
Median Funder	5%

Cohort: Custom Cohort   **Past results:** on

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

Legend:
- Packard 2020
- Packard 2018
- Packard 2016
- Packard 2014
- Packard 2012
- Packard 2010
- Packard 2008
- Packard 2006
- Packard 2004
- Custom Cohort
- Median Funder

Encouraged/facilitated collaboration

Cohort	Percentage
Packard 2020	33%
Packard 2018	34%
Packard 2016	33%
Packard 2014	36%
Packard 2012	38%
Packard 2010	32%
Packard 2008	33%
Packard 2006	34%
Packard 2004	27%
Custom Cohort	39%
Median Funder	34%

Insight and advice on your field

Cohort	Percentage
Packard 2020	33%
Packard 2018	28%
Packard 2016	25%
Packard 2014	32%
Packard 2012	34%
Packard 2010	30%
Packard 2008	27%
Packard 2006	30%
Packard 2004	25%
Custom Cohort	31%
Median Funder	24%

Provided seminars/forums/convenings

Cohort	Percentage
Packard 2020	24%
Packard 2018	21%
Packard 2016	22%
Packard 2014	24%
Packard 2012	27%
Packard 2010	21%
Packard 2008	23%
Packard 2006	26%
Packard 2004	19%
Custom Cohort	25%
Median Funder	24%

Cohort: Custom Cohort   **Past results:** on

Percentage of Grantees that Received Field-Related Assistance (cont.)

Introduction to leaders in the field

Packard 2020	29%
Packard 2018	26%
Packard 2016	25%
Packard 2014	25%
Packard 2012	24%
Packard 2010	22%
Packard 2008	24%
Packard 2006	20%
Packard 2004	17%
Custom Cohort	31%
Median Funder	22%

Provided research or best practices

Packard 2020	16%
Packard 2018	16%
Packard 2016	14%
Packard 2014	18%
Packard 2012	18%
Packard 2010	16%
Packard 2008	15%
Packard 2006	15%
Packard 2004	11%
Custom Cohort	17%
Median Funder	13%

Cohort: Custom Cohort   **Past results:** on

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

Legend: ■ Packard 2020 ■ Packard 2018 ■ Packard 2016 ■ Packard 2014 ■ Packard 2012 ■ Packard 2010 ■ Packard 2008 ■ Packard 2006 ■ Packard 2004 ■ Custom Cohort ■ Median Funder

Communications/marketing/publicity assistance

Packard 2020	10%
Packard 2018	8%
Packard 2016	9%
Packard 2014	10%
Packard 2012	16%
Packard 2010	14%
Packard 2008	12%
Packard 2006	10%
Packard 2004	14%
Custom Cohort	14%
Median Funder	10%

Board development/governance assistance

Packard 2020	7%
Packard 2018	5%
Packard 2016	6%
Packard 2014	9%
Packard 2012	8%
Packard 2010	7%
Packard 2008	5%
Packard 2006	5%
Packard 2004	8%
Custom Cohort	4%
Median Funder	5%

Use of the Foundation's facilities

Packard 2020	5%
Packard 2018	6%
Packard 2016	8%
Packard 2014	10%
Packard 2012	7%
Packard 2010	8%
Packard 2008	6%
Packard 2006	6%
Packard 2004	7%
Custom Cohort	6%
Median Funder	5%

Cohort: Custom Cohort   **Past results:** on

Percentage of Grantees that Received Other Assistance (cont.)

0   20   40   60   80   100

Staff/management training

Packard 2020	9%
Packard 2018	7%
Packard 2016	8%
Packard 2014	6%
Packard 2012	9%
Packard 2010	7%
Packard 2008	7%
Packard 2006	8%
Packard 2004	9%
Custom Cohort	5%
Median Funder	6%

Information technology assistance

Packard 2020	4%
Packard 2018	2%
Packard 2016	1%
Packard 2014	3%
Packard 2012	4%
Packard 2010	4%
Packard 2008	3%
Packard 2006	2%
Packard 2004	4%
Custom Cohort	4%
Median Funder	3%

Fundraising Support

Packard 2020	11%
Packard 2018	N/A
Packard 2016	N/A
Packard 2014	N/A
Packard 2012	N/A
Packard 2010	N/A
Packard 2008	N/A
Packard 2006	N/A
Packard 2004	N/A
Custom Cohort	9%
Median Funder	10%

Cohort: Custom Cohort   **Past results:** on

Percentage of Grantees that Received Other Assistance (cont.)

	0	20	40	60	80	100

Diversity, equity, and inclusion assistance

Packard 2020	7%
Packard 2018	N/A
Packard 2016	N/A
Packard 2014	N/A
Packard 2012	N/A
Packard 2010	N/A
Packard 2008	N/A
Packard 2006	N/A
Packard 2004	N/A
Custom Cohort	6%
Median Funder	6%

Cohort: Custom Cohort   **Past results:** on

COVID-19 Questions

As part of The David and Lucile Packard Foundation's August 2020 grantee perception survey, the Center for Effective Philanthropy (CEP) included questions to gather grantees' input and advice regarding the impact of the COVID-19 pandemic on their organizations.

Note: The questions in this section were recently added to the grantee survey and do not yet have comparative data.

Impact of COVID-19 on Nonprofits

As a result of COVID-19, what barriers are inhibiting your organization from carrying out its work?

Barriers:	This is a significant barrier	I anticipate this will be a significant barrier	This is not now, nor do I anticipate it being, a significant barrier in the future	Don't know/N/A
Ability to create social distancing in your organization's physical space(s)	22%	17%	57%	4%
Creating social distancing while carrying out programming	38%	23%	34%	5%
Accessing beneficiary populations (due to mobility issues, lack of transportation, lack of internet connectivity)	41%	19%	30%	9%
Lack of necessary supplies required to safely conduct business (i.e. PPE, disinfectants, etc.)	8%	18%	67%	7%
Cash flow problems	10%	29%	52%	10%
Loss of revenue/Budget challenges	22%	44%	26%	8%
Infrastructure costs to accommodate COVID-19 (i.e. reconfiguring work and/or programmatic spaces, investing in technology, etc.)	16%	30%	47%	7%
Maintaining staff levels needed to resume and/or carry out programming	17%	30%	48%	5%
Other	57%	17%	3%	23%

Below are verbatim responses from grantees who selected "Other (please describe):" in the previous question:

Grantee Comment
Ability to create event revenue
Ability to mobilize partners and funders to create necessary systemic change in favor of equity and racial justice
Ability to program an end date
Ability to travel to countries and to invite people to Geneva for meetings
Access to others for surveys, TA with state officials, etc.
Accessing policy makers/ decision makers as their priority is now shifted only focusing on Covid related subject
Accessing populations with very low digital literacy
Adapting specific activities to respond to severe impacts of the pandemic on ecosystems and communities we serve
after school programming
all adressed
Anxiety level of staff (an HR issue)
being able to serve only youth of essential workers rather than all kids/teens
Bringing generations together during COVID.
Cancelling planned programming
Cannot congregate groups as large as we normally lead in programming, and can't transport them to our sites due to social distance regulations
Carrying out deliverables on time with work and home overlapping time of staff
Churches and retreat centers are not meeting in person, and Sunday offerings are down. This both impacts revenue and our usual "captive audience"

closure of physical space

communicating our value to our stakeholders preserving audience longterm

companies are more focus on survive instead of sustainability

Competition by COVID-19 diagnostic screening public health urgency

Complete shutdown of Performing arts sector

Complications in international travel (our organization is bi-national and often conducts bi-national events in the US-Mexico border region)

Constant demands on staff time for scenario planning

Constraining timely execution of field operations

Covid has created conditions that have deeply impacted our team (we are a team of 3). Our team members have all experienced mental health issues relating to covid, some of us severely. One of our team members relies on an in-person work environment for structuring her time, has struggled with productivity. The need to re-invent programming has put a strain on team members for whom this was not part of their job description, and team members who have had to step in to help but have had to work beyond their allotted work hours to do so. One of our team members can no longer rely on outside childcare due to medical vulnerabilities within her household, and thus is working less than half time under considerable mental strain. Additionally, the impact of police and state violence against Black and Brown communities has impacted the mental health of our staff, who are all Women of Color. Both covid and violence against Black and Brown lives have impacted the communities we serve disproportionately, and we have needed to create additional healing programs to serve them, under the constrained conditions that covid has created.

Covid-19 test

Current mandatory covid-19 testing for all meeting participants at the host cost

Dealing with discrimination because of COVID 19

Decreased staff capacity levels due to increase caregiving and other responsibilities

Degree of uncertainty (from sustained funding, ability to move advocacy work with positive outcomes, etc.) in current climate

delays in transactions with other businesses and agencies

Difficulty maintaining collaboration with government staff for remote work

DNA

Doing fieldwork

Due to the complete unpredictability of the situation it is extremely challenging to re-purpose project plans

Economic impact on artist, business supporters, and audience.

Emotional stress of Covid-19 and added work/life constraints

facilitating collaboration among staff accustomed to in-person collaboration

fatigue from balancing family and work obligations

Fear and anxiety among clients about visiting medical providers

Federal regulations that need to be flexible.

Field staff transport & mobility

Field work and transportation limitations.

Finding resources/funds to cover the additional costs of testing/programmatic costs increases associated with newly introduced covid procedures

focus of our healthcare provider participants is on COVID-19 rather than other issues

Fostering true engagement among stakeholders on issues is a substantial challenge without the ability to meet face-to-face

Funding

fundraising and engagement -- inability to organize in-person events

Fundraising for non US work under current US specific needs

Future fundraising ability

Having sufficient funds to transition to more online engagement with stakeholders (including technology, accessibility on both provider and user sides)

Having to redesign programs while adhering to restricted funding requirements. Loss of funders who have prioritized domestic issues

Hiring and training local staff due to regional travel restrictions. Developing all the operational tools to support this. Revising all project work plans and budgets has been a big lift. Staff morale and mental health.

Human behavior and lasting behavior changes

If lockdowns continue in our partner countries, many of the above may become a significant barrier to programming and movement. Hard to assess at this time.

Impacts of long term stress on staff & partners

inability to host international meetings

Inability to make long term plans with confidence

Inability to travel

inability to travel for work

Inability to travel internationally slows pace of progress in cultures where in-person discussion is critical to decision-making.

Inability to travel safely

Increase in need placed extra burden on budget. Not loss of revenue but 300% increase in programs due to our responsiveness. Lack of food, emergency supplies and technology for families put extra burden on budget as well.

Increased conservation threats

interaction with constituents we serve

International travel

Keeping our CEO healthy during a pandemic

Keeping our staff funded while so many of our projects (and project funding) is on hold due to COVID-19

Loss in leverage with target audiences because of the collapse of foodservice supply chains due to COVID related closures/lock-downs

Loss of school programs and field trips. Kindergarteners and elementary students do not benefit much from screen based learning.

Maintain/Grow past community partnerships with populations in the highest need

Maintaining mental and emotional well-being of staff, volunteers, supporters

Maintaining staff cohesion and mission focus

Mobility issues are severe in Panama at the moment.

most of these are challenges we have experienced but we are overcoming them. They have left us weakened

Necessity of conducting all business virtually

No core funds for re-skilling needed to be effective in the new normal of post-COVID work environment

None

None that come to mind

Not just the loss of grants, but the change in timing of some grants

Not only internet connectivity but tech literacy are also challenges -- underlying root causes are rearing their heads and our county is not racially woke enough to be able to address them.

only online activism and organizing is of limited effectiveness

Opportunities for face to face contact due to travel restrictions

Our art form combines percussive music, dance, and vocalization as an ensemble. Maintaining adequate social distance, reducing vocalizations, and wearing non-transparent face coverings will greatly impact the delivery of art.

Per the last item, we do not anticipate having to lay off staff related to our program funded by Packard because of its generous flexibility. However, other staff within our organization are facing cuts.

Personnel bandwidth

Planned capacity building activities had to be postponed or virtualized.

Policy changes have impacted our ability to provide services at the typical level

Policy work is not priority for government counterparts

PPMM operates 35 health centers in two states, and our staff are providing critical care on the frontlines of the pandemic. We continue to be directly impacted by local, state, and national response efforts. We do not anticipate a return to "normal" any time in the foreseeable future.

Procurement delays (e.g., MA drugs)

Public hesitance with gathering

reaching out to policy makers

right now we're holding our own but another 6 months w/o audiences and artists will take a significant toll on our operations

school closings

Significantly reduced numbers of clients served (translating to severely reduced earned income) because social distancing requirements limit how many people we can serve at a time within our programs.

Staff infected with corona virus, lilimiting organizational capcity to effcetively run projects or organizational functions

staff lack skills required in the present situation

Staff mobilization

staffs in the program repurposed for emergency response

staff's mental health

state of emergency to conduct training and community gathering for discussion

supporting a work culture & staff morale

The community norm

Travel between sites

Travel costs increase

travel curtailed impacts work

Travel restriction to work with partners in Latin America

Travel restrictions due to Covid-19

We have made the decision to end the lease agreement for our current office in Los Angeles due to concerns that we cannot ensure staff safety under the building's current conditions; barriers we will face in finding an appropriate new space are unclear.

We moved offices right before Covid, making it possible to structure with a covid lens

We think loss of revenue and budget challenges will be a barrier, however, we do not know how significant this will be yet

When the fund available, staffs are manageable

While we have been able to maintain our programmatic work as staff work from home, the impact of the pandemic and subsequent economic crisis is taking a toll on our staff and our partners. Everyone is forging ahead, but everything is taking more time.

With support from Packard and other funders, our team has been able to pivot from in-person to virtual training and TA. Our primary challenge is in engaging school district administrators, faculty, and staff, in light of all that they are managing in this moment. We anticipate that engagement and fatigue in receiving training and TA online/virtually will continue to be challenging.

Working remotely

Working Remotely while maintaining some level of community amongst staff and volunteers.

Working within a University setting has had its plusses but also minuses. Since University is having financial problems our retirement contributions are on hold and we can't get any raises/promotions.

Communicating COVID-19 Issues with the Foundation

When communicating with Packard about the COVID-19 pandemic, I feel comfortable discussing the...

Evolving needs of the populations we serve

■ Yes ■ No ■ Don't know

Packard 2020	96%

Cohort: None   **Past results:** on

Evolving needs of our organization

■ Yes ■ No ■ Don't know

Packard 2020	96%

Cohort: None   **Past results:** on

The following question was asked only of grantees based in the United States.

Implications of race in our organization's response to COVID-19

■ Yes ■ No ■ Don't know

Packard 2020	88%	10%
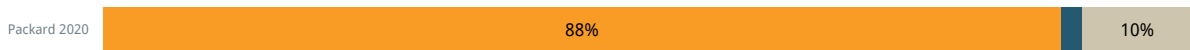
Cohort: None   **Past results:** on

The following question was asked only of grantees based outside of the United States.

Implications of COVID-19 on our work with historically disadvantaged communities

■ Yes ■ No ■ Don't know
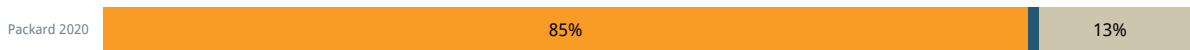
Packard 2020	85%	13%

Cohort: None   **Past results:** on

Customized Questions

Has the Packard Foundation taken any of the following actions to mitigate the negative impacts of COVID-19 on your organization? (Please check all that apply)

■ Packard 2020

| | 0 | 20 | 40 | 60 | 80 | 100 |

Allowed goals and/or timeline of current grant(s) to shift
Packard 2020 — **73%**

Postponed reporting requirements
Packard 2020 — **36%**

Offered to convert restricted grant(s) to unrestricted grant(s)
Packard 2020 — **33%**

Reduced reporting requirements
Packard 2020 — **28%**

Offered to accelerate payment schedules on grant(s)
Packard 2020 — **24%**

Reduced proposal requirements
Packard 2020 — **24%**

Cohort: None   **Past results:** on

How helpful have these actions been in mitigating the negative impacts of COVID-19 on your organization?

1 = Not at all helpful   **7** = Extremely helpful

■ Packard 2020

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

Packard 2020 — **6.26**
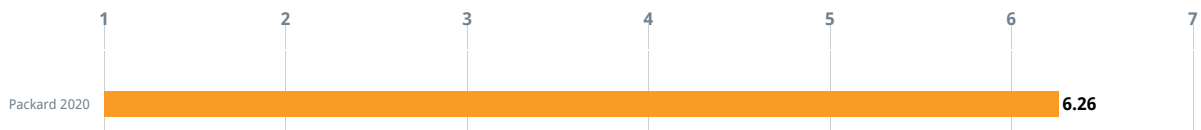
Cohort: None   **Past results:** on

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?

■ Never   ■ Rarely   ■ Sometimes   ■ Often

	Never	Rarely	Sometimes	Often
Packard 2020	8%	21%	59%	12%
Packard 2018	6%	22%	58%	14%

Cohort: None   **Past results:** on

Organizational Effectiveness and Capacity Building Questions

Packard's Organizational Effectiveness program offers a range of capacity support programs, including:

- United States **COVID Response Program**
- Consultation with **Fiscal Management Associates**
- **Resilience Initiative**

The following question was asked only of grantees who participated in one or more of these programs, according to Packard's grantee list.

Overall, how would you rate the Foundation's capacity support programs' impact on your organization?

1 = No impact	**7** = Significant positive impact

🟧 Packard 2020

	1	2	3	4	5	6	7

Packard 2020 — **6.10**
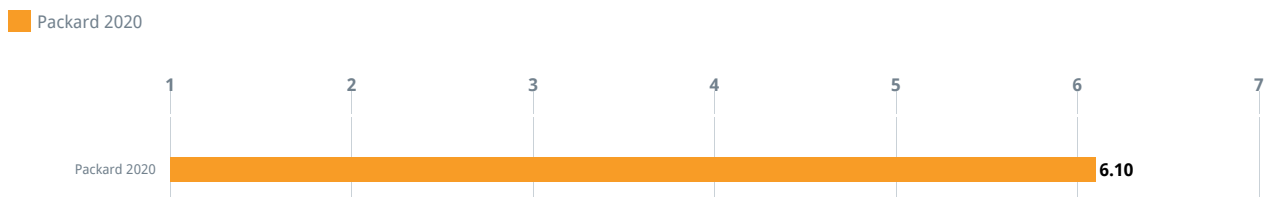
Cohort: None   **Past results:** on

The following question was asked only of grantees who received a Capacity Building Grant, including from Local, according to Packard's grantee list.

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

1 = No impact	**7** = Significant positive impact

🟧 Packard 2020   🟦 Packard 2018   ⬜ Packard 2016

	1	2	3	4	5	6	7

Packard 2020 — **6.37**
Packard 2018 — **6.47**
Packard 2016 — **6.41**
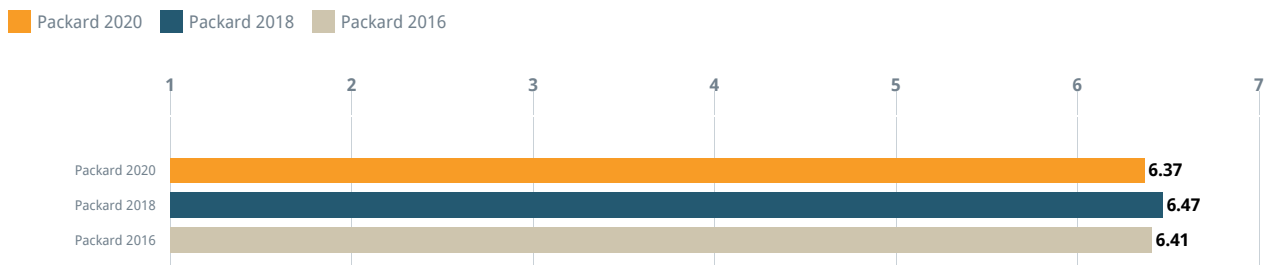
Cohort: None   **Past results:** on

The following questions were asked only of grantees who received a Capacity Building Grant, according to Packard's grantee list.

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

1 = Not at all comfortable   **7** = Extremely comfortable

■ Packard 2020   ■ Packard 2018   ■ Packard 2016

	1	2	3	4	5	6	7

Packard 2020 6.32
Packard 2018 6.53
Packard 2016 6.51
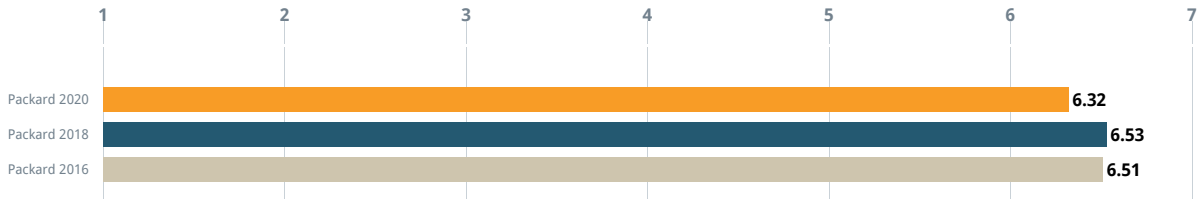
Cohort: None   **Past results:** on

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

1 = Not at all responsive   **7** = Extremely responsive

■ Packard 2020   ■ Packard 2018   ■ Packard 2016

	1	2	3	4	5	6	7

Packard 2020 6.42
Packard 2018 6.47
Packard 2016 6.7
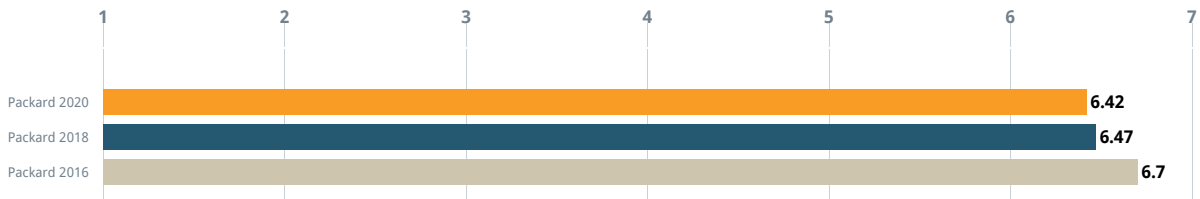
Cohort: None   **Past results:** on

Grantee Experience Standards

Please rate the extent to which you agree or disagree with the following overall statements:

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

🟧 Packard 2020

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 |

I have a clear understanding of the post-grant award process and requirements (e.g., reporting and grant assessment).

Packard 2020 — **6.38**

I feel that the Foundation is thoughtful about collecting the information, data, and feedback it really needs.

Packard 2020 — **6.20**

I have a clear understanding of the pre-grant approval process and requirements (e.g. proposal application).
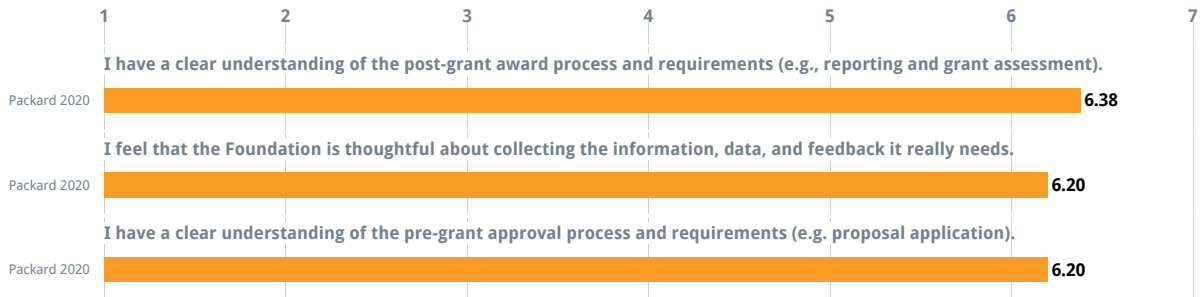
Packard 2020 — **6.20**

Cohort: None   **Past results:** on

Selected Cohort: None

Thinking across your conversations with Packard staff, which of the following best describes their balance of talking and listening?	Packard 2020
Packard staff spent much more time talking than listening	0%
Packard staff spent somewhat more time talking than listening	2%
Packard staff spent fairly equal time talking and listening	48%
Packard staff spent somewhat more time listening than talking	28%
Packard staff spent much more time listening than talking	23%

Selected Cohort: None

To what extent are you aware of the Foundation's strategy or theory of change for the program area from which you receive funding?	Packard 2020
I am aware of the strategy or theory of change for the program from which I receive funding.	64%
I am not aware of the strategy or theory of change for the program area from which I receive funding.	36%

Only asked of grantees who answered 'I am aware of the strategy or theory of change for the program from which I receive funding' to the question above.

To what extent were you given the opportunity to provide input into the Foundation's strategy or theory of change for the program area from which you receive funding?	Packard 2020
I was given an opportunity to provide input, and did provide input.	46%
I was given an opportunity to provide input, but did not choose to do so.	7%
I was not given an opportunity to provide input.	47%

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?"

To download the full set of grantee comments and suggestions, please refer to the "Downloads" dropdown menu at the top right of your report. Please note that some comments may be redacted or removed to protect the confidentiality of respondents.

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 the Foundation's Processes, Interactions, and Communications

Legend:
- Positive comment (orange)
- Comment with at least one constructive theme (dark blue)

	Positive comment	Comment with at least one constructive theme
Packard 2020	84%	16%
Packard 2018	78%	22%
Packard 2016	77%	23%
Custom Cohort	71%	29%
Average Funder	73%	27%
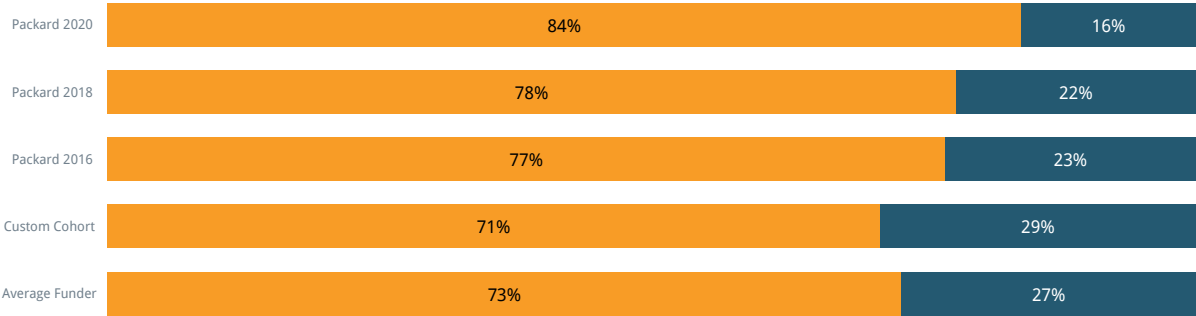
Cohort: Custom Cohort   **Past results:** on

Grantees' Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. The 750 grantees that responded to the survey provided 214 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Grantmaking Characteristics	26%
Non-monetary Support	18%
Funder-Grantee Interactions	13%
Impact on and Understanding of Grantees' Fields	8%
Diversity, Equity, and Inclusion	7%
Impact on and Understanding of Grantees' Communities	5%
Proposal and Selection Processes	5%
Foundation Communications	4%
Reporting and Evaluation Processes	4%
Foundation Strategy	2%
Impact on and Understanding of Grantees' Organizations	1%
Other	6%

Selected Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. The 750 grantees that responded to the survey provided a total of 214 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Grantmaking Characteristics (26% N=56)

- Grant Length (N = 26)

    ◦ "To be a better funder, put more trust in us, and support us for long term fundings."
    ◦ "Overall, longer term grants would be helpful, potentially 3 year grant instead of two."
    ◦ "Investment in long-term programs of work - as opposed to short term projects. The Foundation could identify strategic partners and invest in broadly defined programs of work over multiple funding cycles say for a period of 10-15 years."
    ◦ "After years of successfully completing one-year grants, we would appreciate longer-term organization support."
    ◦ "The Foundation could improve its granting strategy by providing a multi-year project up to 4-5 years."
    ◦ "Investing in long-term impact would ideally be funded through longer-term grants and a sustained partnership."

- Grant Type (N = 16)

    ◦ "More general operating funding that is easier to access. Remove the previous grantee requirement for general operating support."
    ◦ "Greater proportion of unrestricted to simply support more flexibility during this ever changing environment we are currently in."
    ◦ "More unrestricted funding."
    ◦ "Provide more general operating support."
    ◦ "Consider how more grantees can access general operating support."

- Grant Size (N = 11)

    ◦ "Obviously increased funding is at the forefront."
    ◦ "More funding would be helpful of course, especially during this period of time."
    ◦ "The specific improvement which I would suggest the Foundation may do better is on the possibility of increasing funding to significant amounts which would help to cover large population and areas to make significant impacts."
    ◦ "Larger funding streams. "

- Cover Grantees' Full Costs (N = 2)

    ◦ "Do a better job of realizing the true costs of the work and covering salaries for staff carrying out the project."

- Other (N = 1)

Non-monetary Support (18% N=38)

- Facilitate Learning between Grantees (N = 15)

    ◦ "It would be very useful for the Foundation to host convening opportunities within and across programs. This way, the grantees can learn from each other, collaborate, and perhaps integrate in unexpected ways - for the better."
    ◦ "While spending the time to [convene grantees] can sometimes feel like a burden, I have found that being able to 1) understand what other grantees are working on and 2) build relationships with other leaders and organizations can be helpful in achieving our mission."
    ◦ "Facilitating collaboration and sharing best practices amongst the foundation partners, particularly those who are working in same areas, on similar thematics."
    ◦ "Providing special forums/events to facilitate sharing experiences, lesson learned and build collaboration among Foundation's grantees from the same field at one region or cross region."

- Facilitate Connections to Additional Funders (N = 12)

    ◦ "Help with introductions and connections to other funders and organizations with an interest in certain project areas or in areas of work that might overlap in other ways. Convening other funding organizations to showcase grantee accomplishments, and build greater awareness of these publicly and among funders."
    ◦ "Helping grantees connect with other funding streams."
    ◦ "Money is always a challenge. I'd love to see our Program Officers actively working on having other foundations match their gift to us and/or making introductions to new foundations."
    ◦ "Leverage funding by connecting grantees with other funders."

- Build Grantees' Capacity (N = 10)

    ◦ "Provide additional training opportunities (or limited but dedicated additional funding opportunities) to grantees as a matter of course during grant implementation."
    ◦ "I suggest short term training is very important to build the capacity of project staff at least once in a year for professional career improvement."
    ◦ "Continue funding infrastructure systems. Technological infrastructure is critical to nonprofit organizations in helping us better track data – a fundamental lynchpin in ultimately understanding our impact on youth."

- Other (N = 1)

Funder-Grantee Interactions (13% N=27)

- More Frequent Interactions (N = 16)

    ◦ "In the future, it would be best to have regular check-in (maybe monthly or bi-monthly would be ok) with relevant program officer."
    ◦ "We would only suggest perhaps more frequent check-ins with Packard program staff in order to keep them abreast of our strategy and priorities."
    ◦ "Calls once or twice a year to explore what challenges we're experiencing as an organization and in our field of work."
    ◦ "More communication with program officers."
    ◦ "One improvement that would be helpful to us would be to have an annual check-in with the program officer, initiated by the Foundation."

- More Site Visits (N = 5)

    ◦ "I'd suggest an annual visit and/or a meeting at the Foundation to provide an opportunity to convey a better understanding of the program, gather feedback from the program officer and attain a better mutual understanding of each organizations' strategies."

- Staff Responsiveness (N = 2)

    ◦ "Timely responses would be really appreciated."

- Other (N = 4)

Impact on and Understanding of Grantees' Fields (8% N=17)

- Share Lessons Learned across the Field (N = 6)

    ◦ "It would help to have the grantees inform strategy and tactics, and for the funder to assume a role of coordinating diverse integrated approaches."
    ◦ "We would always welcome any input or advice from the Foundation since they see the field and the community from both a high and an intimate level. We would like to be able to benefit from their insights on where the field is succeeding, failing or directions in which it is moving. When so many of us are just fighting the daily fight it would be very helpful to have a more global view."

- Orientation Change (N = 5)

    ◦ "I think Packard should have an "innovation fund" to support original, high risk initiatives, but with potential to be a game changer."

- Involvement in Public Policy (N = 4)

    ◦ "The foundation may be able to further amplify impacts and support grantees by further leveraging political capital, when needed, to support project, program, and strategy objectives, particularly those relating to communications and access to governmental and civil leadership."

- Other (N = 2)

Diversity, Equity, and Inclusion (7% N=16)

- Incorporate DEI into Foundation Strategy (N = 10)

    ◦ "Center racial equity in all that they do. Dismantle the 'color blindness' that they've had for decades that really Just reflects their own privilege - class and white. Keep doing their work to stay woke."
    ◦ "Deepening a commitment to bringing a racial and reproductive justice lens to its grantmaking, and sharing their analysis as it evolves."
    ◦ "We would like the Foundation to...put a greater emphasis on racial equity and social determinants of health -- rather than focusing its health-related funding almost exclusively on access to health insurance (which accounts for only a very small portion of racial disparities in health outcomes)."

- Increase Diversity of Foundation Staff and Grantees (N = 3)

    ◦ "Per previous comments there is a current opportunity and, we'd argue, a responsibility to actively invest in BIPOC leaders and emerging leaders. The Foundation has influence and resources that can make this happen, starting with its current grantees."

- Use Voice to Advance DEI (N = 3)

    ◦ "Be transparent and share your learnings, challenges as an organization re: how Packard is responding to our country's "moment of reckoning" around structural and historical racism and its impact."

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

- Orientation Change (N = 9)

    ◦ "Open the wallet more for local funding; it's been static for too long! There are enough difficult social challenges in this region alone."
    ◦ "Maintain a regional focus."
    ◦ "I would reorient funding to be community or region based to focus on intersectionality."

- Understanding Grantees' Communities and Contexts (N = 2)

    ◦ "It would be nice to have a [place]-based consultant who knows the specifics of our local communities, people, relationships, politics, and history."

Proposal and Selection Processes (5% N=11)

- Streamline Processes (N = 3)

- "First, having to go between the Foundation's overall proposal guidelines and the Focus Area's guidelines is quite time consuming. Can't there be just one template? Also, because Foundation staff are already well in tune with the issues being addressed, the full written proposals seem to us to be merely exercises in writing down what we have discussed together many times."

- Understanding Selection Criteria (N = 3)

  - "Help getting placed in the right long-term grant-making program (i.e. if local grantmaking isn't the right fit, but our project aligns with another Packard program, then facilitating that transition to ensure long-term support)."

- Consider an Open Proposal Process (N = 2)

  - "I think the foundation should consider more open calls for proposals/LOIs to allow more diversity."

- Other (N = 3)

Foundation Communications (4% N=9)

- Clearer Communication about the Foundation's Goals and Strategy (N = 6)

  - "Clearer articulation of the Foundation's goals and objectives in the areas of clean energy, environment and climate policy that could serve to help guide any future requests for funding."
  - "The Foundation could make their vision for funding clearer, most specifically in terms of long term vision beyond the immediate program goals."

- Other (N = 3)

Reporting and Evaluation Processes (4% N=8)

- More Flexibility with Impact Metrics (N = 4)

  - "One of the challenges that we have with the Packard Foundation's proposal and reporting process is the OIT table which doesn't quite fit the advocacy, education, and movement building work that we're doing. We spend significant time filling out this sheet and reporting back on it and the numbers do not paint an accurate picture of our impact or the work that we're actually doing."

- Streamline Processes (N = 2)

  - "Minimize reporting and requirements for evaluations etc would be helpful."

- Other (N = 2)

Foundation Strategy (2% N=5)

- Response to COVID-19 (N = 5)

  - "COVID-19 has brought much uncertainty to organizations (donor funding shifts, impact on communities we serve). Given these changes, it would be helpful to learn if the foundation is seeking to make adjustments in the grant amounts and whether they will have the ability to increase the amount and/or commit to longer multi-year grants which would allow organizations to better prepare to meet the challenges imposed by the pandemic."

Impact on and Understanding of Grantees' Organizations (1% N=3)

- Orientation Change (N = 2)

  - "I'm distressed by the amount of funds going to intermediaries.... Isn't Packard interested in supporting work at the grassroots? Why so much funding going to what are, in essence, other funders? This approach is not appreciated by frontline actors."

- Other (N = 1)

Other (6% N=13)

- Other (N = 13)

Contextual Data

Grantmaking Characteristics

Selected Cohort: Custom Cohort						
Length of Grant Awarded	**Packard 2020**	**Packard 2018**	**Packard 2016**	**Packard 2014**	**Packard 2012**	**Packard 2010**
Average grant length	2 years	2.2 years	2.1 years	2 years	2.1 years	2.2 years

Selected Cohort: Custom Cohort						
Length of Grant Awarded	**Packard 2020**	**Packard 2018**	**Packard 2016**	**Packard 2014**	**Packard 2012**	**Packard 2010**
1 year	34%	37%	37%	39%	39%	47%
2 years	49%	48%	46%	42%	38%	33%
3 years	12%	8%	10%	10%	14%	13%
4 years	2%	2%	0%	3%	2%	2%
5 or more years	3%	5%	7%	6%	6%	4%

Selected Cohort: Custom Cohort			
Proportion of Unrestricted Funding	**Packard 2020**	**Average Funder**	**Custom Cohort**
No, this funding was not restricted to a specific use (i.e. general operating, core support)	31%	22%	21%
Yes, this funding was restricted to a specific use (e.g. supported a specific program, project, capital need, etc.)	69%	78%	79%

Grant Size

Grant Amount Awarded	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Median grant size	$200K	$162.4K	$200K	$150K	$150K	$150K

Grant Amount Awarded	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Less than $10K	1%	0%	1%	1%	0%	3%
$10K - $24K	3%	2%	3%	7%	4%	7%
$25K - $49K	6%	9%	9%	15%	12%	8%
$50K - $99K	14%	16%	18%	16%	16%	15%
$100K - $149K	12%	16%	11%	10%	15%	15%
$150K - $299K	27%	24%	23%	24%	25%	25%
$300K - $499K	13%	11%	12%	10%	9%	10%
$500K - $999K	15%	12%	14%	9%	12%	8%
$1MM and above	9%	8%	9%	8%	7%	10%

Median Percent of Budget Funded by Grant (Annualized)	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Size of grant relative to size of grantee budget	5%	4%	4%	4%	4%	4%

Grantee Characteristics

Operating Budget of Grantee Organization	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Median Budget	$2.2M	$2.5M	$2.2M	$2M	$2M	$2M

Selected Cohort: Custom Cohort

Operating Budget of Grantee Organization	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
<$100K	2%	2%	2%	5%	4%	3%
$100K - $499K	14%	10%	12%	15%	14%	16%
$500K - $999K	10%	14%	13%	15%	16%	16%
$1MM - $4.9MM	38%	34%	36%	32%	31%	31%
$5MM - $24MM	20%	23%	22%	20%	21%	22%
>=$25MM	15%	16%	15%	14%	14%	12%

Funding Relationship

Selected Cohort: Custom Cohort

Funding Status	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Percent of grantees currently receiving funding from the Foundation	91%	88%	86%	83%	88%	85%

Selected Cohort: Custom Cohort						
Pattern of Grantees' Funding Relationship with the Foundation	**Packard 2020**	**Packard 2018**	**Packard 2016**	**Packard 2014**	**Packard 2012**	**Packard 2010**
First grant received from the Foundation	13%	19%	14%	13%	13%	20%
Consistent funding in the past	74%	67%	70%	70%	73%	65%
Inconsistent funding in the past	13%	14%	16%	17%	14%	15%

Grantee Demographics

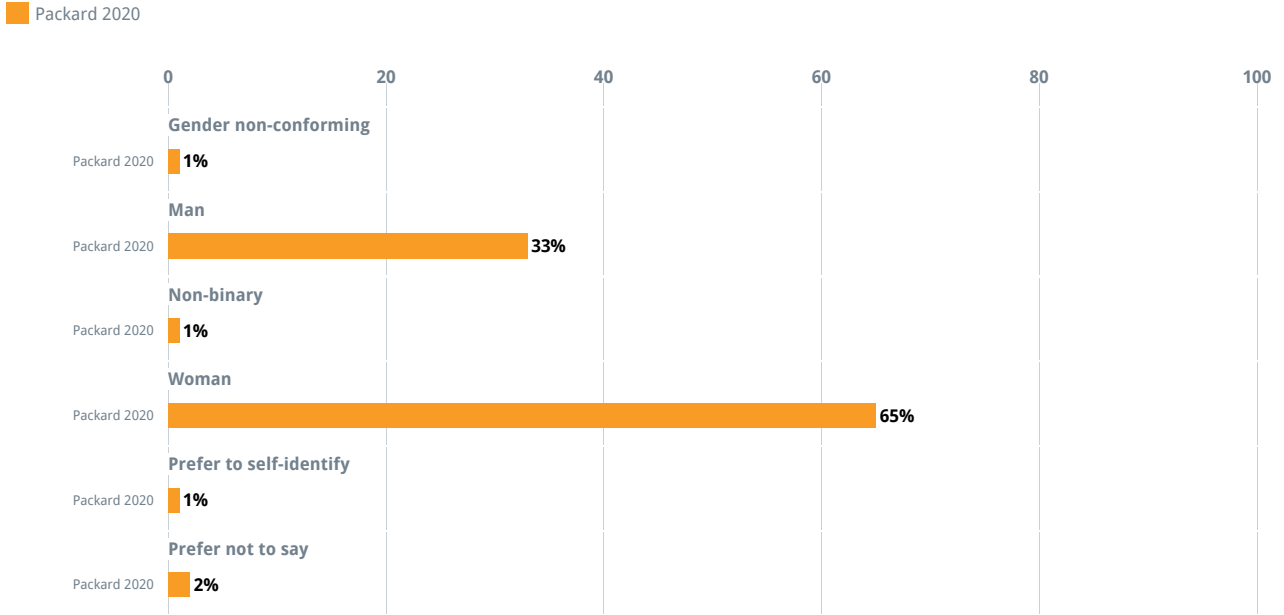| Selected Cohort: Custom Cohort						
Job Title of Respondents	**Packard 2020**	**Packard 2018**	**Packard 2016**	**Packard 2014**	**Packard 2012**	**Packard 2010**
Executive Director	41%	52%	48%	47%	45%	50%
Other Senior Management	22%	18%	16%	15%	16%	17%
Project Director	17%	12%	13%	14%	15%	10%
Development Director	10%	8%	6%	8%	9%	8%
Other Development Staff	7%	10%	7%	7%	7%	8%
Volunteer	0%	1%	1%	2%	0%	1%
Other	4%	0%	9%	7%	9%	7%

Note: Survey questions about race and ethnicity and gender were recently modified to match best practices, so do not yet have comparative data.

Survey language and response options for questions about race and ethnicity are guided by best practices shared by National Institutes of Health, Pew Research Center, Psi Chi Journal of Psychological Research, and the US Census Bureau.

Survey language and response options for questions about gender are guided by best practices shared by Funders For LGBTQ Issues, HRC Foundation's Welcoming Schools, and the Williams Institute of the University of California – Los Angeles School of Law.
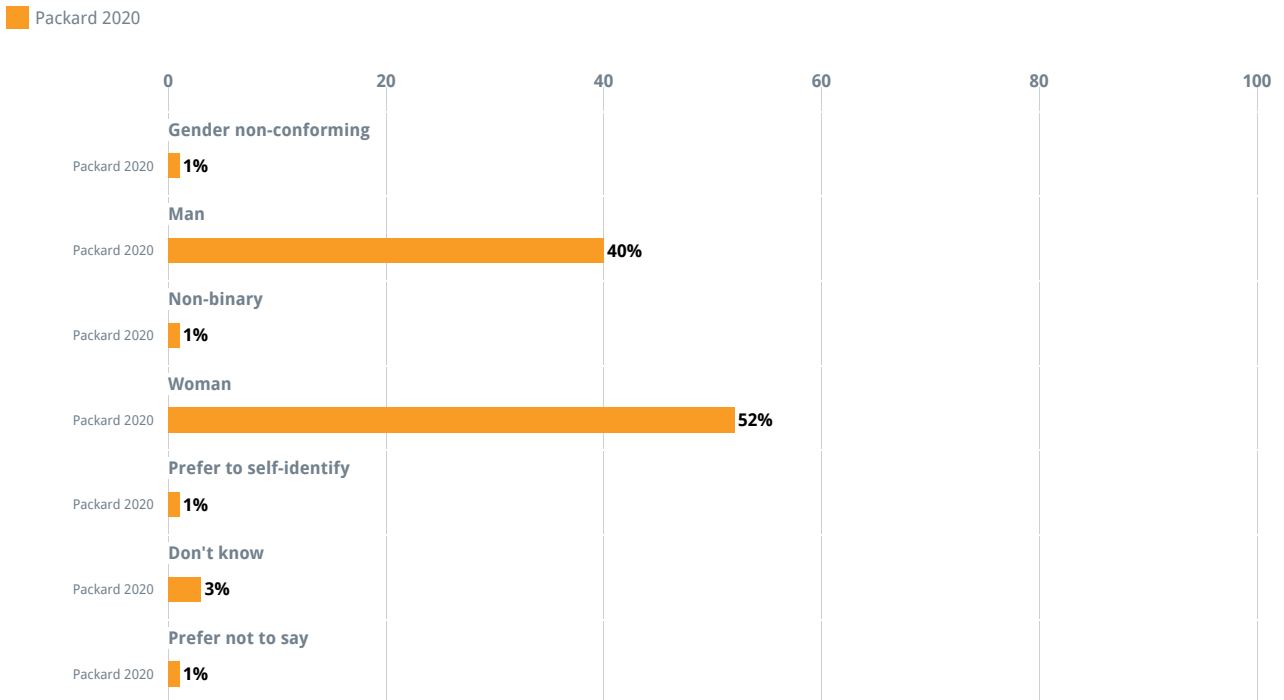
In CEP's previous version of the question on gender identity, 63% of the the average funder's respondents identified as female, 34% male, 0% preferred to self-identify, and 3% indicated they preferred not to say. Respondents could only select one answer option to this question.

Please select the option that represents how you describe yourself:

0   20   40   60   80   100

Gender non-conforming
Packard 2020 **1%**

Man
Packard 2020 **33%**

Non-binary
Packard 2020 **1%**

Woman
Packard 2020 **65%**

Prefer to self-identify
Packard 2020 **1%**

Prefer not to say
Packard 2020 **2%**

Cohort: None   **Past results:** on

Please select the option that represents how the CEO/Executive Director of your organization describes themselves:

■ Packard 2020

0   20   40   60   80   100

Gender non-conforming
Packard 2020 **1%**

Man
Packard 2020 **40%**

Non-binary
Packard 2020 **1%**

Woman
Packard 2020 **52%**

Prefer to self-identify
Packard 2020 **1%**

Don't know
Packard 2020 **3%**
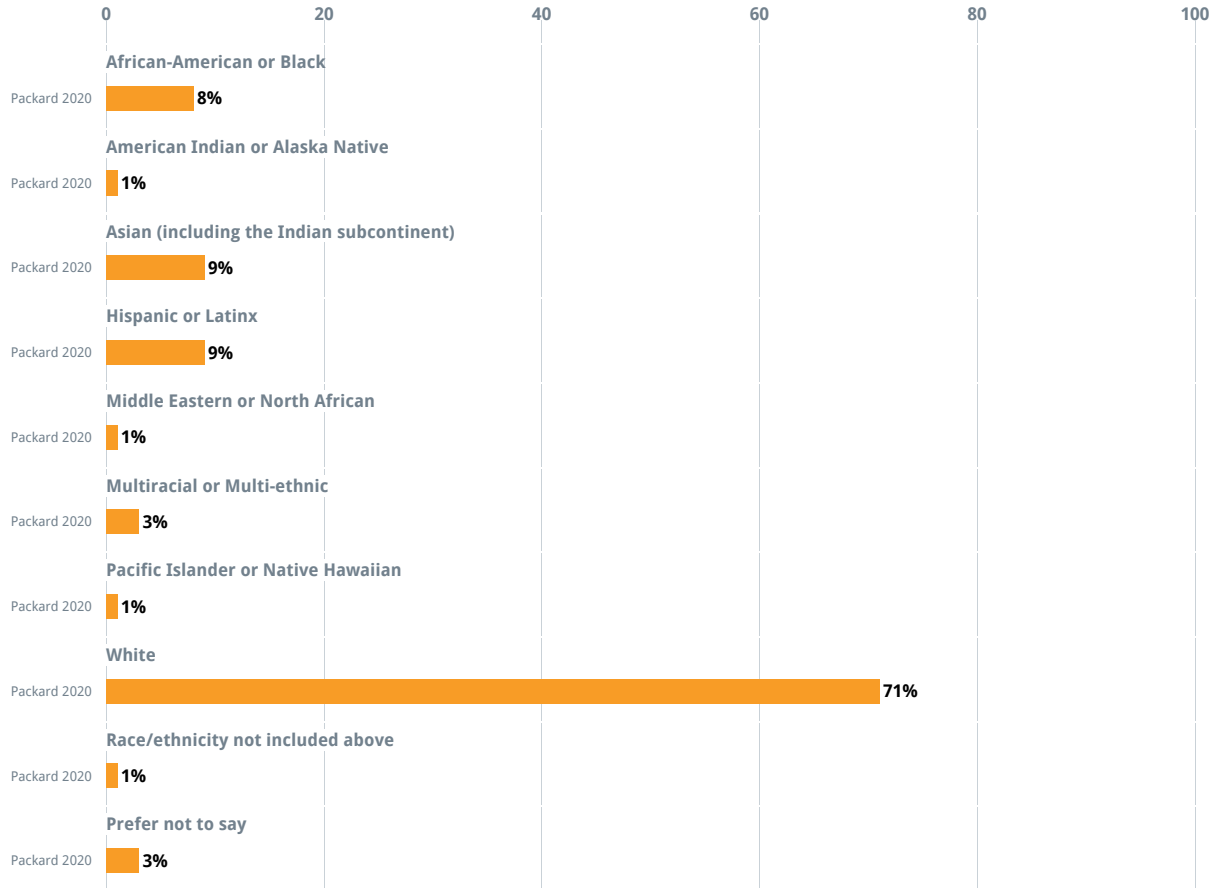
Prefer not to say
Packard 2020 **1%**

Cohort: None   **Past results:** on

In CEP's previous version of the question on racial/ethnic identity, 7% of the the average funder's respondents identified as African-American or Black, 1% American Indian or Alaskan Native, 4% Asian (incl. Indian subcontinent), 5% Hispanic or Latinx, 0% Pacific Islander or Native Hawaiian, 78% White, and 1% indicated their race/ethnicity was not included in the above options. Respondents could select multiple answers to this question.

What is your race/ethnicity?

■ Packard 2020

| | 0 | 20 | 40 | 60 | 80 | 100 |

African-American or Black
Packard 2020 — **8%**

American Indian or Alaska Native
Packard 2020 — **1%**

Asian (including the Indian subcontinent)
Packard 2020 — **9%**

Hispanic or Latinx
Packard 2020 — **9%**

Middle Eastern or North African
Packard 2020 — **1%**

Multiracial or Multi-ethnic
Packard 2020 — **3%**

Pacific Islander or Native Hawaiian
Packard 2020 — **1%**

White
Packard 2020 — **71%**

Race/ethnicity not included above
Packard 2020 — **1%**

Prefer not to say
Packard 2020 — **3%**

Cohort: None   **Past results:** on

This following questions were recently added to the grantee survey and depict comparative data from 36 funders in the dataset.

Selected Cohort: None		
Do you identify as a person of color?	**Packard 2020**	**Average Funder**
Yes	23%	17%
No	73%	78%
Prefer not to say	4%	6%

Selected Cohort: None

Does the CEO/Executive Director of your organization identify as a person of color?	Packard 2020	Average Funder
Yes	24%	17%
No	71%	75%
Don't know	3%	3%
Prefer not to say	2%	4%

Funder Characteristics

Selected Cohort: Custom Cohort

Financial Information	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Total assets	$7423.4M	$7102.4M	$7025.8M	$6456.6M	$5797.4M	$5699.2M
Total giving	$350M	$319M	$307.3M	$294.7M	$265.1M	$282.8M

Selected Cohort: Custom Cohort

Funder Staffing	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2012	Packard 2010
Total staff (FTEs)	131	127	120	114	96	92
Percent of staff who are program staff	53%	42%	39%	41%	40%	45%

Selected Cohort: Custom Cohort

Grantmaking Processes	Packard 2020	Packard 2018	Packard 2016	Packard 2014	Packard 2008	Median Funder
Proportion of grants that are invitation-only	90%	70%	70%	70%	N/A	44%
Proportion of grantmaking dollars that are invitation-only	90%	80%	80%	80%	0%	60%

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 750.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your field?	714
How well does the Foundation understand the field in which you work?	727
To what extent has the Foundation advanced the state of knowledge in your field?	630
To what extent has the Foundation affected public policy in your field?	543
Overall, how would you rate the Foundation's impact on your local community?	550
How well does the Foundation understand the local community in which you work?	609
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	705
How well does the Foundation understand your organization's strategy and goals?	720
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	675
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	722
How often do/did you have contact with your program officer during this grant?	748
Who most frequently initiated the contact you had with your program officer during this grant?	747
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	714
Has your main contact at the Foundation changed in the past six months?	733
Did you submit a proposal to the Foundation for this grant?	737
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?	720
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	690
Are you currently receiving funding from the Foundation?	742
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	737
How well does the Foundation understand your intended beneficiaries' needs?	671
To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	675
Have you participated in a reporting or evaluation process?	714
To what extent was the Foundation's reporting process...Adaptable, if necessary, to fit your circumstances?	562
To what extent was the Foundation's reporting process...A helpful opportunity for you to reflect and learn?	599
To what extent was the Foundation's reporting process...Relevant, with questions and measures pertinent to the work funded by this grant?	592
To what extent was the Foundation's reporting process...Straightforward?	593
Did the Foundation provide financial support for the evaluation?	142
To what extent did the evaluation...Result in you making changes to the work that was evaluated?	151
To what extent did the evaluation...Incorporate your input in the design of the evaluation?	152
To what extent did the evaluation...Generate information that you believe will be useful for other organizations?	152
Funder-Grantee Relationships Summary Measure	655
Understanding Summary Measure	657
To what extent did the Foundation exhibit the following during this grant…Trust in your organization's staff	739

Question Text	Number of Responses
To what extent did the Foundation exhibit the following during this grant…Candor about the Foundation's perspectives on your work	741
To what extent did the Foundation exhibit the following during this grant…Respectful interaction	739
To what extent did the Foundation exhibit the following during this grant…Compassion for those affected by your work	734
Was the funding you received restricted to a specific use?	743
If you have ever requested support from the Foundation to help strengthen your organization, how did you determine what specific support to ask for?	
Based on what the Foundation told your organization to request	739
Based on what your organization believes the Foundation would be willing to fund	739
Based on what your organization needs	739
Based on the results of an assessment or evaluation	739
Not applicable - I have never requested support from the Foundation to strengthen my organization	739
Please rate the extent to which you agree or disagree with the following statements about Diversity, Equity and Inclusion:	
The Foundation has clearly communicated what Diversity, Equity and Inclusion means for its work	670
Overall, the Foundation demonstrates an explicit commitment to Diversity, Equity and Inclusion in its work	668
Overall, most staff I have interacted with at the Foundation embody a strong commitment to Diversity, Equity and Inclusion	673
I believe that the Foundation is committed to combatting racism	656
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	739
Specifically, are Black, Indigenous and/or people of color (BIPOC) communities or individuals the primary intended beneficiaries of the efforts funded by this grant?	348
Does the CEO/Executive Director of your organization identify as a person of color?	570
Please select the option that represents how the CEO/Executive Director of your organization describes themselves (gender):	732
Has the Packard Foundation taken any of the following actions to mitigate the negative impacts of COVID-19 on your organization?	551
How helpful have these actions been in mitigating the negative impacts of COVID-19 on your organization?	549
Overall, how would you rate the Foundation's capacity support programs' impact on your organization?	89
Overall, how would you rate the Foundation's Organizational Effectiveness grant's impact on your organization?	108
How comfortable do you feel approaching the Foundation's Organizational Effectiveness team if a problem arises?	93
Overall, how responsive were the Foundation's Organizational Effectiveness staff?	93
Please rate the extent to which you agree or disagree with the following overall statements: I have a clear understanding of the pre-grant approval process and requirements (e.g. proposal application).	709
Please rate the extent to which you agree or disagree with the following overall statements: I have a clear understanding of the post-grant award process and requirements (e.g., reporting and grant assessment).	710
Please rate the extent to which you agree or disagree with the following overall statements: I feel that the Foundation is thoughtful about collecting the information, data, and feedback it really needs.	695
Thinking across your conversations with Packard staff, which of the following best describes their balance of talking and listening?	722
To what extent are you aware of the Foundation's strategy or theory of change for the program area from which you receive funding?	744
To what extent were you given the opportunity to provide input into the Foundation's strategy or theory of change for the program area from which you receive funding?	455
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?	665

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.

Contact Information

Kevin Bolduc, Vice President
617-492-0800 ext. 202
kevinb@cep.org

Alice Mei, Senior Analyst
415-391-3070 ext. 217
alicem@cep.org