GRANTEE PERCEPTION REPORT®

PREPARED FOR

Barr Foundation

January 2018

THE CENTER FOR
EFFECTIVE PHILANTHROPY

The online version of this report can be accessed at cep.surveyresults.org.

Interpreting Your Charts

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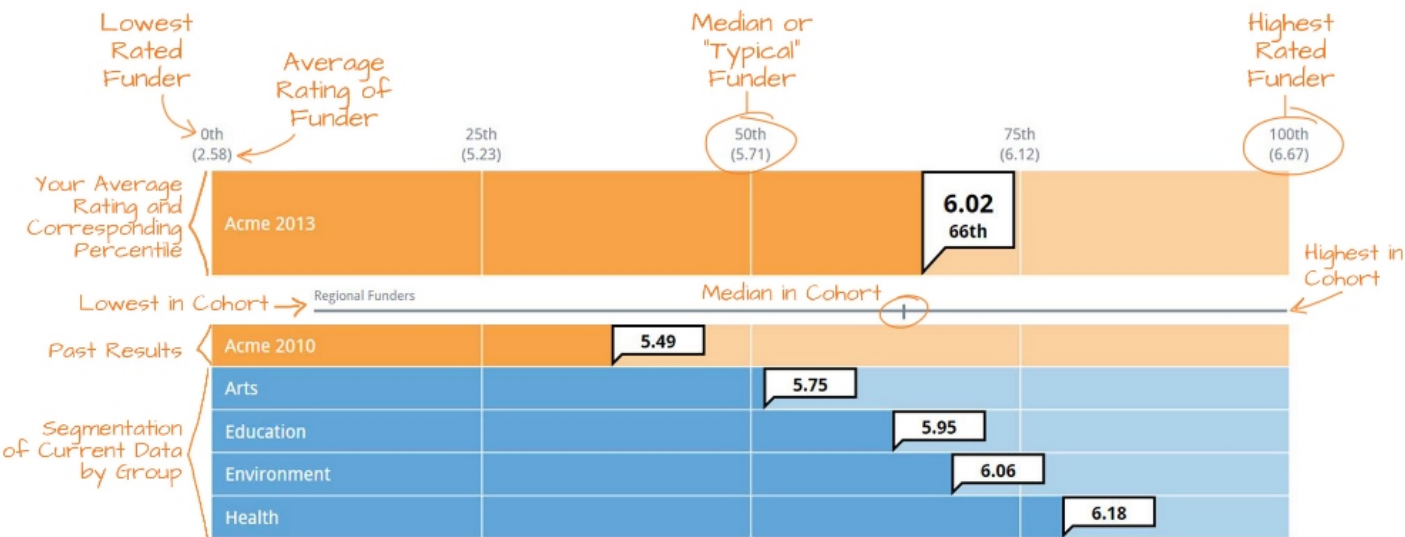
Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.
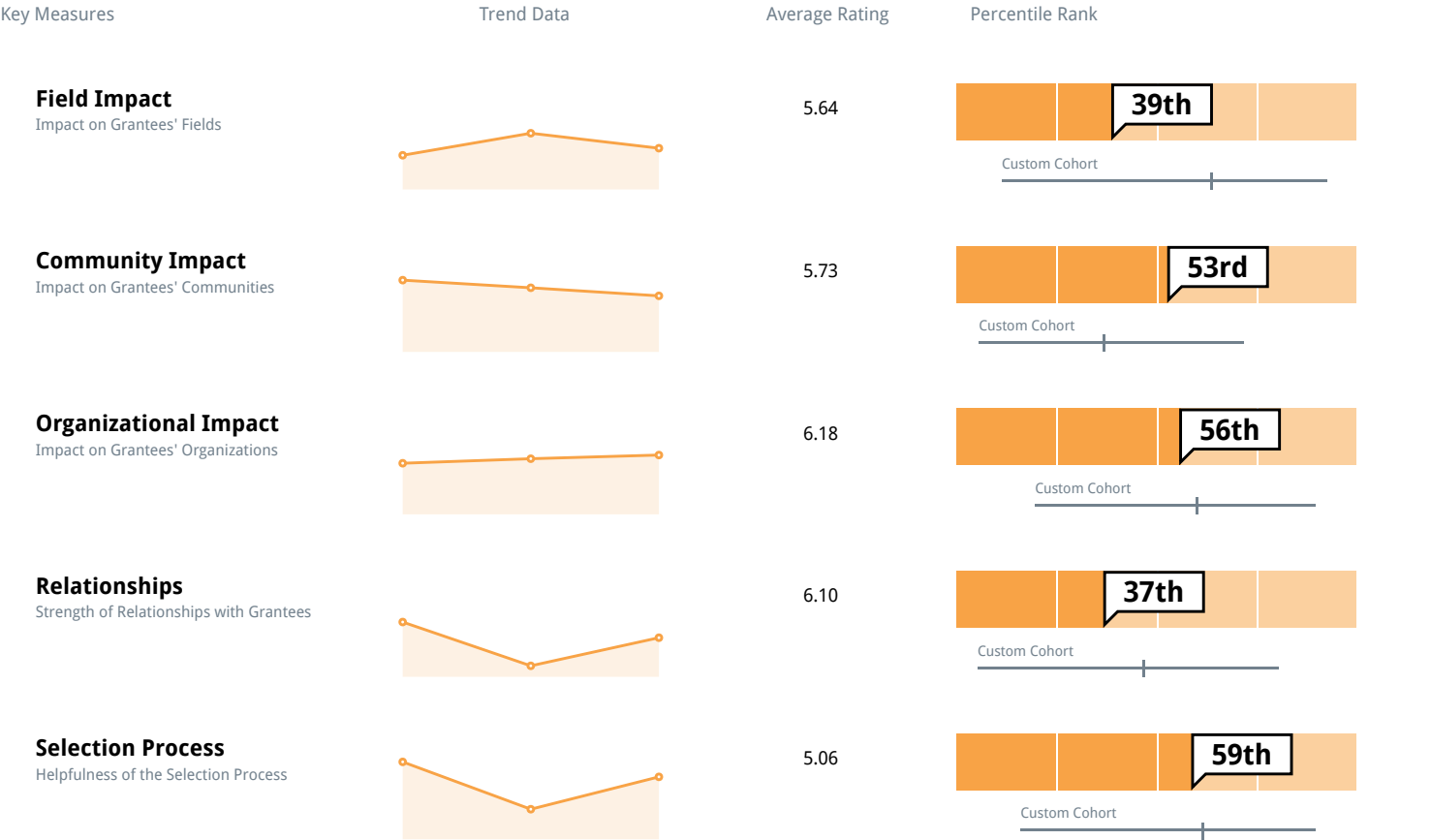
STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

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

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		5.64	39th Custom Cohort
Community Impact Impact on Grantees' Communities		5.73	53rd Custom Cohort
Organizational Impact Impact on Grantees' Organizations		6.18	56th Custom Cohort
Relationships Strength of Relationships with Grantees		6.10	37th Custom Cohort
Selection Process Helpfulness of the Selection Process		5.06	59th Custom Cohort

Word Cloud

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

Busy
Removed Necessary Intense
Angel Rigorous Innovator Fantastic Solitary
Striving Invested Essential Leadership Excellent
Impatient Empathetic **Strategic**
Wonderful Opinion-Leader Controlling
Forefront Smart Inquisitive **Innovative** Visionary!
Forward Transparent Catalytic Great!
Nimble Ambitious Progressive Contradictory Persistent
Tireless Significant
Flexible

Thoughtful

Emergent

Accessible Exceptional **Proactive** Transforming
Partner Intentional Brave
Steward **Collaborative**
Education Transformational
Constant Expansive Well-Resourced Aloof **Forward-Looking**
Searching
Courageous **Engaged** Safe **Leader** Fair
Bostonian
Dialogue **Influential**
Unclear Heavy-Handed **Responsive**
Well-Endowed
Well-known Initiating **Generous** Life-Saving
Organized Clearly-Focused **Focused** Creative
Relevant **Committed** Forward-Thinking
Access Integrity **Powerful** Respectful
Important Connected
Changing Pro-Active **Effective** **Visionary** Broad-Reaching
Crucial Knowledgeable
Transformative **Impactful** **Growing**
Bold Respected Risk-Taking
Distant Disappointing. Community-Oriented Dedicated
Northeast Big **Evolving** Community-Centered Passive
Targeted Exploring Professional Supporter
Potential Thorough Wealthy Solid
Detailed Adaptive Strong

Supportive

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Barr 2017	September and October 2017	300	220	73%
Barr 2012	September and October 2012	166	106	64%
Barr 2007	September and October 2007	271	198	73%

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

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

Subgroups

In addition to showing Barr's overall ratings, this report shows ratings segmented by Program. The online version of this report also shows ratings segmented by Exit vs. Ongoing, Timing of Grant Awarded, and Grant Length.

Program	Number of Responses
Education	70
Climate	60
Arts & Creativity	55
Cross Program Initiative	18
Special Initiatives	14

Exit vs. Ongoing	Number of Responses
Ongoing	203
Exit	17

Timing of Grant Awarded	Number of Responses
Before October 2016	126
October 2016 and later	94

Grant Length	Number of Responses
Multi-Year	152
Single Year	68

Subgroup Methodology

Based on guidance from the Foundation, CEP tagged grantees into the following subgroups using both survey responses and data provided by Barr in its grantee list. Descriptions of the composition of each subgroup are below.

Exit vs. Ongoing: Using the grantee list, CEP tagged all grantees based on whether they were exiting grantees.

Timing of Grant Awarded: Using the grantee list, CEP tagged all grantees based on the date of grant awarded.

Program: Using the grantee list, and in consultation with the Foundation, CEP tagged all grantees into 5 Program groupings.

- **Note:** This grouping excludes 3 grantees whose program area did not meet the threshold of at least 5 responses.

Grant Length: Using grantee-reported data on the length of their grant, CEP categorized grantees into two groups.

Summary of Differences by Subgroup

Exit vs. Ongoing: Although responses from exit grantees trend lower on some measures, overall they are statistically similar to those of ongoing grantees.

Timing of Grant Awarded: Grantee who received their grant in or after October 2016 rate significantly higher than other grantees on most measures.

Program: Ratings from education program grantees trend higher than other programs, in particular when compared to climate and arts & creativity and particularly on measures related to quality of relationships.

Grant Length: Grantees who report receiving multi-year grants rate the Foundation significantly more positively for its impact on their fields, communities, and organizations than single year grant recipients. Multi-year recipients also rate the Foundation's understanding of their communities and its impact on their ability to continue the funded work significantly more positively than single year grant recipients.

Comparative Cohorts

Customized Cohort

Barr selected a set of 16 funders to create a smaller comparison group that more closely resembles Barr in scale and scope.

Custom Cohort
Barr Foundation
Doris Duke Charitable Foundation
Evelyn and Walter Haas, Jr. Fund
Nellie Mae Education Foundation
Rockefeller Brothers Fund
Surdna Foundation, Inc.
The Boston Foundation
The California Endowment
The David and Lucile Packard Foundation
The Heinz Endowments
The Hyams Foundation, Inc.
The James Irvine Foundation
The Kresge Foundation
The McKnight Foundation
The Wallace Foundation
The William and Flora Hewlett Foundation

Standard Cohorts

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

Strategy Cohorts

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

Annual Giving Cohorts

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

Foundation Type Cohorts

Cohort Name	Count	Description

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

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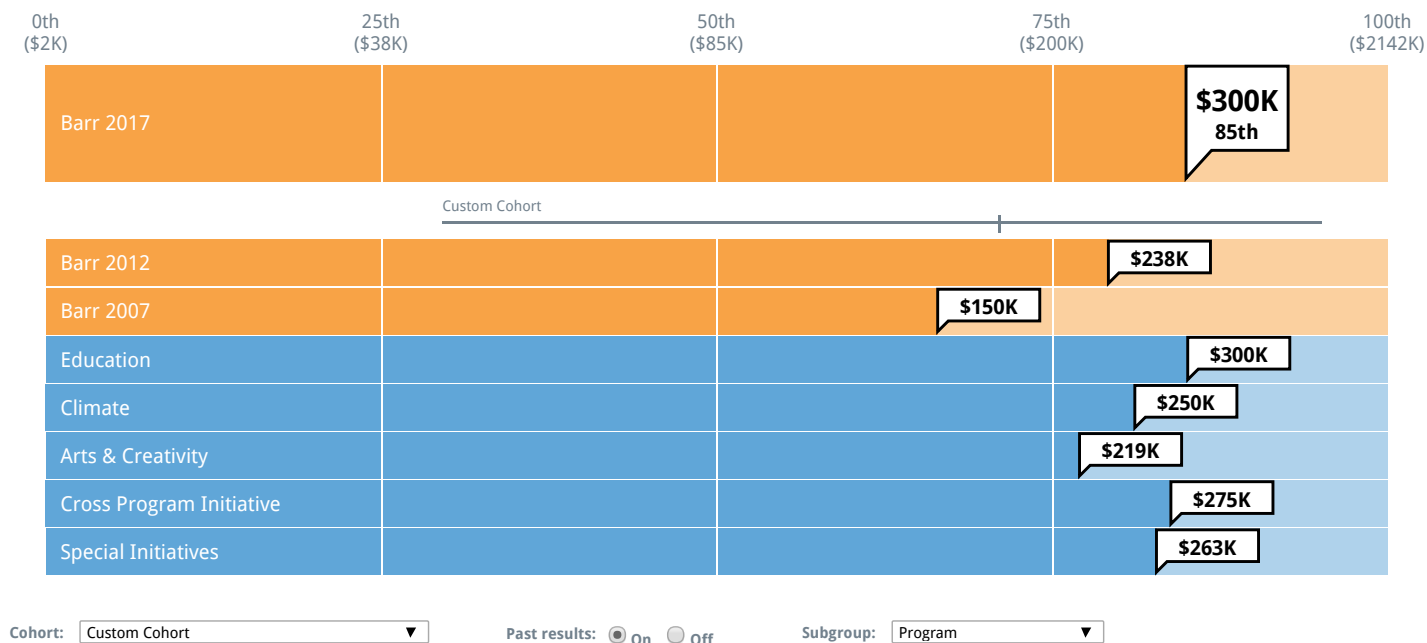
Cohort Name	Count	Description
Funders Outside the United States	22	Funders that are primarily based outside the United States
Recently Established Foundations	60	Funders that were established in 2000 or later

Grantmaking Characteristics

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

Median Grant Size

	0th ($2K)	25th ($38K)	50th ($85K)	75th ($200K)	100th ($2142K)
Barr 2017				**$300K** 85th	

Custom Cohort

Barr 2012				**$238K**	
Barr 2007			**$150K**		
Education				**$300K**	
Climate				**$250K**	
Arts & Creativity				**$219K**	
Cross Program Initiative				**$275K**	
Special Initiatives				**$263K**	

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

Average Grant Length

	0th (1.1yrs)	25th (1.8yrs)	50th (2.1yrs)	75th (2.6yrs)	100th (7.9yrs)
Barr 2017			**2.2yrs*** 52nd		

Custom Cohort

Barr 2012				**2.8yrs**	
Barr 2007			**2.2yrs**		
Education			**2.1yrs**		
Climate		**1.8yrs**			
Arts & Creativity				**2.7yrs**	
Cross Program Initiative			**2.3yrs**		
Special Initiatives			**2.3yrs**		

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

Median Organizational Budget

	0th ($0.0M)	25th ($0.8M)	50th ($1.5M)	75th ($2.5M)	100th ($30.0M)

Barr 2017 — **$3.0M 80th**

Custom Cohort

Barr 2012 — **$1.5M**
Barr 2007 — **$1.8M**
Education — **$4.2M**
Climate — **$2.3M**
Arts & Creativity — **$3.2M**
Cross Program Initiative — **$3.0M**
Special Initiatives — **$5.5M**
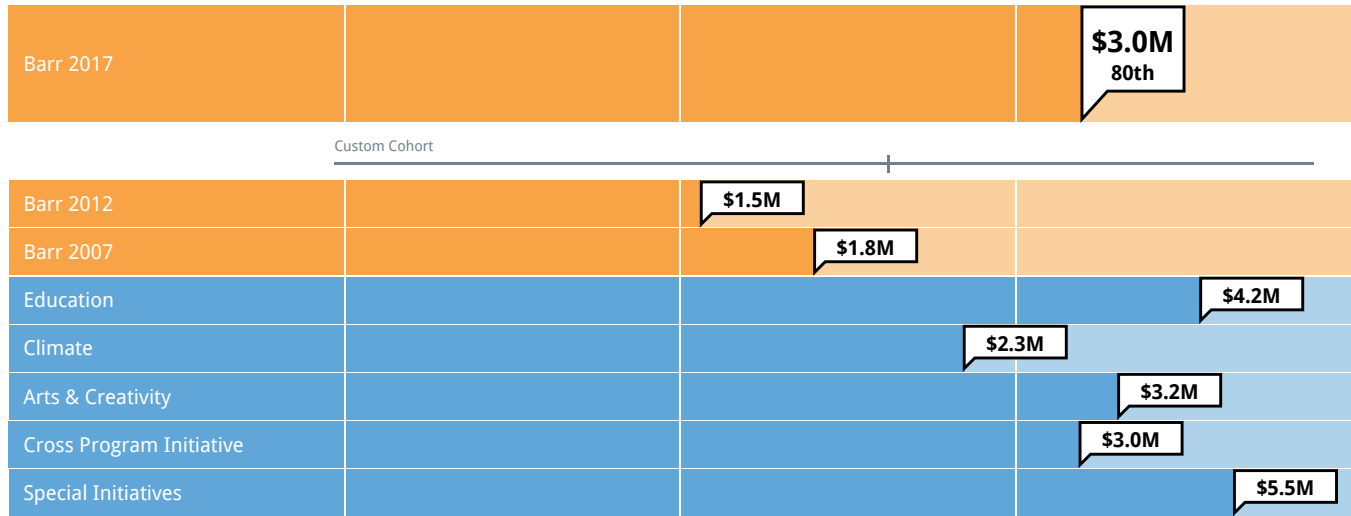
Cohort: Custom Cohort ▼   **Past results:** ● On ○ Off   **Subgroup:** Program ▼

Type of Support	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Percent of grantees receiving general operating/core support	29%	31%	28%	21%	27%
Percent of grantees receiving program/project support	58%	60%	57%	65%	65%
Percent of grantees receiving other types of support	13%	9%	15%	14%	8%

Grant History	Barr 2017	Barr 2012	Average Funder	Custom Cohort
Percentage of first-time grants	37%	15%	29%	24%

Program Staff Load	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	$4.8M	$7.9M	$6.6M	$2.6M	$4.2M
Applications per program full-time employee	21	38	33	29	19
Active grants per program full-time employee	49	108	63	34	34

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 (5.48)	50th (5.74)	75th (5.95)	100th (6.46)

Barr 2017	**5.64** **39th**

Custom Cohort

Barr 2012	5.78
Barr 2007	5.56
Education	5.46
Climate	5.79
Arts & Creativity	5.70
Cross Program Initiative	5.50
Special Initiatives	6.00

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼
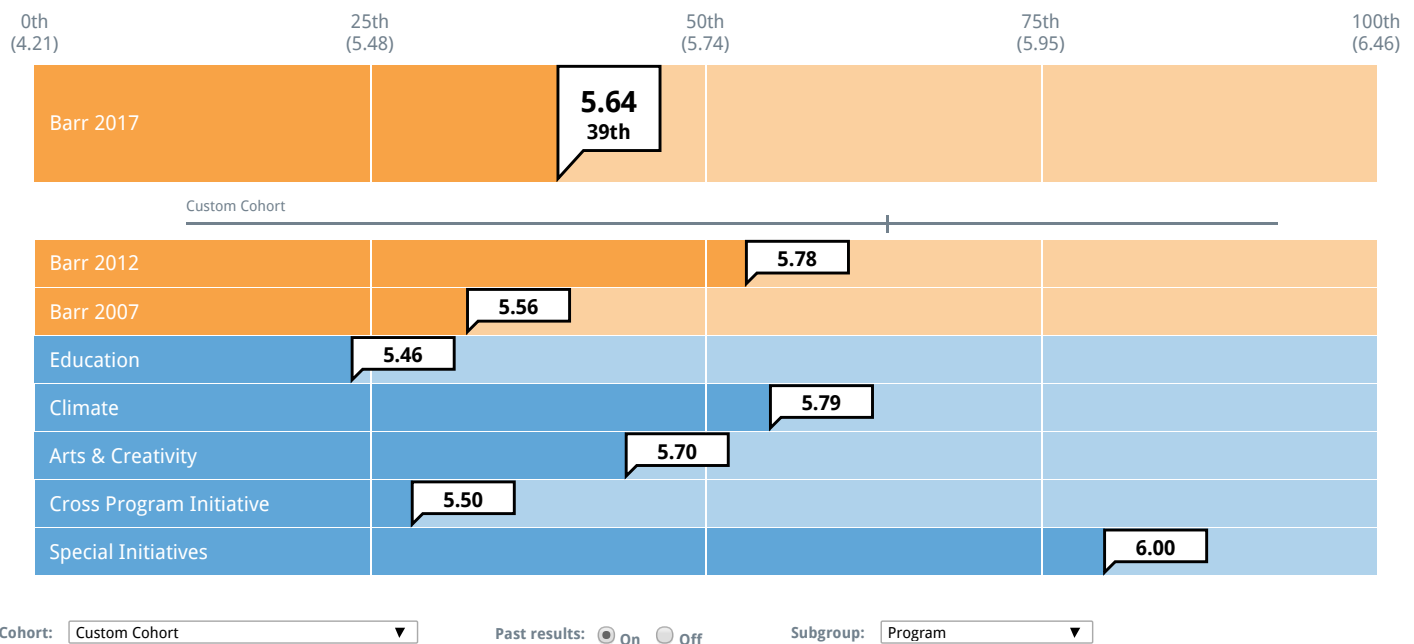
"How well does the Foundation understand the field in which you work?"

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

0th (4.60)	25th (5.44)	50th (5.69)	75th (5.93)	100th (6.39)

Barr 2017	**5.76*** **59th**

Custom Cohort

Barr 2012	5.48
Barr 2007	5.84
Education	6.11
Climate	5.86
Arts & Creativity	5.22
Cross Program Initiative	6.06
Special Initiatives	5.45

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼
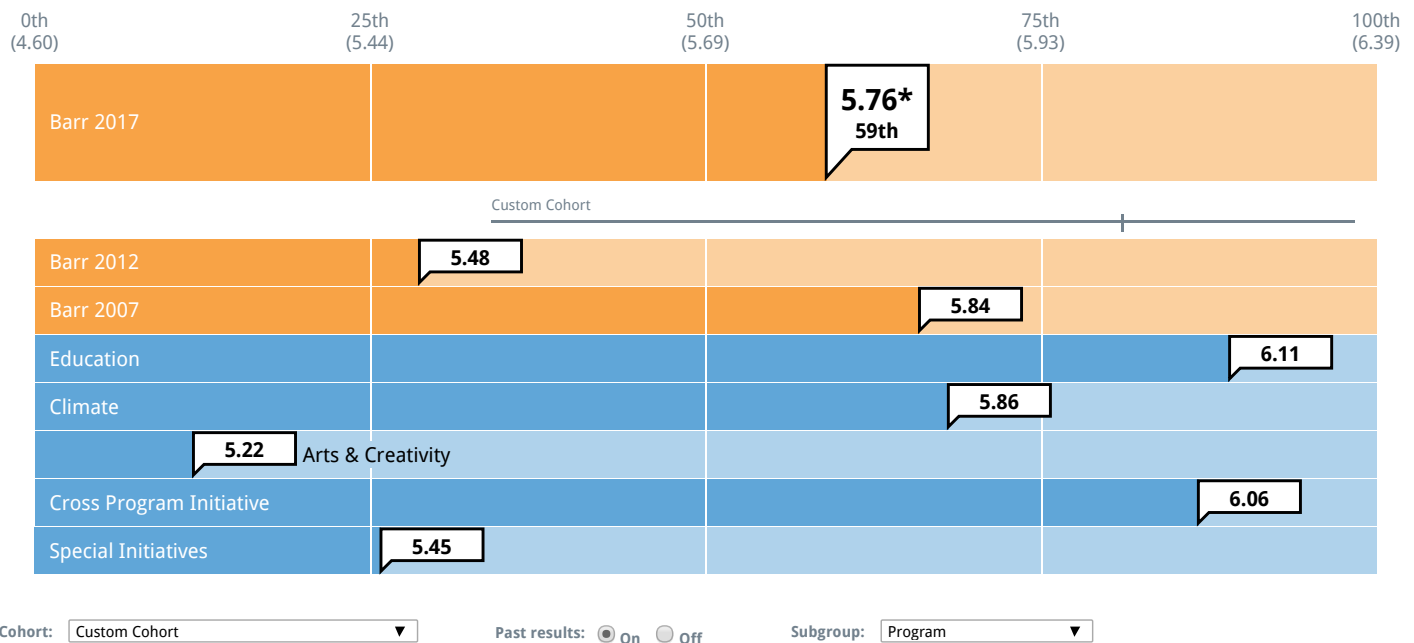
Advancing Knowledge and Public Policy

"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 (4.68)	50th (5.11)	75th (5.46)	100th (6.44)

Barr 2017 — **5.47*** **77th**

Custom Cohort

Barr 2012	**5.10**
Barr 2007	**5.11**
Education	**5.38**
Climate	**5.84**
Arts & Creativity	**5.31**
Cross Program Initiative	**5.19**
Special Initiatives	**5.33**

Cohort: Custom Cohort ▼   **Past results:** ● On ○ Off   **Subgroup:** Program ▼
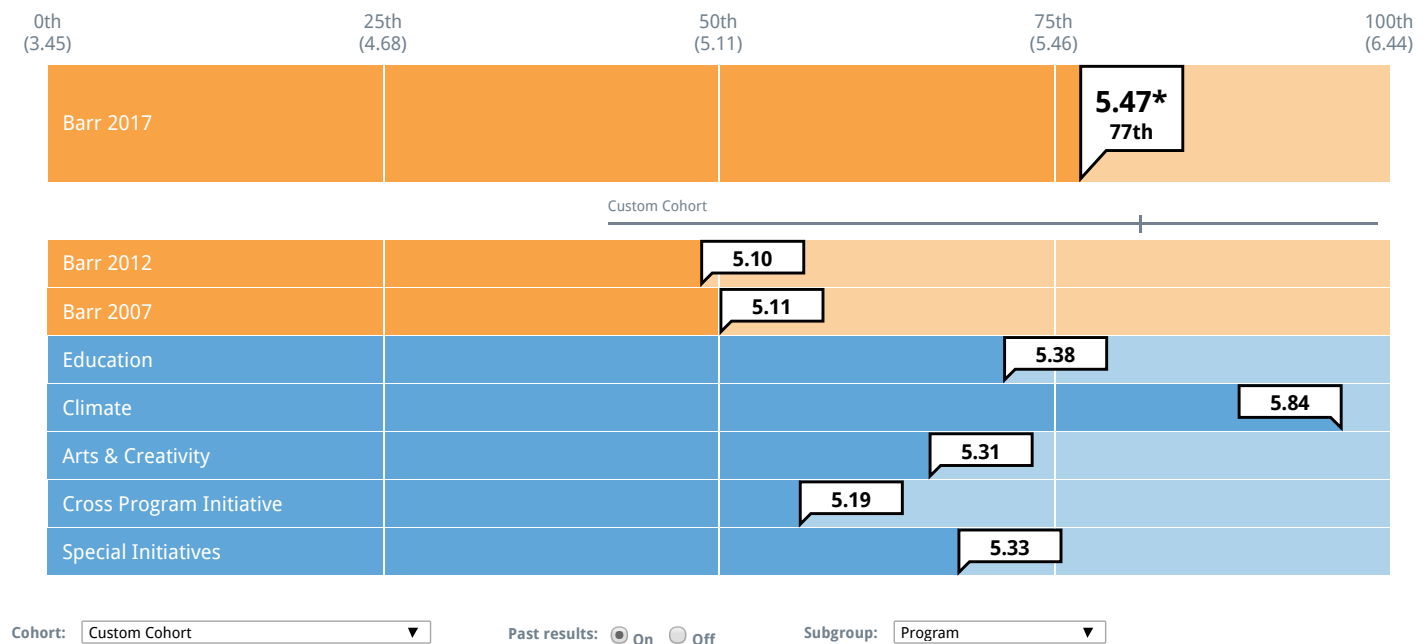
"To what extent has the Foundation affected public policy in your field?"

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

0th (2.54)	25th (4.19)	50th (4.61)	75th (5.09)	100th (5.99)

Barr 2017 — **5.27*** **83rd**

Custom Cohort

Barr 2012	**4.60**
Barr 2007	**4.68**
Education	**4.98**
Climate	**5.77**
Arts & Creativity	**5.16**
Cross Program Initiative	**4.67**
Special Initiatives	**5.20**

Cohort: Custom Cohort ▼   **Past results:** ● On ○ Off   **Subgroup:** Program ▼

13

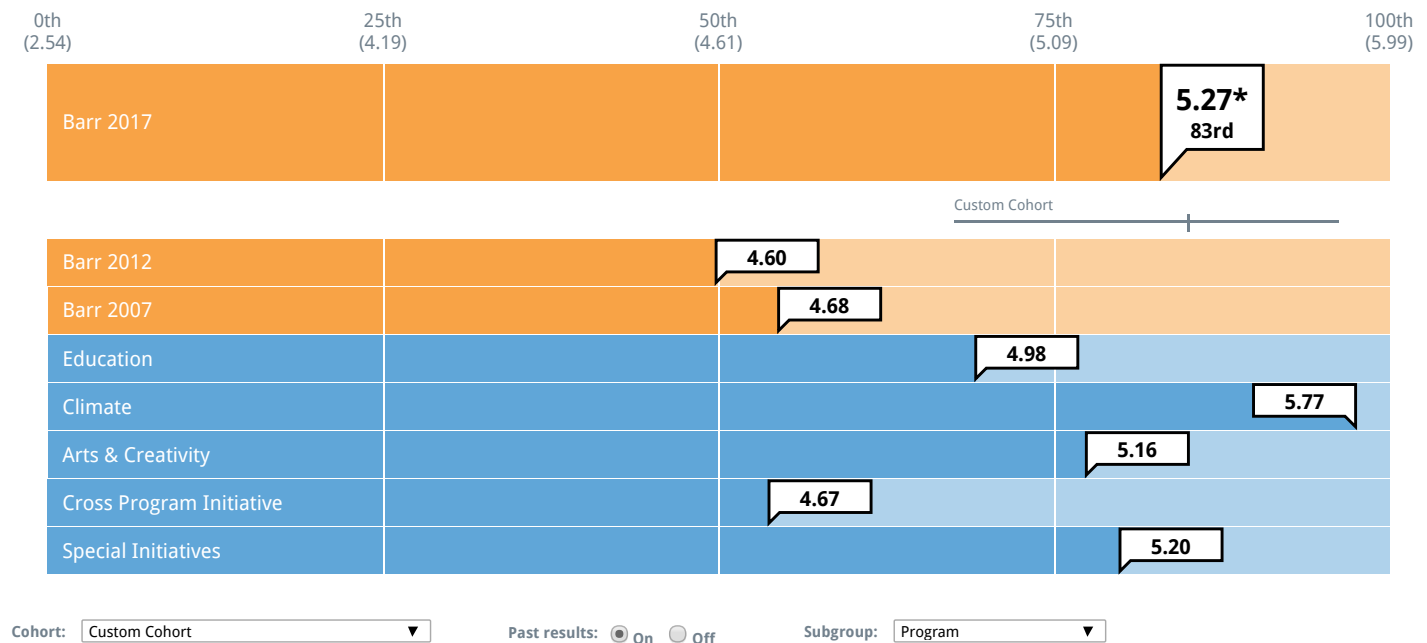# Impact on and Understanding of Grantees' Local Communities

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

1 = No impact   **7** = Significant positive impact
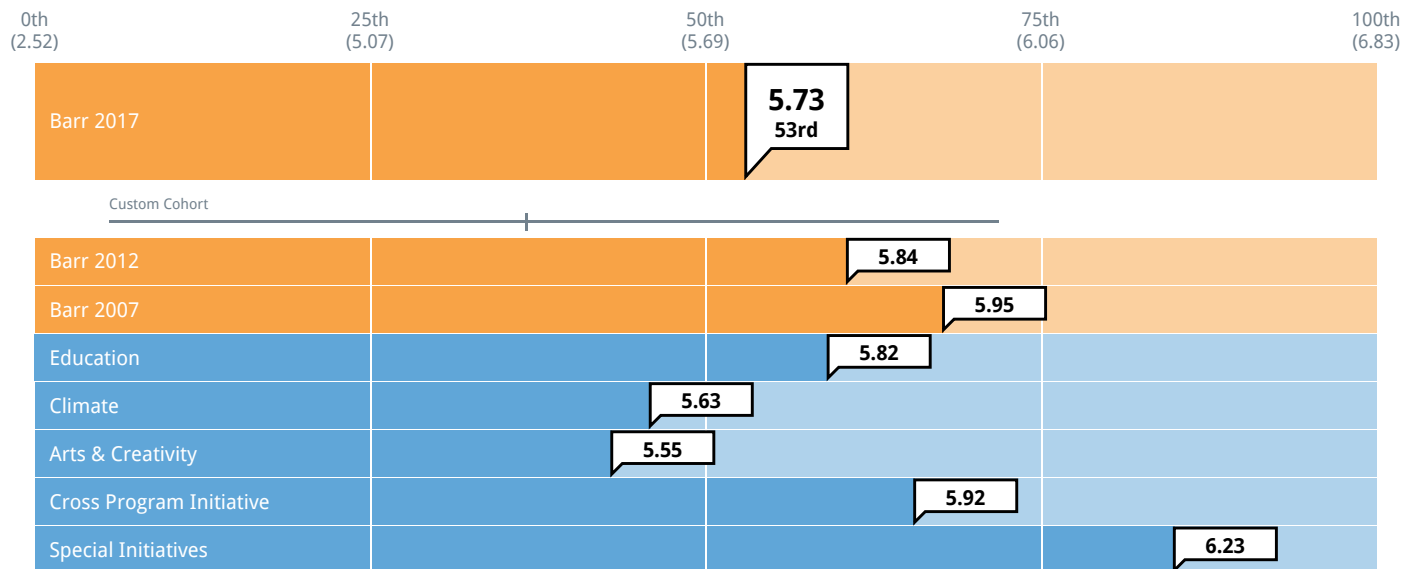
0th (2.52)	25th (5.07)	50th (5.69)	75th (6.06)	100th (6.83)

Barr 2017 — **5.73** 53rd

Custom Cohort

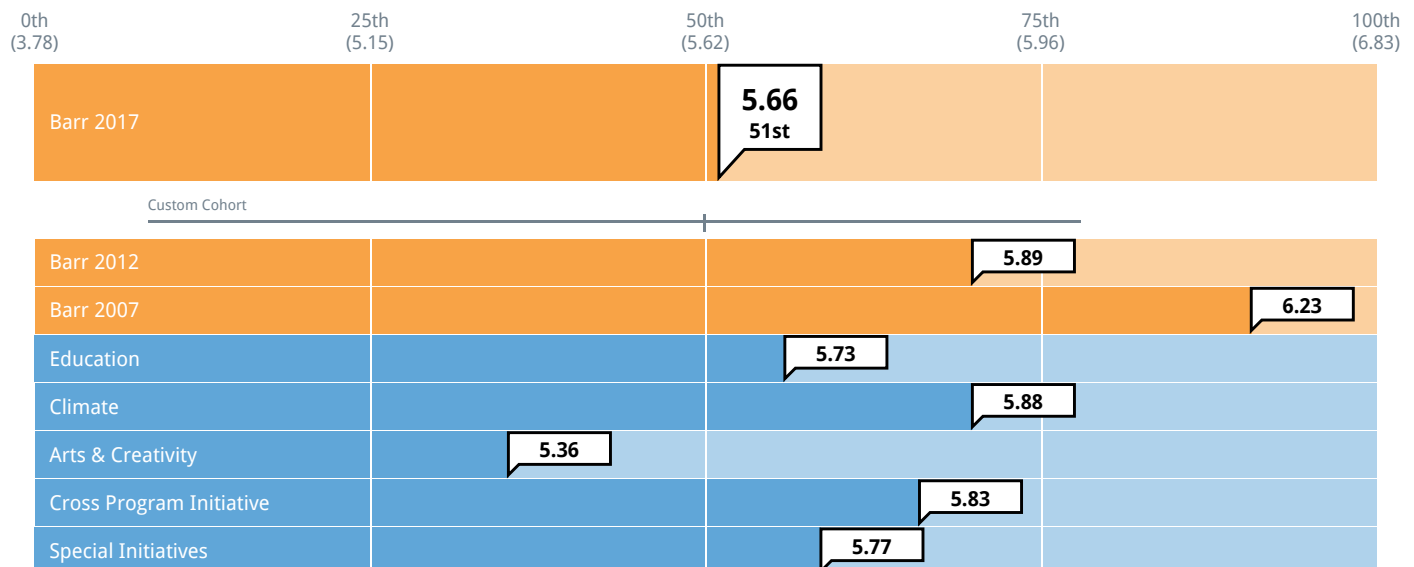| Barr 2012 | 5.84 |
Barr 2007	5.95
Education	5.82
Climate	5.63
Arts & Creativity	5.55
Cross Program Initiative	5.92
Special Initiatives	6.23

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

"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 (5.15)	50th (5.62)	75th (5.96)	100th (6.83)

Barr 2017 — **5.66** 51st

Custom Cohort

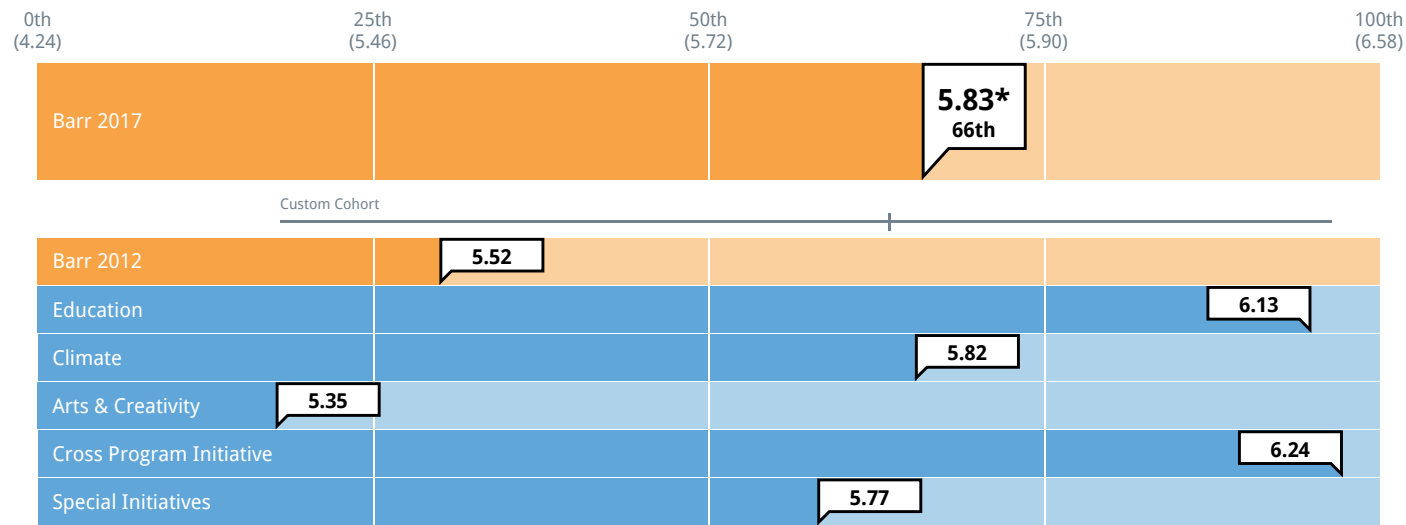| Barr 2012 | 5.89 |
Barr 2007	6.23
Education	5.73
Climate	5.88
Arts & Creativity	5.36
Cross Program Initiative	5.83
Special Initiatives	5.77

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

Beneficiary and Contextual Understanding

"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 (5.46)	50th (5.72)	75th (5.90)	100th (6.58)

Barr 2017   **5.83*** 66th

Custom Cohort

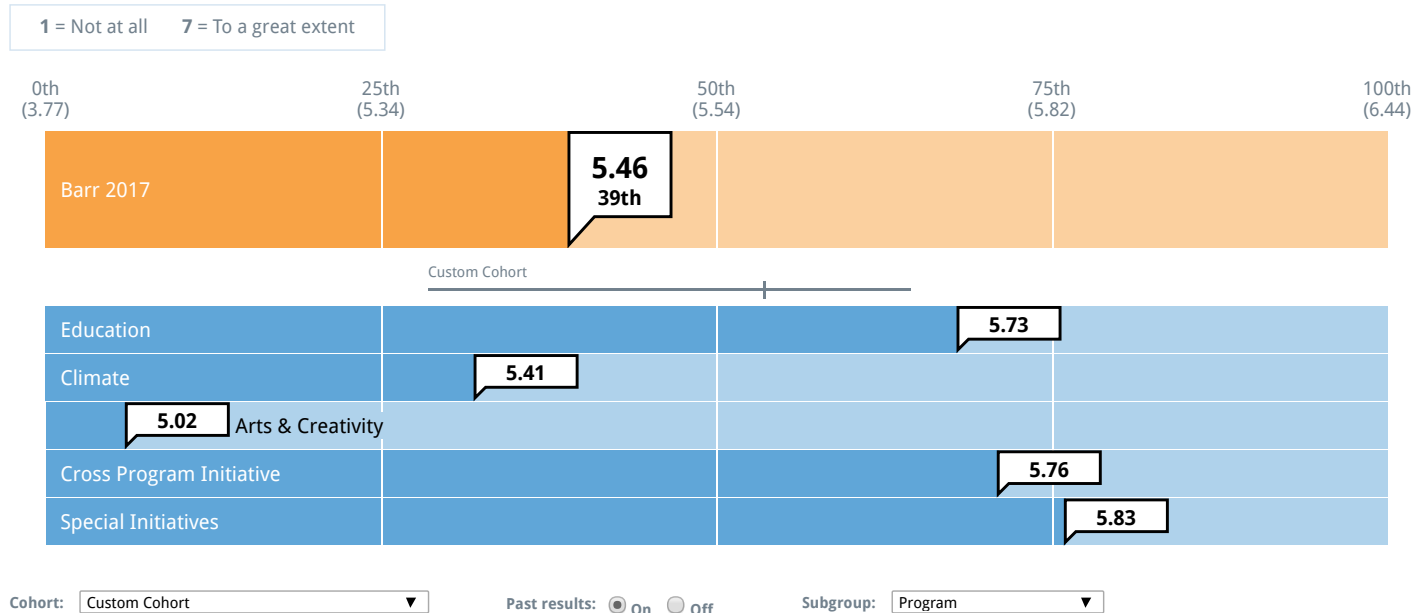| Program	Value
Barr 2012	5.52
Education	6.13
Climate	5.82
Arts & Creativity	5.35
Cross Program Initiative	6.24
Special Initiatives	5.77

Cohort: Custom Cohort ▼   **Past results:** ⦿ On ◯ Off   **Subgroup:** Program ▼

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

"How well does the Foundation understand your intended beneficiaries' needs?"
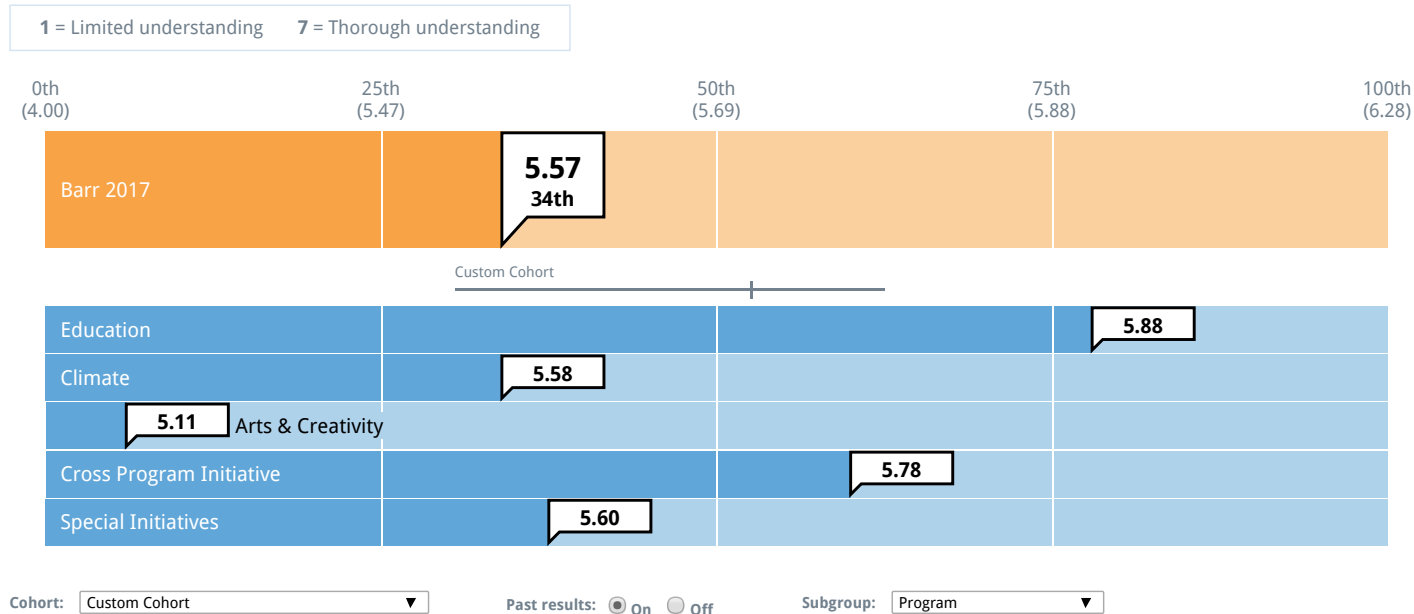
1 = Limited understanding   **7** = Thorough understanding

0th (4.00)	25th (5.47)	50th (5.69)	75th (5.88)	100th (6.28)

Barr 2017 **5.57** 34th

Custom Cohort

Education		5.88
Climate	5.58	
5.11 Arts & Creativity		
Cross Program Initiative	5.78	
Special Initiatives	5.60	

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

"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 (5.34)	50th (5.54)	75th (5.82)	100th (6.44)

Barr 2017 **5.46** 39th

Custom Cohort

Education		5.73
Climate	5.41	
5.02 Arts & Creativity		
Cross Program Initiative	5.76	
Special Initiatives	5.83	

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

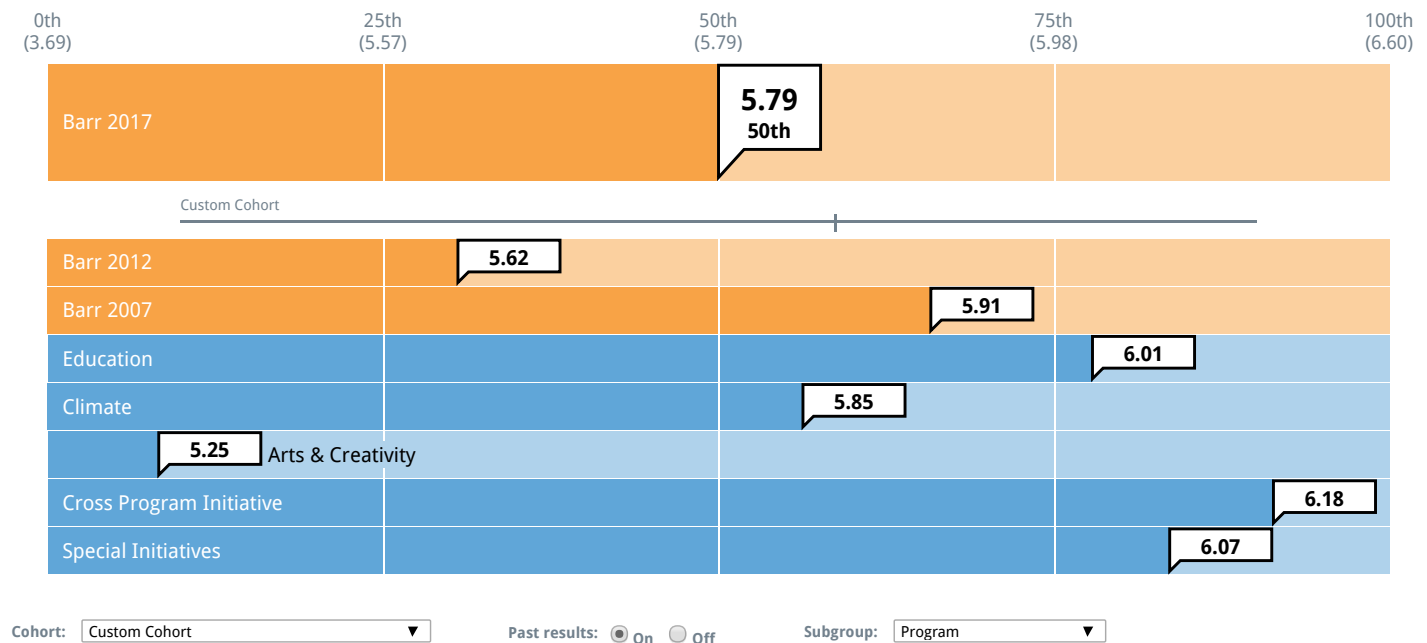# Impact on and Understanding of Grantees' Organizations

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

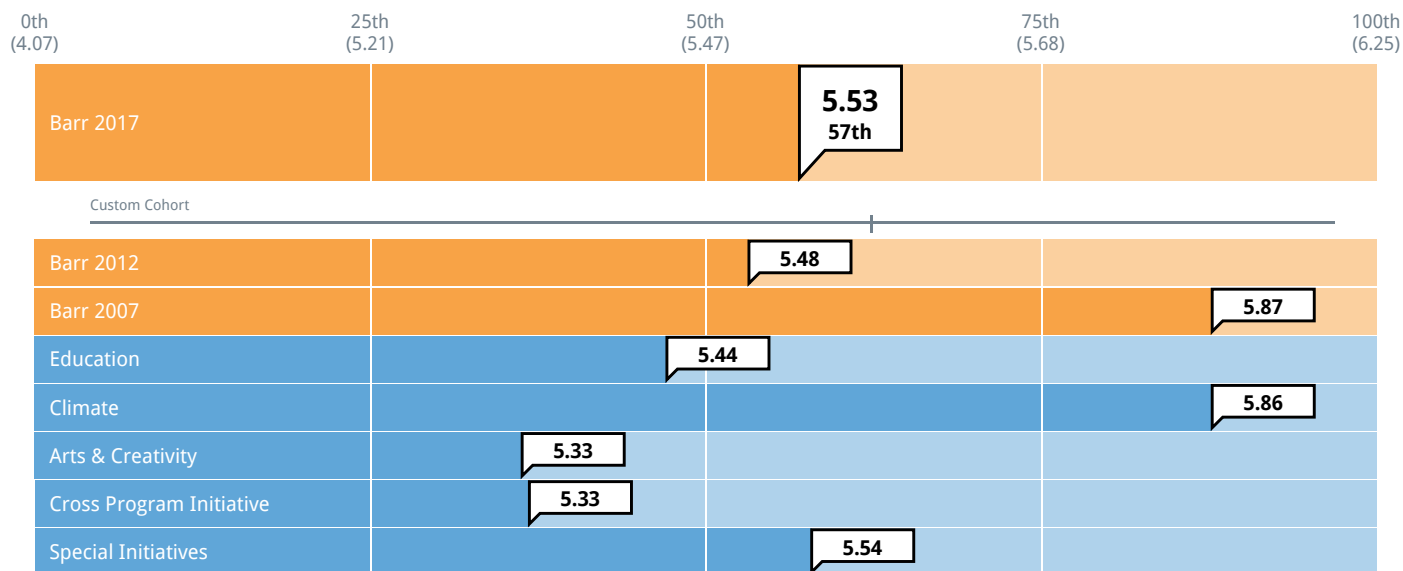**1** = No impact   **7** = Significant positive impact

	0th (4.58)	25th (5.88)	50th (6.13)	75th (6.30)	100th (6.73)
Barr 2017			**6.18** 56th		

Custom Cohort

Barr 2012			6.16		
Barr 2007			6.12		
Education			6.20		
Climate			6.10		
Arts & Creativity			6.20		
Cross Program Initiative		6.06			
Special Initiatives					6.50

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼
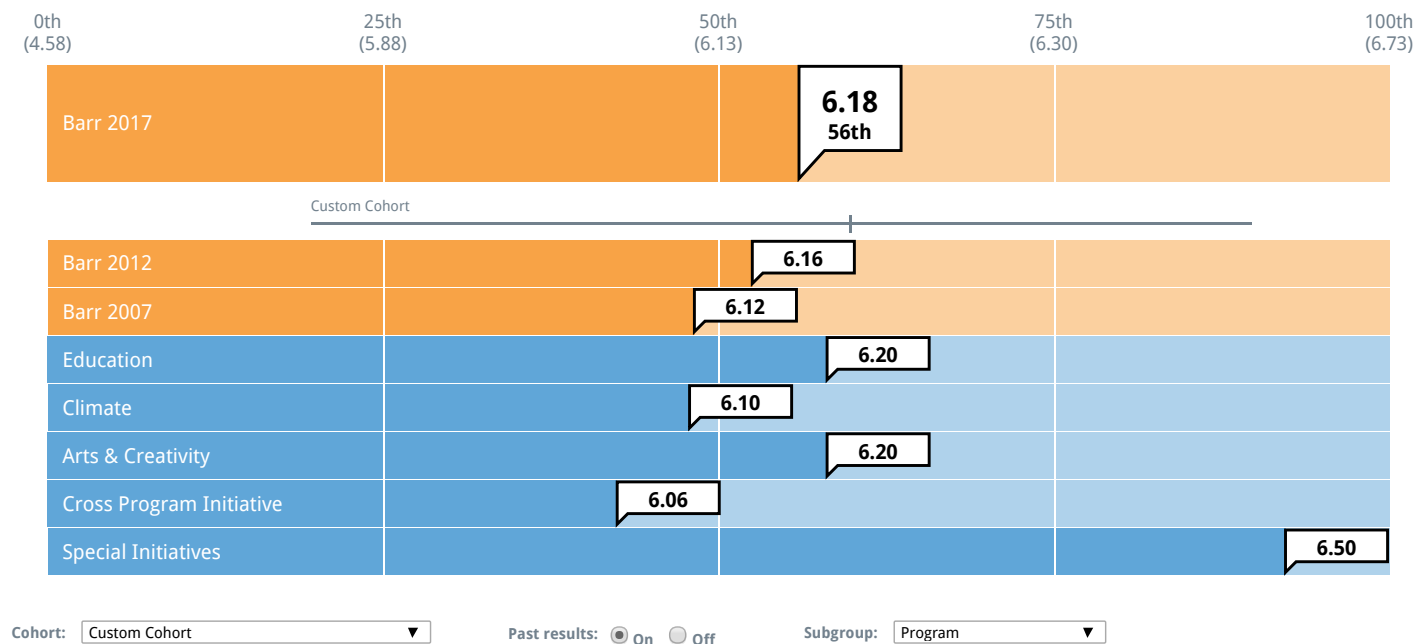
"How well does the Foundation understand your organization's strategy and goals?"

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

	0th (3.69)	25th (5.57)	50th (5.79)	75th (5.98)	100th (6.60)
Barr 2017			**5.79** 50th		

Custom Cohort

Barr 2012		5.62			
Barr 2007				5.91	
Education				6.01	
Climate			5.85		
Arts & Creativity	5.25				
Cross Program Initiative					6.18
Special Initiatives					6.07

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼

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

1 = Did not improve ability   7 = Substantially improved ability

0th (4.07)	25th (5.21)	50th (5.47)	75th (5.68)	100th (6.25)

Barr 2017 — **5.53** **57th**

Custom Cohort

Barr 2012 — **5.48**

Barr 2007 — **5.87**

Education — **5.44**

Climate — **5.86**

Arts & Creativity — **5.33**

Cross Program Initiative — **5.33**

Special Initiatives — **5.54**

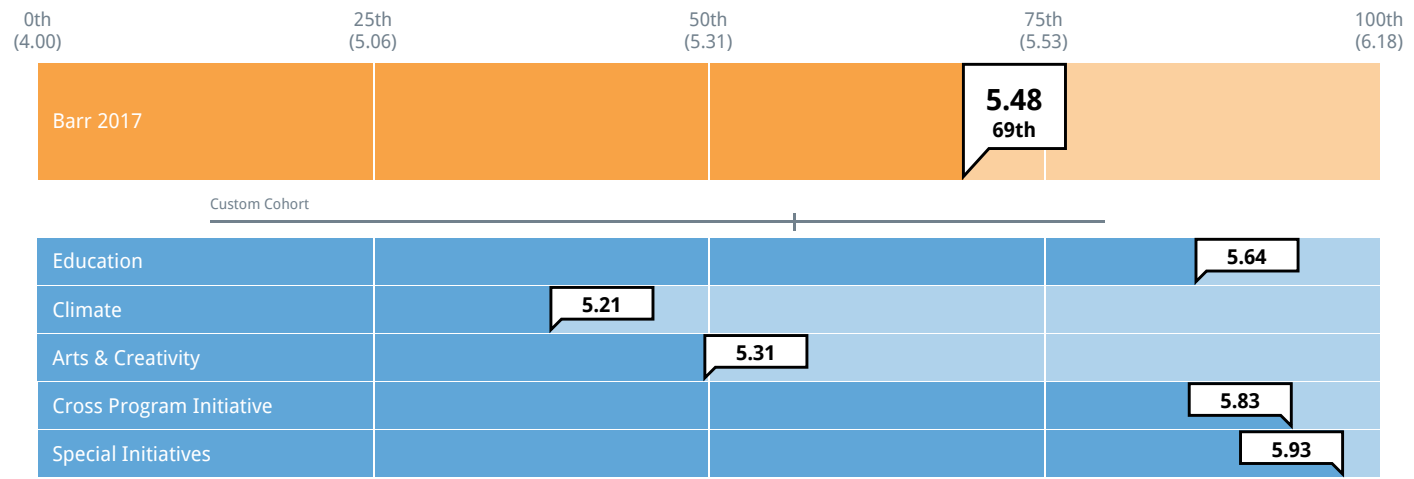Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

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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 (5.06)	50th (5.31)	75th (5.53)	100th (6.18)

Barr 2017 — **5.48** / **69th**

Custom Cohort

Education	5.64
Climate	5.21
Arts & Creativity	5.31
Cross Program Initiative	5.83
Special Initiatives	5.93

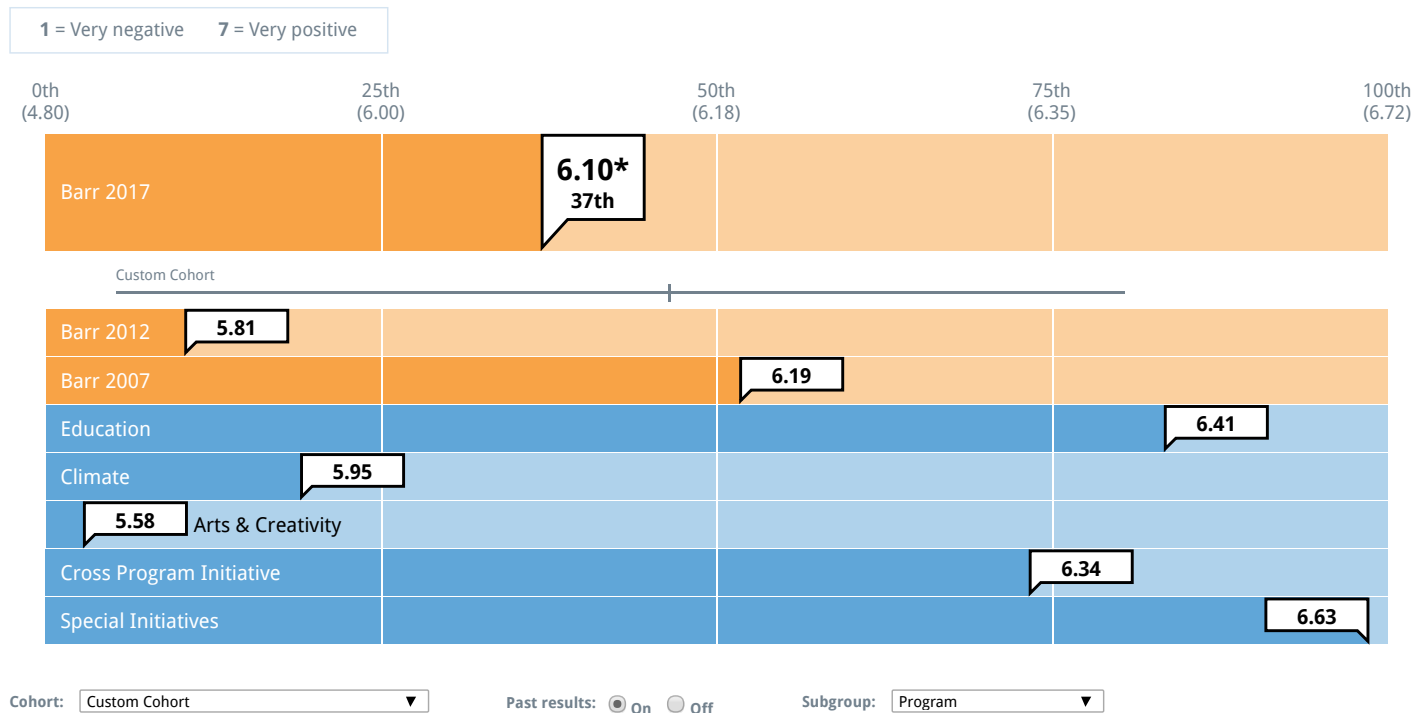Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Program ▼

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 the foundation
2. Comfort approaching the foundation if a problem arises
3. Responsiveness of foundation staff
4. Clarity of communication of the foundation's goals and strategy
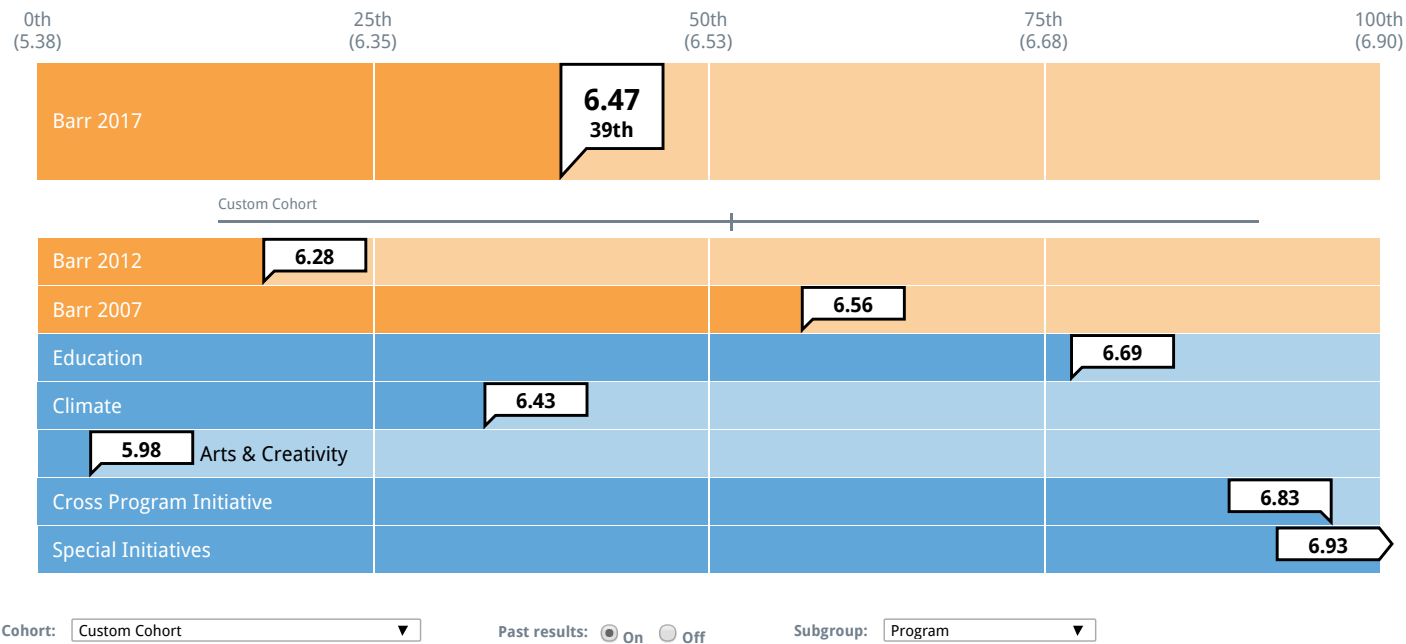5. Consistency of information provided by different communications
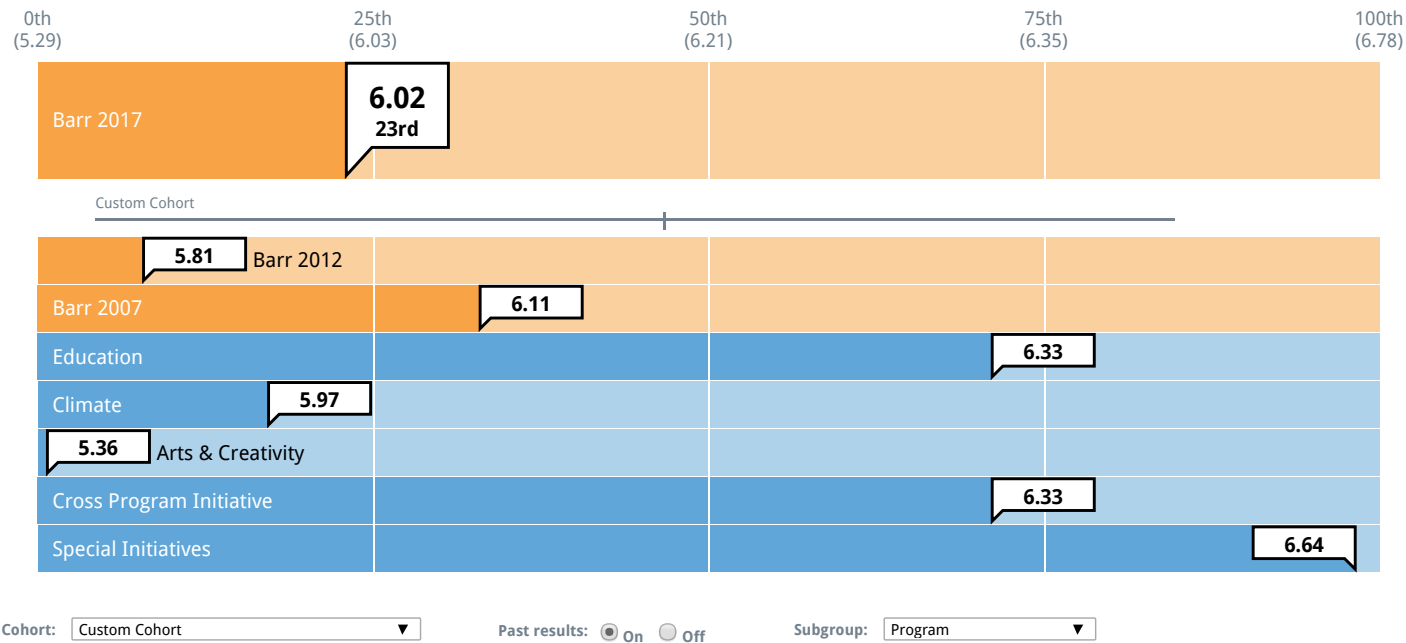
Funder-Grantee Relationships Summary Measure

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

	0th (4.80)	25th (6.00)	50th (6.18)	75th (6.35)	100th (6.72)
Barr 2017		6.10* 37th			

Custom Cohort

Barr 2012	5.81				
Barr 2007			6.19		
Education				6.41	
Climate	5.95				
Arts & Creativity	5.58				
Cross Program Initiative				6.34	
Special Initiatives					6.63

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼

Quality of Interactions

"Overall, how fairly did the Foundation treat you?"

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

0th (5.38)	25th (6.35)	50th (6.53)	75th (6.68)	100th (6.90)

Barr 2017 — **6.47** 39th

Custom Cohort

Barr 2012 — 6.28
Barr 2007 — 6.56
Education — 6.69
Climate — 6.43
Arts & Creativity — 5.98
Cross Program Initiative — 6.83
Special Initiatives — 6.93

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼

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

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

0th (5.29)	25th (6.03)	50th (6.21)	75th (6.35)	100th (6.78)

Barr 2017 — **6.02** 23rd

Custom Cohort

Barr 2012 — 5.81
Barr 2007 — 6.11
Education — 6.33
Climate — 5.97
Arts & Creativity — 5.36
Cross Program Initiative — 6.33
Special Initiatives — 6.64

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼
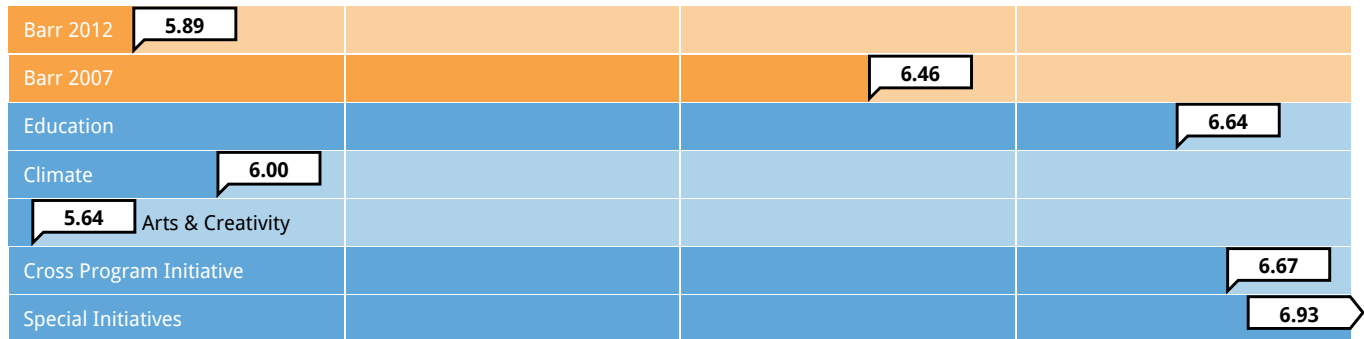
"Overall, how responsive was the Foundation staff?"

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

0th (4.90)	25th (6.10)	50th (6.35)	75th (6.56)	100th (6.89)
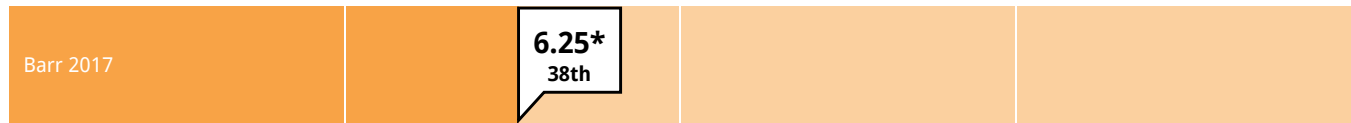
Barr 2017 — 6.25* 38th

Custom Cohort

Barr 2012 — 5.89

Barr 2007 — 6.46

Education — 6.64

Climate — 6.00

Arts & Creativity — 5.64

Cross Program Initiative — 6.67

Special Initiatives — 6.93

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Program ▼

22

Interaction Patterns

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

Frequency of Contact with Program Officer	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Weekly or more often	1%	1%	2%	3%	2%
A few times a month	10%	9%	5%	11%	13%
Monthly	19%	19%	19%	15%	19%
Once every few months	61%	62%	50%	53%	55%
Yearly or less often	9%	10%	24%	18%	11%

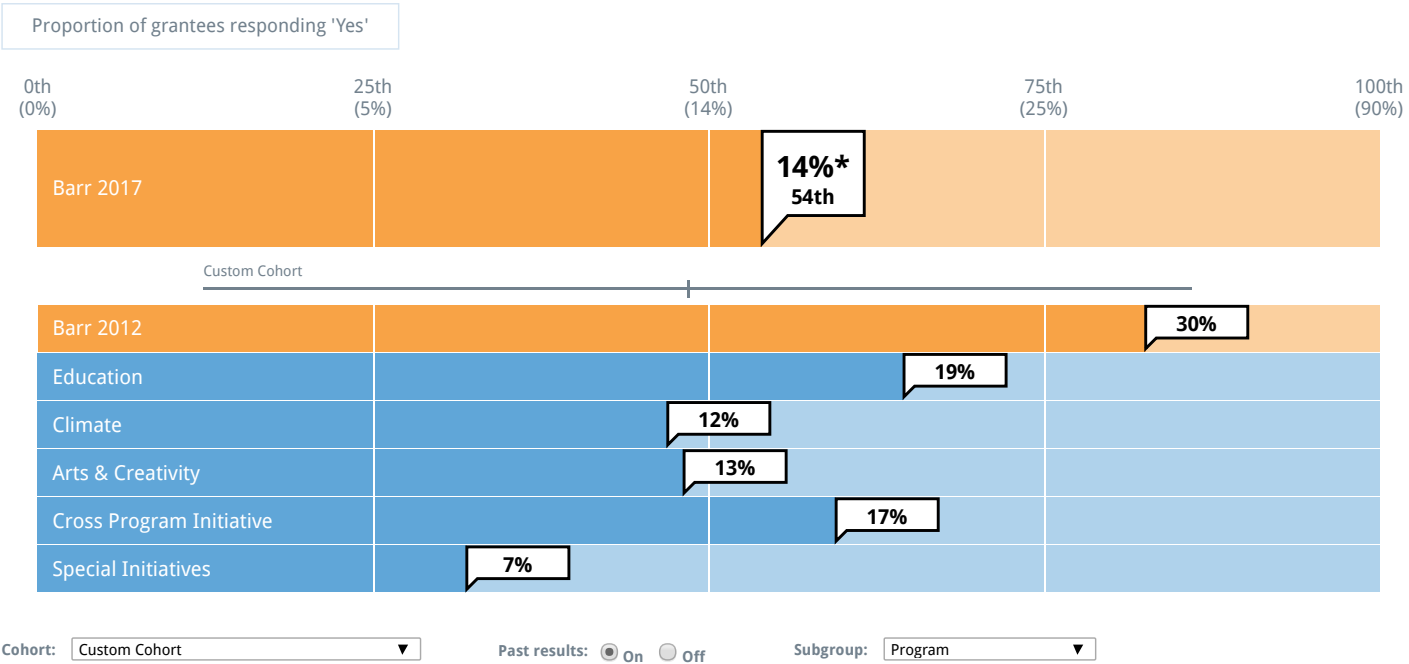| Frequency of Contact with Program Officer (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Weekly or more often	3%	0%	2%	0%	0%
A few times a month	9%	10%	9%	17%	0%
Monthly	16%	20%	18%	6%	43%
Once every few months	64%	62%	56%	72%	57%
Yearly or less often	9%	8%	15%	6%	0%

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

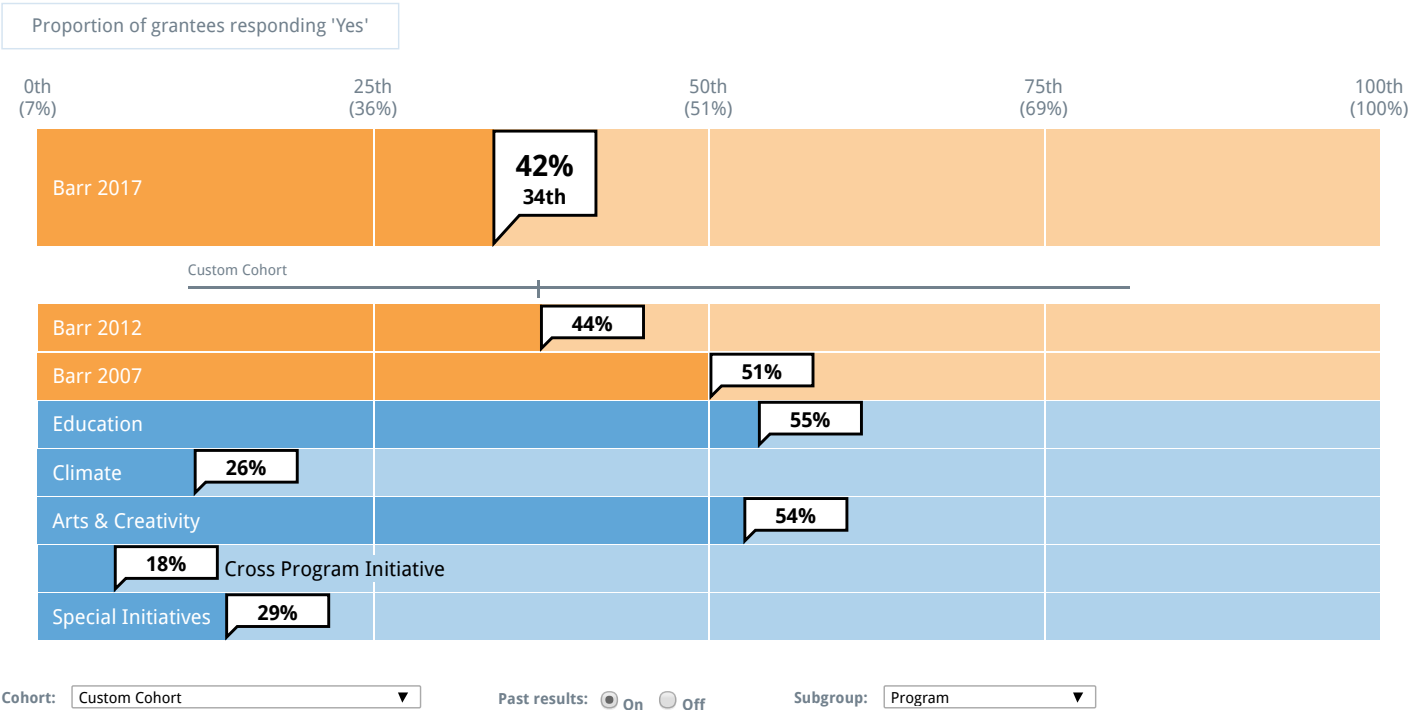| Initiation of Contact with Program Officer	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Program Officer	10%	6%	9%	15%	11%
Both of equal frequency	52%	46%	50%	50%	52%
Grantee	38%	48%	42%	35%	37%

Initiation of Contact with Program Officer (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Program Officer	6%	9%	13%	11%	14%
Both of equal frequency	59%	51%	46%	56%	50%
Grantee	35%	40%	40%	33%	36%

Contact Change and Site Visits

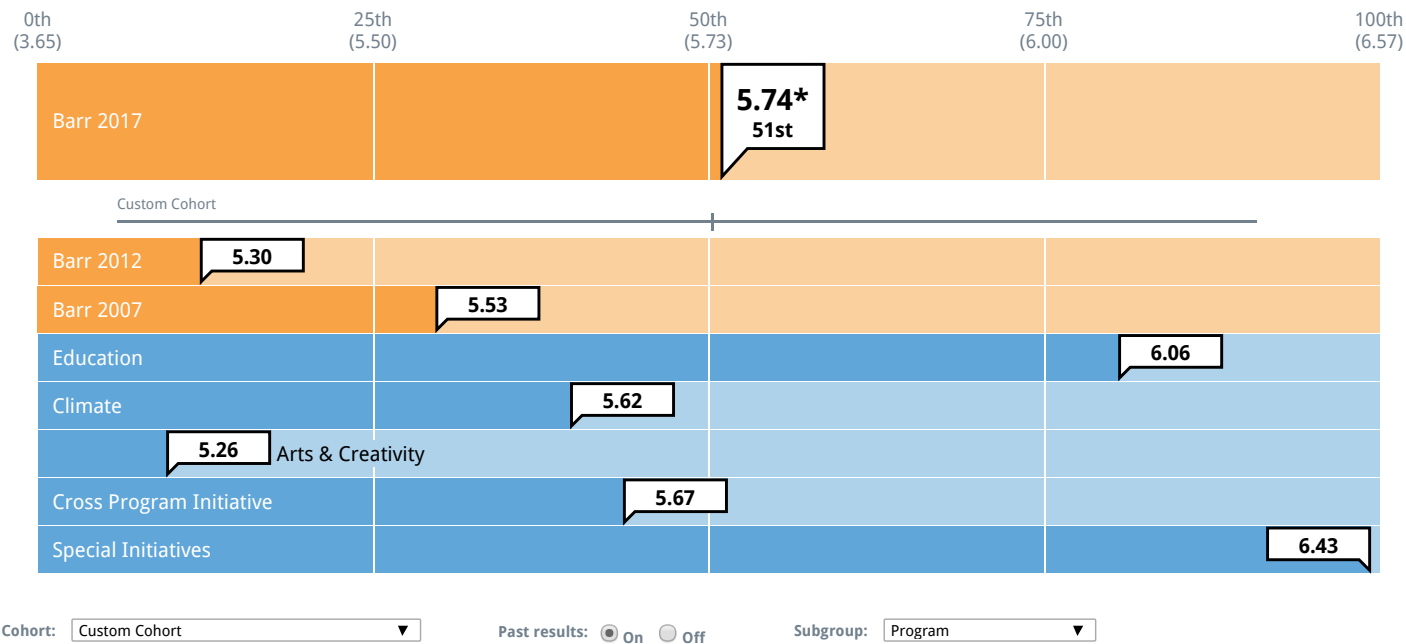## "Has your main contact at the Foundation changed in the past six months?"

Proportion of grantees responding 'Yes'

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

Barr 2017 — 14%* 54th

Custom Cohort

Barr 2012 — 30%
Education — 19%
Climate — 12%
Arts & Creativity — 13%
Cross Program Initiative — 17%
Special Initiatives — 7%

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

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

Proportion of grantees responding 'Yes'

0th (7%)	25th (36%)	50th (51%)	75th (69%)	100th (100%)

Barr 2017 — 42% 34th

Custom Cohort

Barr 2012 — 44%
Barr 2007 — 51%
Education — 55%
Climate — 26%
Arts & Creativity — 54%
Cross Program Initiative — 18%
Special Initiatives — 29%

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

Foundation Communication

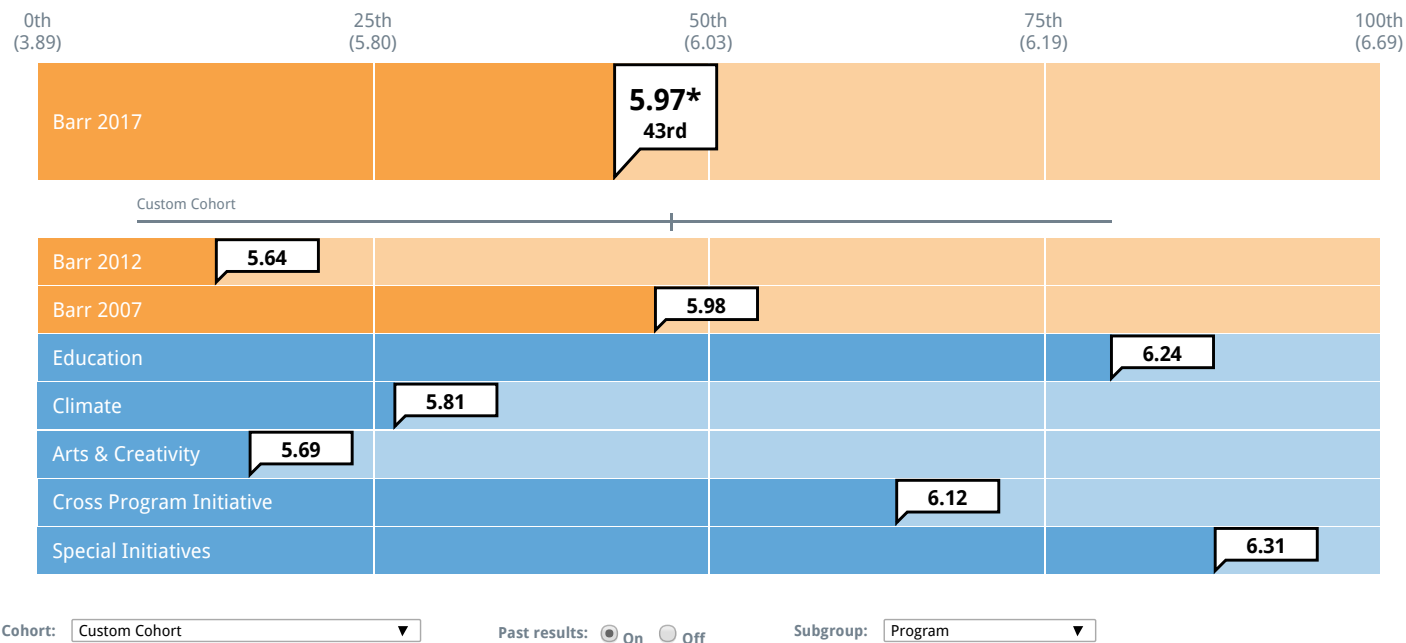## "How clearly has the Foundation communicated its goals and strategy to you?"

1 = Not at all clearly   7 = Extremely clearly

0th (3.65)	25th (5.50)	50th (5.73)	75th (6.00)	100th (6.57)

Barr 2017 — 5.74* 51st

Custom Cohort

- Barr 2012 — 5.30
- Barr 2007 — 5.53
- Education — 6.06
- Climate — 5.62
- Arts & Creativity — 5.26
- Cross Program Initiative — 5.67
- Special Initiatives — 6.43

Cohort: Custom Cohort ▾   Past results: ● On ○ Off   Subgroup: Program ▾

"How consistent was the information provided by different communications 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 (5.80)	50th (6.03)	75th (6.19)	100th (6.69)

Barr 2017 — 5.97* 43rd

Custom Cohort

- Barr 2012 — 5.64
- Barr 2007 — 5.98
- Education — 6.24
- Climate — 5.81
- Arts & Creativity — 5.69
- Cross Program Initiative — 6.12
- Special Initiatives — 6.31

Cohort: Custom Cohort ▾   Past results: ● On ○ Off   Subgroup: Program ▾
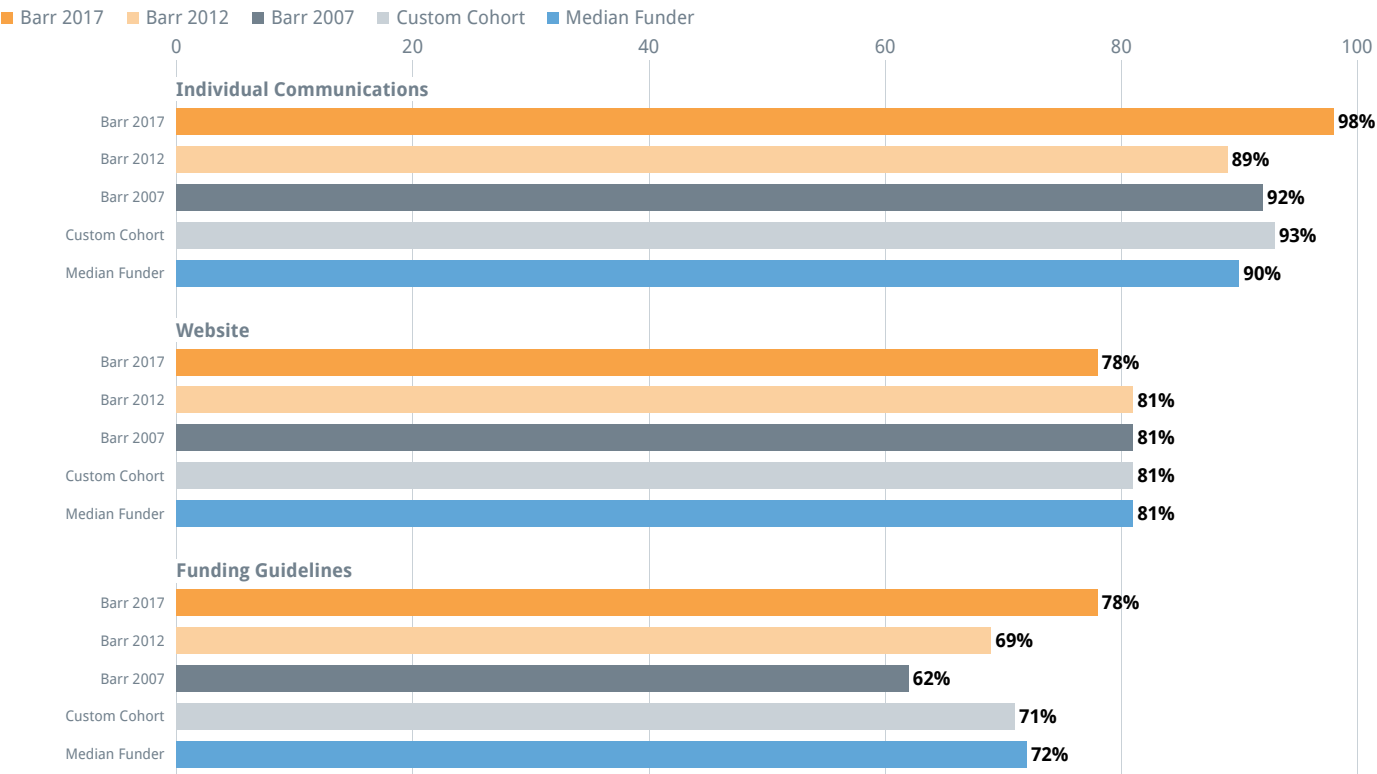
Communication Resources

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

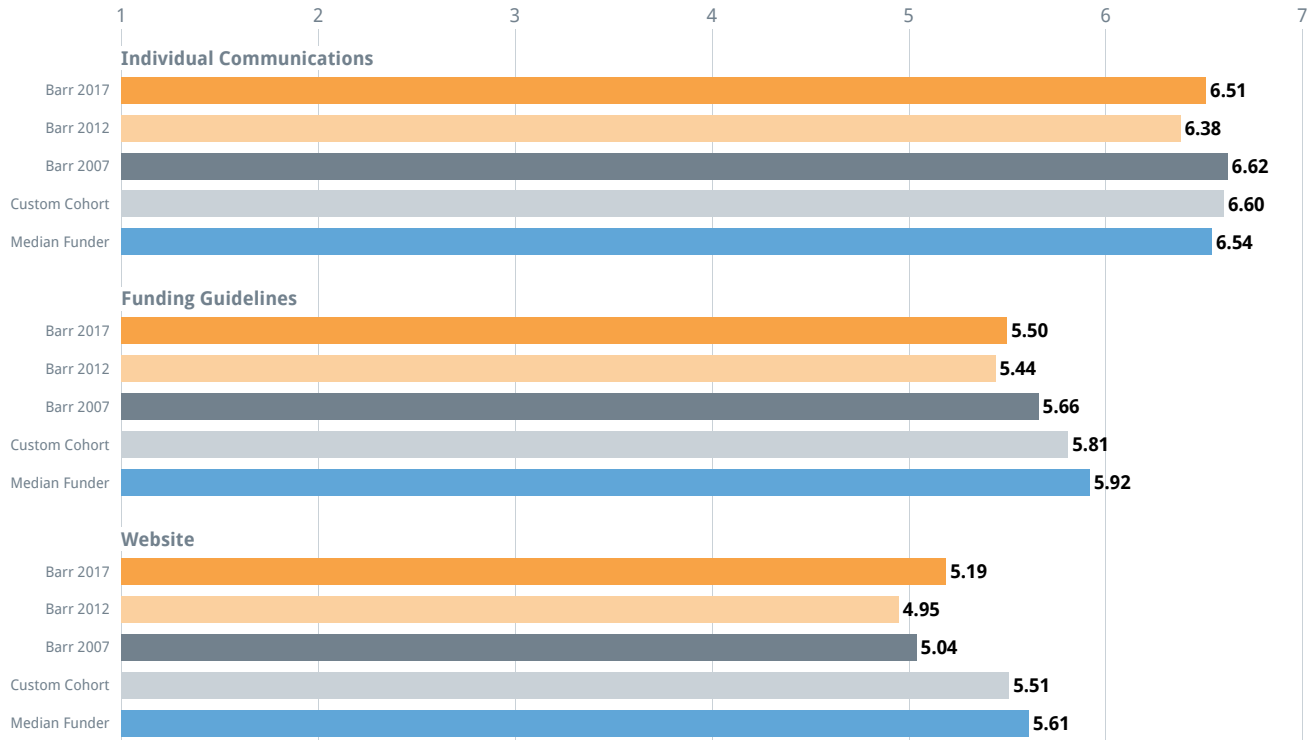**"Please indicate whether you used any of the following resources, and if so how helpful you found each."**

Usage of Communication Resources - Overall

■ Barr 2017   ■ Barr 2012   ■ Barr 2007   ■ Custom Cohort   ■ Median Funder

Individual Communications

Barr 2017	98%
Barr 2012	89%
Barr 2007	92%
Custom Cohort	93%
Median Funder	90%

Website

Barr 2017	78%
Barr 2012	81%
Barr 2007	81%
Custom Cohort	81%
Median Funder	81%

Funding Guidelines

Barr 2017	78%
Barr 2012	69%
Barr 2007	62%
Custom Cohort	71%
Median Funder	72%

Helpfulness of Communication Resources - Overall

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

■ Barr 2017   ■ Barr 2012   ■ Barr 2007   ■ Custom Cohort   ■ Median Funder

Individual Communications

Barr 2017	6.51
Barr 2012	6.38
Barr 2007	6.62
Custom Cohort	6.60
Median Funder	6.54

Funding Guidelines

Barr 2017	5.50
Barr 2012	5.44
Barr 2007	5.66
Custom Cohort	5.81
Median Funder	5.92

Website

Barr 2017	5.19
Barr 2012	4.95
Barr 2007	5.04
Custom Cohort	5.51
Median Funder	5.61

The following charts show the usage and helpfulness of communications resources segmented by subgroup.

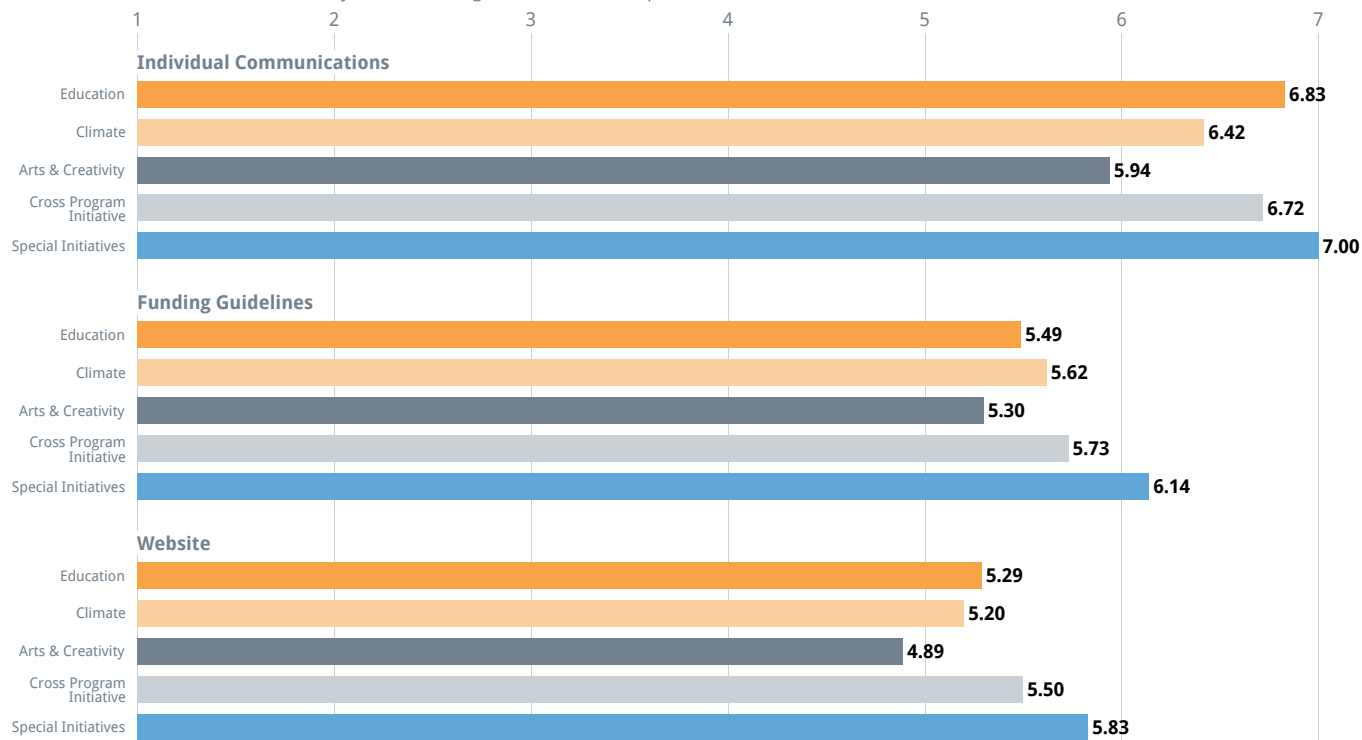**"Please indicate whether you used any of the following resources, and if so how helpful you found each."**

Usage of Communication Resources - By Subgroup

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Individual Communications

Subgroup	Value
Education	100%
Climate	98%
Arts & Creativity	95%
Cross Program Initiative	100%
Special Initiatives	100%

Website

Subgroup	Value
Education	80%
Climate	77%
Arts & Creativity	80%
Cross Program Initiative	67%
Special Initiatives	86%

Funding Guidelines

Subgroup	Value
Education	89%
Climate	75%
Arts & Creativity	80%
Cross Program Initiative	61%
Special Initiatives	50%
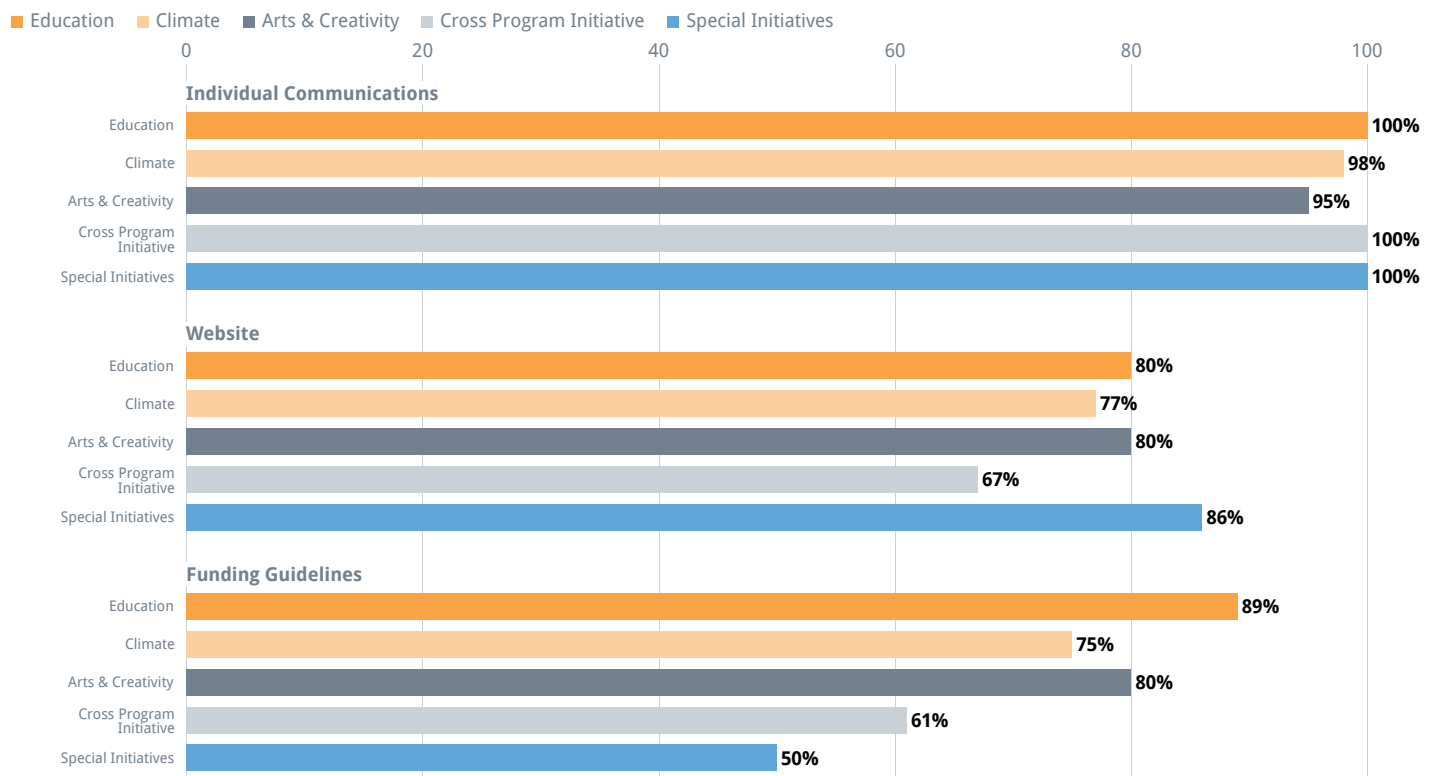
Helpfulness of Communication Resources - By Subgroup

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

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives
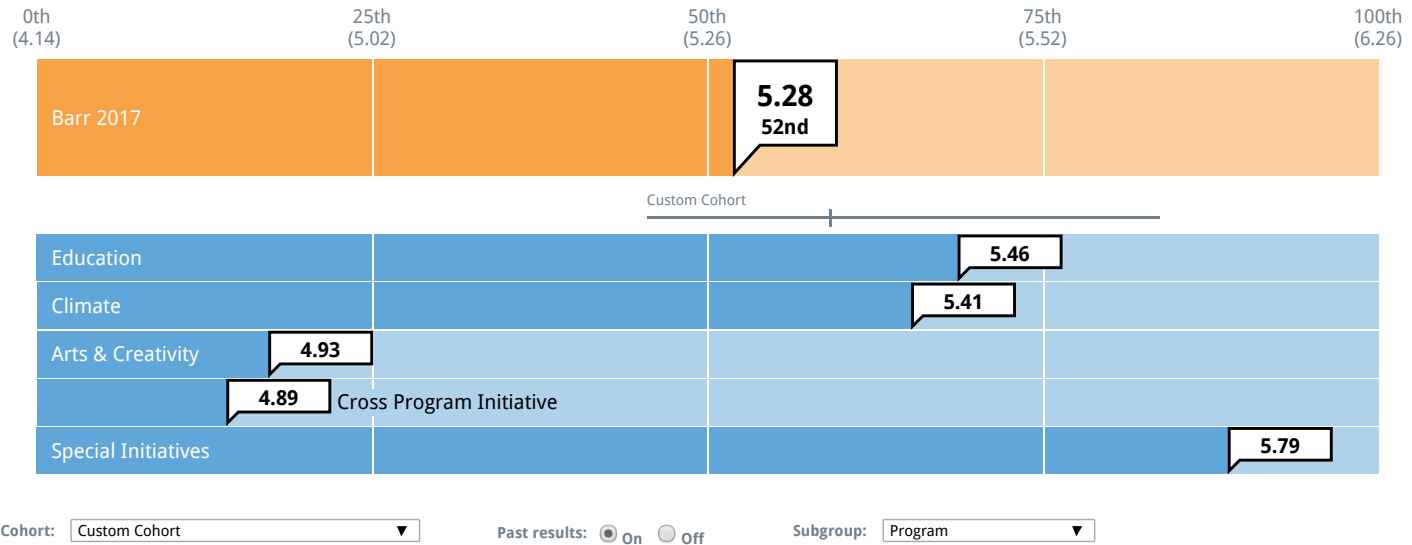
Individual Communications

Subgroup	Value
Education	6.83
Climate	6.42
Arts & Creativity	5.94
Cross Program Initiative	6.72
Special Initiatives	7.00

Funding Guidelines

Subgroup	Value
Education	5.49
Climate	5.62
Arts & Creativity	5.30
Cross Program Initiative	5.73
Special Initiatives	6.14

Website

Subgroup	Value
Education	5.29
Climate	5.20
Arts & Creativity	4.89
Cross Program Initiative	5.50
Special Initiatives	5.83

Funder Transparency

"Overall how transparent is the Foundation with your organization?"

1 = Not at all transparent   7 = Extremely transparent

0th (3.69)	25th (5.47)	50th (5.66)	75th (5.95)	100th (6.43)

Barr 2017 — **5.72** 55th

Custom Cohort

Education				6.03
Climate	5.42			
5.33 Arts & Creativity				
Cross Program Initiative				6.24
Special Initiatives				6.43

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Program ▼
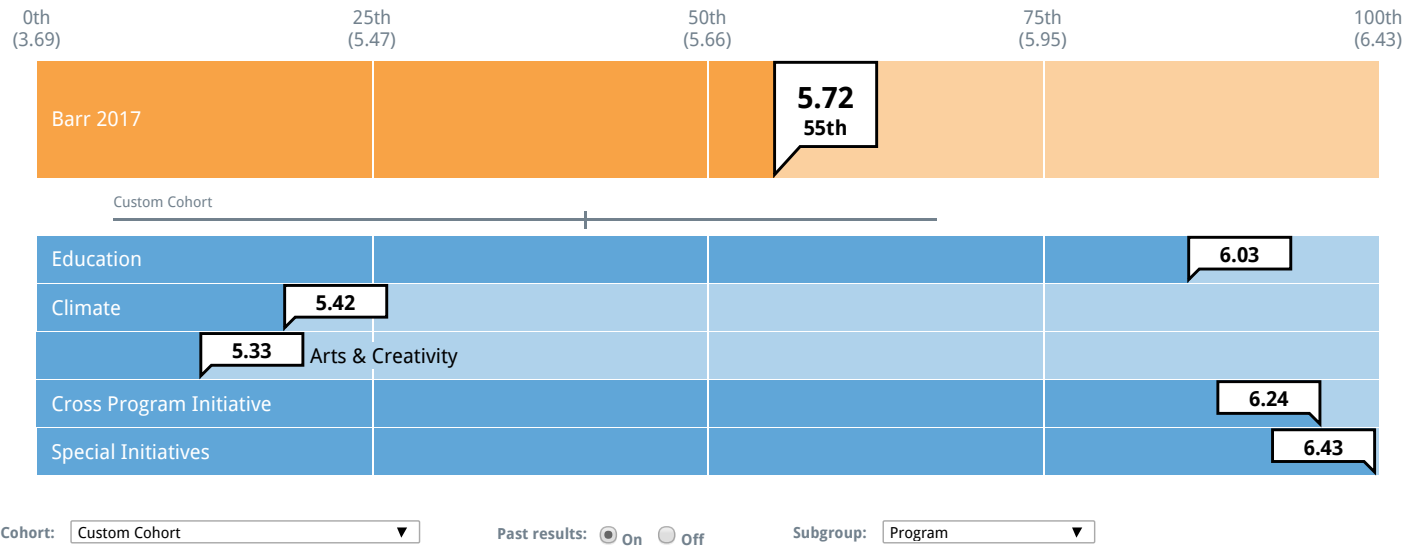
"To what extent is the Foundation open to ideas from grantees about its strategy?"

1 = Not at all   7 = To a great extent

0th (4.14)	25th (5.02)	50th (5.26)	75th (5.52)	100th (6.26)

Barr 2017 — **5.28** 52nd

Custom Cohort

Education			5.46	
Climate			5.41	
Arts & Creativity	4.93			
4.89 Cross Program Initiative				
Special Initiatives				5.79

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Program ▼

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 (4.68)	50th (4.94)	75th (5.20)	100th (6.20)

Barr 2017 — 5.06* 59th

Custom Cohort

Barr 2012	4.70			
Barr 2007			5.19	
Education			5.22	
Climate	4.65			
Arts & Creativity				5.41
Cross Program Initiative	4.61			
Special Initiatives		5.07		

Cohort: [Custom Cohort ▼]　　Past results: ◉ On ○ Off　　Subgroup: [Program ▼]
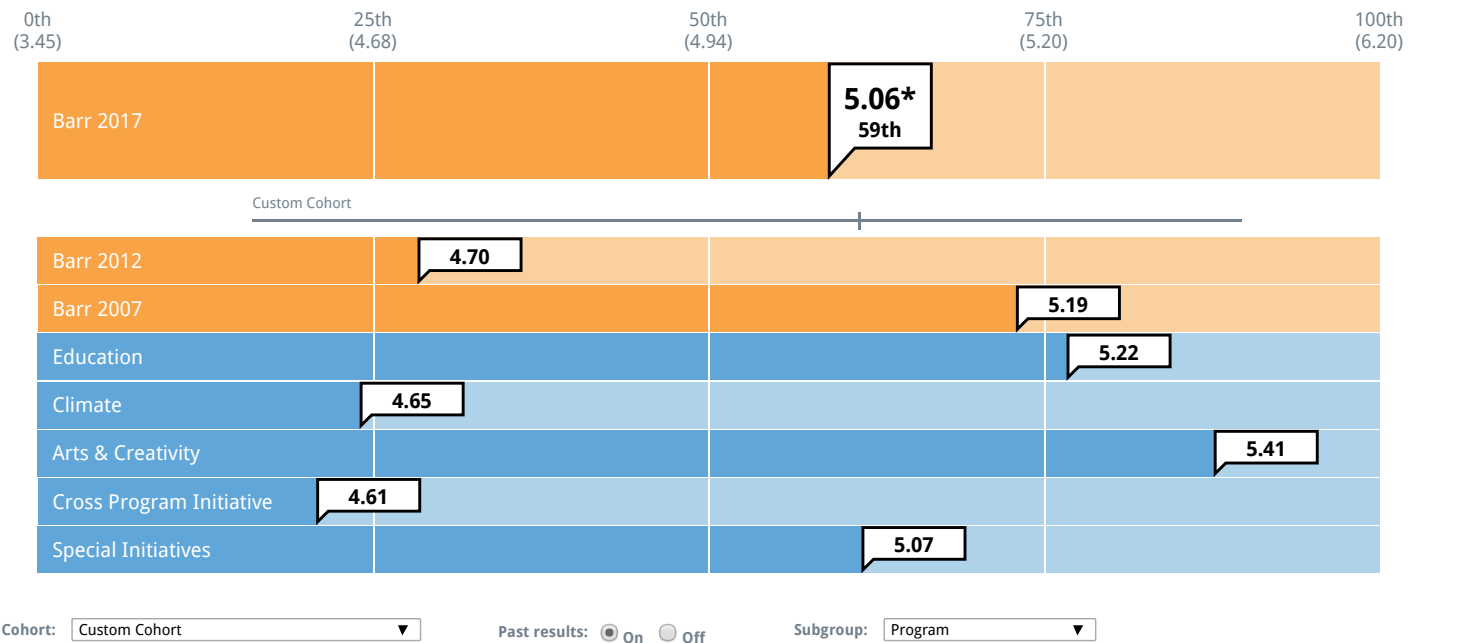
Selection Process

Did you submit a proposal for this grant?	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Submitted a Proposal	97%	92%	84%	95%	95%
Did Not Submit a Proposal	3%	8%	16%	5%	5%

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

1 = No involvement   **7** = Substantial involvement

	0th (1.87)	25th (3.19)	50th (3.78)	75th (4.24)	100th (6.41)

Barr 2017 — 4.54* 83rd

Custom Cohort

Barr 2012 — 3.77
Barr 2007 — 3.99
Education — 4.28
Climate — 4.34
Arts & Creativity — 4.85
Cross Program Initiative — 4.94
Special Initiatives — 4.75
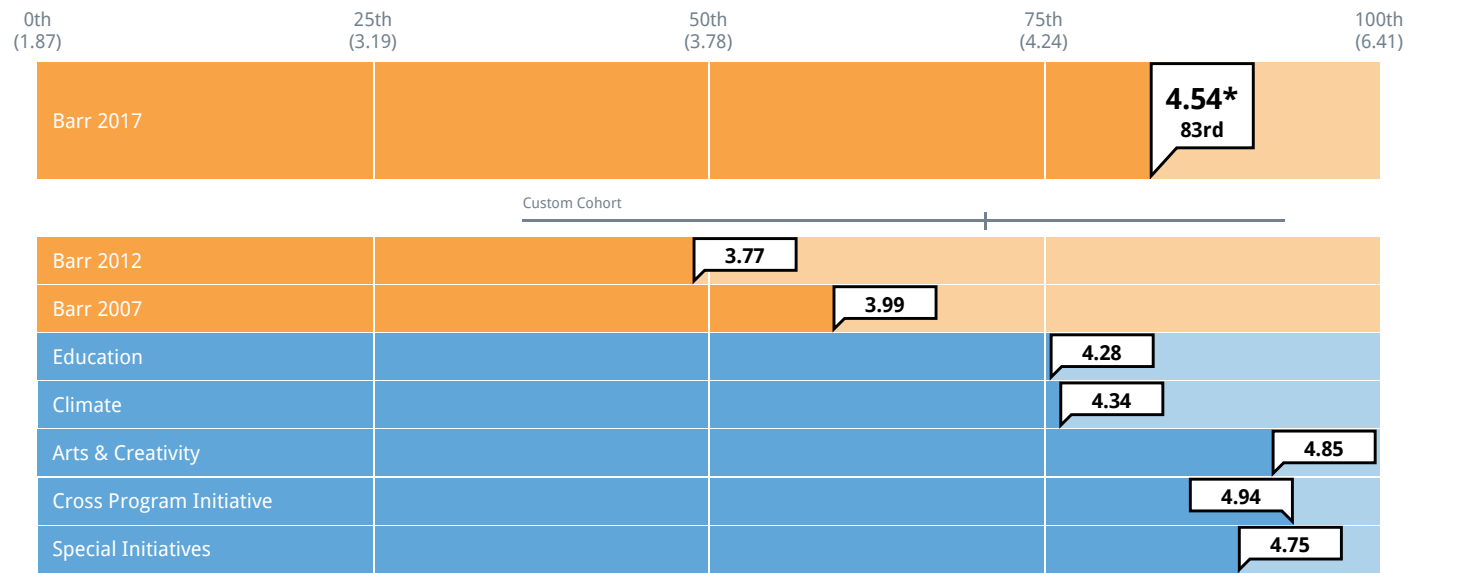
Cohort: Custom Cohort ▼   Past results: ● On   ○ Off   Subgroup: Program ▼

"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 (1.40)	25th (2.02)	50th (2.24)	75th (2.48)	100th (3.99)

Barr 2017 — **2.18** **41st**

Custom Cohort

Barr 2012 — **2.19**

Barr 2007 — **2.29**

1.70 Education

Climate — **2.46**

Arts & Creativity — **2.65**

1.88 Cross Program Initiative

1.42 Special Initiatives

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Program ▼

33
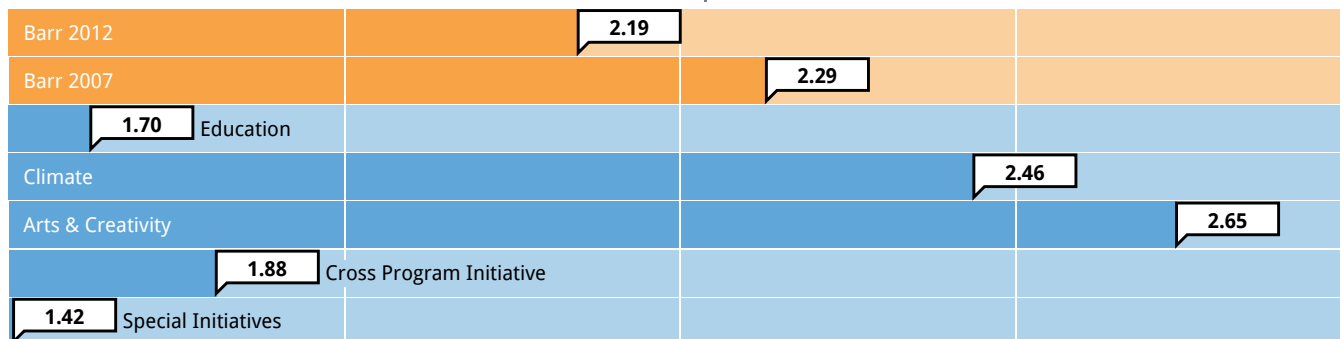
Time Between Submission and Clear Commitment

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

Time Elapsed from Submission of Proposal to Clear Commitment of Funding	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Less than 1 month	13%	7%	1%	6%	8%
1 - 3 months	61%	54%	72%	56%	61%
4 - 6 months	23%	33%	21%	29%	26%
7 - 9 months	1%	3%	3%	5%	3%
10 - 12 months	1%	1%	1%	2%	1%
More than 12 months	1%	1%	2%	2%	1%

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Less than 1 month	6%	11%	11%	7%	67%
1 - 3 months	68%	67%	48%	73%	33%
4 - 6 months	23%	22%	35%	20%	0%
7 - 9 months	2%	0%	2%	0%	0%
10 - 12 months	0%	0%	4%	0%	0%
More than 12 months	2%	0%	0%	0%	0%

Reporting and Evaluation Process

"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?"
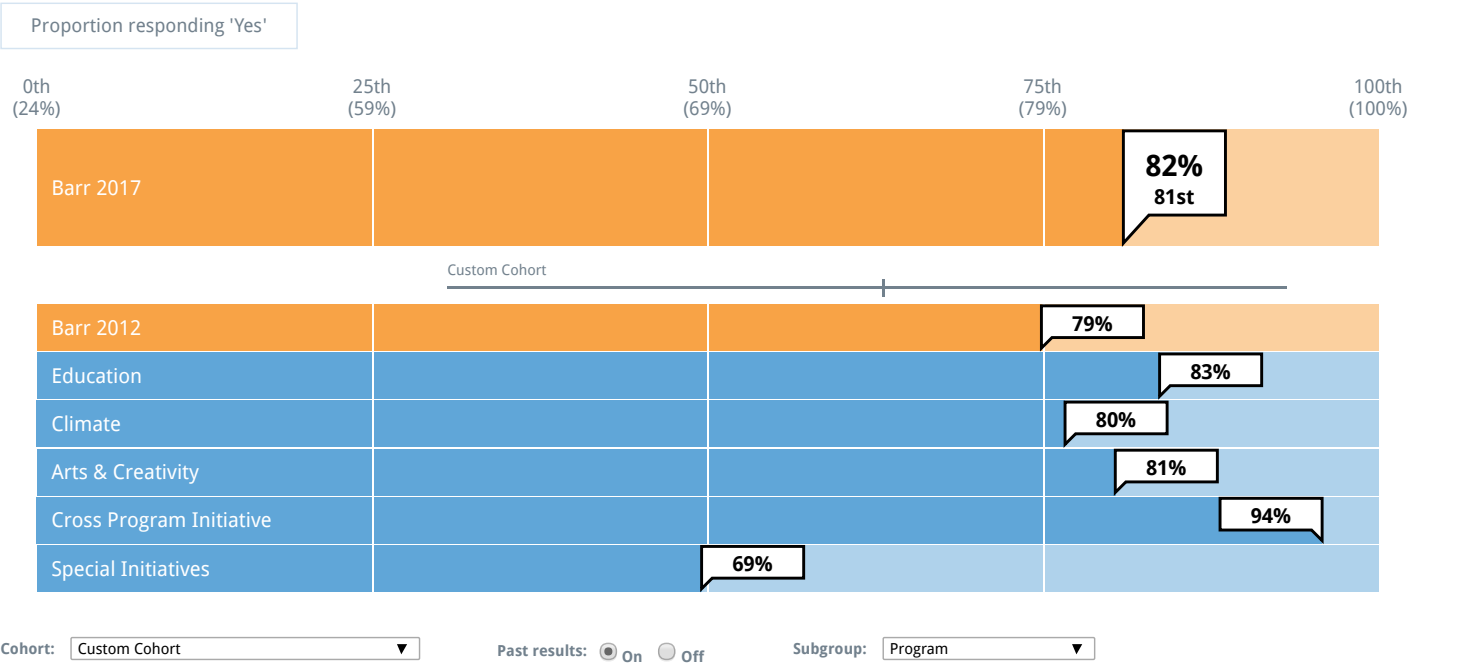
Proportion responding 'Yes'

	0th (24%)	25th (59%)	50th (69%)	75th (79%)	100th (100%)

Barr 2017 — 82% — 81st

Custom Cohort

Barr 2012	79%
Education	83%
Climate	80%
Arts & Creativity	81%
Cross Program Initiative	94%
Special Initiatives	69%

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Program ▼

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

Participation in Reporting and/or Evaluation Processes	Barr 2017	Average Funder
Participated in a reporting process only	53%	56%
Participated in an evaluation process only	0%	1%
Participated in both a reporting and an evaluation process	26%	31%
Participated in neither a reporting nor an evaluation process	20%	12%

Participation in Reporting and/or Evaluation Processes (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Participated in a reporting process only	58%	58%	35%	75%	46%
Participated in an evaluation process only	0%	2%	0%	0%	0%
Participated in both a reporting and an evaluation process	12%	34%	47%	6%	8%
Participated in neither a reporting nor an evaluation process	30%	7%	18%	19%	46%

Reporting Process

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

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

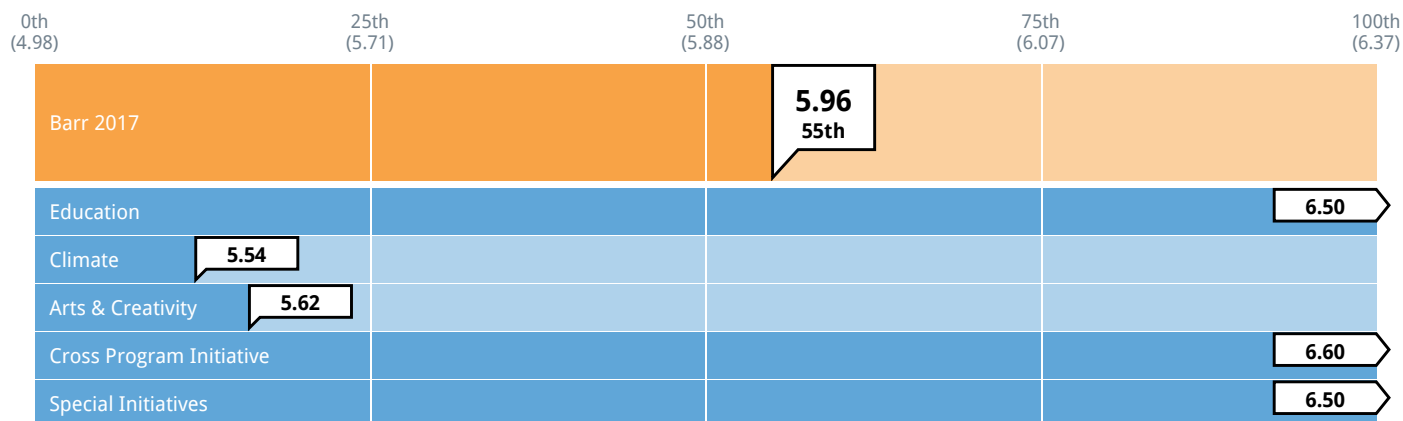**1** = Not at all   **7** = To a great extent
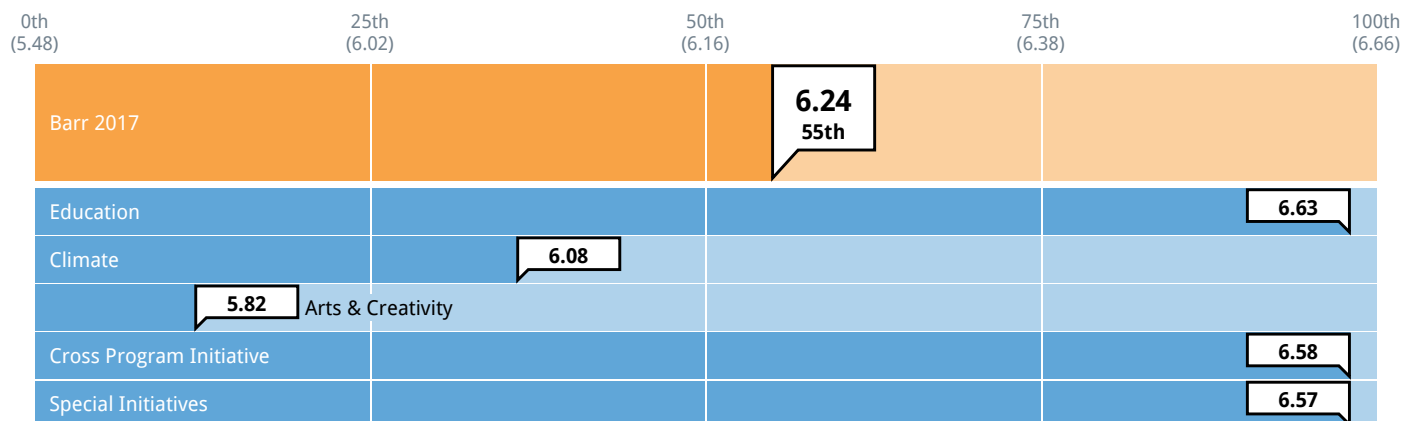
0th (5.48)	25th (6.02)	50th (6.16)	75th (6.38)	100th (6.66)

Barr 2017 — **6.24** 55th

Education — **6.63**

Climate — **6.08**

Arts & Creativity — **5.82**

Cross Program Initiative — **6.58**

Special Initiatives — **6.57**

Cohort: None ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Program ▼

"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 (4.98)	25th (5.71)	50th (5.88)	75th (6.07)	100th (6.37)

Barr 2017 — **5.96** 55th

Education — **6.50**

Climate — **5.54**

Arts & Creativity — **5.62**

Cross Program Initiative — **6.60**

Special Initiatives — **6.50**

Cohort: None ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Program ▼

"To what extent was the Foundation's reporting process aligned appropriately to the timing of your work?"
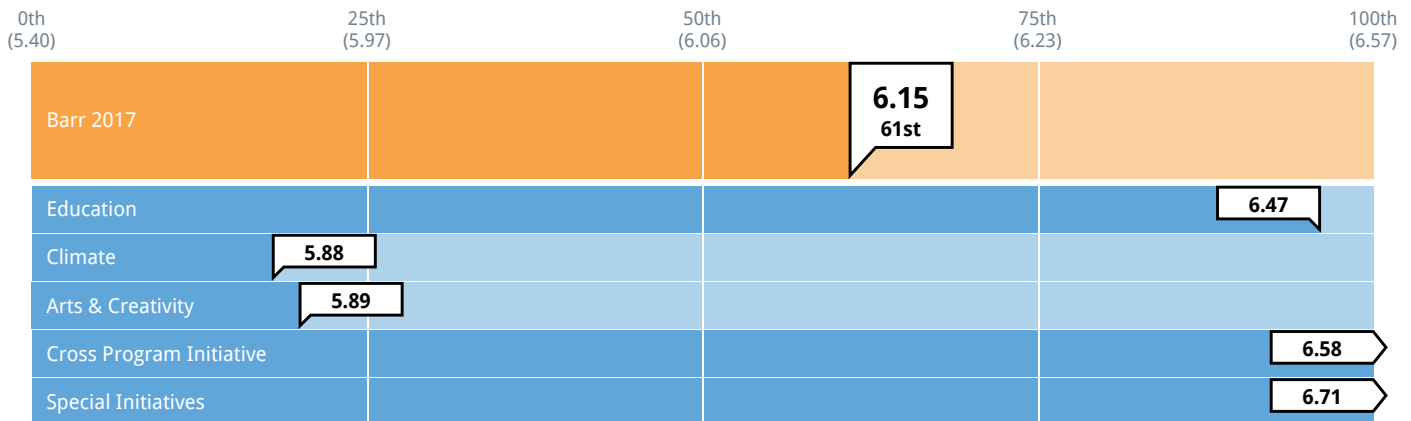
1 = Not at all   7 = To a great extent
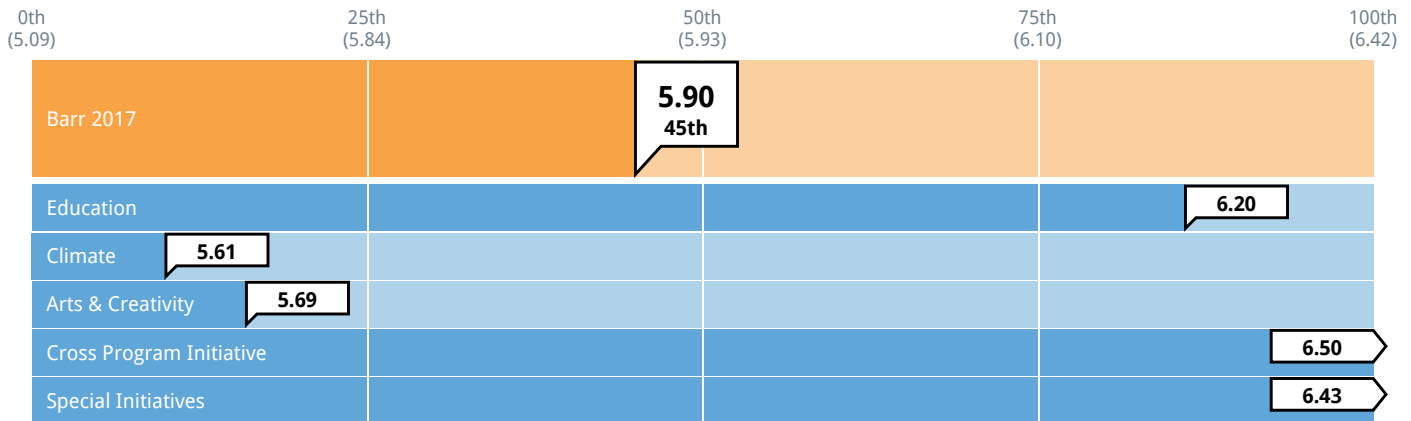
	0th (5.09)	25th (5.84)	50th (5.93)	75th (6.10)	100th (6.42)
Barr 2017			**5.90** 45th		
Education				6.20	
Climate	5.61				
Arts & Creativity	5.69				
Cross Program Initiative					6.50
Special Initiatives					6.43

Cohort: None ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼

"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 (5.40)	25th (5.97)	50th (6.06)	75th (6.23)	100th (6.57)
Barr 2017			**6.15** 61st		
Education				6.47	
Climate	5.88				
Arts & Creativity	5.89				
Cross Program Initiative					6.58
Special Initiatives					6.71

Cohort: None ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼

"To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?"
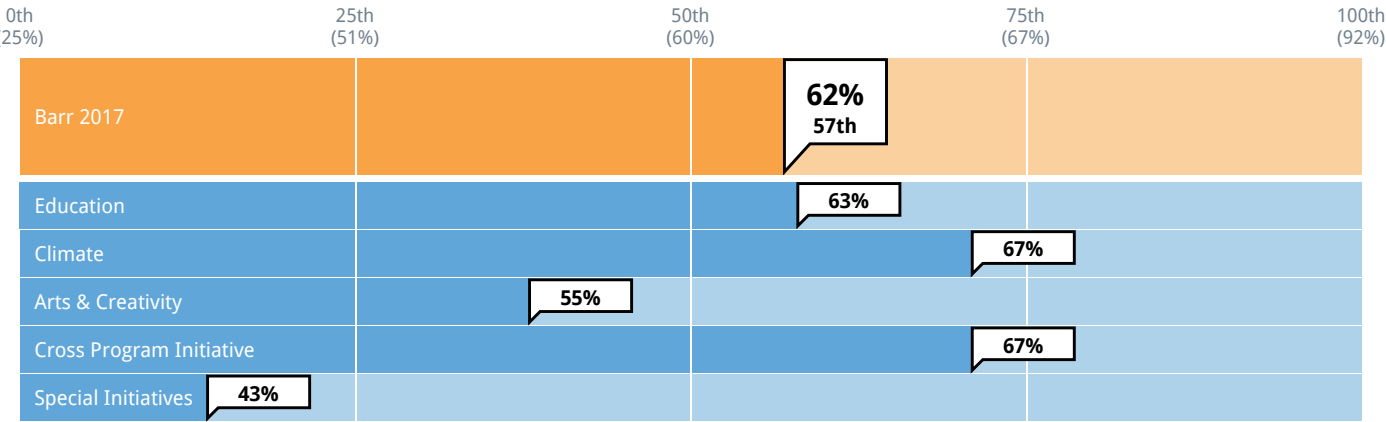
1 = Not at all   **7** = To a great extent

0th (5.04)	25th (5.64)	50th (5.86)	75th (6.11)	100th (6.48)

Barr 2017 — **5.69** 31st

Education — 5.64

Climate — 5.76

Arts & Creativity — 5.39

Cross Program Initiative — 6.08

Special Initiatives — 6.17
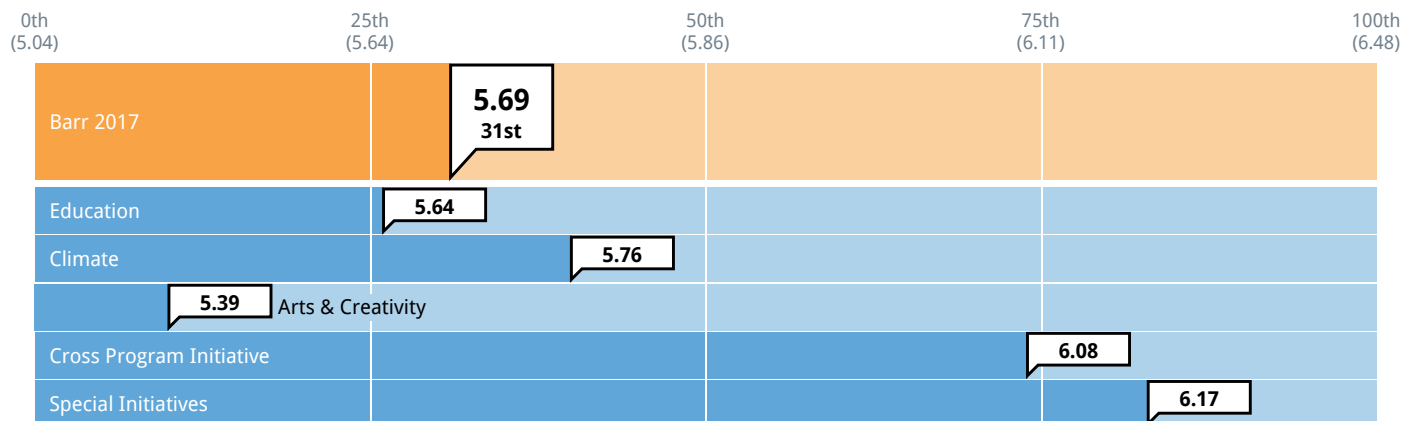
Cohort: None ▼   Past results: ● On ○ Off   Subgroup: Program ▼

"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 (25%)	25th (51%)	50th (60%)	75th (67%)	100th (92%)
Barr 2017				**62%** 57th	
Education				63%	
Climate				67%	
Arts & Creativity		55%			
Cross Program Initiative				67%	
Special Initiatives	43%				

Cohort:　None ▼　　　Past results: ⦿ On ◯ Off　　　Subgroup:　Program ▼

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Evaluation Process

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

"Who was primarily responsible for carrying out the evaluation?"	Barr 2017	Average Funder
Evaluation staff at the Foundation	19%	19%
Evaluation staff at your organization	19%	51%
External evaluator, chosen by the Foundation	47%	15%
External evaluator, chosen by your organization	15%	15%

"Who was primarily responsible for carrying out the evaluation?" (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Evaluation staff at the Foundation	38%	26%	8%	N/A	N/A
Evaluation staff at your organization	13%	32%	13%	N/A	N/A
External evaluator, chosen by the Foundation	25%	26%	71%	N/A	N/A
External evaluator, chosen by your organization	25%	16%	8%	N/A	N/A

"Did the Foundation provide financial support for the evaluation?"	Barr 2017	Average Funder
Yes, the evaluation's costs were fully funded by the Foundation	64%	32%
Yes, the evaluation's costs were partially funded by the Foundation	7%	16%
No, the evaluation's costs were not funded by the Foundation	29%	52%

"Did the Foundation provide financial support for the evaluation?" (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Yes, the evaluation's costs were fully funded by the Foundation	43%	63%	70%	N/A	N/A
Yes, the evaluation's costs were partially funded by the Foundation	43%	0%	0%	N/A	N/A
No, the evaluation's costs were not funded by the Foundation	14%	38%	30%	N/A	N/A

"To what extent did the evaluation incorporate input from your organization in the design of the evaluation?"
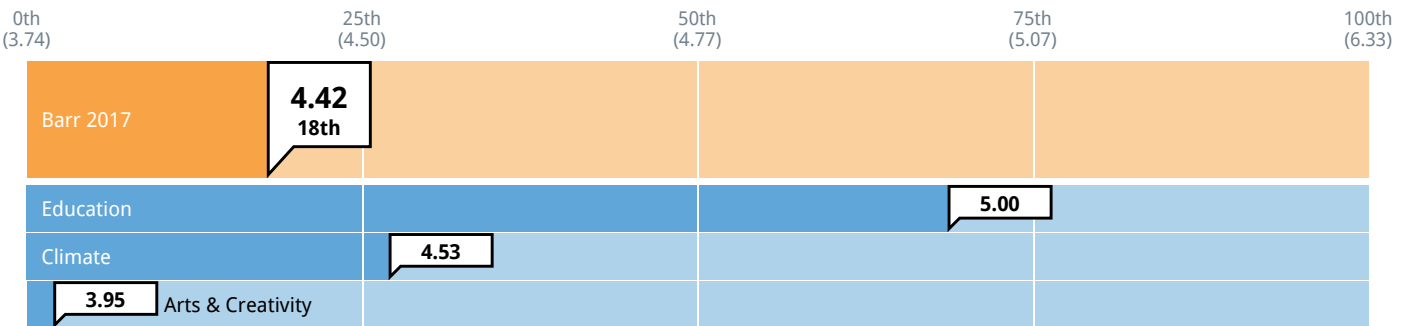
1 = Not at all   7 = To a great extent

0th (4.11)	25th (5.30)	50th (5.54)	75th (5.78)	100th (6.40)

4.83
7th   Barr 2017

Education — 6.00

Climate — 5.38

3.76   Arts & Creativity
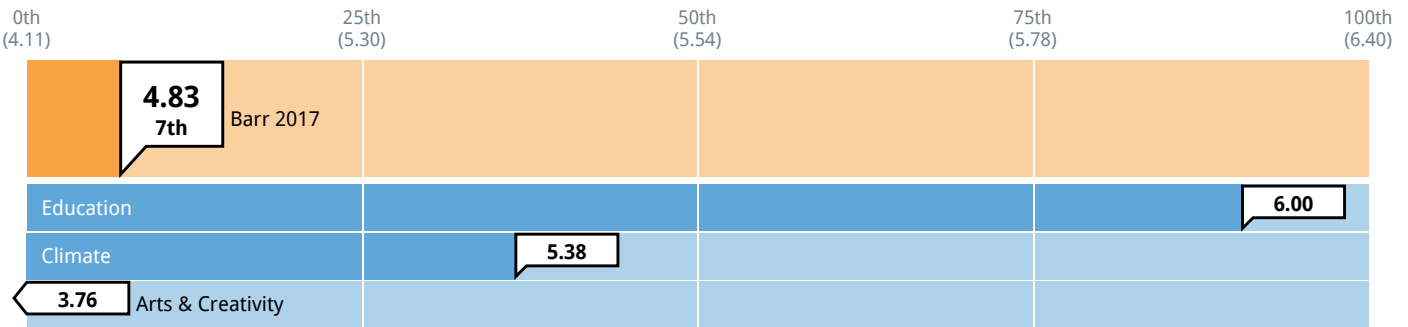
Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Program ▼

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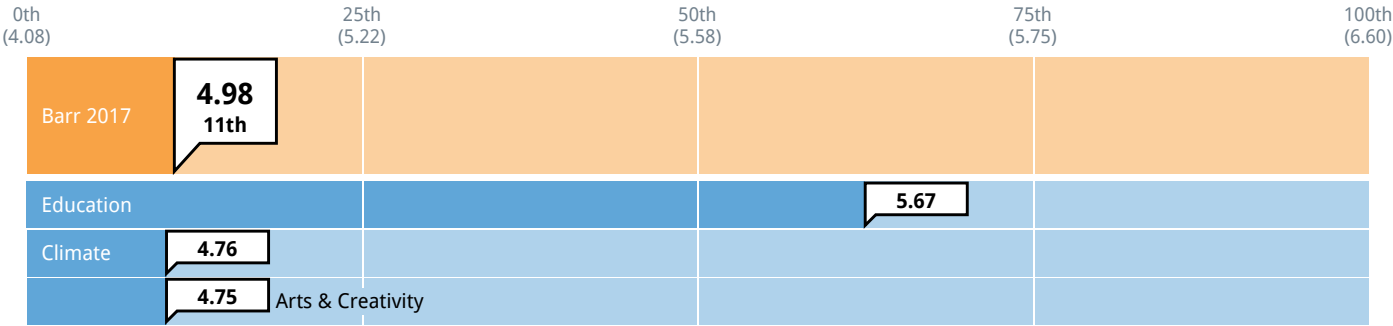
1 = Not at all   7 = To a great extent

0th (3.74)	25th (4.50)	50th (4.77)	75th (5.07)	100th (6.33)

Barr 2017   **4.42**
18th

Education — 5.00

Climate — 4.53

3.95   Arts & Creativity

Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Program ▼

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"To what extent did the evaluation generate information that you believe will be useful for other organizations?"
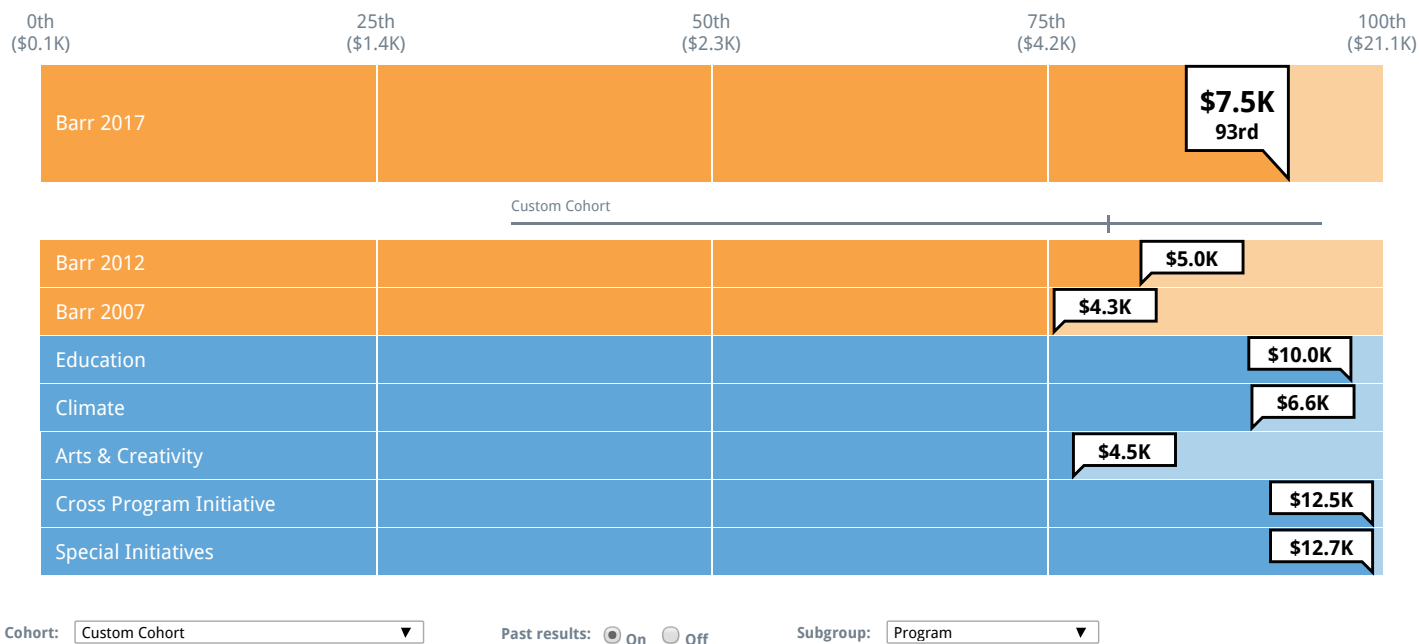
1 = Not at all   7 = To a great extent

0th (4.08)	25th (5.22)	50th (5.58)	75th (5.75)	100th (6.60)

Barr 2017 — **4.98** **11th**

Education — 5.67

Climate — 4.76

Arts & Creativity — 4.75

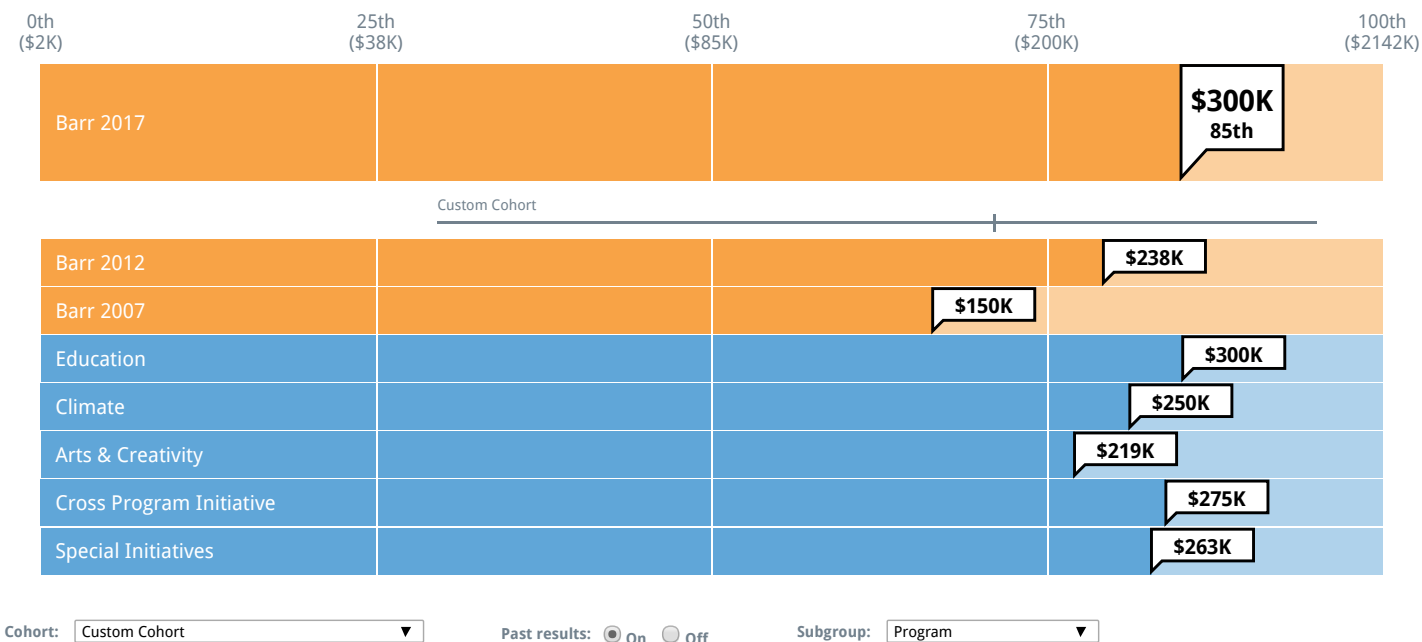Cohort: None ▾   Past results: ◉ On ○ Off   Subgroup: Program ▾

Dollar Return and Time Spent on Processes

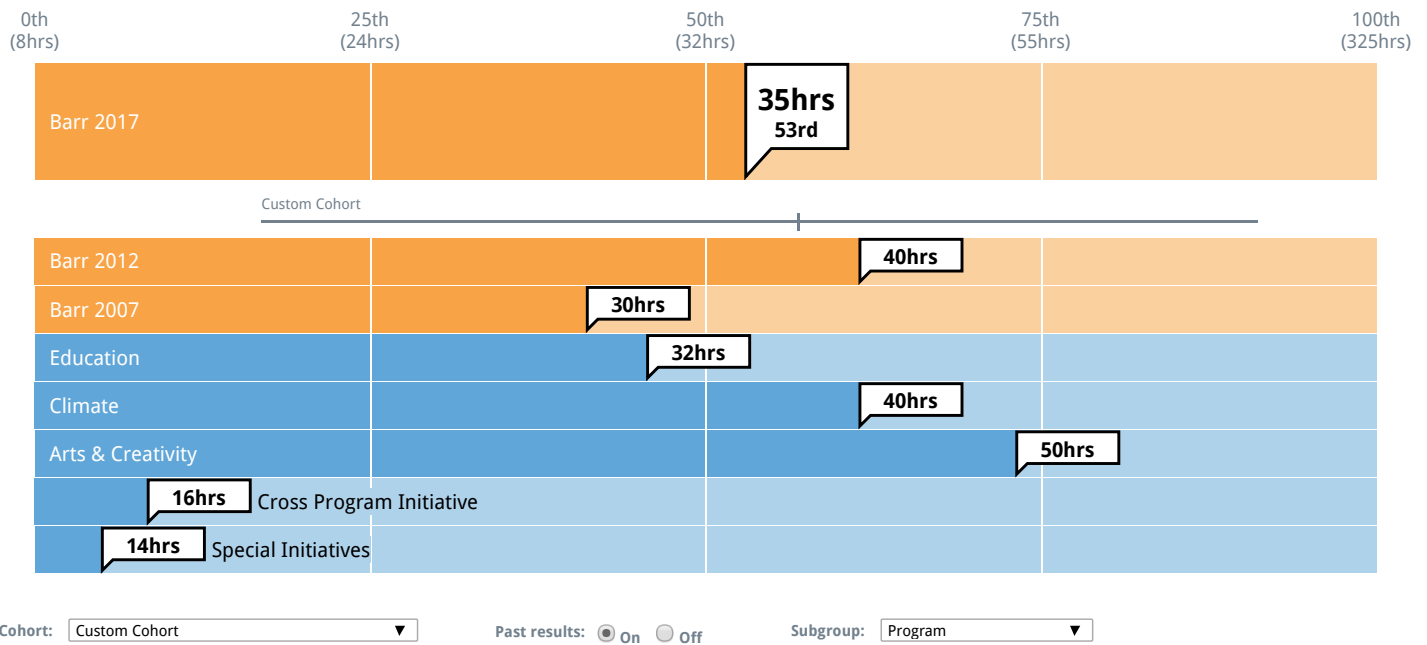## Dollar Return: Median grant dollars awarded per process hour required

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

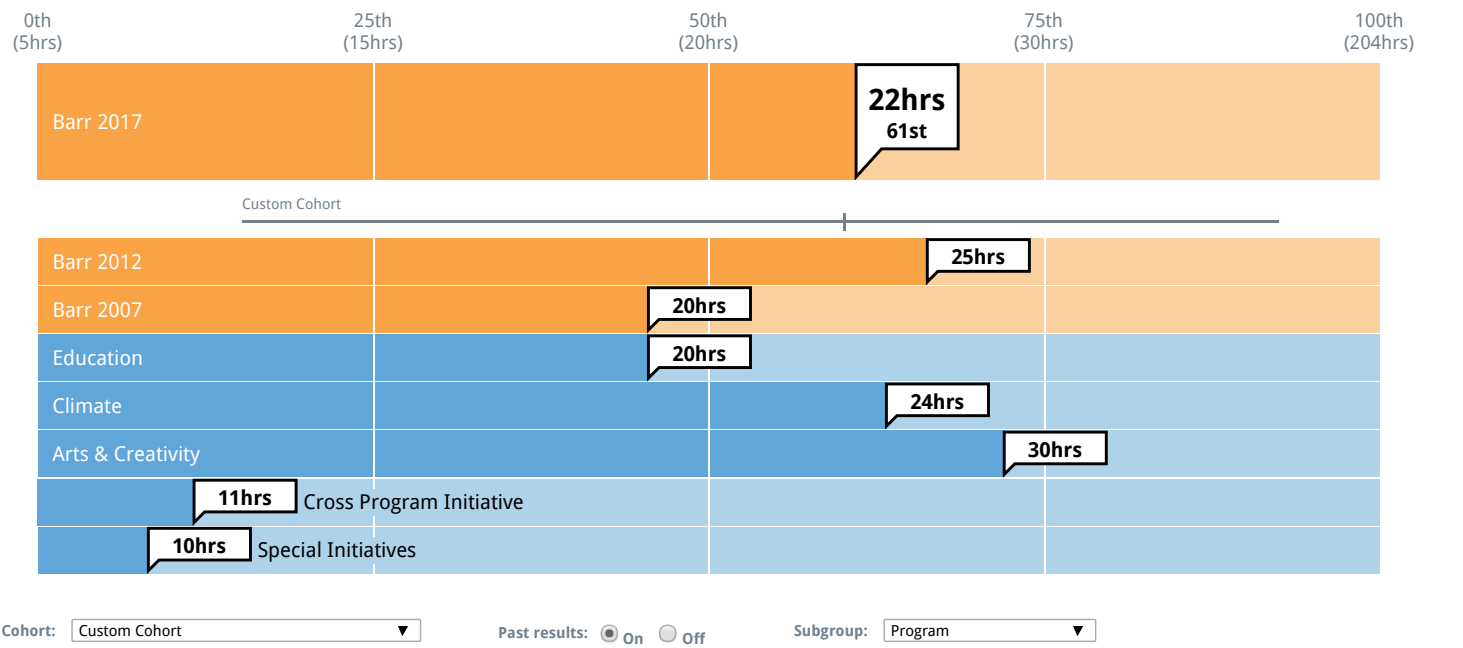|	0th ($0.1K)	25th ($1.4K)	50th ($2.3K)	75th ($4.2K)	100th ($21.1K)
Barr 2017					**$7.5K** 93rd

Custom Cohort

Barr 2012				$5.0K	
Barr 2007				$4.3K	
Education					$10.0K
Climate					$6.6K
Arts & Creativity				$4.5K	
Cross Program Initiative					$12.5K
Special Initiatives					$12.7K

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼

Median Grant Size

	0th ($2K)	25th ($38K)	50th ($85K)	75th ($200K)	100th ($2142K)
Barr 2017					**$300K** 85th

Custom Cohort

Barr 2012				$238K	
Barr 2007			$150K		
Education					$300K
Climate				$250K	
Arts & Creativity				$219K	
Cross Program Initiative				$275K	
Special Initiatives				$263K	

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Program ▼

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Median hours spent by grantees on funder requirements over grant lifetime

	0th (8hrs)	25th (24hrs)	50th (32hrs)	75th (55hrs)	100th (325hrs)

Barr 2017 — 35hrs / 53rd

Custom Cohort

Category	Hours
Barr 2012	40hrs
Barr 2007	30hrs
Education	32hrs
Climate	40hrs
Arts & Creativity	50hrs
Cross Program Initiative	16hrs
Special Initiatives	14hrs

Cohort: Custom Cohort ▼   **Past results:** ⦿ On ○ Off   **Subgroup:** Program ▼

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Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process

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

Barr 2017 — 22hrs / 61st

Custom Cohort

Barr 2012 — 25hrs
Barr 2007 — 20hrs
Education — 20hrs
Climate — 24hrs
Arts & Creativity — 30hrs
Cross Program Initiative — 11hrs
Special Initiatives — 10hrs

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Program ▼

Time Spent On Proposal And Selection Process	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
1 to 9 hours	17%	15%	16%	20%	15%
10 to 19 hours	21%	18%	23%	21%	22%
20 to 29 hours	20%	19%	26%	18%	20%
30 to 39 hours	10%	14%	13%	8%	9%
40 to 49 hours	13%	15%	14%	12%	14%
50 to 99 hours	13%	11%	6%	12%	12%
100 to 199 hours	3%	5%	2%	6%	6%
200+ hours	4%	2%	0%	3%	2%

Time Spent On Proposal And Selection Process (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
1 to 9 hours	18%	14%	8%	31%	42%
10 to 19 hours	19%	19%	19%	44%	25%
20 to 29 hours	22%	22%	19%	13%	8%
30 to 39 hours	15%	7%	10%	0%	8%
40 to 49 hours	13%	15%	15%	6%	0%
50 to 99 hours	9%	17%	17%	6%	0%
100 to 199 hours	3%	2%	6%	0%	8%
200+ hours	1%	5%	6%	0%	8%

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)

Barr 2017 — **6hrs 31st**

Custom Cohort

Barr 2012 — **7hrs**
Barr 2007 — **7hrs**
Education — **5hrs**
Climate — **8hrs**
Arts & Creativity — **10hrs**
3hrs Cross Program Initiative
2hrs Special Initiatives

Cohort: Custom Cohort ▼   **Past results:** ● On ○ Off   **Subgroup:** Program ▼
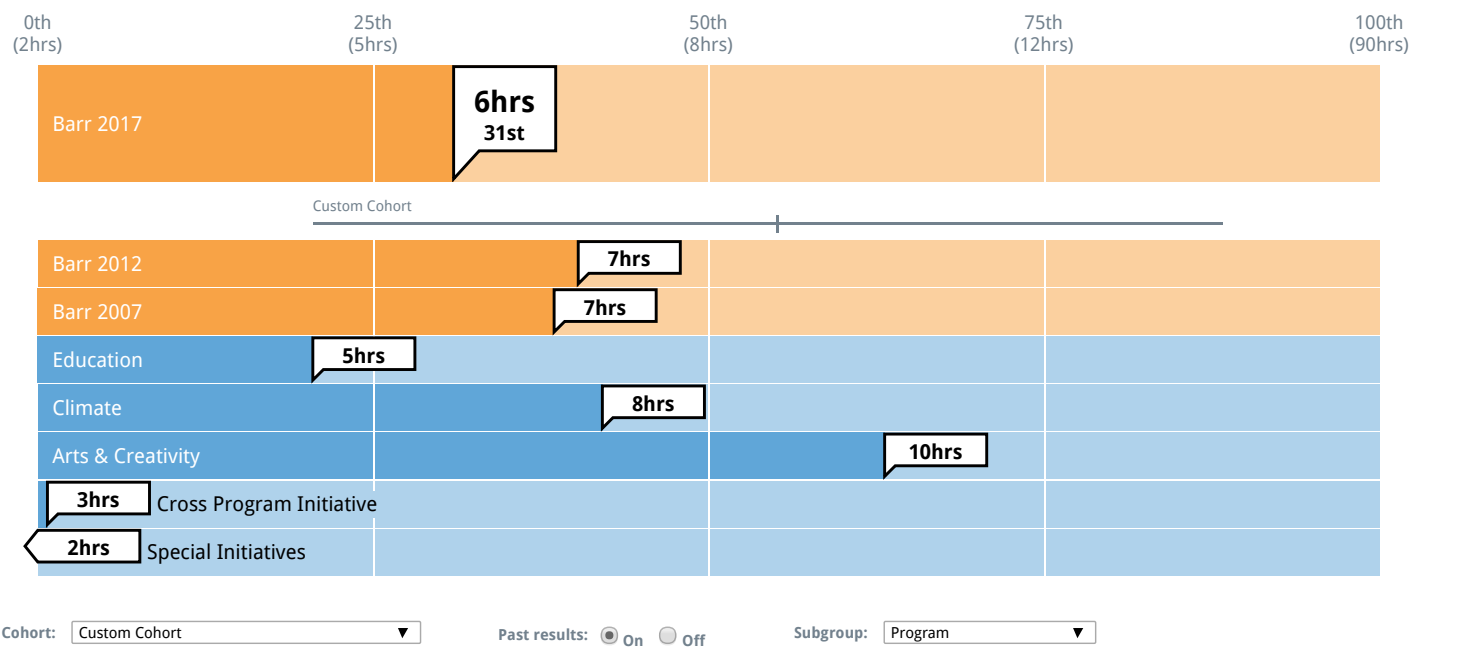
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
1 to 9 hours	60%	59%	58%	52%	50%
10 to 19 hours	17%	19%	22%	20%	22%
20 to 29 hours	8%	10%	9%	11%	12%
30 to 39 hours	4%	5%	5%	4%	3%
40 to 49 hours	4%	2%	3%	4%	4%
50 to 99 hours	5%	3%	1%	5%	5%
100+ hours	2%	1%	1%	4%	4%

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
1 to 9 hours	70%	54%	47%	80%	83%
10 to 19 hours	19%	15%	20%	20%	0%
20 to 29 hours	2%	8%	16%	0%	0%
30 to 39 hours	2%	4%	4%	0%	0%
40 to 49 hours	2%	6%	7%	0%	0%
50 to 99 hours	2%	8%	4%	0%	17%
100+ hours	2%	4%	2%	0%	0%

Non-Monetary Assistance

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

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 Foundation facilities
	Provided seminars/forums/convenings	Staff/management training

Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.
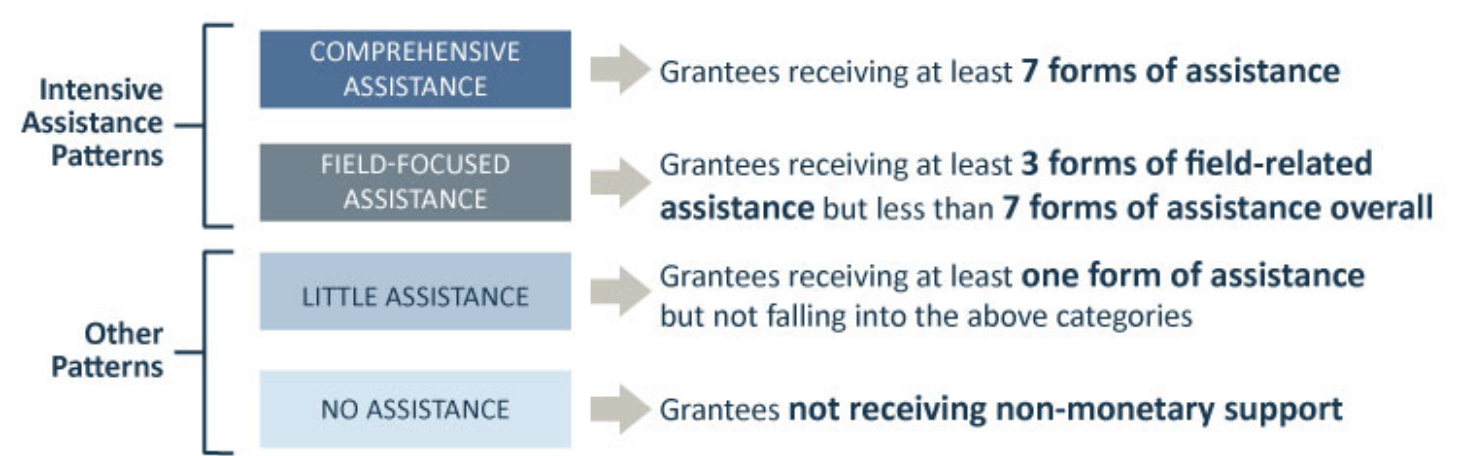
Non-Monetary Assistance Patterns	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Comprehensive	7%	7%	5%	7%	6%
Field-focused	15%	12%	9%	11%	17%
Little	48%	49%	46%	40%	42%
None	30%	32%	40%	43%	35%

Non-Monetary Assistance Patterns (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Comprehensive	10%	0%	17%	0%	0%
Field-focused	7%	17%	26%	6%	14%
Little	59%	43%	41%	50%	36%
None	24%	40%	17%	44%	50%

Proportion of grantees that received field-focused or comprehensive assistance

0th (0%)	25th (9%)	50th (15%)	75th (23%)	100th (64%)

Barr 2017 — **22%** **73rd**

Custom Cohort

Barr 2012 — 19%

Barr 2007 — 15%

Education — 17%

Climate — 17%

Arts & Creativity — 43%

6% Cross Program Initiative

Special Initiatives — 14%

Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Program ▼]

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Management Assistance Activities

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

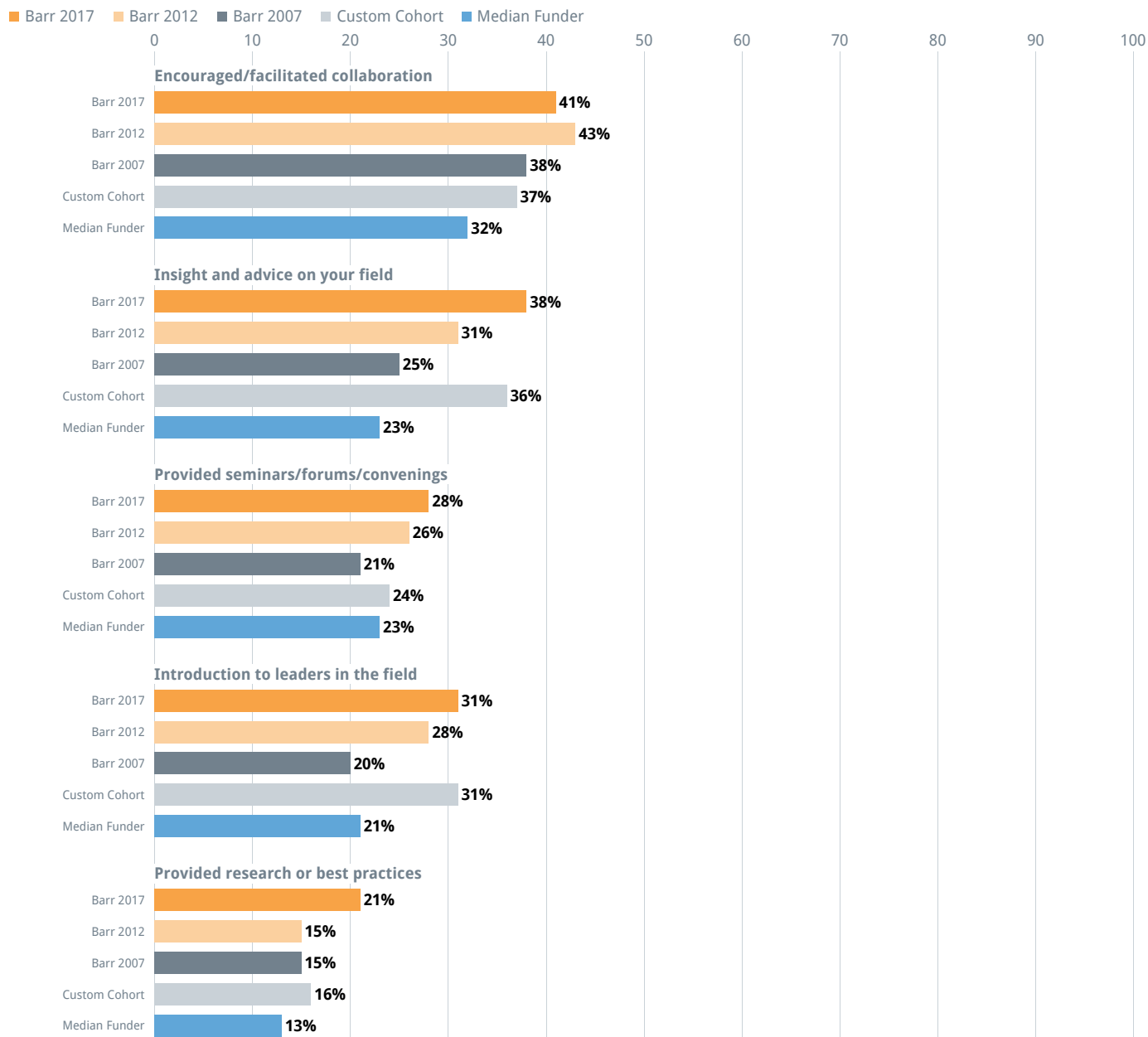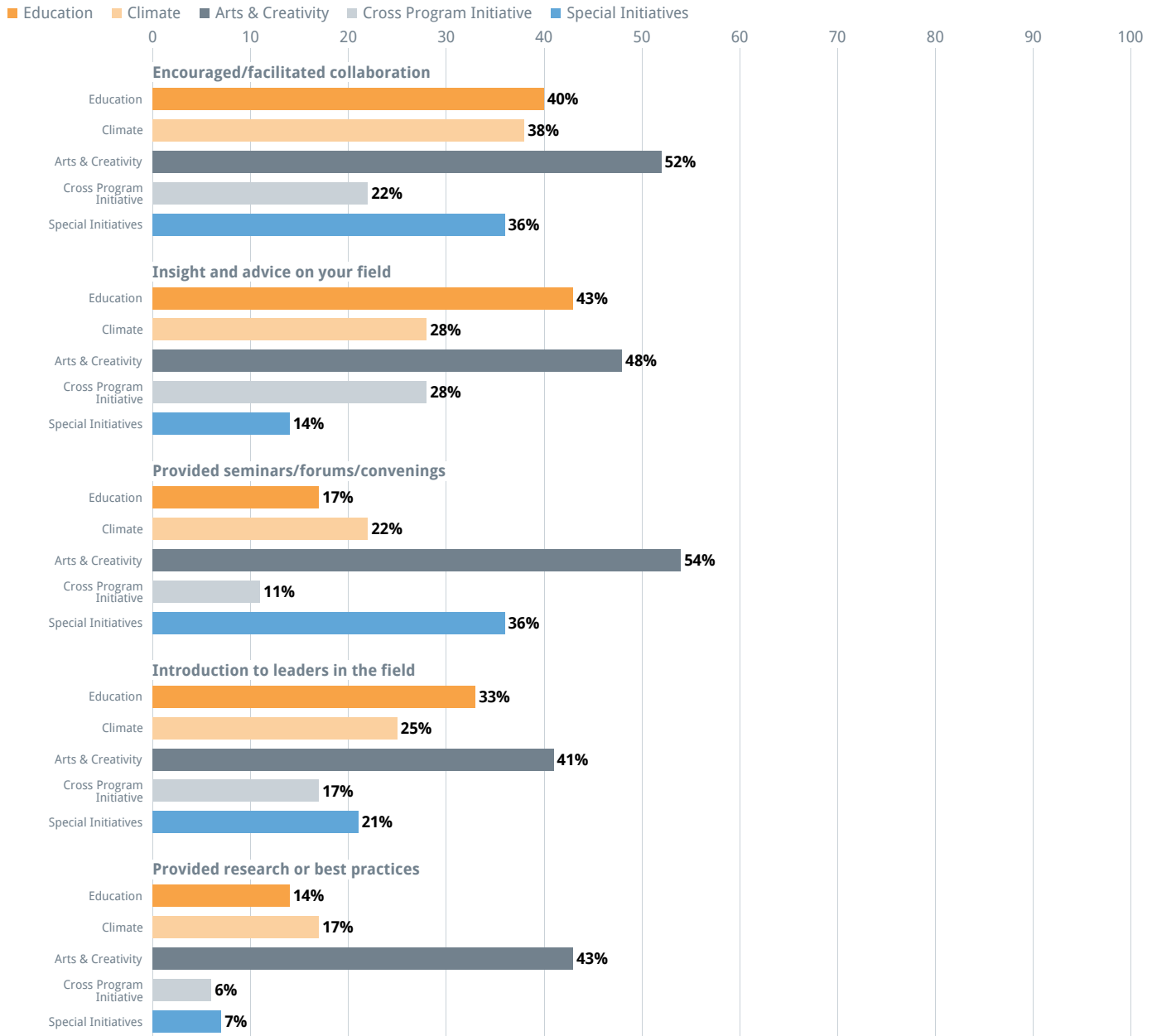## Percentage of Grantees that Received Management Assistance

Legend: ■ Barr 2017 ■ Barr 2012 ■ Barr 2007 ■ Custom Cohort ■ Median Funder

Strategic planning advice

Barr 2017	26%
Barr 2012	23%
Barr 2007	26%
Custom Cohort	24%
Median Funder	19%

General management advice

Barr 2017	11%
Barr 2012	7%
Barr 2007	15%
Custom Cohort	11%
Median Funder	11%

Development of performance measures

Barr 2017	14%
Barr 2012	20%
Barr 2007	12%
Custom Cohort	11%
Median Funder	11%

Financial planning/accounting

Barr 2017	11%
Barr 2012	9%
Barr 2007	7%
Custom Cohort	4%
Median Funder	5%

Percentage of Grantees that Received Management Assistance - By Subgroup

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Strategic planning advice

Education	31%
Climate	17%
Arts & Creativity	28%
Cross Program Initiative	33%
Special Initiatives	7%

General management advice

Education	13%
Climate	2%
Arts & Creativity	24%
Cross Program Initiative	6%
Special Initiatives	0%

Development of performance measures

Education	17%
Climate	8%
Arts & Creativity	20%
Cross Program Initiative	17%
Special Initiatives	0%

Financial planning/accounting

Education	10%
Climate	2%
Arts & Creativity	28%
Cross Program Initiative	0%
Special Initiatives	14%

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 the Foundation) associated with this funding."

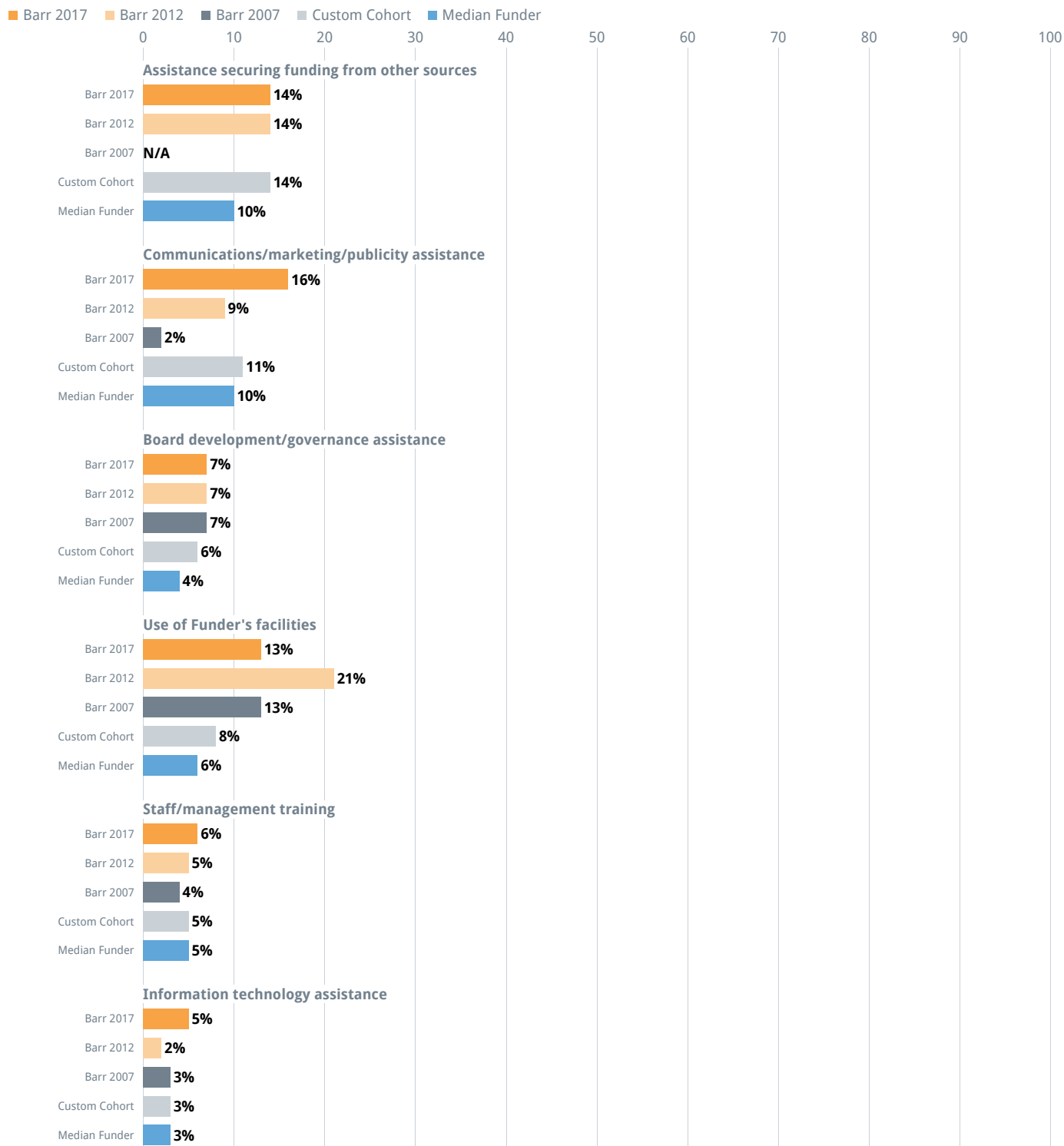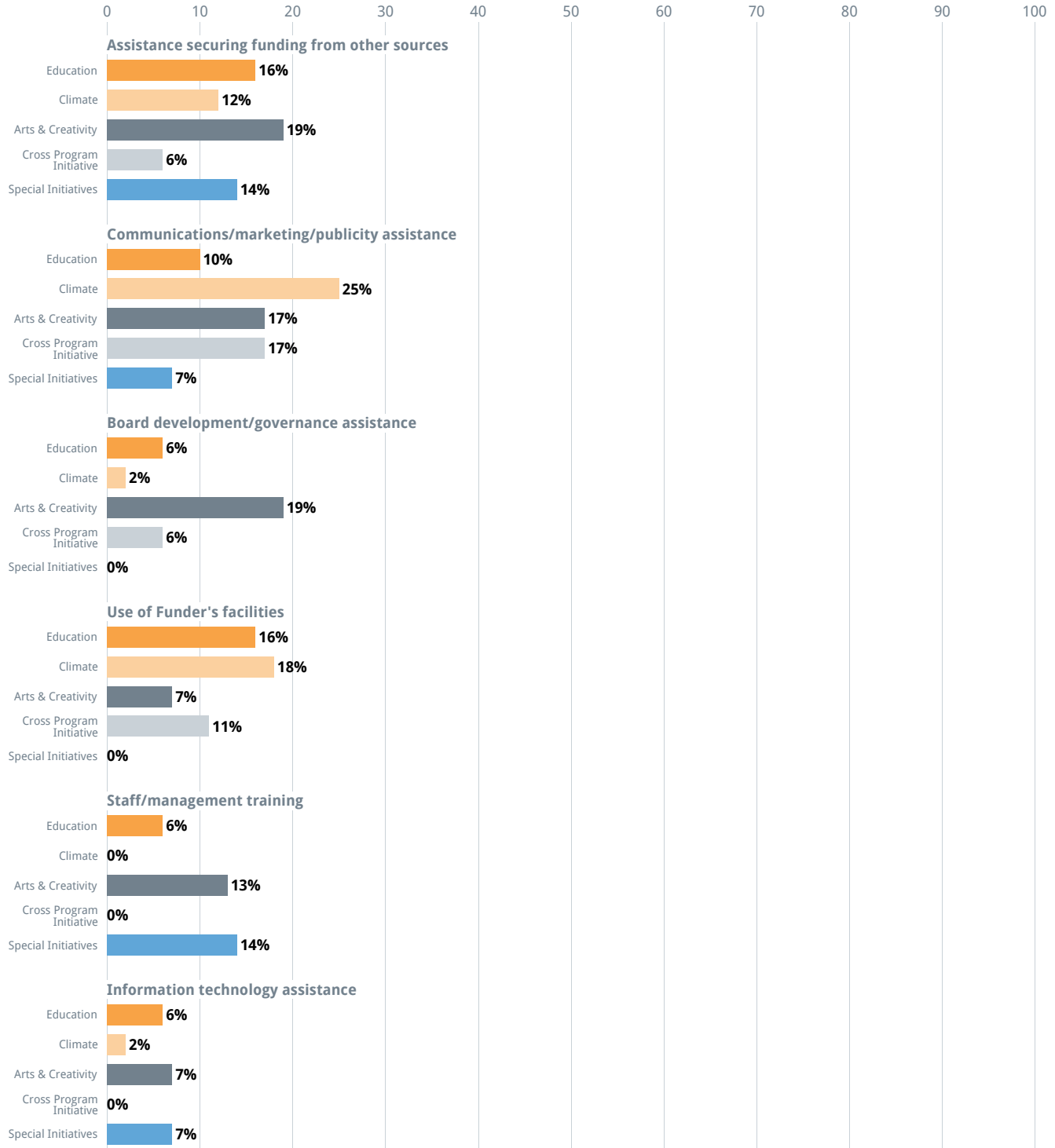## Percentage of Grantees that Received Field-Related Assistance

■ Barr 2017 ■ Barr 2012 ■ Barr 2007 ■ Custom Cohort ■ Median Funder

Encouraged/facilitated collaboration

Category	Value
Barr 2017	41%
Barr 2012	43%
Barr 2007	38%
Custom Cohort	37%
Median Funder	32%

Insight and advice on your field

Category	Value
Barr 2017	38%
Barr 2012	31%
Barr 2007	25%
Custom Cohort	36%
Median Funder	23%

Provided seminars/forums/convenings

Category	Value
Barr 2017	28%
Barr 2012	26%
Barr 2007	21%
Custom Cohort	24%
Median Funder	23%

Introduction to leaders in the field

Category	Value
Barr 2017	31%
Barr 2012	28%
Barr 2007	20%
Custom Cohort	31%
Median Funder	21%

Provided research or best practices

Category	Value
Barr 2017	21%
Barr 2012	15%
Barr 2007	15%
Custom Cohort	16%
Median Funder	13%

Percentage of Grantees that Received Field-Related Assistance - By Subgroup

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Encouraged/facilitated collaboration

Subgroup	%
Education	40%
Climate	38%
Arts & Creativity	52%
Cross Program Initiative	22%
Special Initiatives	36%

Insight and advice on your field

Subgroup	%
Education	43%
Climate	28%
Arts & Creativity	48%
Cross Program Initiative	28%
Special Initiatives	14%

Provided seminars/forums/convenings

Subgroup	%
Education	17%
Climate	22%
Arts & Creativity	54%
Cross Program Initiative	11%
Special Initiatives	36%

Introduction to leaders in the field

Subgroup	%
Education	33%
Climate	25%
Arts & Creativity	41%
Cross Program Initiative	17%
Special Initiatives	21%

Provided research or best practices

Subgroup	%
Education	14%
Climate	17%
Arts & Creativity	43%
Cross Program Initiative	6%
Special Initiatives	7%

Other Assistance Activities

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

Percentage of Grantees that Received Other Assistance

■ Barr 2017 ■ Barr 2012 ■ Barr 2007 ■ Custom Cohort ■ Median Funder

Assistance securing funding from other sources

Barr 2017	14%
Barr 2012	14%
Barr 2007	N/A
Custom Cohort	14%
Median Funder	10%

Communications/marketing/publicity assistance

Barr 2017	16%
Barr 2012	9%
Barr 2007	2%
Custom Cohort	11%
Median Funder	10%

Board development/governance assistance

Barr 2017	7%
Barr 2012	7%
Barr 2007	7%
Custom Cohort	6%
Median Funder	4%

Use of Funder's facilities

Barr 2017	13%
Barr 2012	21%
Barr 2007	13%
Custom Cohort	8%
Median Funder	6%

Staff/management training

Barr 2017	6%
Barr 2012	5%
Barr 2007	4%
Custom Cohort	5%
Median Funder	5%

Information technology assistance

Barr 2017	5%
Barr 2012	2%
Barr 2007	3%
Custom Cohort	3%
Median Funder	3%

Percentage of Grantees that Received Other Assistance - By Subgroup

Legend: ■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Axis: 0 10 20 30 40 50 60 70 80 90 100

Assistance securing funding from other sources

Subgroup	Value
Education	16%
Climate	12%
Arts & Creativity	19%
Cross Program Initiative	6%
Special Initiatives	14%

Communications/marketing/publicity assistance

Subgroup	Value
Education	10%
Climate	25%
Arts & Creativity	17%
Cross Program Initiative	17%
Special Initiatives	7%

Board development/governance assistance

Subgroup	Value
Education	6%
Climate	2%
Arts & Creativity	19%
Cross Program Initiative	6%
Special Initiatives	0%

Use of Funder's facilities

Subgroup	Value
Education	16%
Climate	18%
Arts & Creativity	7%
Cross Program Initiative	11%
Special Initiatives	0%

Staff/management training

Subgroup	Value
Education	6%
Climate	0%
Arts & Creativity	13%
Cross Program Initiative	0%
Special Initiatives	14%

Information technology assistance

Subgroup	Value
Education	6%
Climate	2%
Arts & Creativity	7%
Cross Program Initiative	0%
Special Initiatives	7%

Barr-Specific Questions

"In your direct experience with the Foundation, to what extent has it demonstrated each of the following Foundation values and approaches?" - Overall

1 = Does not demonstrate at all   **7** = Strongly demonstrates

■ Barr 2017

Long-term perspective (considering implications for future generations)
Barr 2017 — **5.97**

Curiosity (seeking new ideas and perspectives)
Barr 2017 — **5.80**

Collaboration (constructive partners with all sectors)
Barr 2017 — **5.72**

Comfort with risk (ambitious goals, comfort with risk of failure)
Barr 2017 — **5.65**

Use of a broad range of tools (e.g., capacity building, advocacy, communications, leadership)
Barr 2017 — **5.65**

Flexibility and nimbleness (responsive to circumstances, attentive to partners)
Barr 2017 — **5.64**

Focus on learning and sharing knowledge
Barr 2017 — **5.60**

Humility (respect for its partners; understanding that solutions reside with those it serves)
Barr 2017 — **5.56**

"In your direct experience with the Foundation, to what extent has it demonstrated each of the following Foundation values and approaches?" - By Subgroup

1 = Does not demonstrate at all   **7** = Strongly demonstrates

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Long-term perspective (considering implications for future generations)

Subgroup	Value
Education	6.17
Climate	6.14
Arts & Creativity	5.53
Cross Program Initiative	5.89
Special Initiatives	6.23

Curiosity (seeking new ideas and perspectives)

Subgroup	Value
Education	5.85
Climate	5.56
Arts & Creativity	5.90
Cross Program Initiative	5.83
Special Initiatives	6.31

Collaboration (constructive partners with all sectors)

Subgroup	Value
Education	5.74
Climate	5.75
Arts & Creativity	5.64
Cross Program Initiative	5.89
Special Initiatives	5.69

Comfort with risk (ambitious goals, comfort with risk of failure)

Subgroup	Value
Education	5.73
Climate	5.33
Arts & Creativity	5.78
Cross Program Initiative	5.89
Special Initiatives	6.08

Use of a broad range of tools (e.g., capacity building, advocacy, communications, leadership)

Subgroup	Value
Education	5.56
Climate	5.67
Arts & Creativity	5.76
Cross Program Initiative	5.56
Special Initiatives	5.85

Flexibility and nimbleness (responsive to circumstances, attentive to partners)

Subgroup	Value
Education	5.85
Climate	5.38
Arts & Creativity	5.34
Cross Program Initiative	6.06
Special Initiatives	6.38

Focus on learning and sharing knowledge

Subgroup	Value
Education	5.62
Climate	5.38
Arts & Creativity	5.74
Cross Program Initiative	5.61
Special Initiatives	6.08

Humility (respect for its partners; understanding that solutions reside with those it serves)

Category	Value
Education	5.93
Climate	5.33
Arts & Creativity	4.94
Cross Program Initiative	6.11
Special Initiatives	6.46

Barr Values and Approaches

Openness and Transparency: The Barr Foundation emphasizes the importance of clarity and openness about the Foundation's values, priorities, processes, and learning.

"To what extent have the Barr Foundation's communications (e.g., website, blogposts, newsletters, social media, etc.) increased the transparency of the Foundation's work?" - Overall

1 = Not at all   **7** = To a great extent
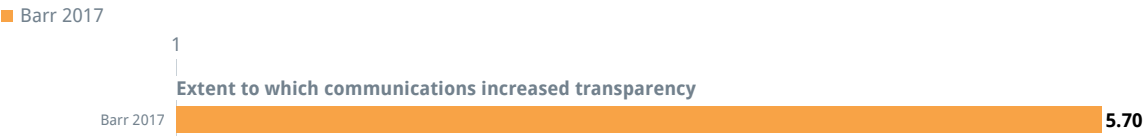
■ Barr 2017

Extent to which communications increased transparency

Barr 2017	5.70

"To what extent have the Barr Foundation's communications (e.g., website, blogposts, newsletters, social media, etc.) increased the transparency of the Foundation's work?" - By Subgroup

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

■ Education   ■ Climate   ■ Arts & Creativity   ■ Cross Program Initiative   ■ Special Initiatives

Extent to which communications increased transparency

Education	5.71
Climate	5.72
Arts & Creativity	5.40
Cross Program Initiative	6.06
Special Initiatives	6.38

58
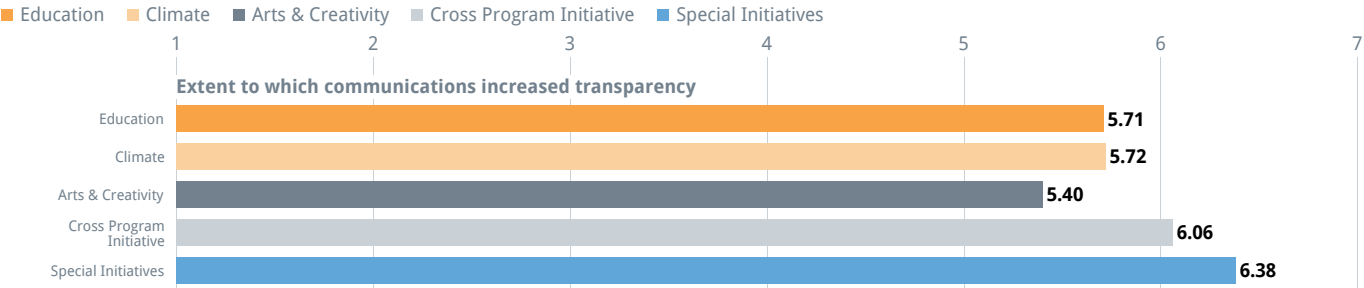
"To what extent has the Foundation demonstrated openness and transparency in its actions (e.g., your interactions with Barr Foundation staff)? " - Overall

1 = Not at all   **7** = To a great extent
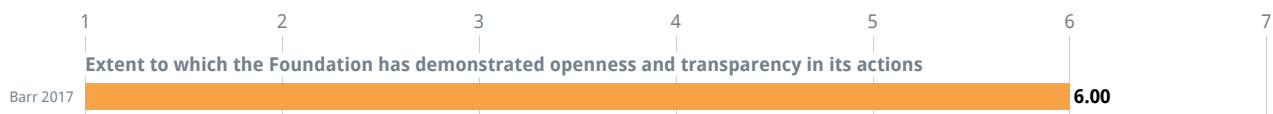
■ Barr 2017

Extent to which the Foundation has demonstrated openness and transparency in its actions

Barr 2017 — 6.00

"To what extent has the Foundation demonstrated openness and transparency in its actions (e.g., your interactions with Barr Foundation staff)? " - By Subgroup

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

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Extent to which the Foundation has demonstrated openness and transparency in its actions

Subgroup	Value
Education	6.22
Climate	5.80
Arts & Creativity	5.53
Cross Program Initiative	6.56
Special Initiatives	6.71
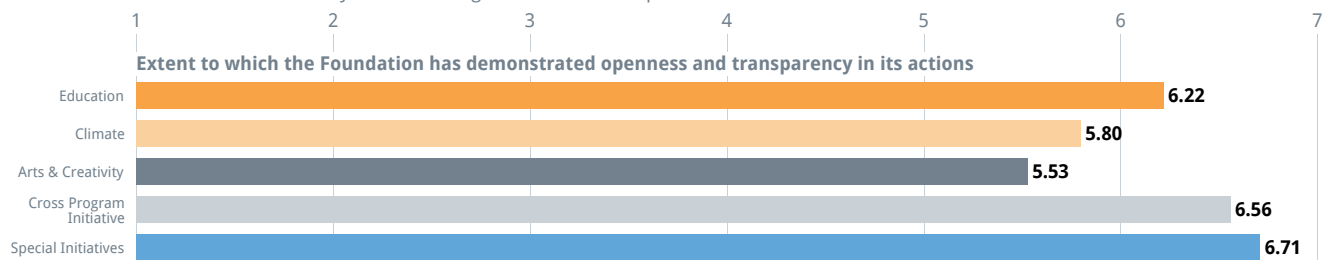
Leadership: Where appropriate and constructive, the Foundation seeks to use its voice and platform to advance the goals and priorities of the Foundation, its grantees, and its partners.

"To what extent have you seen the Foundation demonstrating this type of leadership?" - Overall

1 = Not at all   7 = To a great extent

■ Barr 2017

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

Demonstration of leadership

Barr 2017 — **5.79**
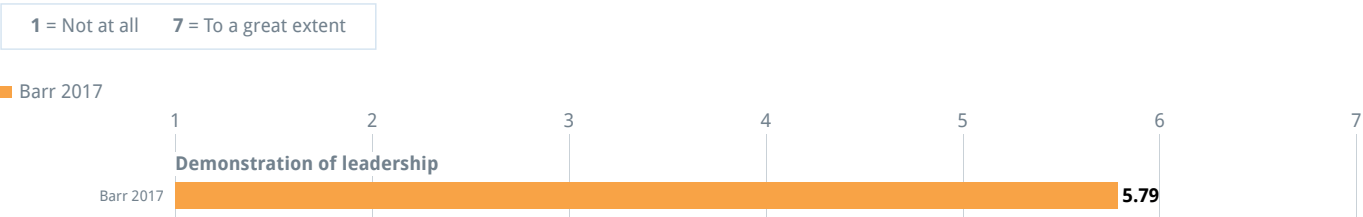
"To what extent have you seen the Foundation demonstrating this type of leadership?" - By Subgroup
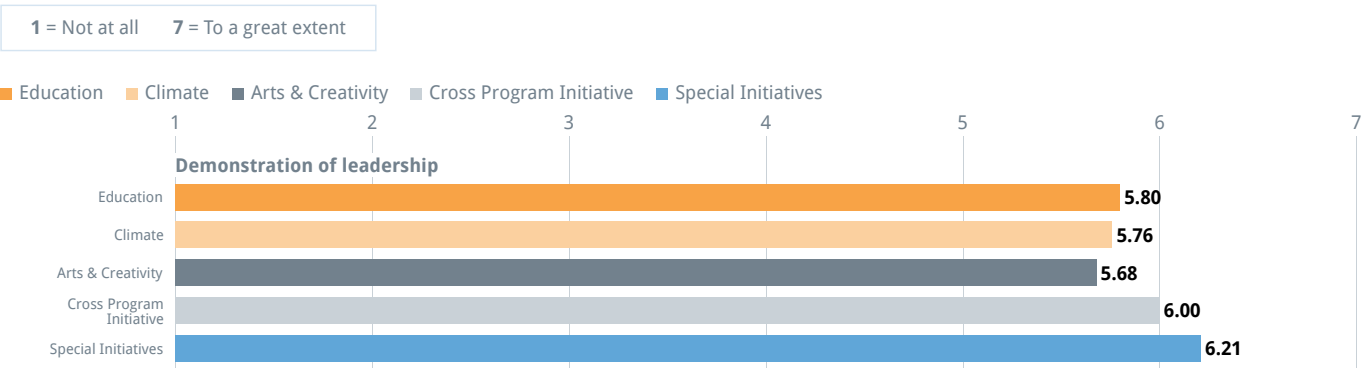
1 = Not at all   7 = To a great extent

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Demonstration of leadership

Subgroup	Value
Education	**5.80**
Climate	**5.76**
Arts & Creativity	**5.68**
Cross Program Initiative	**6.00**
Special Initiatives	**6.21**

"To what extent do you believe the Foundation's leadership has been helpful in advancing the goals and priorities of the Foundation, its grantees, and partners?" - Overall

1 = Not at all   **7** = To a great extent
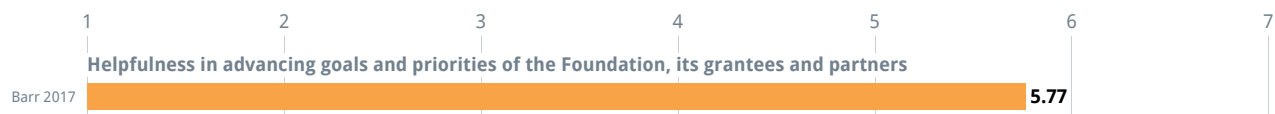
■ Barr 2017

Helpfulness in advancing goals and priorities of the Foundation, its grantees and partners

Barr 2017	**5.77**

"To what extent do you believe the Foundation's leadership has been helpful in advancing the goals and priorities of the Foundation, its grantees, and partners?" - By Subgroup

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

■ Education ■ Climate ■ Arts & Creativity ■ Cross Program Initiative ■ Special Initiatives

Helpfulness in advancing goals and priorities of the Foundation, its grantees and partners

Education	**5.81**
Climate	**5.66**
Arts & Creativity	**5.61**
Cross Program Initiative	**6.28**
Special Initiatives	**6.29**

61
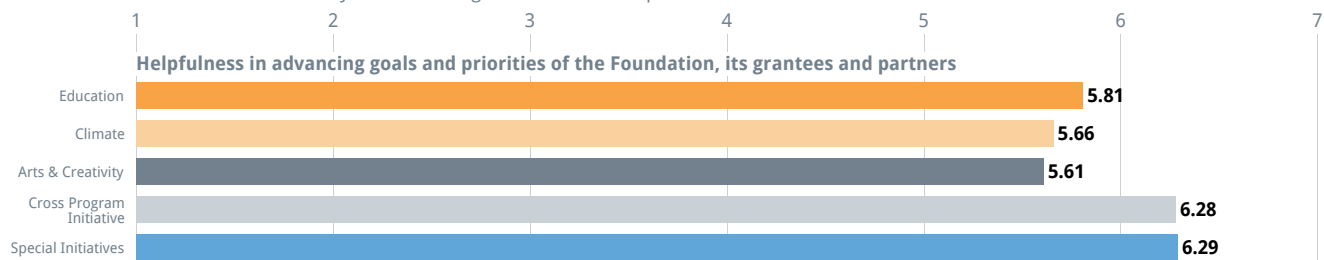
"How would you suggest the Foundation adjust the frequency and forcefulness of the way it uses its voice and platform to advance the goals and priorities of the Foundation, its grantees, and its partners?" - Overall

1 = Should greatly decrease   **4** = Should not change / Just right   **7** = Should greatly increase

■ Barr 2017

Forcefulness of its leadership efforts

Barr 2017 — **5.17**

Frequency with which Barr engages in these kinds of leadership activities

Barr 2017 — **5.15**

"How would you suggest the Foundation adjust the frequency and forcefulness of the way it uses its voice and platform to advance the goals and priorities of the Foundation, its grantees, and its partners?" - By Subgroup

1 = Should greatly decrease   **4** = Should not change / Just right   **7** = Should greatly increase

■ Education   ■ Climate   ■ Arts & Creativity   ■ Cross Program Initiative   ■ Special Initiatives

Forcefulness of its leadership efforts

Subgroup	Value
Education	5.09
Climate	5.20
Arts & Creativity	5.21
Cross Program Initiative	5.57
Special Initiatives	4.79

Frequency with which Barr engages in these kinds of leadership activities

Subgroup	Value
Education	5.07
Climate	5.24
Arts & Creativity	5.21
Cross Program Initiative	5.29
Special Initiatives	4.71
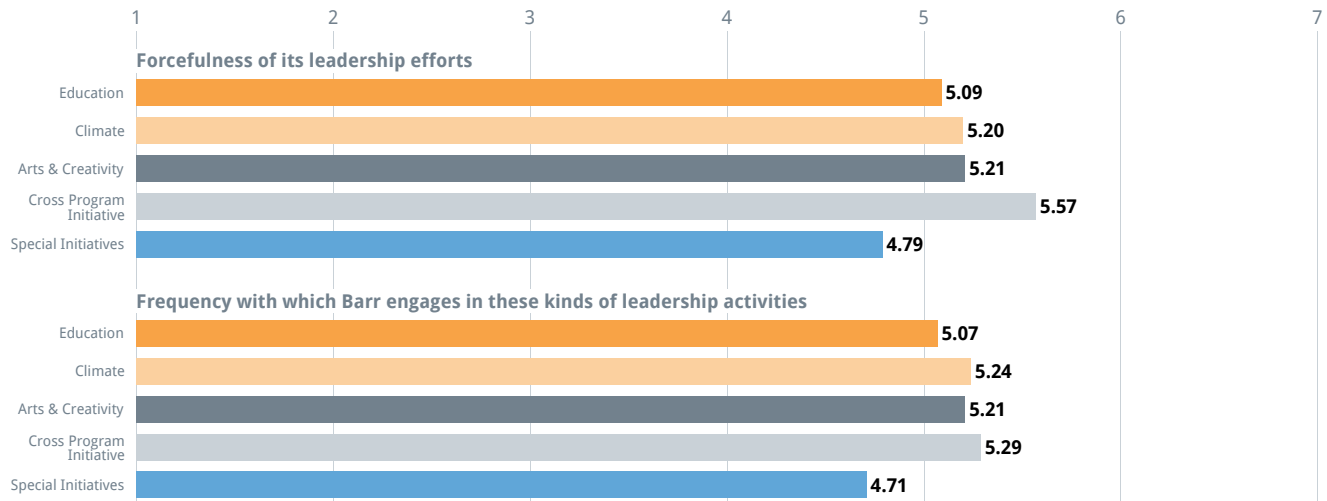
Exit Grantees

*The following questions were asked of exit grantees only.

Due to the relatively small size of this population, segmented data is not shown in order to protect the confidentiality of respondents.

"How clearly did the Foundation communicate the following aspects of the transition to you?" - Overall

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

■ Barr 2017

The occurrence of the transition in Barr program strategies
Barr 2017 — **5.53**

The timeline for the transition
Barr 2017 — **5.35**

The implications of the transition for your organization
Barr 2017 — **5.35**

"For any of the following types of support you received from the Foundation, please rate how helpful it was to sustaining and strengthening the capacity of your organization to do its work effectively." - Overall

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

■ Barr 2017

	1	2	3	4	5	6	7

Assistance with strategic/sustainability/ business planning for your organization
Barr 2017 — **5.45**

Grants for general operating support during the transition
Barr 2017 — **5.25**

Assistance with building evaluation capacity to improve your programmatic work
Barr 2017 — **4.92**

Assistance with financial planning
Barr 2017 — **4.63**

Assistance with fundraising and development
Barr 2017 — **4.60**

Assistance with strategic communications capacity and skills
Barr 2017 — **4.50**

Assistance with operational planning
Barr 2017 — **4.33**

Assistance with building advocacy capacity
Barr 2017 — **3.89**

"Please think about the outcomes and impact that were the focus of your Barr Foundation grant. Which of the following statements best describes how, if at all, your organization is planning to continue to focus on those impact and outcomes after this grant period?"	Barr 2017
The intended outcomes of the grant-funded work will have been achieved and there is no need to continue related efforts.	0%
We plan to continue to focus on these outcomes by integrating that focus into existing, funded programs.	12%
We plan to continue to focus on these outcomes and have secured the resources to allow us to do so.	24%
We hope to continue to focus on these outcomes and are still seeking resources to allow us to do so.	65%
We will not continue to focus on these outcomes. We would have liked to do so but were unable to secure the resources necessary.	0%
We do not yet know whether we will seek to continue focus on these outcomes.	0%

Grantee Suggestions for the Foundation

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

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 comments have been edited or deleted to protect the confidentiality of respondents.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Quality of Interactions	26%
Non-Monetary Assistance	25%
Grantmaking Characteristics	14%
Impact on and Understanding of Grantees' Fields	12%
Administrative Processes	11%
Clarity and Consistency of Communications	10%
Other	3%

Selected Comments

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

Quality of Interactions (26% N=29)

- More Frequent Contact (N = 6)

    - "We hope the Foundation will encourage program officers to be more communicative with organizations and to keep and open dialogue about the work."
    - "We would welcome the chance to have more open conversations with Foundation staff."

- Staff Caseload (N = 6)

    - "Staff seems stretched thin. I wonder if they are carrying too large a load. It would be great if they had some breathing room and were able to engage a little less frantically."
    - "Staff seems stretched a little thin, so can at times be overwhelmed. Might be worth thinking about how large a load of grantees (and potential grantees) each staff member carries, so that they are able to devote appropriate time to each and still be able to practice self-care"

- Transparency (N = 4)

    - "It would also be helpful for us to understand the Foundation's perspective on next steps, where this, or other work we are doing, is aligned with their priorities, and where we might collaborate next, if possible. The process could be open and honest and would greatly reduce any lack of transparency."

- More Site Visits (N = 3)

    - "Make regular site visits."

- Other (N = 3)

- Contact Change (N = 2)

    - "Our new executive team had a new program officer who left the foundation after less than a year. It created an unusual and difficult situation."

- Responsiveness (N = 2)

    - "Having a responsible staff person to work with makes a world of difference in terms of being able to collaborate with the foundation."

- Trust Grantees (N = 2)

    - "Put more faith in its grantees to do the work."

- Understanding (N = 1)

Non-Monetary Assistance (25% N=28)

- Grantee Collaboration (N = 8)

    - "Connect grantees more effectively to each other with more transparency."
    - "We would like to coordinate with other grantees so work isn't being duplicated."
    - "Create incentives for grantees to work collaboratively on broad goals rather than compete for funds."

- Grantee Convenings (N = 8)

    - "Funders have immense power to serve as conveners and encourage organizations that compete for resources to work as collaborators. Barr could serve this role in Boston."
    - "More of a role as a convener bringing grantees (and others, perhaps) together -- including across silos."
    - "It would be wonderful to have the Barr Foundation host a birds-of-a-feather gathering for grantees at the Barr Foundation's offices in Boston to share their work, learn from each other and build a network together in our respective field."

- Other (N = 5)

- Assistance Securing Funding from Other Resources (N = 5)

    - "Offer Barr resources and relationships to groups the Foundation funds to help leverage additional funding, so we can sustain our efforts and increase our capacity to be even more effective."
    - "The funding alone is never enough. The Foundation can make greater impact on grantees by connecting them to other resources, including other grantors"

- Training (N = 2)

    - "Have a small additional fund for other related requests like trainings."

Grantmaking Characteristics (14% N=16)

- Longer Grants (N = 8)

    - "We would be far more effective if we were able to secure funding for multi-year strategies with clear goals and benchmarks. Having to start and stop our work based on funding availability has been very disruptive and has made it difficult to build our program."
    - "Making sure that funding is ongoing without gaps would give our organization greater stability."
    - "More longer term grants"

- General Support (N = 6)

    - "Being less critical of general operating costs will allow parties to stay in the space."
    - "Consider the impact and needs of grantees when it comes to core operating support."

- Larger Grants (N = 1)

- Other (N = 1)

Impact on and Understanding of Grantees' Fields (12% N=14)

- Funding Focus (N = 13)

    - "Do a thorough analysis of leverage points for climate and transportation, and make sure resources are devoted to the most promising ones."
    - "I'd love to see the foundation invest more deeply in grassroots organizing."
    - "Provide a progressive balance to TBF's conservative stance. Support more grassroots organizing and experimentation."

- Public Policy (N = 1)

Administrative Processes (11% N=12)

- Clarify Guidelines (N = 4)

    - "The Foundation could provide greater clarity on their expectations around reporting for multi-year commitments."

- Other (N = 3)

- Lengthen Time Needed to Submit Reports (N = 3)

    - "The turnaround time on applications could ultimately be a little short."

- More Feedback (N = 2)

    - "Feedback on what to focus on to receive increased funding."

Clarity and Consistency of Communications (10% N=11)

- Clarity of Communications (N = 10)

    - "[Clarify] sense of my project fitting into the Foundation's strategy and goals."
    - "It would be helpful to have more of a give and take about what the foundation is interested in within the area in which we were granted, and what they hoped to see us work on."
    - "More clarity around strategy for cross-program initiatives"

- Website (N = 1)

Other (3% N=3)

- Other (N = 3)

Contextual Data

Grantmaking Characteristics

Length of Grant Awarded	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Average grant length	2.2 years	2.8 years	2.2 years	2.1 years	2.2 years

Length of Grant Awarded	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
1 year	31%	17%	35%	46%	33%
2 years	37%	29%	24%	24%	37%
3 years	21%	41%	31%	18%	20%
4 years	2%	5%	5%	4%	4%
5 or more years	9%	8%	4%	8%	6%

Type of Grant Awarded	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Program / Project Support	58%	60%	57%	65%	65%
General Operating / Core Support	29%	31%	28%	21%	27%
Capital Support: Building / Renovation / Endowment Support / Other	4%	2%	9%	5%	2%
Technical Assistance / Capacity Building	9%	6%	5%	4%	5%
Scholarship / Fellowship	0%	0%	2%	2%	1%
Event / Sponsorship Funding	0%	1%	0%	2%	0%

Grantmaking Characteristics - By Subgroup

Length of Grant Awarded (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Average grant length	2.1 years	1.8 years	2.7 years	2.3 years	2.3 years

Length of Grant Awarded (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
1 year	34%	32%	28%	28%	21%
2 years	34%	61%	24%	28%	21%
3 years	24%	3%	20%	39%	57%
4 years	4%	2%	0%	0%	0%
5 or more years	3%	2%	28%	6%	0%

Type of Grant Awarded (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Program / Project Support	59%	88%	39%	17%	50%
General Operating / Core Support	27%	10%	41%	67%	36%
Capital Support: Building / Renovation / Endowment Support / Other	6%	0%	6%	0%	0%
Technical Assistance / Capacity Building	7%	2%	15%	17%	14%
Scholarship / Fellowship	1%	0%	0%	0%	0%
Event / Sponsorship Funding	0%	0%	0%	0%	0%

Grant Size

Grant Amount Awarded	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Median grant size	$300K	$237.5K	$150K	$84.6K	$187K

Grant Amount Awarded	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Less than $10K	0%	3%	5%	10%	1%
$10K - $24K	0%	4%	15%	13%	4%
$25K - $49K	5%	8%	7%	13%	10%
$50K - $99K	6%	13%	10%	16%	16%
$100K - $149K	13%	4%	10%	9%	9%
$150K - $299K	26%	21%	21%	16%	23%
$300K - $499K	20%	20%	17%	8%	13%
$500K - $999K	15%	19%	7%	7%	12%
$1MM and above	15%	8%	6%	8%	11%

Median Percent of Budget Funded by Grant (Annualized)	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	4%	6%	3%	4%	4%

Grant Size - By Subgroup

Grant Amount Awarded (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Median grant size	$300K	$250K	$218.8K	$275K	$262.5K

Grant Amount Awarded (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Less than $10K	0%	2%	0%	0%	0%
$10K - $24K	0%	0%	0%	0%	0%
$25K - $49K	0%	2%	13%	11%	0%
$50K - $99K	4%	8%	6%	6%	0%
$100K - $149K	10%	14%	13%	17%	14%
$150K - $299K	29%	27%	21%	17%	36%
$300K - $499K	27%	17%	12%	22%	29%
$500K - $999K	16%	19%	15%	17%	0%
$1MM and above	14%	12%	19%	11%	21%

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Size of grant relative to size of grantee budget	6%	6%	3%	4%	3%

Grantee Characteristics

Operating Budget of Grantee Organization	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Median Budget	$3M	$1.5M	$1.8M	$1.5M	$2M

Operating Budget of Grantee Organization	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
<$100K	0%	5%	2%	8%	3%
$100K - $499K	5%	21%	19%	19%	14%
$500K - $999K	15%	15%	13%	14%	13%
$1MM - $4.9MM	39%	33%	37%	30%	36%
$5MM - $24MM	28%	21%	22%	18%	21%
>=$25MM	12%	5%	8%	11%	12%

Grantee Characteristics - By Subgroup

Operating Budget of Grantee Organization (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Median Budget	$4.2M	$2.3M	$3.2M	$3M	$5.5M

Operating Budget of Grantee Organization (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
<$100K	0%	0%	0%	6%	0%
$100K - $499K	10%	4%	0%	6%	7%
$500K - $999K	7%	23%	15%	11%	21%
$1MM - $4.9MM	37%	41%	46%	33%	21%
$5MM - $24MM	31%	18%	31%	39%	29%
>=$25MM	14%	14%	8%	6%	21%

Funding Relationship

Pattern of Grantees' Funding Relationship with the Foundation	Barr 2017	Barr 2012	Average Funder	Custom Cohort
First grant received from the Foundation	37%	15%	29%	24%
Consistent funding in the past	45%	63%	53%	58%
Inconsistent funding in the past	18%	23%	19%	18%

Funding Status and Grantees Previously Declined Funding	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	83%	60%	88%	80%	87%
Percent of grantees previously declined funding by the Foundation	28%	37%	19%	31%	26%

Funding Relationship - By Subgroup

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
First grant received from the Foundation	43%	18%	45%	35%	69%
Consistent funding in the past	42%	62%	40%	41%	8%
Inconsistent funding in the past	15%	20%	15%	24%	23%

Funding Status and Grantees Previously Declined Funding (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Percent of grantees currently receiving funding from the Foundation	91%	87%	60%	94%	100%
Percent of grantees previously declined funding by the Foundation	18%	33%	36%	29%	18%

Grantee Demographics

Job Title of Respondents	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Executive Director	60%	63%	49%	47%	49%
Other Senior Management	16%	10%	13%	15%	17%
Project Director	6%	3%	11%	12%	12%
Development Director	7%	10%	11%	8%	8%
Other Development Staff	6%	8%	12%	7%	7%
Volunteer	0%	0%	0%	1%	0%
Other	6%	8%	5%	9%	6%

Gender of Respondents	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
Female	54%	59%	63%	64%	58%
Male	46%	41%	37%	36%	42%

Race/Ethnicity of Respondents	Barr 2017	Barr 2012	Barr 2007	Average Funder	Custom Cohort
African-American/Black	4%	14%	10%	7%	8%
American Indian/Alaskan Native	0%	0%	0%	1%	1%
Asian (incl. Indian subcontinent)	6%	4%	4%	4%	5%
Caucasian/White	80%	71%	77%	80%	74%
Hispanic/Latino	6%	8%	4%	5%	7%
Multi-racial	3%	2%	3%	3%	4%
Pacific Islander	1%	0%	0%	0%	0%
Other	1%	1%	2%	1%	1%

Funder Characteristics

Financial Information	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Total assets	$1700M	$1134.5M	$1019.3M	$213M	$1591.9M
Total giving	$71.9M	$53.5M	$39.9M	$15.3M	$72.3M

Funder Staffing	Barr 2017	Barr 2012	Barr 2007	Median Funder	Custom Cohort
Total staff (FTEs)	29	21	10	15	44
Percent of staff who are program staff	52%	33%	60%	40%	47%

Grantmaking Processes	Barr 2017	Barr 2012	Median Funder	Custom Cohort
Proportion of grants that are proactive	100%	100%	46%	85%
Proportion of grantmaking dollars that are proactive	100%	100%	65%	90%

Response to 2016 Elections

*The following questions were recently added to the grantee survey and depict comparative data from 23 funders in the dataset.

"What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?"	Barr 2017	Average Funder
Generally positive impact	7%	8%
No impact/Neutral	15%	15%
Generally negative impact	78%	77%

"Has your organization modified or made plans to modify your work in any of the following areas as a result of the changing U.S. political landscape?"

■ Barr 2017   ■ Median Funder

Your organization's programmatic goals
- Barr 2017: 39%
- Median Funder: 34%

Your organization's approaches to achieving impact
- Barr 2017: 50%
- Median Funder: 38%

Your organization's fundraising approach
- Barr 2017: 44%
- Median Funder: 45%

The types of services you provide to beneficiaries
- Barr 2017: 28%
- Median Funder: 27%

None of the above: my organization has not made or considered making any modifications to our work.
- Barr 2017: 27%
- Median Funder: 32%
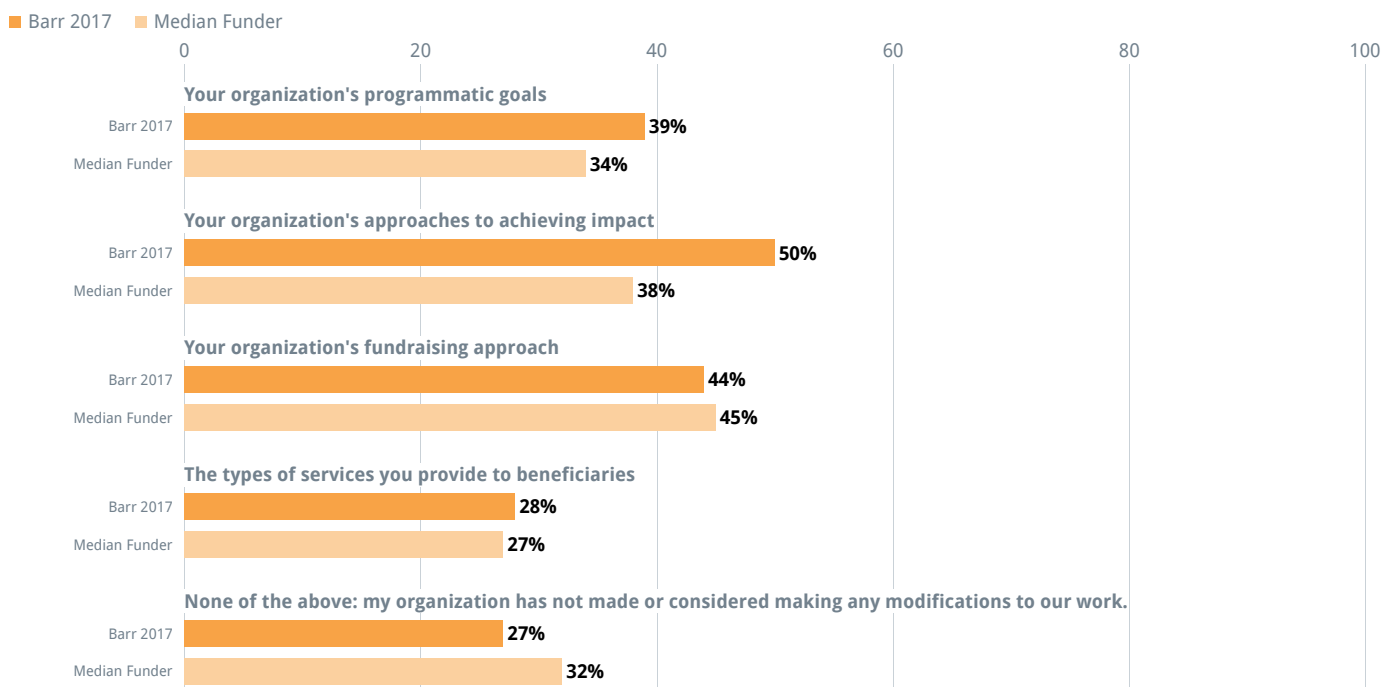
(If grantees indicated making at least one modification above)

"In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas:"

Direct service work	Barr 2017	Average Funder
Increasing emphasis	39%	41%
No change in emphasis	59%	57%
Decreasing emphasis	2%	2%

Policy/advocacy work	Barr 2017	Average Funder
Increasing emphasis	78%	71%
No change in emphasis	22%	28%
Decreasing emphasis	0%	1%

Collaboration with other nonprofit organizations	Barr 2017	Average Funder
Increasing emphasis	73%	74%
No change in emphasis	27%	26%
Decreasing emphasis	0%	0%

Collaboration with other sectors	Barr 2017	Average Funder
Increasing emphasis	72%	70%
No change in emphasis	27%	30%
Decreasing emphasis	1%	0%

Local community engagement efforts	Barr 2017	Average Funder
Increasing emphasis	78%	75%
No change in emphasis	22%	24%
Decreasing emphasis	0%	1%

Collecting input from your beneficiaries	Barr 2017	Average Funder
Increasing emphasis	59%	60%
No change in emphasis	41%	39%
Decreasing emphasis	0%	0%

"Has the changing U.S. political landscape had any impact on your organization's ability to raise funds in support of your work?"

Ability to raise funds from foundations	Barr 2017	Average Funder
Generally positive impact	18%	18%
No impact/Neutral	65%	63%
Generally negative impact	16%	19%

Ability to raise funds from other sources (e.g., public funders, individual donors)	Barr 2017	Average Funder
Generally positive impact	25%	22%
No impact/Neutral	48%	47%
Generally negative impact	27%	31%

"Have you received any of the following communications from the Foundation related to the changing U.S. political landscape?"

Public communication from the Foundation (e.g., blog post, mass email, newsletter)	Barr 2017	Average Funder
Yes	61%	36%
No, and I would like to receive this communication	28%	46%
No, and I don't think this communication would be helpful	11%	18%

Communication with your program officer about your organization's work	Barr 2017	Average Funder
Yes	39%	32%
No, and I would like to receive this communication	38%	49%
No, and I don't think this communication would be helpful	23%	19%

Communication with your program officer about the Foundation's work	Barr 2017	Average Funder
Yes	40%	31%
No, and I would like to receive this communication	49%	56%
No, and I don't think this communication would be helpful	10%	13%

Response to 2016 Elections - By Subgroup

*The following questions were recently added to the grantee survey and depict comparative data from 23 funders in the dataset.

"What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?" (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Generally positive impact	0%	12%	7%	18%	8%
No impact/Neutral	20%	10%	17%	36%	0%
Generally negative impact	80%	78%	76%	45%	92%

"Has your organization modified or made plans to modify your work in any of the following areas as a result of the changing U.S. political landscape?" - By Subgroup

Legend: Education, Climate, Arts & Creativity, Cross Program Initiative, Special Initiatives

Your organization's programmatic goals
- Education: 19%
- Climate: 58%
- Arts & Creativity: 34%
- Cross Program Initiative: 47%
- Special Initiatives: 57%

Your organization's approaches to achieving impact
- Education: 34%
- Climate: 78%
- Arts & Creativity: 34%
- Cross Program Initiative: 53%
- Special Initiatives: 71%

Your organization's fundraising approach
- Education: 32%
- Climate: 56%
- Arts & Creativity: 44%
- Cross Program Initiative: 12%
- Special Initiatives: 79%

The types of services you provide to beneficiaries
- Education: 22%
- Climate: 25%
- Arts & Creativity: 24%
- Cross Program Initiative: 47%
- Special Initiatives: 50%

None of the above: my organization has not made or considered making any modifications to our work.
- Education: 41%
- Climate: 12%
- Arts & Creativity: 30%
- Cross Program Initiative: 29%
- Special Initiatives: 7%

(If grantees indicated making at least one modification above)

"In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas:"

Direct service work (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Increasing emphasis	19%	44%	52%	33%	63%
No change in emphasis	81%	50%	48%	50%	38%
Decreasing emphasis	0%	6%	0%	17%	0%

Policy/advocacy work (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Increasing emphasis	72%	74%	81%	86%	89%
No change in emphasis	28%	26%	19%	14%	11%
Decreasing emphasis	0%	0%	0%	0%	0%

Collaboration with other nonprofit organizations (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Increasing emphasis	72%	70%	80%	83%	69%
No change in emphasis	28%	30%	20%	17%	31%
Decreasing emphasis	0%	0%	0%	0%	0%

Collaboration with other sectors (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Increasing emphasis	62%	84%	77%	64%	50%
No change in emphasis	36%	16%	23%	36%	50%
Decreasing emphasis	3%	0%	0%	0%	0%

Local community engagement efforts (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Increasing emphasis	74%	72%	86%	75%	85%
No change in emphasis	26%	28%	14%	25%	15%
Decreasing emphasis	0%	0%	0%	0%	0%

Collecting input from your beneficiaries (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Increasing emphasis	55%	46%	66%	83%	75%
No change in emphasis	45%	54%	34%	17%	25%
Decreasing emphasis	0%	0%	0%	0%	0%

"Has the changing U.S. political landscape had any impact on your organization's ability to raise funds in support of your work?"

Ability to raise funds from foundations (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Generally positive impact	4%	30%	3%	17%	77%
No impact/Neutral	84%	52%	67%	83%	23%
Generally negative impact	12%	18%	31%	0%	0%

Ability to raise funds from other sources (e.g., public funders, individual donors) (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Generally positive impact	9%	38%	16%	21%	75%
No impact/Neutral	62%	31%	54%	71%	8%
Generally negative impact	28%	31%	30%	7%	17%

"Have you received any of the following communications from the Foundation related to the changing U.S. political landscape?"

Public communication from the Foundation (e.g., blog post, mass email, newsletter) (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Yes	40%	70%	67%	75%	92%
No, and I would like to receive this communication	44%	26%	21%	17%	0%
No, and I don't think this communication would be helpful	16%	5%	12%	8%	8%

Communication with your program officer about your organization's work (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Yes	26%	42%	30%	62%	83%
No, and I would like to receive this communication	43%	44%	39%	15%	17%
No, and I don't think this communication would be helpful	30%	13%	32%	23%	0%

Communication with your program officer about the Foundation's work (By Subgroup)	Education	Climate	Arts & Creativity	Cross Program Initiative	Special Initiatives
Yes	35%	34%	38%	46%	83%
No, and I would like to receive this communication	47%	61%	52%	46%	17%
No, and I don't think this communication would be helpful	18%	5%	10%	8%	0%

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 Barr's grantee survey was 220.

Question Text	Count of Responses
Overall, how would you rate the Foundation's impact on your field?	204
How well does the Foundation understand the field in which you work?	208
To what extent has the Foundation advanced the state of knowledge in your field?	186
To what extent has the Foundation affected public policy in your field?	159
Overall, how would you rate the Foundation's impact on your local community?	188
How well does the Foundation understand the local community in which you work?	186
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	210
How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?	194
How well does the Foundation understand your organization's strategy and goals?	212
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	213
Who most frequently initiated the contact you had with your program officer during this grant?	220
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	204
Has your main contact at the Foundation changed in the past six months?	216
Did you submit a proposal to the Foundation for this grant?	217
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?	210
How involved was Foundation staff in the development of your grant proposal?	209
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	192
Have you ever been declined funding from the Foundation?	185
Are you currently receiving funding from the Foundation?	218
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	213
How well does the Foundation understand your intended beneficiaries' needs?	207
To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	203
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About CEP and Contact Information

Mission:

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

Vision:

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

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

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

About the GPR

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

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

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