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# St. David's Foundation 2024 Grantee Perception Report

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THE CENTER FOR  
EFFECTIVE PHILANTHROPY

675 Massachusetts Avenue  
7th Floor  
Cambridge, MA 02139  
617-492-0800

131 Steuart Street  
Suite 501  
San Francisco, CA 94105  
415-391-3070

[cep.org](https://cep.org)

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

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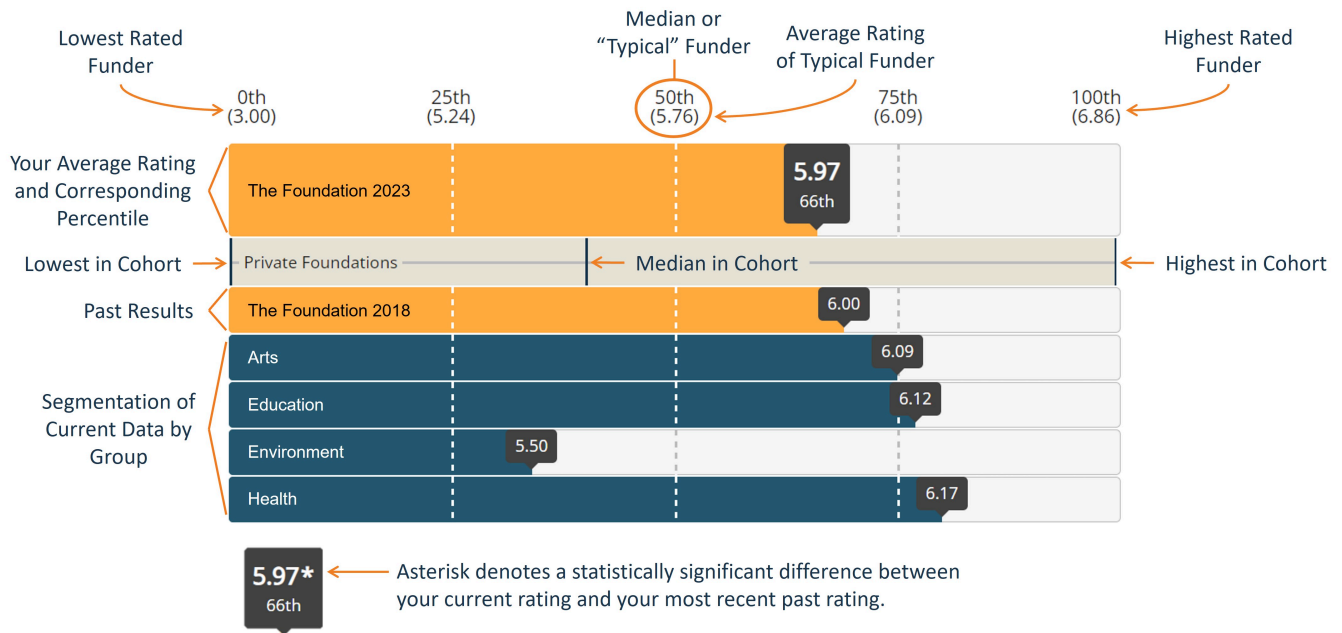
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## Survey Information

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 ten responses.

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
St. David's 2024	April and May 2024	189	105	56%
St. David's 2021	September and October 2021	283	180	64%
St. David's 2018	February and March 2018	122	95	78%
St. David's 2015	February and March 2015	76	58	76%

Throughout this report, St. David's Foundation's ("St. David's" or "the Foundation's") survey results are compared to CEP's broader dataset of more than 60,000 grantee responses from over 350 funders built up over more than a decade of grantee surveys. A list of some funders who have recently participated in the GPR can be found at <https://cep.org/gpr-participants/>.

### Subgroups

In addition to showing St. David's overall ratings, this report shows ratings segmented by POC-Led. The online version of this report also shows ratings segmented by Relationship, Funding Area, Respondent Gender, and Respondent Person of Color Identity.

POC-Led	Number of Responses
Majority POC-Led	27
Not Majority POC-Led	59
Not Available	19

Relationship	Number of Responses
Newer (2021+)	26
Existing	79

Funding Area	Number of Responses
Children	14
Older Adults	19
Rural	15
Clinics	18
Innovation	17
Other	22

Respondent Gender	Number of Responses
Identifies as a Man	12
Identifies as a Woman	88

Respondent Person of Color Identity	Number of Responses
Does not identify as a Person of Color	71
Identifies as a Person of Color	32

### Customized Cohorts

St. David's selected 2 sets of 11 funders to create smaller comparison groups to compare the Foundation against.

#### Regional Private/Conversion Funders of Similar Size

Barr Foundation
Crankstart Foundation
Crown Family Philanthropies
Houston Endowment
Missouri Foundation for Health
St. David's Foundation
The California Endowment
The California Wellness Foundation
The Colorado Health Foundation
The Duke Endowment
The William Penn Foundation

#### National/International Private Funders with Largest Assets

Andrew W. Mellon Foundation
Carnegie Corporation of New York
Gordon and Betty Moore Foundation
Harry and Jeanette Weinberg Foundation
Robert Wood Johnson Foundation
St. David's Foundation
The Annie E. Casey Foundation
The Kresge Foundation
The Leona M. and Harry B. Helmsley Charitable Trust
The McKnight Foundation

National/International Private Funders with Largest Assets

W.K. Kellogg Foundation

## Key Ratings Summary

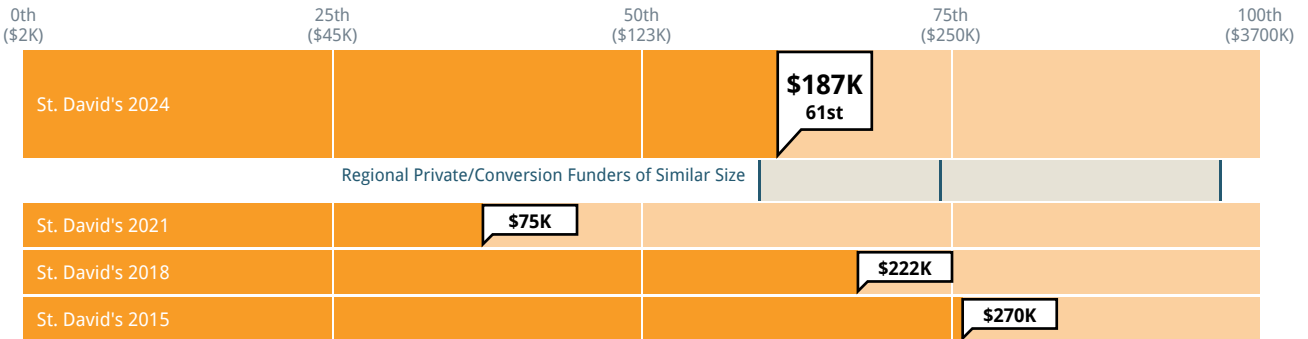
The following chart highlights a selection of St. David's Foundation's key results. Each of these data points corresponds to an individual survey measure that is displayed with additional detail in the subsequent pages of this report.



## Grantmaking Characteristics

Funders 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.

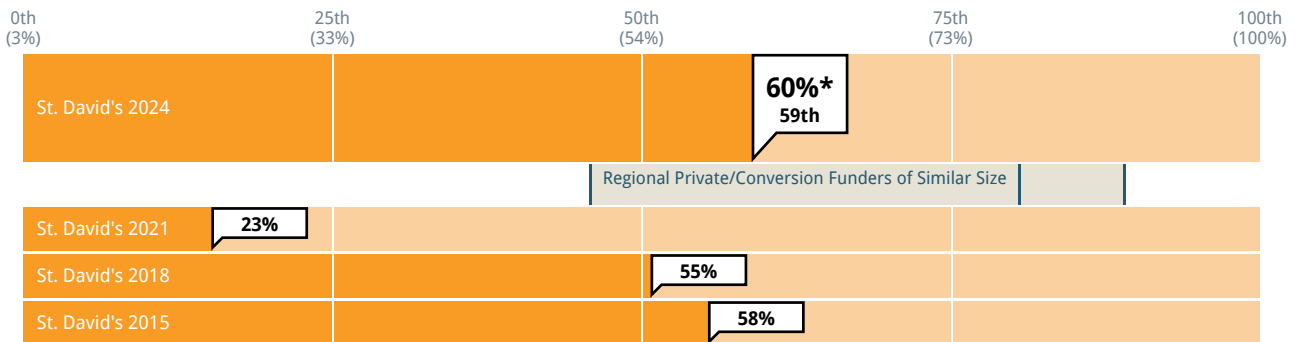
### Median Grant Size



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### Proportion of Multi-year Grants

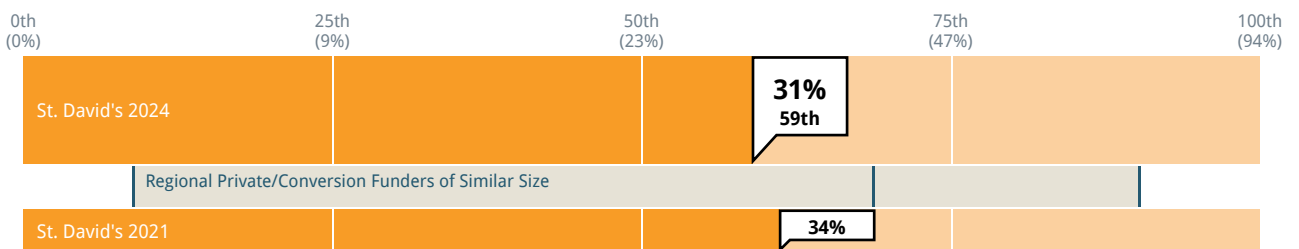
Proportion of grantees that report receiving grants for two years or longer



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### Proportion of Unrestricted Funding

Proportion of grantees responding 'No, this funding was not restricted to a specific use (e.g., general operating, core support)'

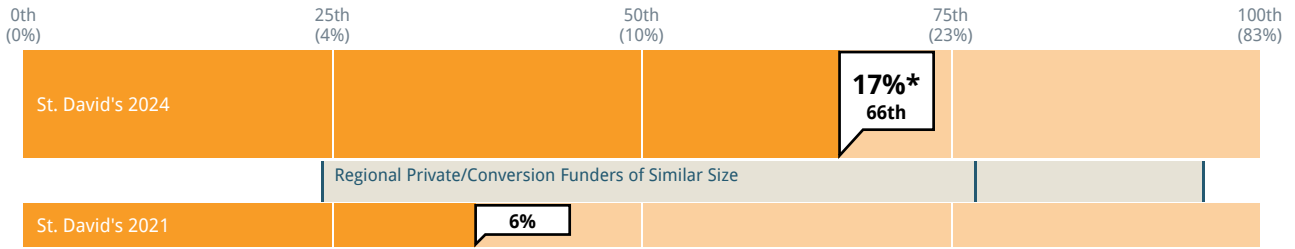


Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None



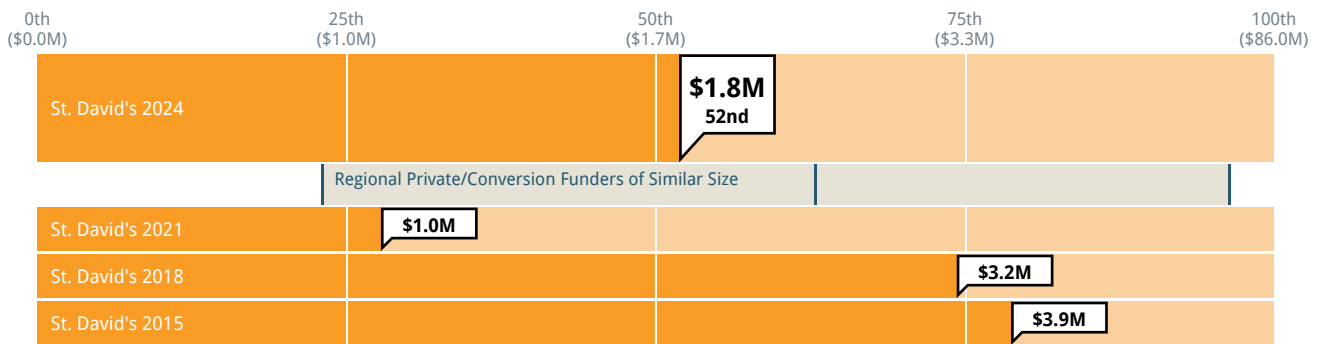
### Proportion of Multi-year Unrestricted Grants

Proportion of grantees that report receiving grants for two years or longer and who report receiving general operating support funding that was not restricted to a specific use.



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### Median Organizational Budget



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

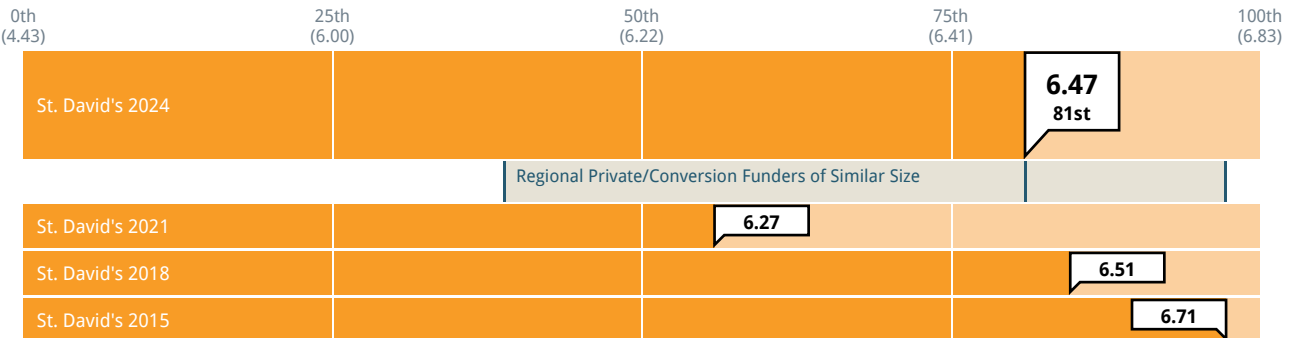
Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Grant History	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/Conversion Funders of Similar Size
Percentage of first-time grants	21%	38%	27%	9%	29%	27%

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Program Staff Load	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/Conversion Funders of Similar Size
Dollars awarded per program full-time employee	\$7.9M	\$5.4M	\$5.6M	\$6.5M	\$2.6M	\$5.3M
Applications per program full-time employee	12	60	26	15	22	13
Active grants per program full-time employee	30	36	19	17	30	32

## Overall Impact

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

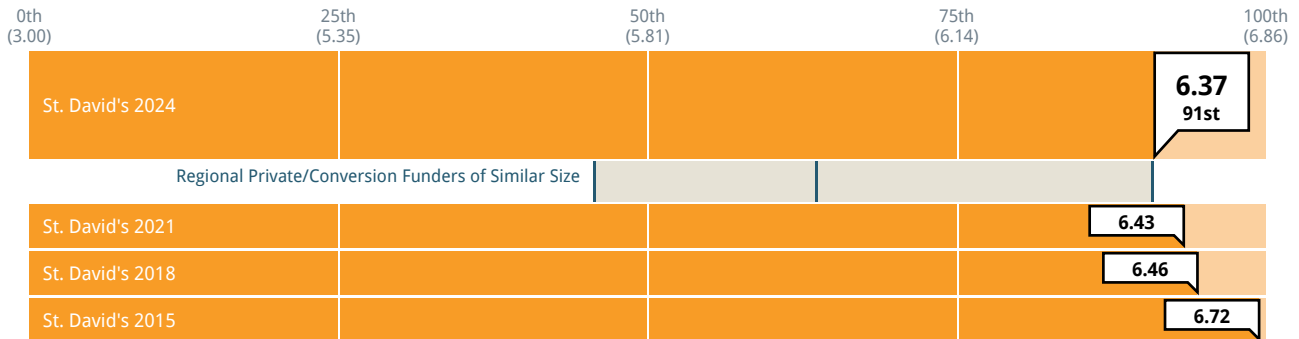
1 = No impact    7 = Significant positive impact



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

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

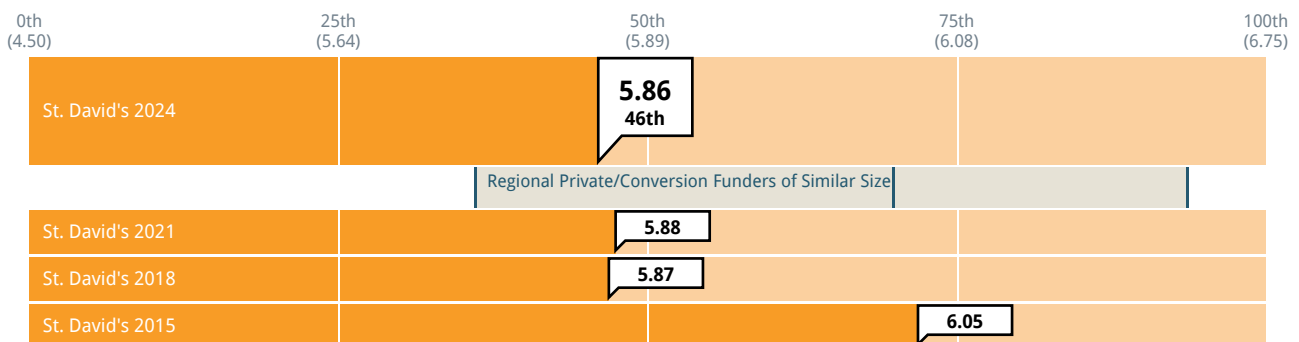
1 = No impact    7 = Significant positive impact



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

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

1 = No impact    7 = Significant positive impact

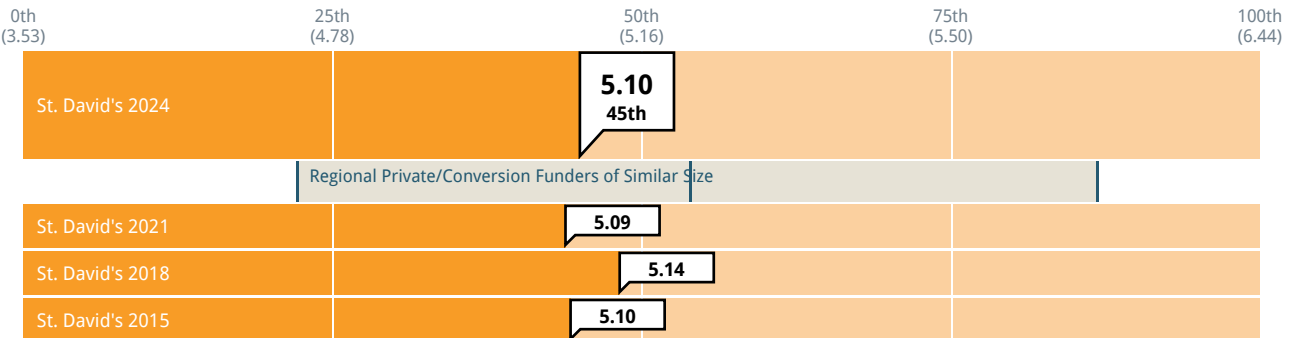


Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

## Advancing Knowledge and Public Policy

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

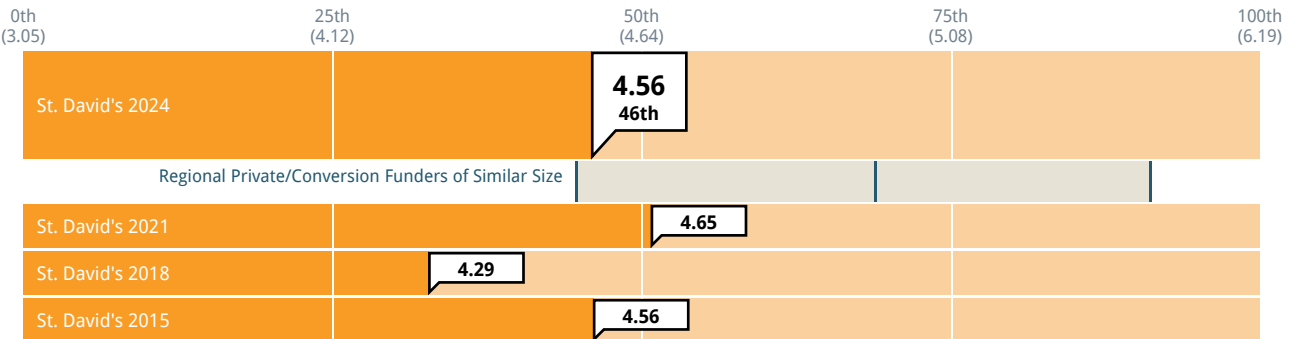
1 = Not at all    7 = Leads the field to new thinking and practice



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

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

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

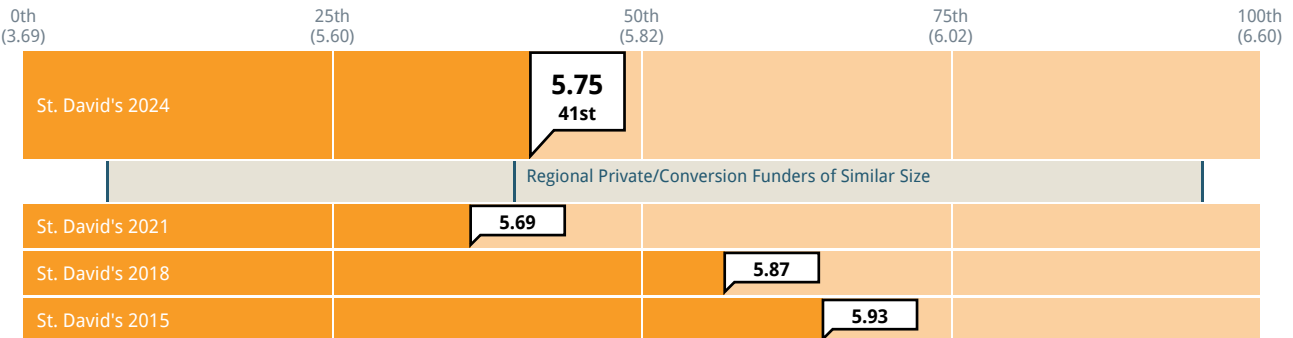


Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

## Overall Understanding

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

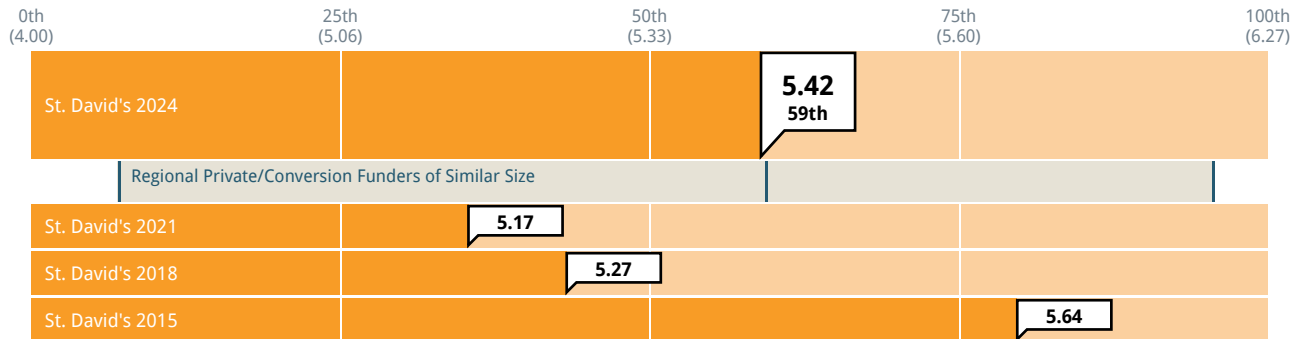
1 = Limited understanding 7 = Thorough understanding



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

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

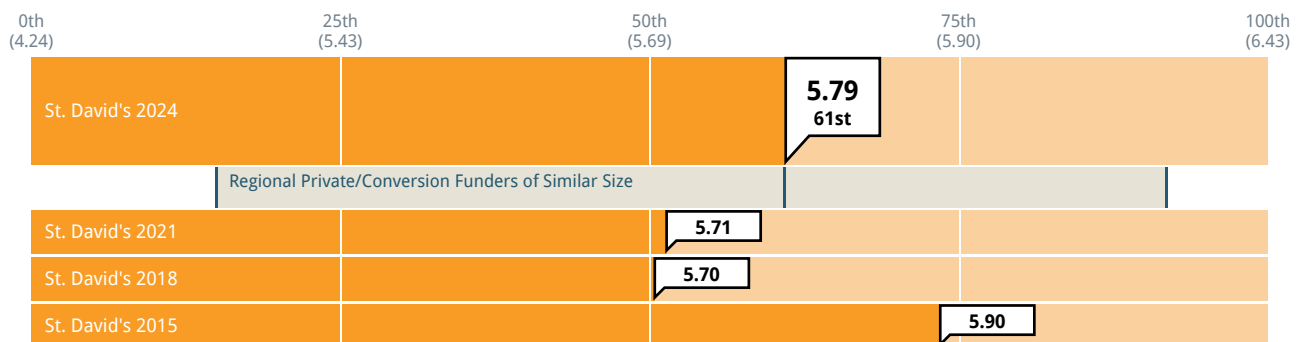
1 = Not at all aware 7 = Extremely aware



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

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

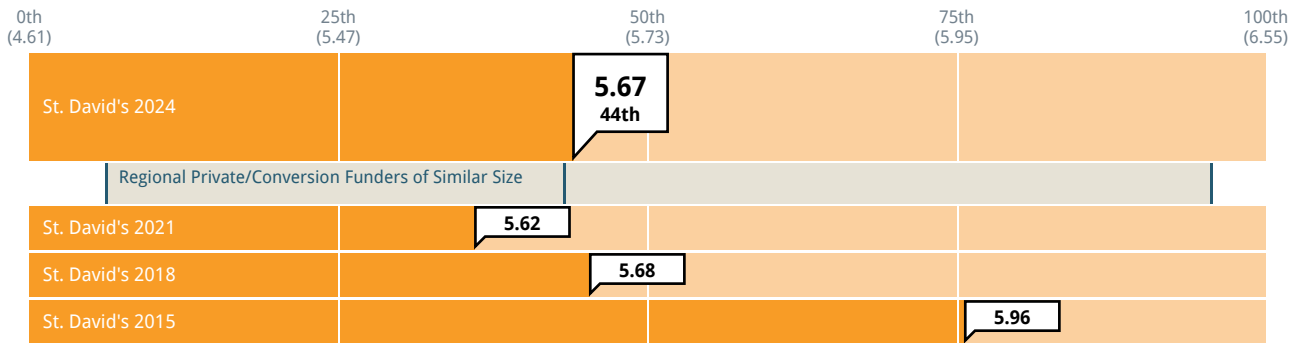
1 = Limited understanding 7 = Thorough understanding



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

**How well does the Foundation understand the field in which you work?**

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

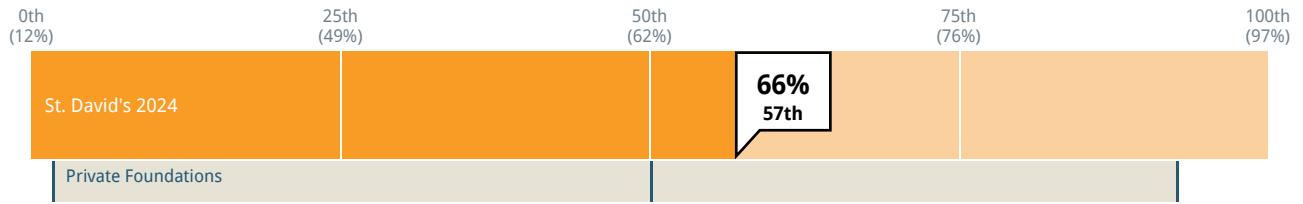


Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

## Assistance Beyond the Grant

### Proportion of Grantees Receiving Assistance Beyond the Grant

Proportion of grantees who indicate receiving at least one form of assistance beyond the grant



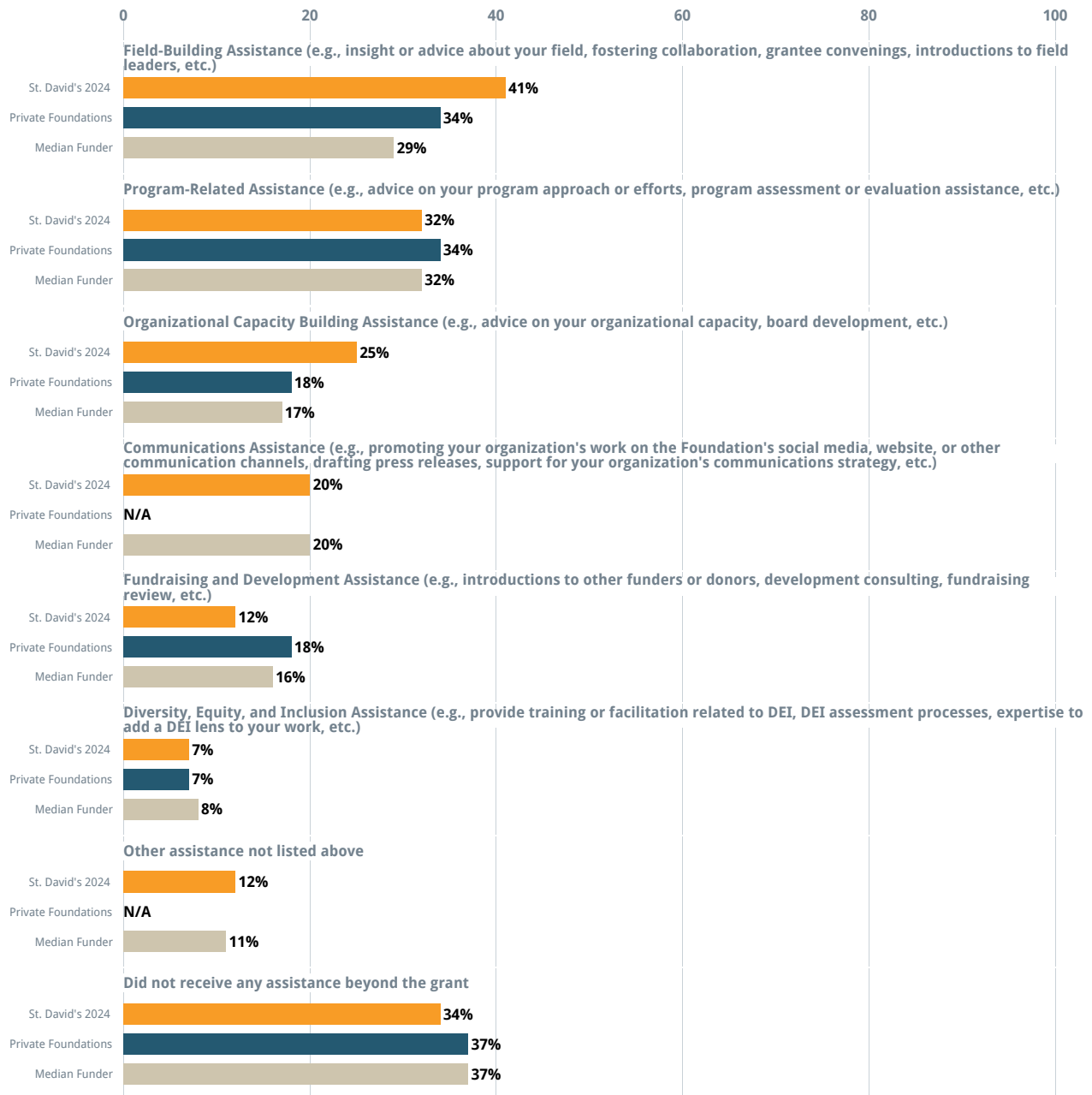
Cohort: Private Foundations Past results: on Subgroup: None

In the survey, respondents were asked about the assistance beyond the grant they received in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous assistance beyond the grant question.

Please note that "Communications Assistance" and "Other assistance not listed above" were added as options to this question in 2024, and these options depict comparative data from fewer than 50 funders in the dataset.

**Please indicate any types of assistance beyond the grant that were a component of what you received from the Foundation (from staff or a third party paid for by the Foundation).**

■ St. David's 2024 
 ■ Private Foundations 
 ■ Median Funder



Cohort: Private Foundations Past results: on

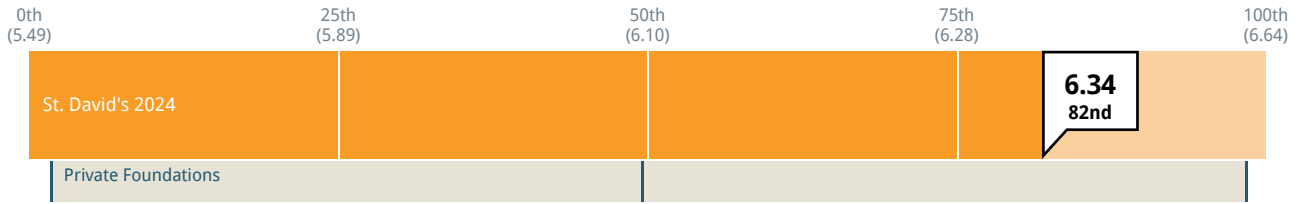
**Note:** The following questions were asked only of grantees who indicated receiving at least one form of assistance beyond the grant in the previous question.

**Please rate the extent to which you agree with the following statements about the assistance beyond the grant you received from the Foundation.**



**The support I received met an important need for my organization and/or program**

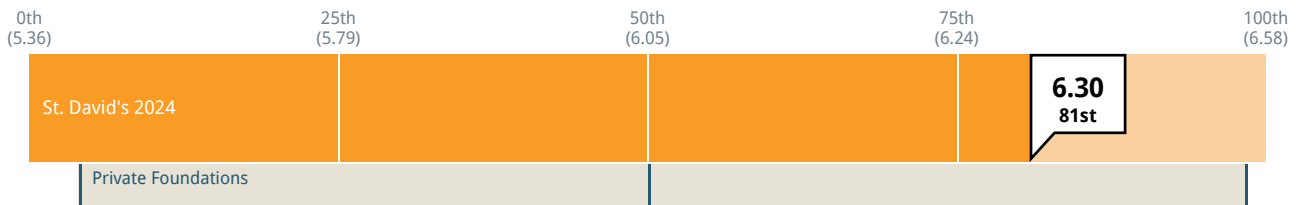
1 = Not at all    4 = Somewhat    7 = To a great extent



Cohort: Private Foundations    Past results: on    Subgroup: None

**The support I received strengthened my organization and/or program**

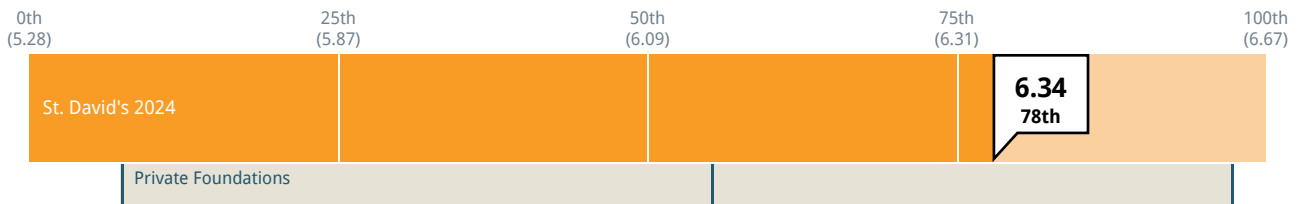
1 = Not at all    4 = Somewhat    7 = To a great extent



Cohort: Private Foundations    Past results: on    Subgroup: None

**The Foundation's assistance beyond the grant was a worthwhile use of the time required of us**

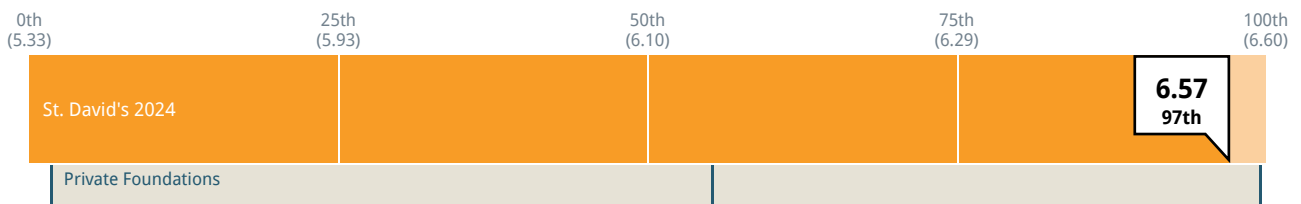
1 = Not at all    4 = Somewhat    7 = To a great extent



Cohort: Private Foundations    Past results: on    Subgroup: None

**I felt the Foundation would be open to feedback about the assistance beyond the grant it provided**

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



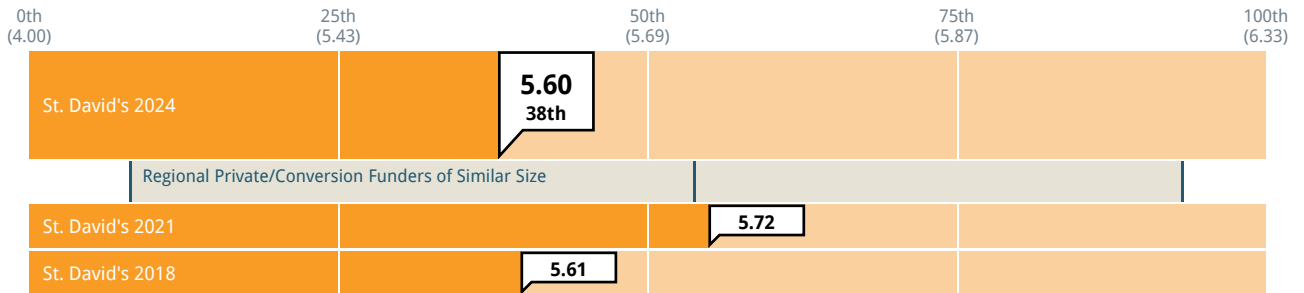
Cohort: Private Foundations    Past results: on    Subgroup: None

## People and Communities Served

In the following question, we use the phrase “the people and communities that you serve” to refer to those your organization seeks to serve through the services and/or programs it provides.

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

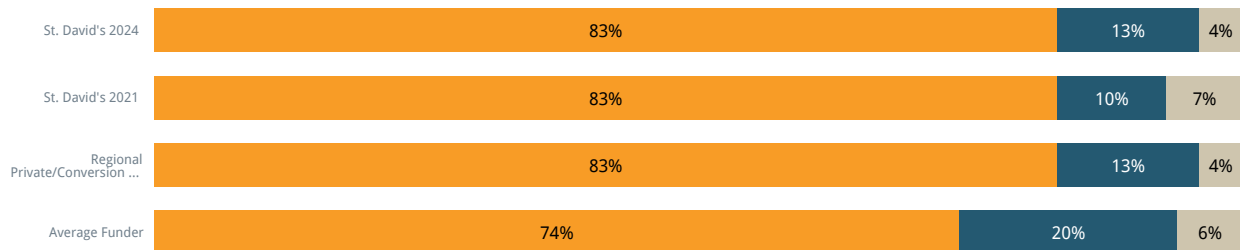
1 = Limited understanding    7 = Thorough understanding



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

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

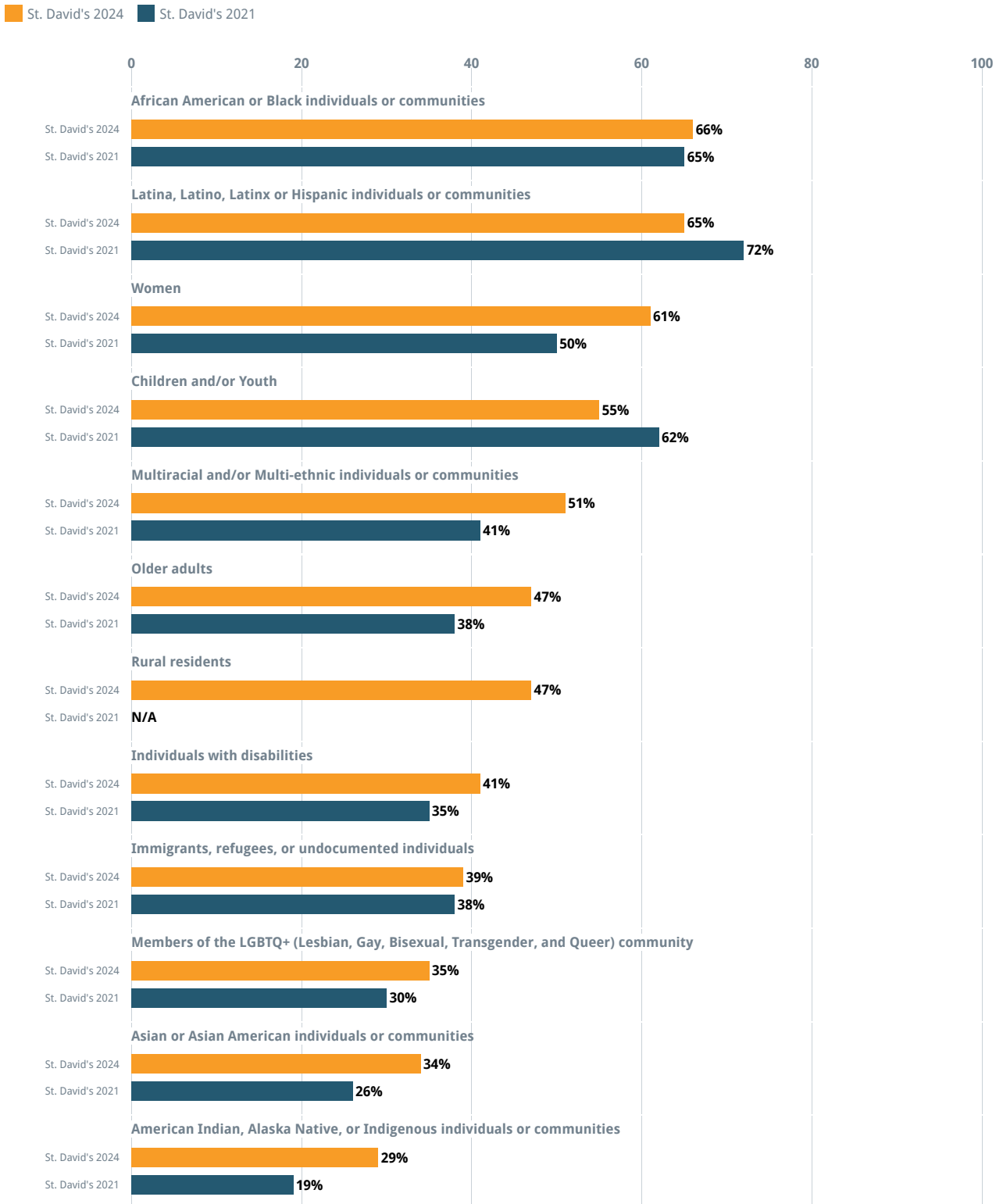
Yes    No    Don't know



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on

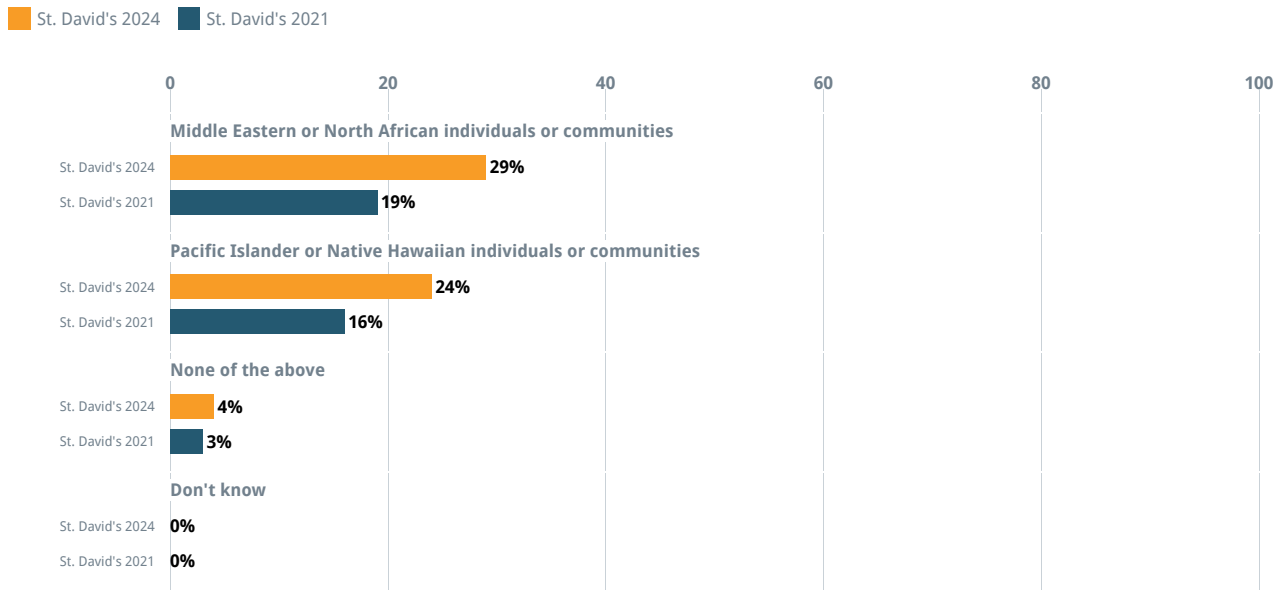
The following question is asked only of grantees who answered "yes" to the question "Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?"

Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant?



Cohort: None Past results: on

Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant? (cont.)

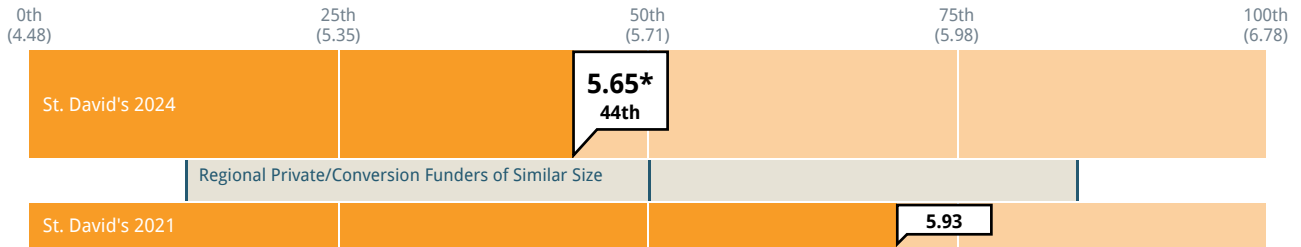


Cohort: None Past results: on

## Diversity, Equity, and Inclusion

To what extent do you agree or disagree that the Foundation has clearly communicated what diversity, equity, and inclusion means for its work?

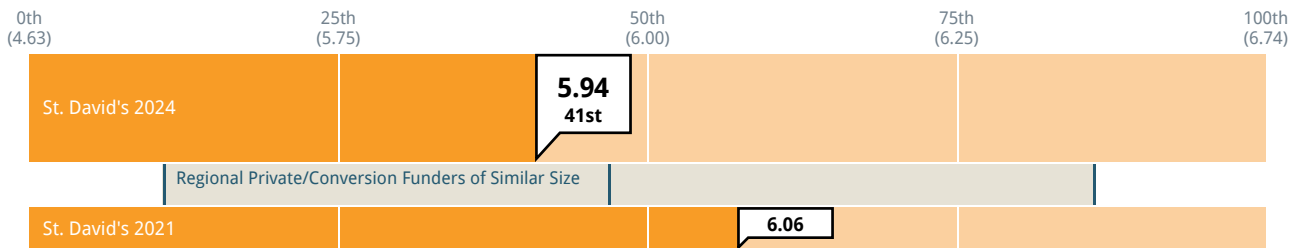
1 = Strongly disagree    4 = Neither agree nor disagree    7 = Strongly agree



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

To what extent do you agree or disagree that the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work?

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

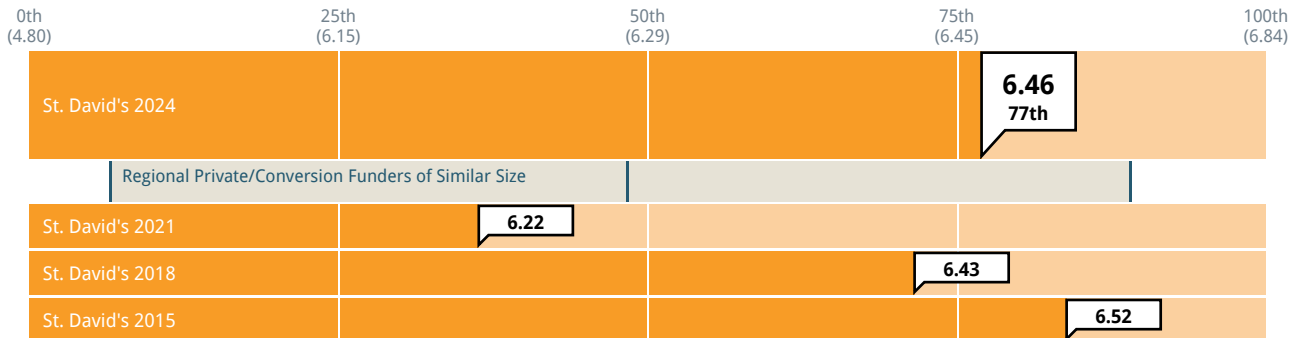


Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

## Funder-Grantee Relationships

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

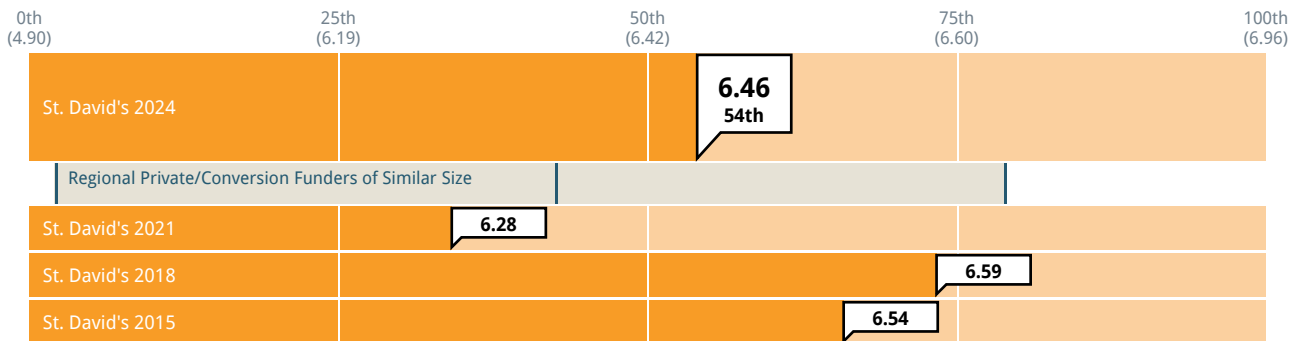
1 = Not at all comfortable 7 = Extremely comfortable



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### Overall, how responsive was Foundation staff?

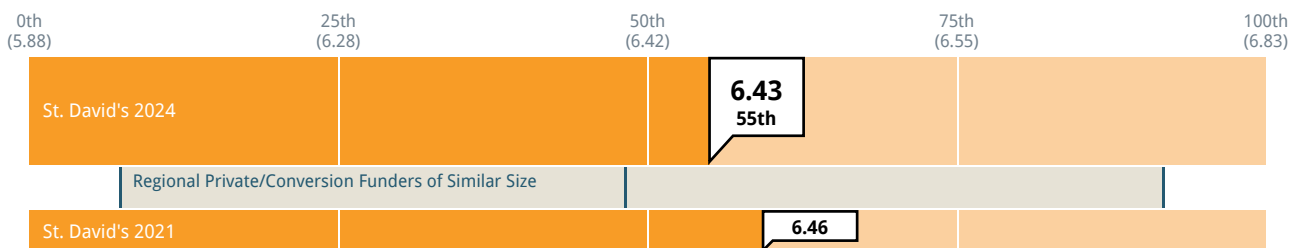
1 = Not at all responsive 7 = Extremely responsive



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### To what extent did the Foundation exhibit trust in your organization's staff during this grant?

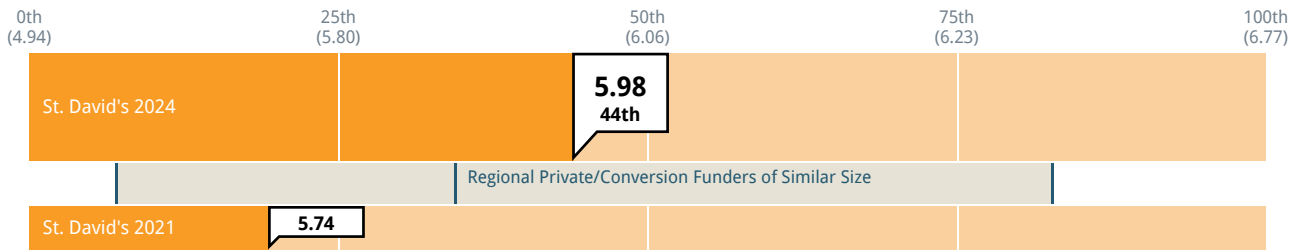
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

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

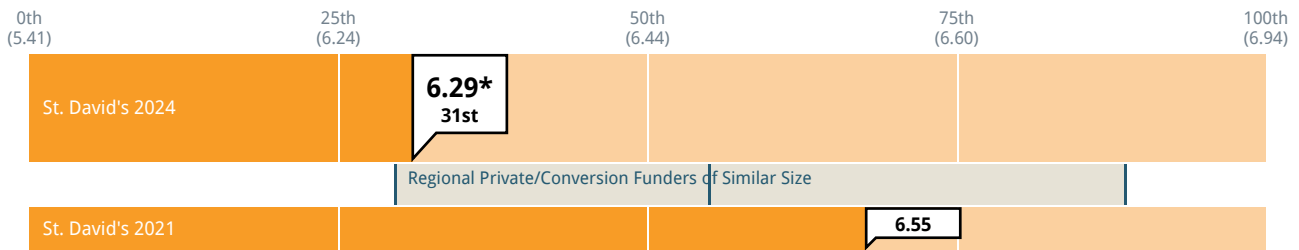
1 = Not at all    4 = Somewhat    7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

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

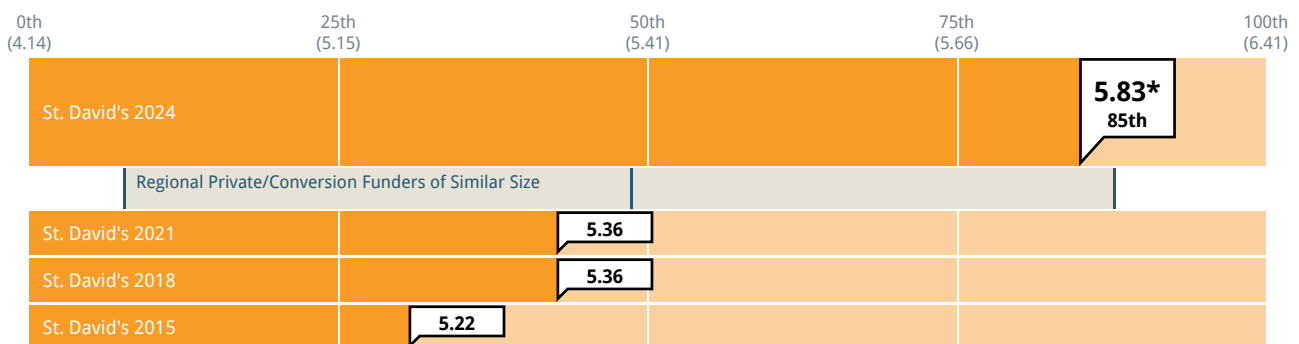
1 = Not at all    4 = Somewhat    7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

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

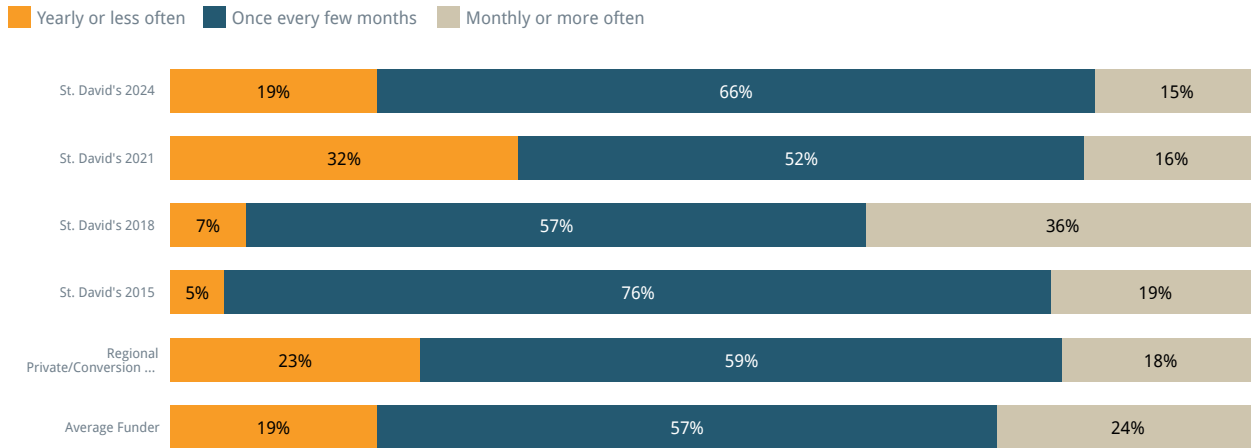
1 = Not at all    7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

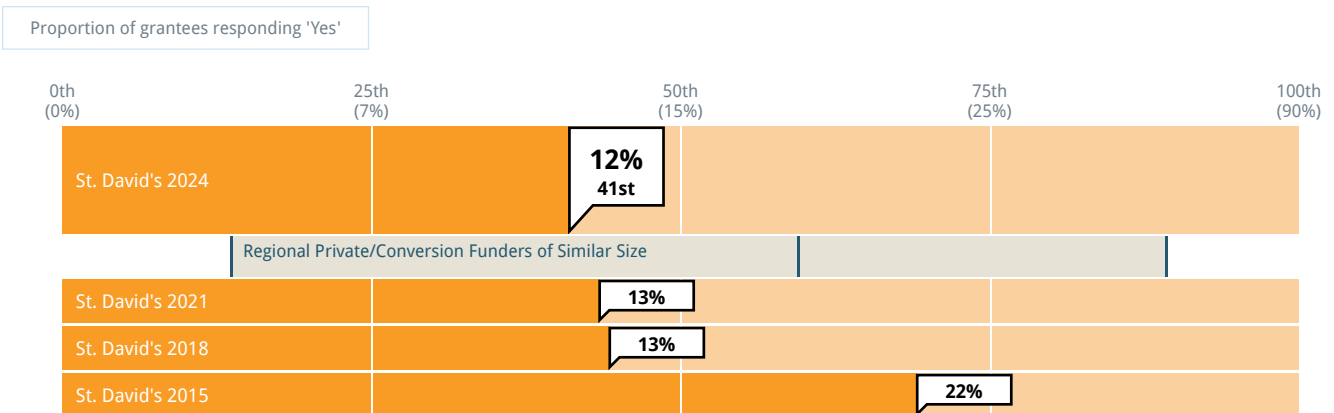
**Interaction Patterns**

### How often do/did you have contact with your primary contact during this grant?



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

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



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### At any point during this grant, including the selection process, did Foundation staff conduct a site visit?

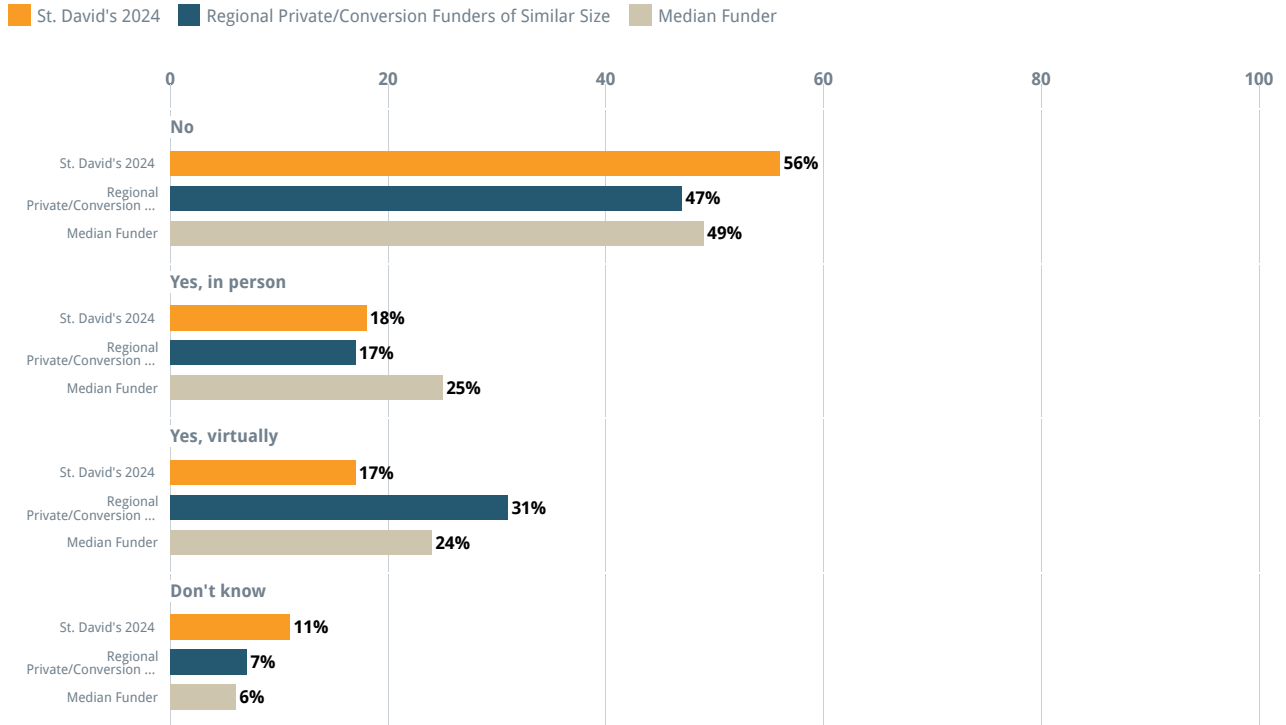


Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

In the survey, respondents were asked the site visit question in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous site visit question.



**At any point during this grant, including the selection process, did Foundation staff conduct a site visit?**

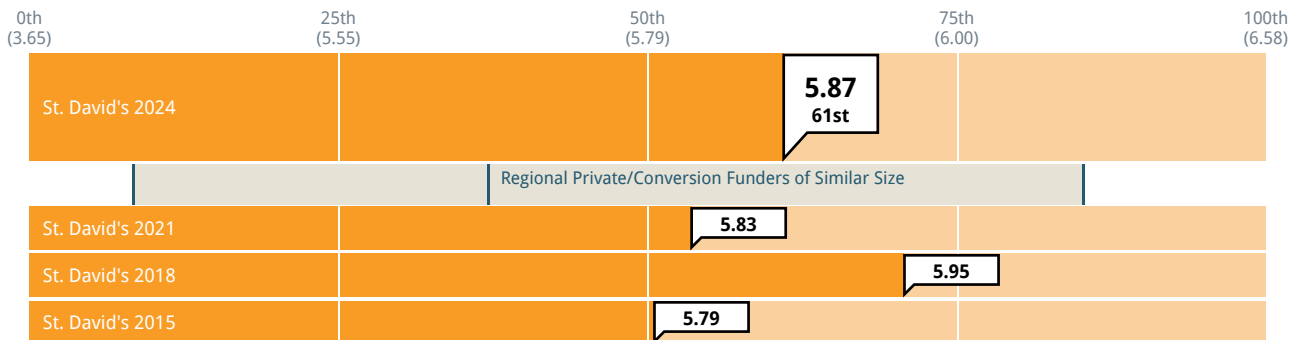


Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

**Communication**

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

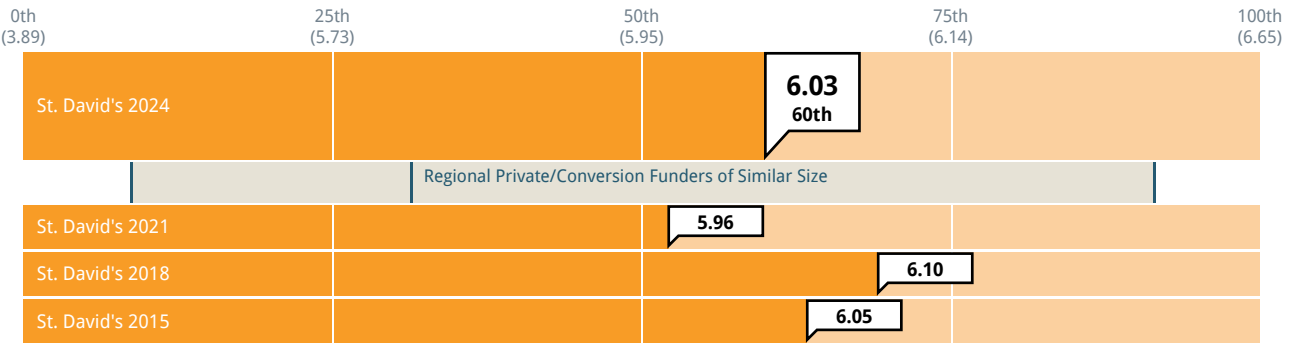
1 = Not at all clearly 7 = Extremely clearly



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

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

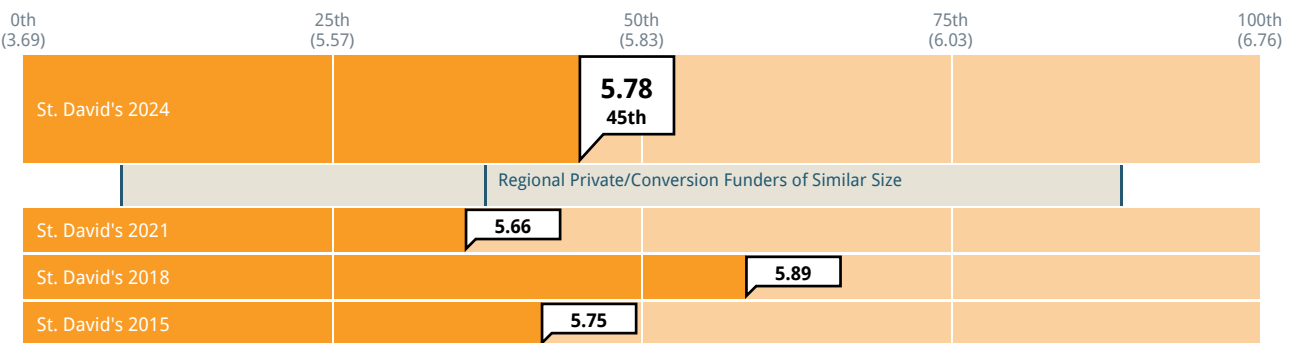
1 = Not at all consistent    7 = Completely consistent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

**Overall, how transparent is the Foundation with your organization?**

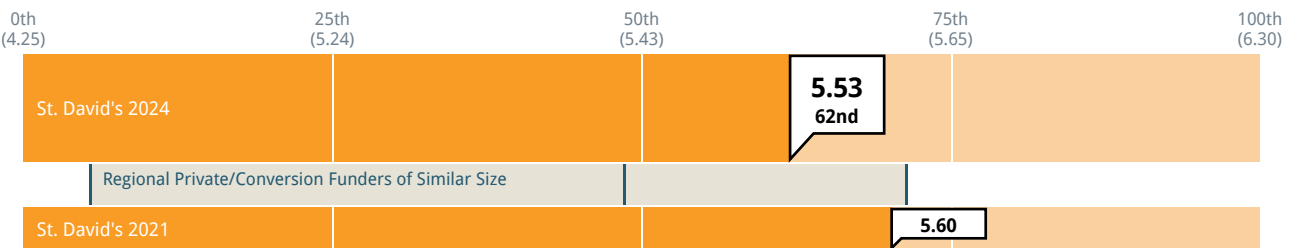
1 = Not at all transparent    7 = Extremely transparent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

**How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?**

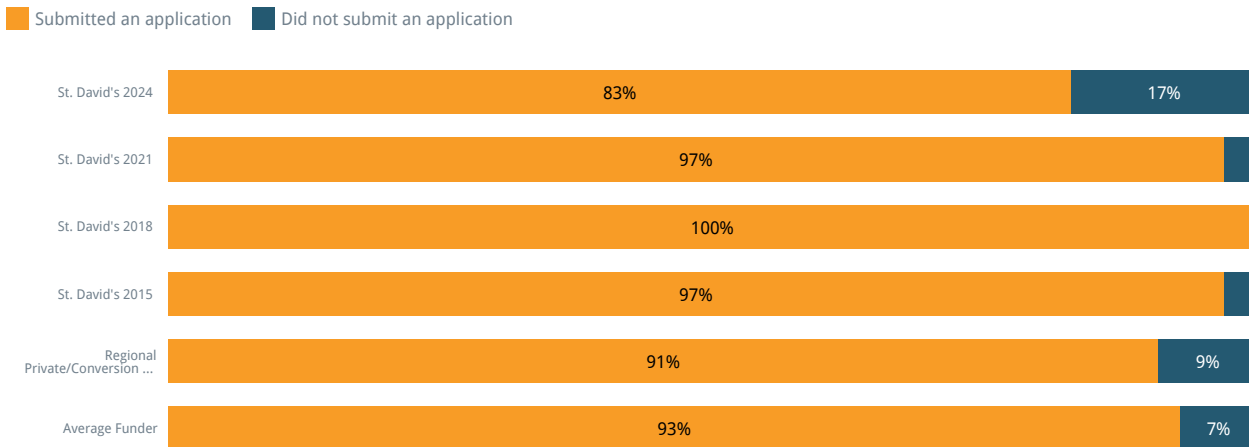
1 = Limited understanding    7 = Thorough understanding



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

## Grant Processes

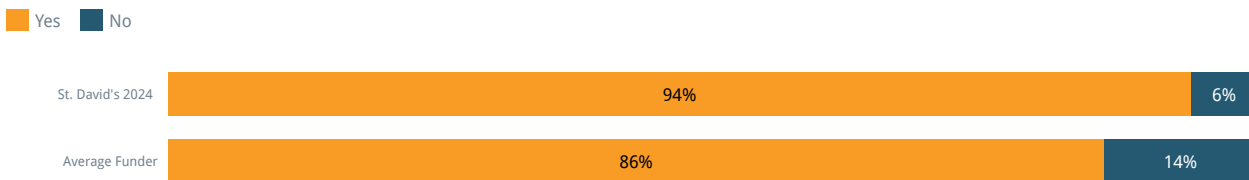
### Did you submit an application to the Foundation for this grant?



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

The following question was only asked of grantees that indicated submitting an application for their grant. This question was recently added to the grantee survey and depicts comparative data from fewer than 50 funders in the dataset.

### Did you have contact with a Foundation staff member via phone, email, or in-person/video before you applied?

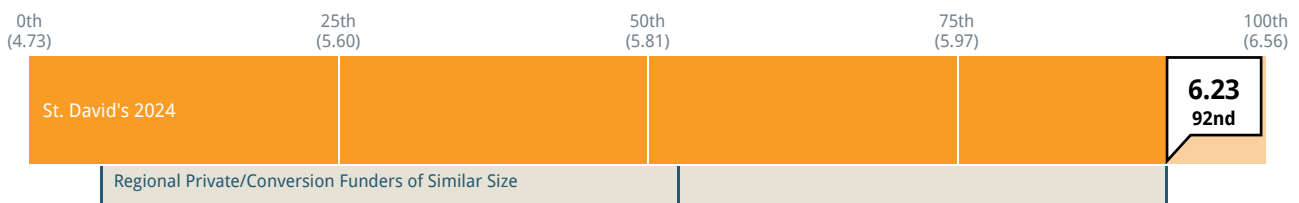


Cohort: None Past results: on

## Selection Process

### To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?

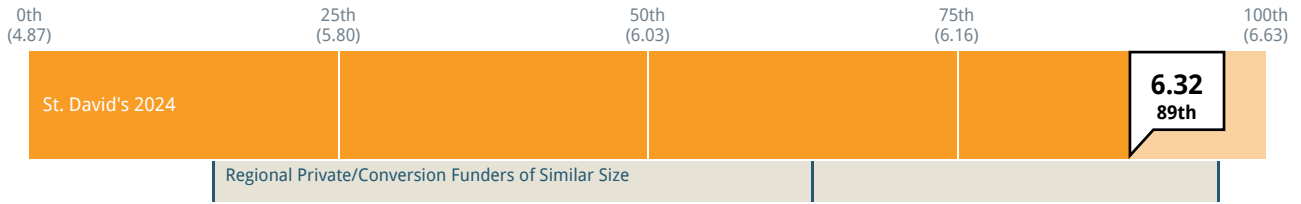
1 = Not at all 7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

**To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?**

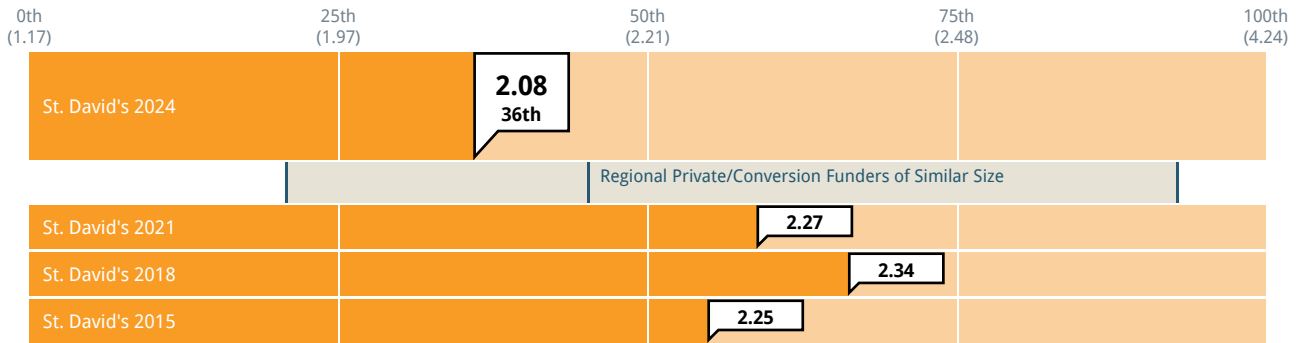
1 = Not at all    7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

**As you developed your grant application, how much pressure did you feel to modify your organization's priorities in order to create a grant application that was likely to receive funding?**

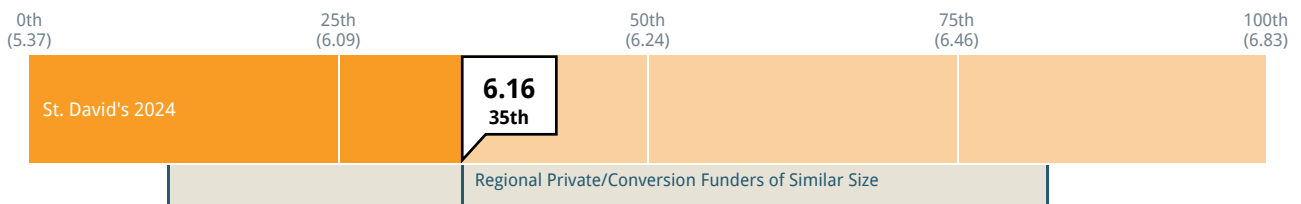
1 = No pressure    7 = Significant pressure



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

**To what extent was the Foundation clear and transparent about the selection process requirements and timelines?**

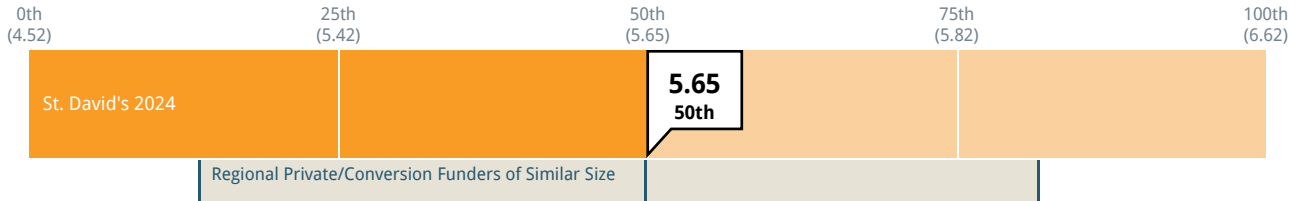
1 = Not at all    7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

**To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether an application would be funded or declined?**

1 = Not at all 7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

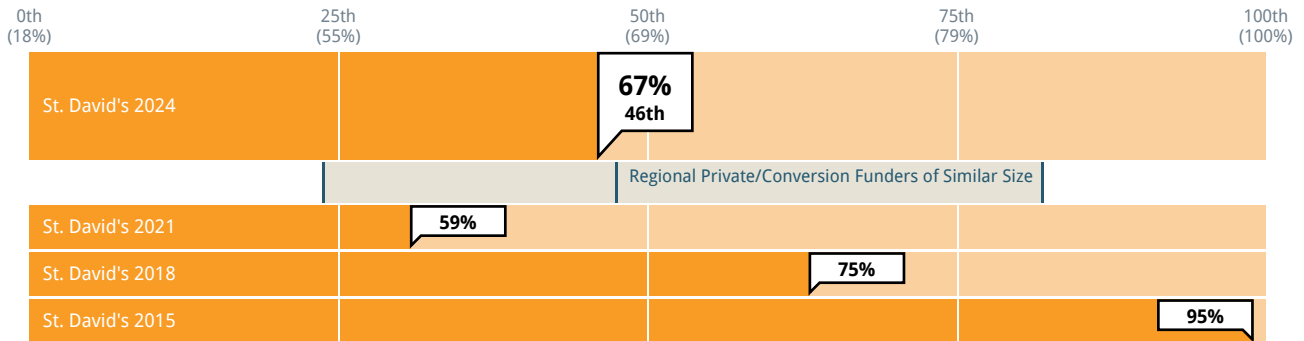
**Reporting and Evaluation Process**

**Definition of Reporting and Evaluation**

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

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

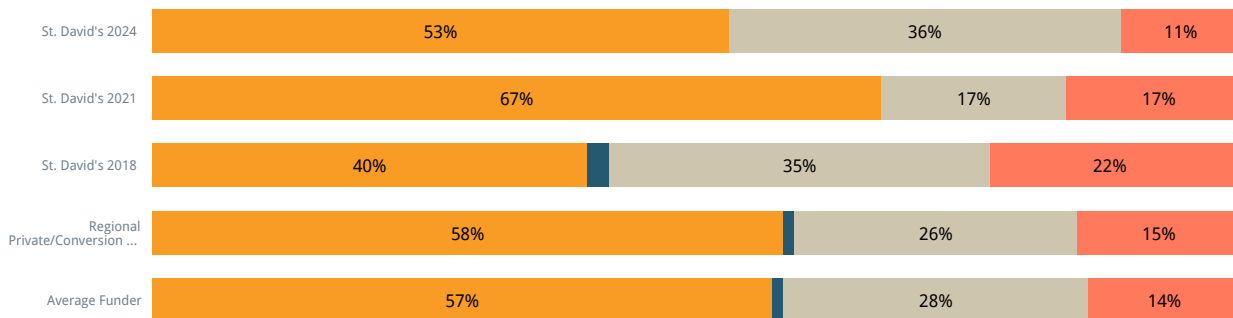
Proportion of grantees responding 'Yes'



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

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

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



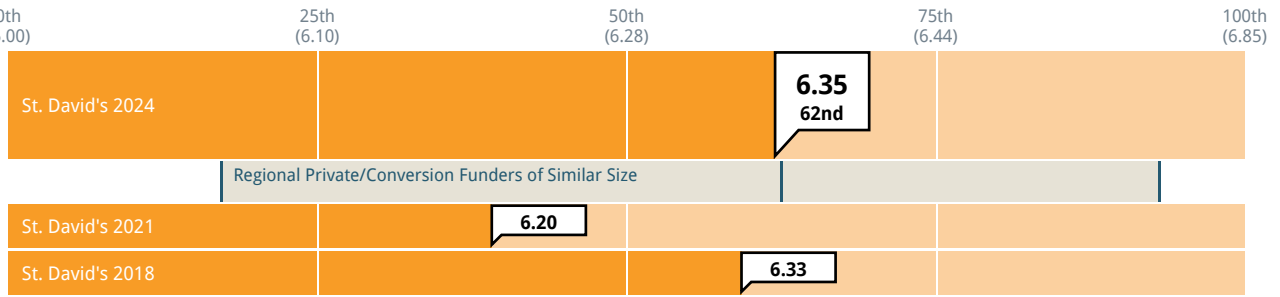
Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

## Reporting Process

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

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

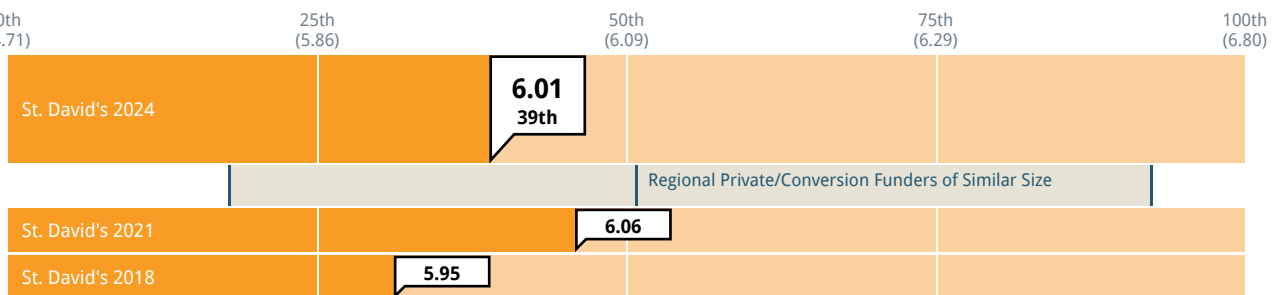
1 = Not at all 7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

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

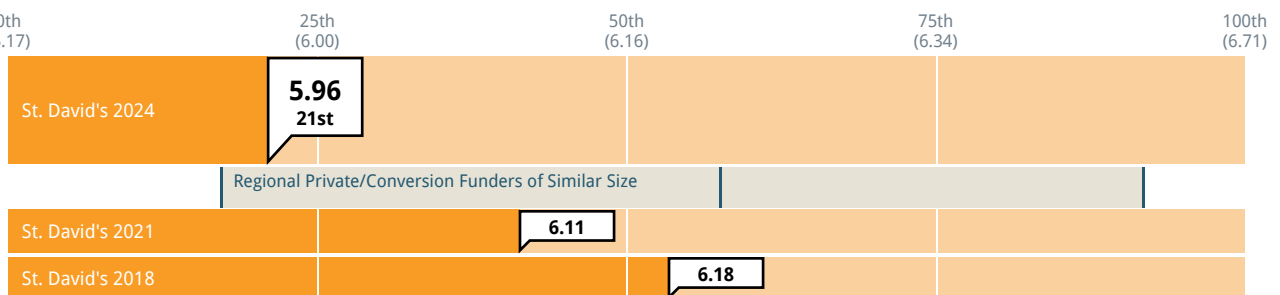
1 = Not at all 7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?

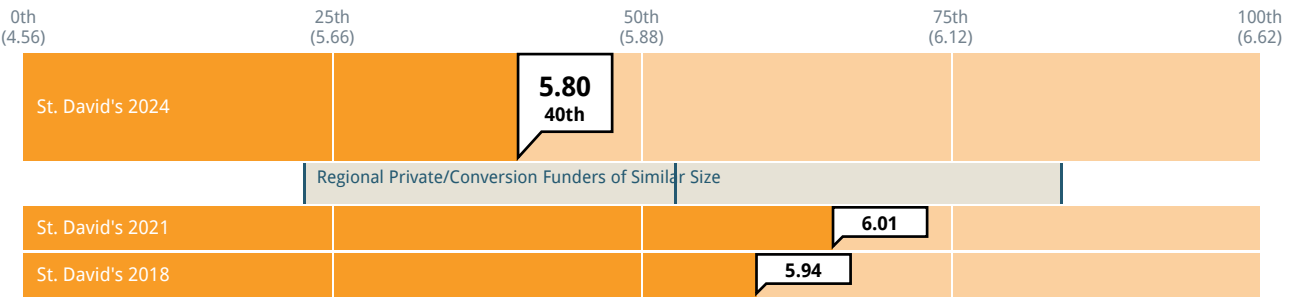
1 = Not at all 7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

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

1 = Not at all    7 = To a great extent



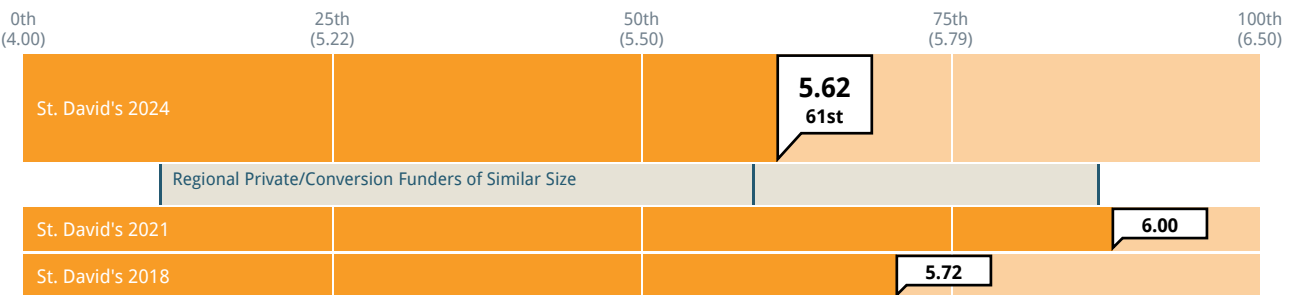
Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

**Evaluation Process**

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

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

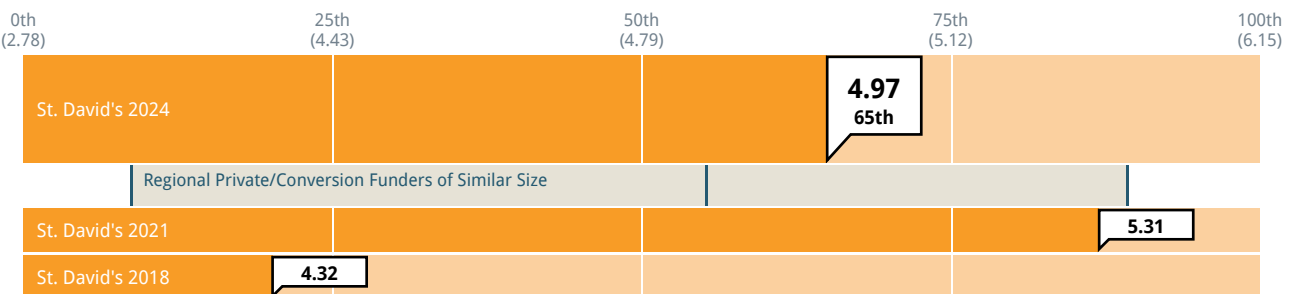
1 = Not at all    7 = To a great extent



Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

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

1 = Not at all    7 = To a great extent

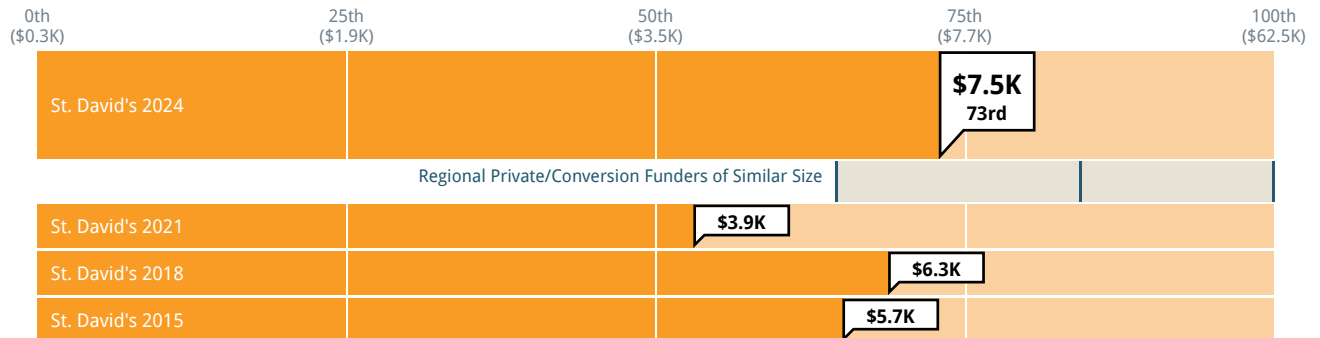


Cohort: Regional Private/Conversion Funders of Similar Size    Past results: on    Subgroup: None

## Dollar Return and Time Spent on Processes

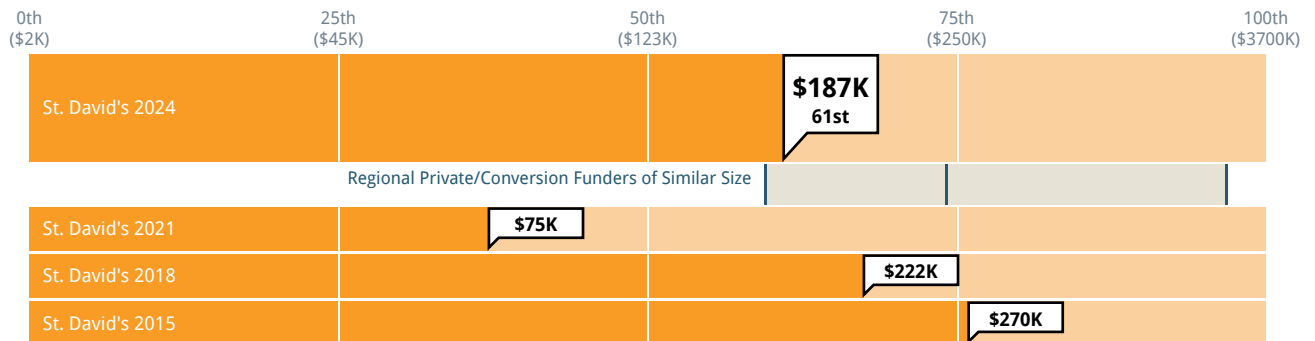
### Dollar Return: Median grant dollars awarded per process hour required

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



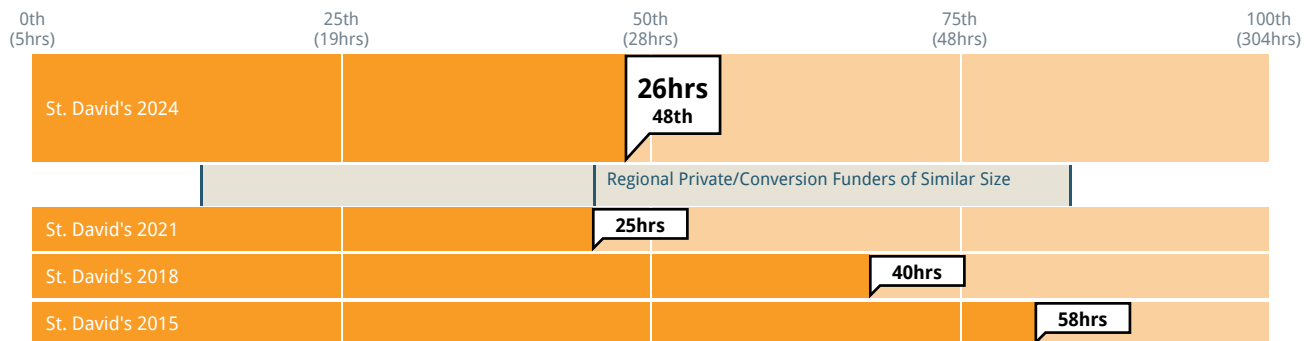
Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### Median Grant Size



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

### Median hours spent by grantees on funder requirements over grant lifetime

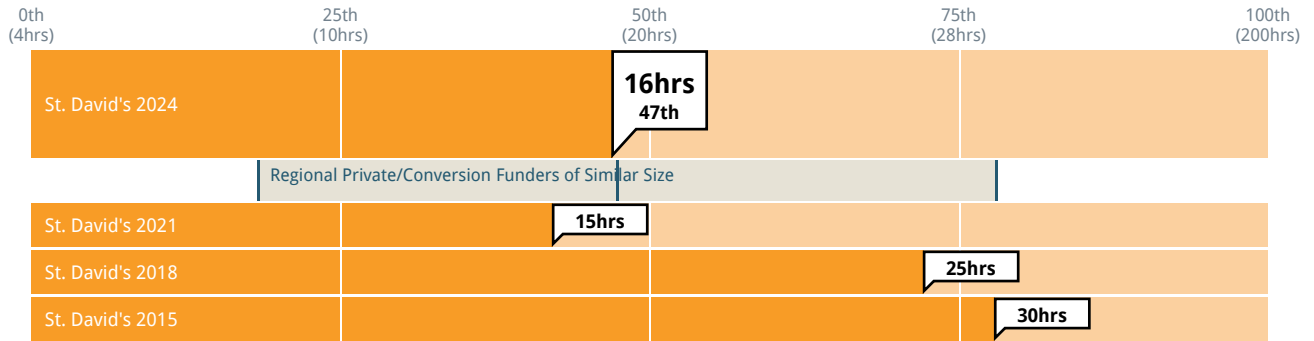


Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

## Time Spent on Selection Process



**Median Hours Spent on Application and Selection Process**



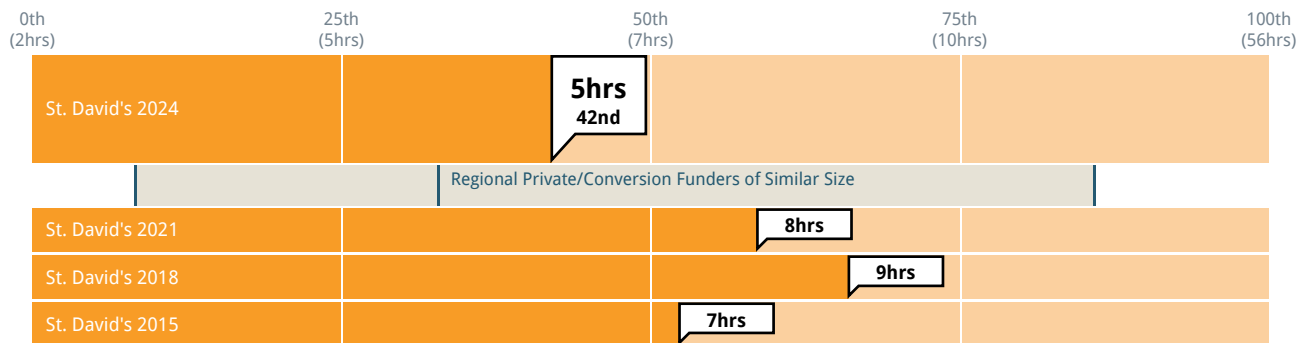
Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Time Spent On Application and Selection Process	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/Conversion Funders of Similar Size
1 to 9 hours	24%	32%	10%	5%	27%	25%
10 to 19 hours	26%	25%	17%	18%	22%	26%
20 to 29 hours	25%	15%	26%	18%	16%	19%
30 to 39 hours	3%	8%	16%	11%	6%	7%
40 to 49 hours	13%	11%	10%	22%	10%	11%
50 to 99 hours	4%	8%	16%	20%	10%	9%
100 to 199 hours	1%	2%	3%	5%	5%	2%
200+ hours	2%	0%	2%	0%	3%	1%

Selected Subgroup: None
<b>Time Spent On Application and Selection Process (By Subgroup)</b>
1 to 9 hours
10 to 19 hours
20 to 29 hours
30 to 39 hours
40 to 49 hours
50 to 99 hours
100 to 199 hours
200+ hours

### Time Spent on Reporting and Evaluation Process

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



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/Conversion Funders of Similar Size
1 to 9 hours	66%	55%	51%	52%	58%	68%
10 to 19 hours	15%	21%	23%	23%	18%	16%
20 to 29 hours	7%	10%	14%	8%	9%	7%
30 to 39 hours	2%	5%	1%	10%	3%	3%
40 to 49 hours	7%	3%	7%	2%	3%	2%
50 to 99 hours	1%	3%	1%	4%	4%	3%
100+ hours	2%	3%	3%	2%	4%	2%

Selected Subgroup: None	
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	
1 to 9 hours	
10 to 19 hours	
20 to 29 hours	
30 to 39 hours	
40 to 49 hours	
50 to 99 hours	
100+ hours	

## St. David's Customized Questions

CEP included a series of St. David's-specific customized questions in the Foundation's grantee survey. The following pages outline grantees' responses to those questions.

### Foundation Strategy

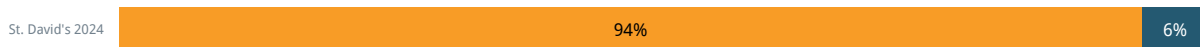
The Foundation recently launched its new 2024 – 2030 Strategic Plan titled *Pathways to Health Equity*, which describes its focus on removing barriers to better living **today** and changing systems and conditions to improve outcomes for a healthier community **tomorrow**. The plan lays out three broad areas of impact, all in service of health equity:

- Increase access to quality care designed to advance health equity
- Remove economic barriers to improve health outcomes
- Equip communities to achieve their health priorities

Additionally, the plan shares a fourth, internal-focused goal related to improving internal processes and ways of working to establish organizational excellence across all Foundation departments.

#### Were you aware that the Foundation had recently undergone this strategic change?

Yes No

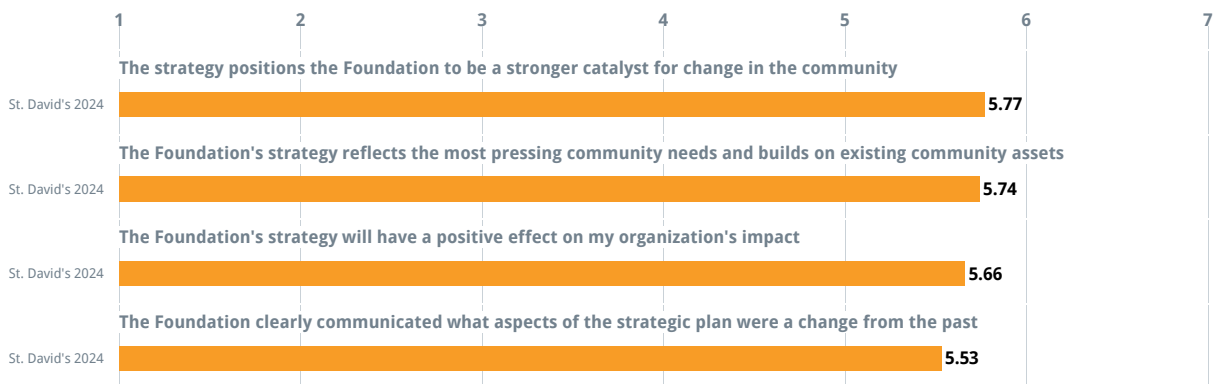


Cohort: None Past results: on

#### Please rate your level of agreement or disagreement with each of the following statements regarding your perceptions of the Foundation's Pathways to Equity strategy:

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

St. David's 2024



Cohort: None Past results: on

Selected Cohort: None	
To what extent were you given the opportunity to provide input into the Foundation's strategic plan?	St. David's 2024
I was given an opportunity to provide input, and did provide input.	55%
I was given an opportunity to provide input, but did not choose to do so.	6%
I was not given an opportunity to provide input.	17%
I am not sure/Unknown to me.	22%

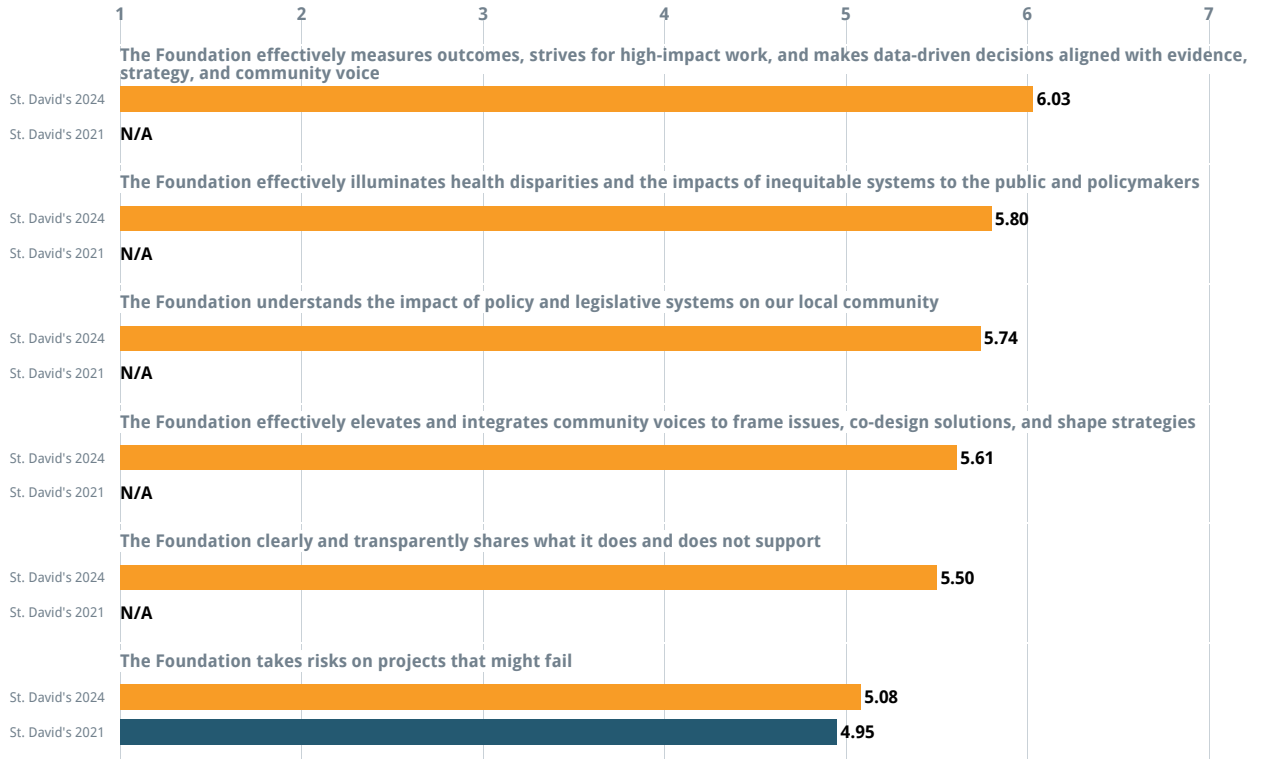
Selected Subgroup: None	
To what extent were you given the opportunity to provide input into the Foundation's strategic plan? (By Subgroup)	
I was given an opportunity to provide input, and did provide input.	
I was given an opportunity to provide input, but did not choose to do so.	
I was not given an opportunity to provide input.	
I am not sure/Unknown to me.	

### Overall Perceptions of the Foundation

Please rate your level of agreement or disagreement with each of the following statements regarding your perceptions of the Foundation as a whole:

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

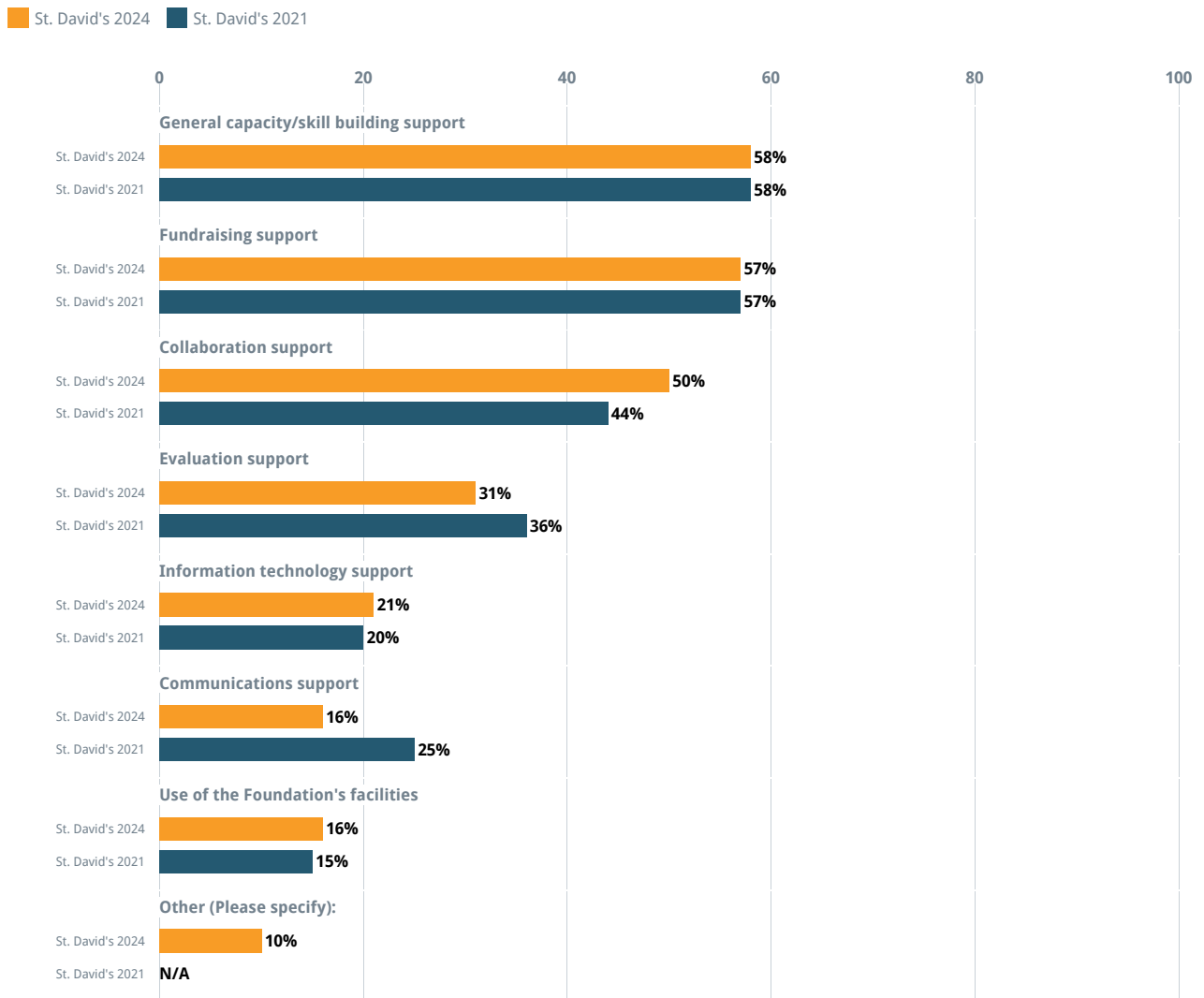
St. David's 2024    St. David's 2021



Cohort: None    Past results: on

### Assistance Beyond the Grant

Please indicate which of the following offerings, if any, would be most helpful in strengthening your organization's work (Please check up to three options):



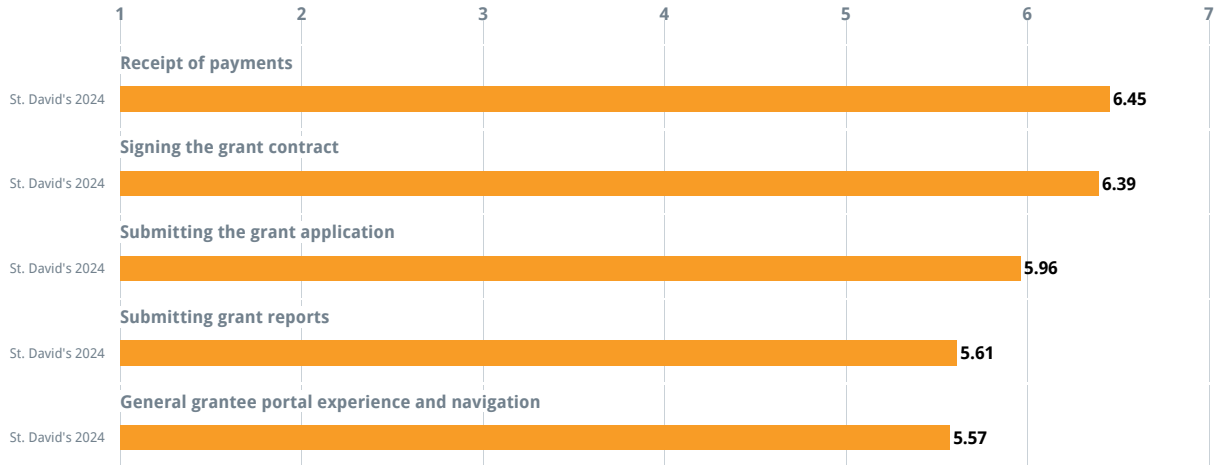
Cohort: None Past results: on

## Grant Management Systems and Technology

Overall, how would you rate your experience with the grants management systems and technologies used during the following stages of this grant:

1 = Extremely difficult to use    7 = Extremely easy to use

St. David's 2024



Cohort: None    Past results: on



## Grantees' Written Comments

In the Grantee Perception Report survey, CEP asks three written questions. St. David's Foundation also added a fourth, custom open-ended question to its survey.

1. "Please comment on the quality of the Foundation's processes, interactions, and communications."
2. "Thinking beyond the grant you received, please comment on how the Foundation influences your field, community, or organization."
3. "What specific improvements would you suggest that would make the Foundation a better funder?"
4. "Looking ahead, how would you like to see the Foundation show up as a convener and co-creator for systems change?"

To download the full set of grantee comments and suggestions, please refer to the Attachments in the "Report Overview" section of your report. Please note that some comments may be redacted or removed to protect the confidentiality of respondents.

### CEP's Qualitative Analysis

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

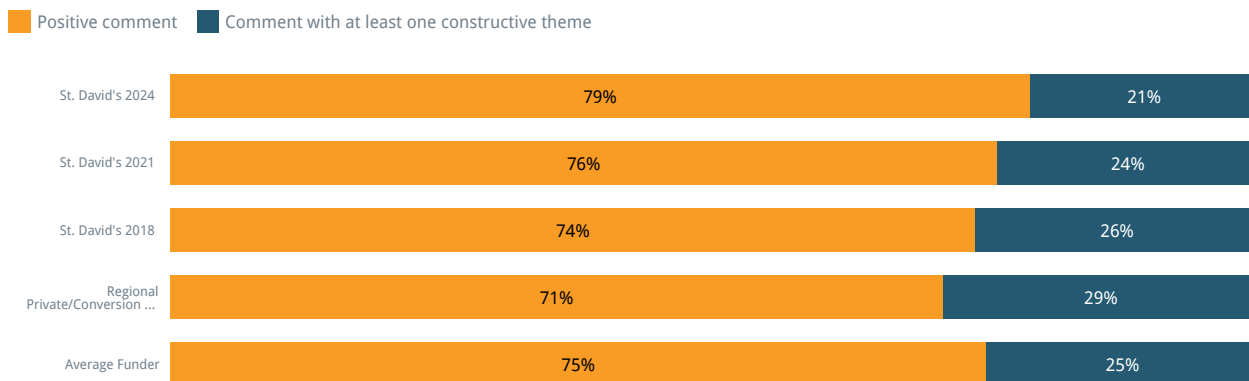
The following pages outline the results of CEP's analyses.

## Quality of Processes, Interactions and Communications

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

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

### Positivity of Comments about the Quality of the Foundation's Processes, Interactions, and Communications



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

## Suggestion Topics

Grantees were asked to provide any suggestions for how the Foundation could improve. The 105 grantees that responded to the survey provided 78 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

### Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Non-Monetary Support	28%
Relationships with Grantees	26%
Grantmaking	18%
Foundation Strategy	15%
Grantmaking Process	13%

## Selected Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. The 105 grantees that responded to the survey provided a total of 78 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

### Non-Monetary Support (28% N=22)

- Facilitate Convening and Collaboration Among Organizations (N = 10)
  - "To enhance communication and collaboration among funding partners, the Foundation could implement regular convenings or virtual meetings where all stakeholders can come together to share updates, discuss challenges, and explore opportunities for synergy."
  - "More opportunities to network with other grantees or attend virtual workshops about our focus area would be helpful."
  - "Encouraging collaborations across different grantees, setting up a workshop or 1 day conference for grantees to share findings, and developing a network to share and highlight what grantees are doing."
  - "Help to connect grantees and non-grantees who operate in the same space to create greater opportunities for collaboration."
- Assistance Securing Other Funding / Co-Funding with Other Funders (N = 8)
  - "It has so much leverage as a regional foundation that it should use its clout to bring in funding from the Ford Foundation, Rockefeller Foundation, etc. Together their impact would be very significant."
  - "Do more to encourage more philanthropy in Austin."
  - "Connect funded organizations with other foundations to help diversify their funding."
- Miscellaneous Forms of Assistance (N = 2)
  - "Establishing a dedicated online platform or portal where partners can easily access information, resources, and best practices could also facilitate ongoing communication and collaboration."
- Sharing Grantees' Work (N = 2)
  - "Publicly sharing the work of grantees."

### Relationships with Grantees (26% N=20)

- More Engagement with Grantees (N = 6)
  - "The Foundation should initiate and maintain better streams of communication for organizations making an impact in the community."
  - "More conversation with grantees at the start of grant and establish the frequency of communication desired up front."
  - "Would love to have a closer relationship with the new program manager."
- Develop Understanding of Grantees (N = 4)
  - "The Foundation could have longer-term strategic discussions with its grantees to better understand the organizations today and in the future."
  - "More learning about the barriers that nonprofits and their leaders face."
- Exhibit Trust in Grantees (N = 4)
  - "Please listen and trust the partners who are doing the work in their communities."
  - "Don't just hear feedback/input/suggestions, listen to it. Your expertise may not be in specific solutions, but the partners you work with are experts in them. Trust them."
- Transparency About Future Funding (N = 3)
  - "Be transparent about your intentions to continue to fund vs. not as far into the future as possible. Is your goal to wind people down off your funding, tell them this and do it. Otherwise there's continuous uncertainty from the grantee perspective about if they can rely on this ongoing support."
- Sharing Feedback (N = 2)
  - "I would appreciate more direct feedback about how the Foundation views the success level of our work, using their grant."
- More Foundation Staff (N = 1)
  - "If they had more staff support to the program officers, that could make communication flow better."

### Grantmaking (18% N=14)

- Unrestricted Funding (N = 5)
  - "More unrestricted support that can be used to pay non-profit staff a livable wage as the cost of living in Austin continues to rise."
  - "Organizations overwhelmingly need operating funds in addition to programmatic funding. It is only with more unrestricted funding that organizations can build strong staff and sustainable organizations that are capable of actually creating change in the community."
- Longer Term Grants (N = 4)

- "Set up longer grant cycles with auto renewals."
- "The length of the funding periods are not long enough to truly invest in the long-term success and impact of efforts."
- Increase Giving (N = 3)
  - "Be more ambitious with what you grant out each year."
- Open RFPs (N = 2)
  - "Host more open calls for applicants for various funding opportunities. We would love to become an annual grantee, but have found few opportunities to share our work."

**Foundation Strategy (15% N=12)**

- Clear Communication About the Foundation's Work and Priorities (N = 4)
  - "As the new strategic plan rolls out, clear communication needs to occur about how it will impact and change the funding process."
  - "The Foundation's role and interests in the community are very ambiguous."
- Issue Areas to Prioritize (N = 4)
  - "Understanding that there are many needs in our community, I think the Foundation could focus on those that are most expressly being attacked or limited by outside/political forces and/or policies and/or funding shortages/cuts."
  - "There will always be a significant amount of uncompensated healthcare costs for uninsured populations in Texas. Historically, SDF's funding has supported this notion and has been critical to the sustainability of area safety net clinics. The possibility that SDF will move away from providing this support under its new strategic direction is concerning. Discontinuing this funding would be detrimental to the long-term financial viability of healthcare providers serving the underserved populations throughout the SDF service area."
- Discuss Strategy with Grantees (N = 2)
  - "We are not sure as to when grantees can convene with the Foundation to learn more about the impact of the new strategic plan and future opportunities for partnership and projects."
- Fund New Approaches (N = 2)
  - "Be open to innovative approaches. Support pilot projects."

**Grantmaking Process (13% N=10)**

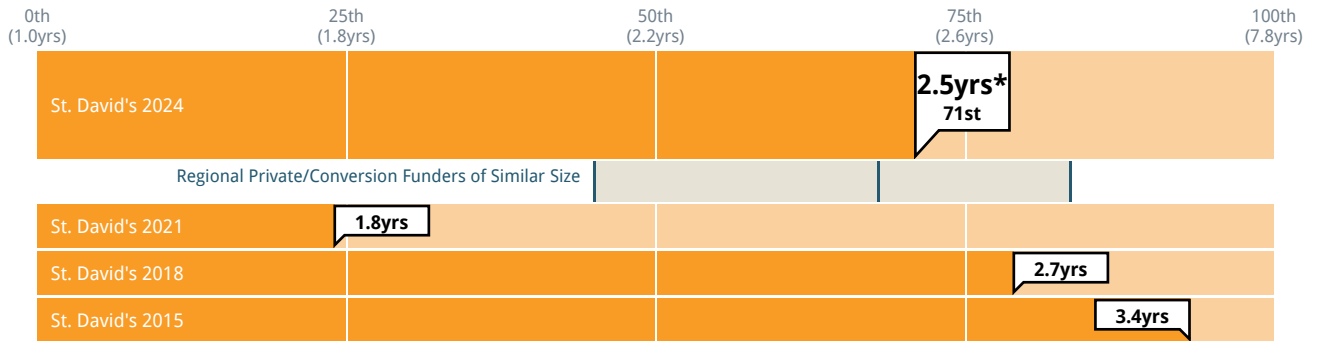
- Improve Clarity of Funding Cycles and Timelines (N = 3)
  - "Greater transparency on the RFP process and available funding timelines."
- Improve Online Portal Experience (N = 3)
  - "The reporting portal has been of concern for our organization. It is not user friendly."
- Improve Reporting Process (N = 2)
  - "Improvements on reporting outcomes."
- Transparency About Funding Criteria (N = 2)
  - "More transparency of what the Foundation will and will not fund."

## Contextual Data

Please note that all information below is based on self-reported data from grantees.

## Grantmaking Characteristics

### Average Grant Length



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on Subgroup: None

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Length of Grant Awarded	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/Conversion Funders of Similar Size
Average grant length	2.5 years	1.8 years	2.7 years	3.4 years	2.2 years	2.5 years

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Length of Grant Awarded	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/Conversion Funders of Similar Size
0 - 1.99 years	40%	77%	45%	42%	47%	27%
2 - 2.99 years	35%	15%	35%	16%	23%	30%
3 - 3.99 years	13%	2%	3%	14%	19%	34%
4 - 4.99 years	5%	1%	0%	4%	3%	3%
5 - 50 years	8%	5%	17%	25%	8%	7%

Selected Cohort: Regional Private/Conversion Funders of Similar Size				
Proportion of Unrestricted Funding	St. David's 2024	St. David's 2021	Average Funder	Regional Private/Conversion Funders of Similar Size
No, this funding was not restricted to a specific use (e.g., general operating, core support)	31%	34%	29%	37%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	69%	66%	71%	63%

**Grantmaking Characteristics - By Subgroup**

Selected Subgroup: None
<b>Length of Grant Awarded (By Subgroup)</b>
Average grant length

Selected Subgroup: None	
<b>Length of Grant Awarded (By Subgroup)</b>	
0 - 1.99 years	
2 - 2.99 years	
3 - 3.99 years	
4 - 4.99 years	
5 - 50 years	

Selected Subgroup: None	
<b>Proportion of Unrestricted Funding (By Subgroup)</b>	
No, this funding was not restricted to a specific use (e.g., general operating, core support)	
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	

**Grant Size**

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
<b>Grant Amount Awarded</b>	<b>St. David's 2024</b>	<b>St. David's 2021</b>	<b>St. David's 2018</b>	<b>St. David's 2015</b>	<b>Median Funder</b>	<b>Regional Private/Conversion Funders of Similar Size</b>
Median grant size	\$187K	\$75K	\$222.4K	\$270K	\$122.7K	\$250K

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Grant Amount Awarded	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/Conversion Funders of Similar Size
Less than \$10K	0%	5%	1%	2%	8%	0%
\$10K - \$24K	0%	15%	0%	0%	10%	1%
\$25K - \$49K	11%	21%	6%	4%	12%	4%
\$50K - \$99K	21%	14%	8%	6%	15%	11%
\$100K - \$149K	12%	10%	25%	13%	10%	9%
\$150K - \$299K	19%	15%	13%	30%	17%	25%
\$300K - \$499K	11%	6%	16%	11%	10%	17%
\$500K - \$999K	12%	5%	11%	19%	9%	16%
\$1MM and above	15%	10%	20%	15%	10%	17%

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Median Percent of Budget Funded by Grant (Annualized)	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/Conversion Funders of Similar Size
Size of grant relative to size of grantee budget	6%	7%	5%	4%	4%	6%

## Grant Size - By Subgroup

Selected Subgroup: None
<b>Grant Amount Awarded (By Subgroup)</b>
Median grant size

Selected Subgroup: None
<b>Grant Amount Awarded (By Subgroup)</b>
Less than \$10K
\$10K - \$24K
\$25K - \$49K
\$50K - \$99K
\$100K - \$149K
\$150K - \$299K
\$300K - \$499K
\$500K - \$999K
\$1MM and above

Selected Subgroup: None
<b>Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)</b>
Size of grant relative to size of grantee budget

## Grantee Characteristics

Please note that all information below is based on self-reported data from grantees.



Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Operating Budget of Grantee Organization	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/ Conversion Funders of Similar Size
Median Budget	\$1.8M	\$1M	\$3.2M	\$3.9M	\$1.7M	\$2.4M

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Operating Budget of Grantee Organization	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/ Conversion Funders of Similar Size
<\$100K	6%	8%	3%	2%	8%	4%
\$100K - \$499K	13%	28%	9%	7%	18%	12%
\$500K - \$999K	22%	13%	12%	13%	13%	12%
\$1MM - \$4.9MM	25%	25%	33%	31%	30%	33%
\$5MM - \$24MM	27%	16%	29%	28%	19%	24%
>=\$25MM	7%	9%	14%	19%	12%	14%

**Grantee Characteristics - By Subgroup**

Selected Subgroup: None	
Operating Budget of Grantee Organization (By Subgroup)	
Median Budget	

Selected Subgroup: None						
<b>Operating Budget of Grantee Organization (By Subgroup)</b>						
<\$100K						
\$100K - \$499K						
\$500K - \$999K						
\$1MM - \$4.9MM						
\$5MM - \$24MM						
>=\$25MM						

**Funding Relationship**

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Funding Status	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/ Conversion Funders of Similar Size
Percent of grantees currently receiving funding from the Foundation	83%	61%	94%	93%	82%	83%

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Pattern of Grantees' Funding Relationship with the Foundation	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/ Conversion Funders of Similar Size
First grant received from the Foundation	21%	38%	27%	9%	29%	27%
Consistent funding in the past	58%	42%	63%	84%	53%	55%
Inconsistent funding in the past	21%	20%	11%	7%	18%	18%

### Funding Relationship - by Subgroup

Selected Subgroup: None
<b>Funding Status (By Subgroup)</b>
Percent of grantees currently receiving funding from the Foundation

Selected Subgroup: None
<b>Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)</b>
First grant received from the Foundation
Consistent funding in the past
Inconsistent funding in the past

### Funder Characteristics

Please note that all information below is based on self-reported data from St. David's Foundation.

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Financial Information	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/Conversion Funders of Similar Size
Total assets	N/A	\$1209.2M	\$862.5M	\$661.2M	\$319.9M	\$2693.7M
Total giving	\$79.3M	\$66.5M	\$51.2M	\$39M	\$20.8M	\$106.5M

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Funder Staffing	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/Conversion Funders of Similar Size
Total staff (FTEs)	91	80	36	27	18	43
Percent of staff who are program staff	11%	15%	25%	22%	45%	37%

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Grantmaking Processes	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Median Funder	Regional Private/Conversion Funders of Similar Size
Proportion of grants that are invitation-only	100%	44%	25%	45%	59%	81%
Proportion of grantmaking dollars that are invitation-only	100%	83%	20%	17%	73%	94%

## Methodology, Analysis, and Respondent Demographics

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
St. David's 2024	April and May 2024	189	105	56%
St. David's 2021	September and October 2021	283	180	64%
St. David's 2018	February and March 2018	122	95	78%
St. David's 2015	February and March 2015	76	58	76%

Survey Year	Year of Active Grants
St. David's 2024	2023-2024
St. David's 2021	2020-2021
St. David's 2018	2017
St. David's 2015	2014

## Standard Comparative Cohorts

CEP included 18 standard cohorts to allow for comparisons to a variety of different types of funders.

### Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	34	Funders with median grant size of \$20K or less
Large Grant Providers	126	Funders with median grant size of \$200K or more
High Touch Funders	33	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Proactive Grantmakers	121	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	110	Funders that make at most 10% of grants by invitation only
Intermediary Funders	25	Funders that primarily regrant philanthropic dollars
International Funders	62	Funders that fund outside of their own country

### Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	57	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	96	Funders with annual giving of \$50 million or more

### Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	181	All private foundations in the GPR dataset
Family Foundations	93	All family foundations in the GPR dataset
Community Foundations	41	All community foundations in the GPR dataset
Health Conversion Foundations	31	All health conversion foundations in the GPR dataset

## Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	45	Funders that are primarily based outside the United States
Recently Established Foundations	63	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	146	Funders who surveyed grantees during COVID-19 (2020 - 2022)
European Funders	27	Funders that are headquartered in Europe

## Subgroup Methodology and Differences

The following page outlines the methodology used to determine the subgroups that are displayed in the report, along with any differences in grantee perceptions. Differences should be interpreted in the context of the Foundation's goals and strategy.

CEP conducts statistical analysis on groups of 10 or larger. Ratings described as "significantly" higher or lower reflect statistically significant differences at a P-value less than or equal to 0.1. Ratings described as "trending" higher or lower reflect a 0.3-point difference larger or smaller than the overall average rating.

### Subgroup Methodology

**POC-Led:** Using the grantee list provided by the Foundation, CEP tagged grantees based on whether their organization is POC-Led. Grantees that were tagged as "Undisclosed" and "Not Available" in the list are grouped into "Not Available."

**Relationship:** Using data grantees provided in the survey, CEP tagged grantees based on if they are relatively newer grantees of the Foundation (2021 and more recent) or already had an existing relationship with the Foundation before 2021.

**Funding Area:** Using data grantees provided in the survey, CEP tagged grantees based on funding area. "Other" includes grantees from the following funding areas: Capacity Building, Critical Infrastructure, Evaluation, and Women.

**Respondent Gender:** Using data grantees provided in the survey, CEP tagged grantees based on their gender identity. Those segmented as "Identifies as a Man" selected "Man" only, and those segmented as "Identifies as a Woman" selected "Woman" only.

**Respondent Person of Color Identity:** Using data grantees provided in the survey, CEP tagged grantees based on their person of color identity.

Based on the grantee list provided by the Foundation, CEP also tagged grantees and ran additional analyses based on **Organization Size, Primary County, and Level of Impact**.

### Subgroup Differences

#### POC-Led:

- Ratings from Majority POC-Led grantees are *significantly lower* than Not Majority POC-Led grantees for the following measures:
  - Impact on grantees' local communities and grantees' fields
  - Effect on public policy in grantees' fields
  - Grantees' agreement that the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work
  - Whether the Foundation effectively illuminates health disparities and the impacts of inequitable systems to the public and policymakers
- Ratings from Majority POC-Led grantees are *significantly higher* than Not Majority POC-Led grantees for the following measures:
  - Whether assistance beyond the grant received was a worthwhile use of the time required of grantees, and that grantees felt the Foundation would be open to feedback about the assistance beyond the grant provided
  - The extent to which the reporting process is straightforward and adaptable to fit grantees' circumstances

**Relationship:** There is no consistent pattern of meaningful differences when responses are analyzed by whether grantees were an existing or newer (2021+) partner of the Foundation.

**Funding Area:** There is no consistent pattern of meaningful differences when responses are analyzed by grantees' funding area.

**Respondent Gender:** Ratings from respondents who identify exclusively as "woman" are *significantly lower* than respondents who identify exclusively as "man" for a handful of measures. For more information, please see the "[Respondent Demographics](#)" section.

**Respondent Person of Color Identity:** Ratings from grantees who identify as a person of color are *significantly higher* than grantees who identify as not a person of color for a handful of measures. For more information, please see the "[Respondent Demographics](#)" section.

**Organization Size:** Grantees tagged by the Foundation as "Large" (\$1M+ in organizational budget size) provide significantly higher ratings compared to grantees tagged as "Medium" or "Small" (<\$1M) for many measures, including aspects of understanding, interactions and communications, the selection process, and a custom question about overall perceptions of the Foundation.

**Primary County:**

- Ratings from grantees tagged to [Bastrop County](#) *trend higher* than overall St. David's ratings for most measures in the survey.
- Ratings from grantees tagged to [Williamson County](#) *trend lower* than overall St. David's ratings for most measures in the survey.

**Level of Impact:**

- Ratings from [System/Policy \(improvement for more than one organization\)](#) grantees *trend higher* than overall St. David's ratings for many measures, including aspects of understanding, the selection process, a custom question about overall perceptions of the Foundation, and perceptions of the Foundation's Pathways to Equity strategy.
- Ratings from [Community/Built Environ. \(asset building, connections, physical spaces\)](#) grantees *trend lower* than overall St. David's ratings for about half of perceptual measures in the survey, including aspects of understanding, DEI, selection and reporting processes, and field-related measures.

## Respondent Demographics

Respondents in the United States are asked questions related to their gender identity, transgender identity, racial/ethnic identity, identity as a person of color, disability identity, and identity as a member of the LGBTQ+ community.

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

Survey language and response options for questions about gender and LGBTQ+ identity are guided by best practices shared by [Funders For LGBTQ Issues](#), [HRC Foundation's Welcoming Schools](#), and the [Williams Institute of the University of California – Los Angeles School of Law](#).

Survey respondents are asked to share their gender identities in a check-all-that-apply question. Each chart has the option of showing the average ratings of respondents who selected only "man," only "woman," multiple gender identities, "gender non-conforming or non-binary," "prefer to self-identify," and "prefer not to say" - as long as that response option had at least 10 respondents.

All demographic survey questions are optional.

## Differences in Ratings by Respondent Demographics

It is CEP's standard practice to analyze responses for differences by the following demographics characteristics:

**Person of Color Identity:**

- Ratings from grantees who identify as a [person of color](#) are *significantly higher* than grantees who identify as [not a person of color](#) for the following measures:
  - Whether assistance beyond the grant was a worthwhile use of the time required of grantees
  - The extent to which the reporting process is straightforward, adaptable, and relevant
  - The extent to which the evaluation process incorporates input from grantees' organizations in the design of the evaluation and the extent to which the evaluation process results in grantees' organizations making changes to the work that was evaluated
  - Agreement that the Foundation's strategy will have a positive effect on grantee organizations' impact

**Respondent Gender Identity:**

- Ratings from respondents who identify exclusively as "[woman](#)" are *significantly lower* than respondents who identify exclusively as "[man](#)" for the following measures:
  - Impact on grantees' local communities
  - Grantees' comfort approaching the funder if a problem arises
  - The extent to which the funder exhibits compassion for those affected by grantees' work
  - Agreement that the Foundation clearly communicated what aspects of the strategic plan were a change from the past, and that the Foundation's strategy reflects the most pressing community needs and builds on existing community assets
  - Agreement that the Foundation clearly and transparently shares what it does and does not support
  - Grantee experience with grants management systems and technologies during the following stages: general grantee portal experience and navigation, submitting grant reports, signing the grant contract, and receipt of payments

**Transgender Identity:** There are too few respondents to analyze results by transgender identity.

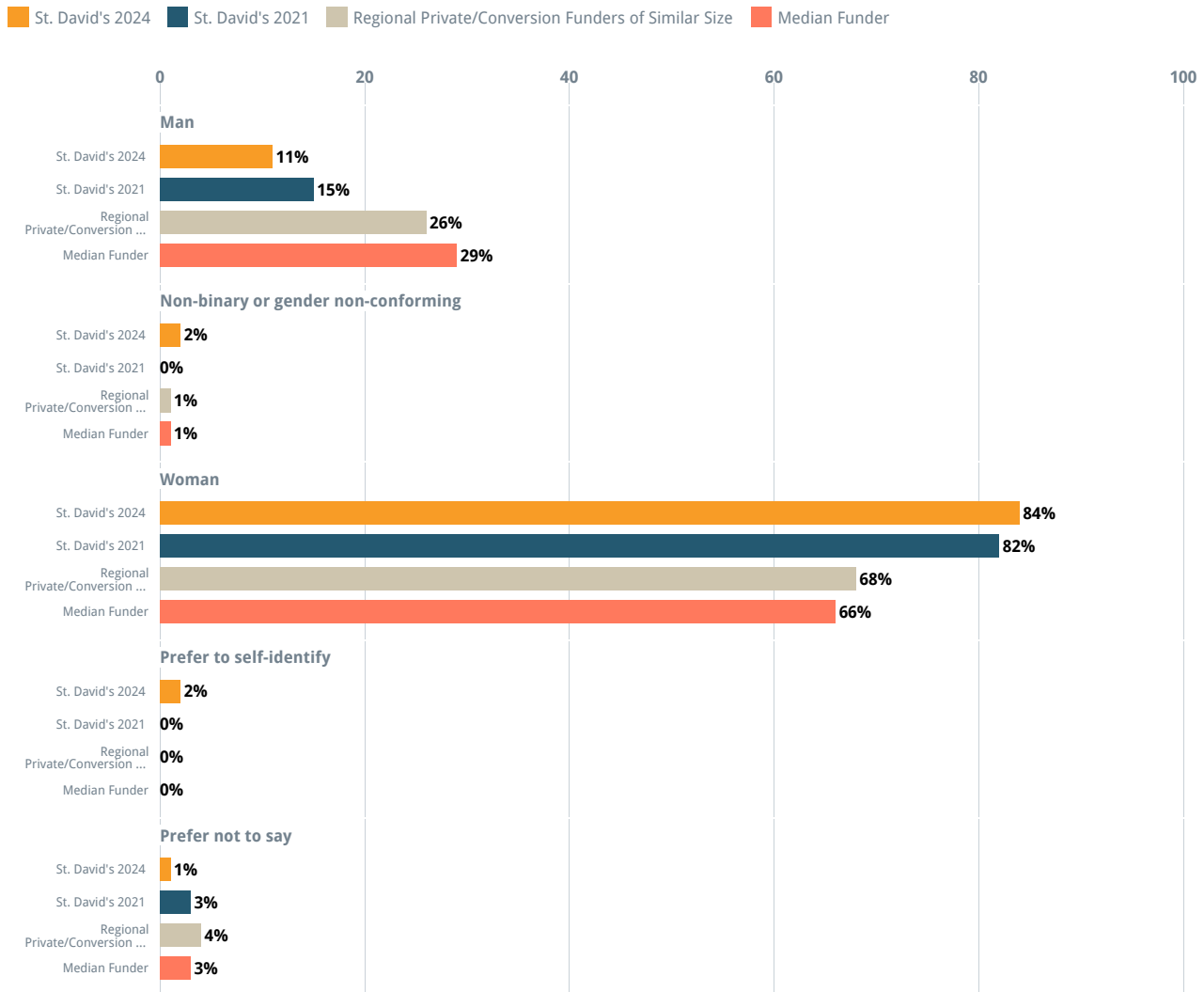
**LGBTQ+ Identity:** There is not a consistent pattern of meaningful differences when responses are analyzed by grantees' LGBTQ+ Identity.

**Disability Identity:**

- Ratings from respondents who [have a disability](#) are *significantly higher* than respondents who [do not have a disability](#) for the following measures:
  - Level of pressure to modify grantees' priorities to create a request that was likely to receive funding (1 = no pressure, 7 = significant pressure)
- Ratings from respondents who [have a disability](#) are *significantly lower* than respondents who [do not have a disability](#) for the following measures:
  - Understanding of grantees' fields

- Helpfulness of the selection process to grantees in strengthening the efforts of the funded organization/program
- The extent to which the selection process was an appropriate level of effort given the amount of funding received
- Clarity and transparency of the selection process requirements and timelines
- The extent to which the reporting process is adaptable, relevant, and helpful
- Agreement that the Foundation clearly communicated what aspects of the strategic plan were a change from the past, and that the Foundation's strategy reflects the most pressing community needs and builds on existing community assets
- Agreement that the Foundation effectively elevates and integrates community voices to frame issues, co-design solutions, and shape strategies
- Grantee experience with the grants management systems and technologies used for submitting the grant application

**Please select the option that represents how you describe yourself:**

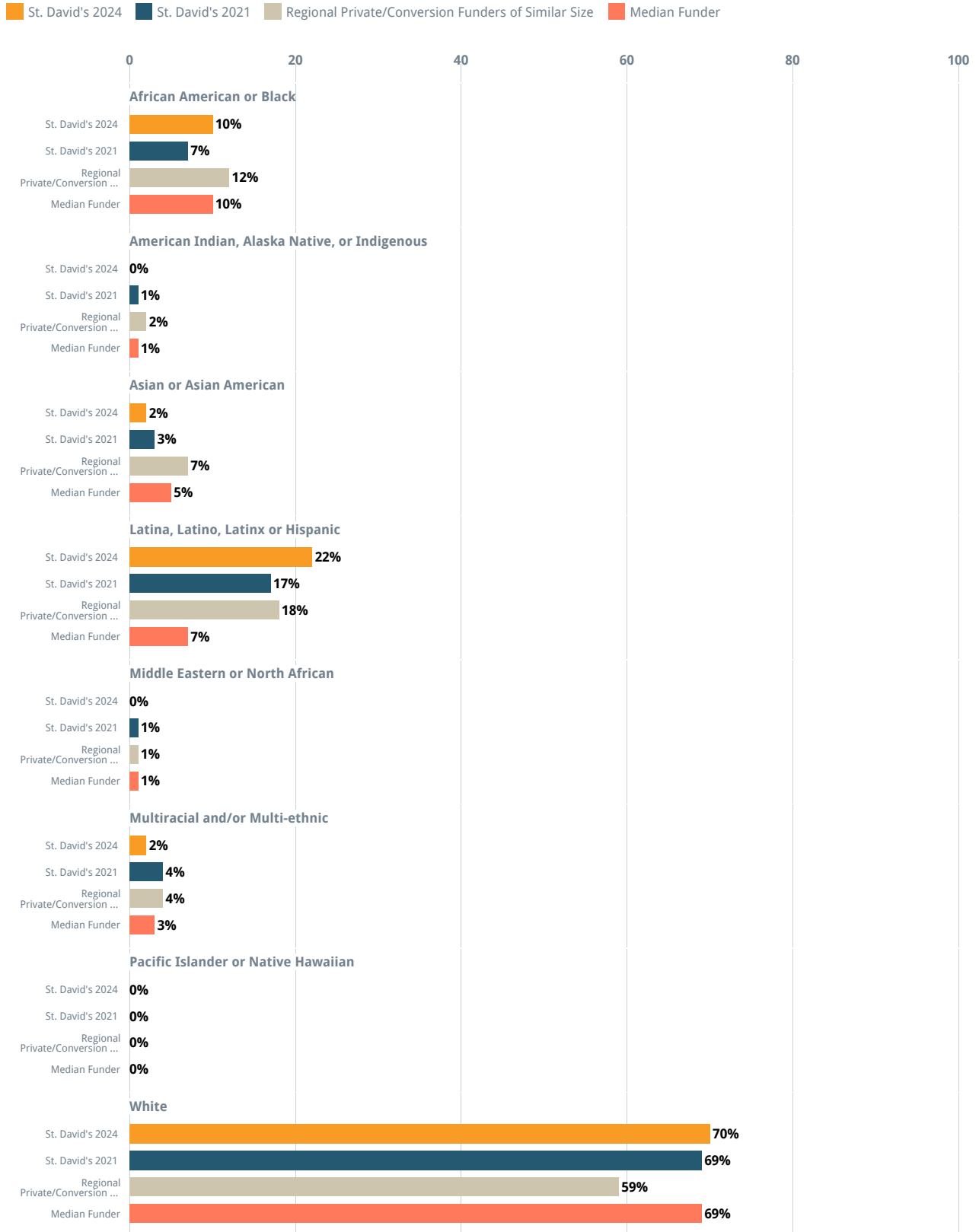


Cohort: Regional Private/Conversion Funders of Similar Size Past results: on



Selected Cohort: Regional Private/Conversion Funders of Similar Size				
Are you transgender?	St. David's 2024	St. David's 2021	Average Funder	Regional Private/ Conversion Funders of Similar Size
Yes	1%	0%	1%	1%
No	96%	98%	96%	95%
Prefer not to say	3%	2%	4%	4%

How would you describe your race and/or ethnicity?



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

How would you describe your race and/or ethnicity? (cont.)



Cohort: Regional Private/Conversion Funders of Similar Size Past results: on

Selected Cohort: Regional Private/Conversion Funders of Similar Size				
Do you identify as a person of color?	St. David's 2024	St. David's 2021	Average Funder	Regional Private/Conversion Funders of Similar Size
Yes	30%	23%	26%	34%
No	68%	73%	68%	60%
Prefer not to say	2%	4%	6%	5%

Selected Cohort: Regional Private/Conversion Funders of Similar Size				
Do you have a disability?	St. David's 2024	St. David's 2021	Average Funder	Regional Private/Conversion Funders of Similar Size
Yes	11%	7%	6%	8%
No	88%	89%	88%	87%
Prefer not to say	1%	3%	5%	6%

Selected Cohort: Regional Private/Conversion Funders of Similar Size				
Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community?	St. David's 2024	St. David's 2021	Average Funder	Regional Private/Conversion Funders of Similar Size
Yes	11%	11%	11%	13%
No	87%	86%	83%	82%
Prefer not to say	2%	3%	6%	6%

## Respondent Job Title

Selected Cohort: Regional Private/Conversion Funders of Similar Size						
Job Title of Respondents	St. David's 2024	St. David's 2021	St. David's 2018	St. David's 2015	Average Funder	Regional Private/Conversion Funders of Similar Size
Executive Director/CEO	46%	48%	47%	51%	47%	46%
Other Senior Team (i.e., reporting to Executive Director/CEO)	32%	14%	17%	23%	20%	24%
Project Director	8%	10%	7%	4%	11%	8%
Development Staff	10%	21%	27%	19%	16%	16%
Volunteer	0%	2%	2%	0%	1%	1%
Other	5%	4%	0%	4%	5%	5%

## Additional Survey Information

Grantees may decide not to answer any question in the grantee survey. On many questions in the 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 in each of the survey measures. The total number of respondents to St. David's grantee survey was 105.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your organization?	105

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your local community?	104
Overall, how would you rate the Foundation's impact on your field?	101
To what extent has the Foundation advanced the state of knowledge in your field?	91
To what extent has the Foundation affected public policy in your field?	64
How well does the Foundation understand your organization's strategy and goals?	102
How aware is the Foundation of the challenges that your organization is facing?	105
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	104
How well does the Foundation understand the field in which you work?	104
Please indicate any types of assistance beyond the grant that were a component of what you received from the Foundation.	102
Please rate the extent to which you agree with the following statements about the assistance beyond the grant you received from the Foundation:	
The assistance beyond the grant I received met an important need for my organization and/or program	67
The assistance beyond the grant I received strengthened my organization and/or program	67
The Foundation's assistance beyond the grant was a worthwhile use of the time required of us	67
I felt the Foundation would be open to feedback about the assistance beyond the grant it provided	67
How well does the Foundation understand the needs of the people and communities that you serve?	103
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	105
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant?	85
To what extent do you agree or disagree that the Foundation has clearly communicated what diversity, equity, and inclusion means for its work?	99
To what extent do you agree or disagree that the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work?	99
How comfortable do you feel approaching the Foundation if a problem arises?	104
Overall, how responsive was the Foundation staff?	105
To what extent did the Foundation exhibit trust in your organization's staff during this grant?	103
To what extent did the Foundation exhibit candor about the Foundation's perspectives on your work during this grant?	104
To what extent did the Foundation exhibit compassion for those affected by your work during this grant?	103
To what extent is the Foundation open to ideas from grantees about its strategy?	103
How often do/did you have contact with your primary contact during this grant?	105
Has your main contact at the Foundation changed in the past six months?	103
At any point during this grant, including the selection process, did Foundation staff conduct a site visit?	105
How clearly has the Foundation communicated its goals and strategy to you?	105
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	95
Overall, how transparent is the Foundation with your organization?	105
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	103
Did you submit an application to the Foundation for this grant?	103
Did you have contact with a Foundation staff member via phone, email, or in-person/video before you applied?	81
To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?	88
To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?	94
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?	84
To what extent was the Foundation clear and transparent about the selection process requirements and timelines?	96
To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether an application would be funded or declined?	75

Question Text	Number of Responses
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?	94
Have you participated in a reporting or evaluation process?	102
To what extent was the Foundation's reporting process straightforward?	82
To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?	86
To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?	91
To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?	89
To what extent did the evaluation incorporate your input in the design of the evaluation?	34
To what extent did the evaluation result in you making changes to the work that was evaluated?	35
Total funding committed for this grant	104
Total number of years of approved funding for this grant	103
Was the funding you received restricted to a specific use?	105
What is the approximate annual operating budget of your organization?	100
Are you currently receiving funding from the Foundation?	105
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	105
Custom Questions	
Were you aware that the Foundation had recently undergone this strategic change?	105
Please rate your level of agreement or disagreement with each of the following statements regarding your perceptions of the Foundation's Pathways to Equity strategy:	
The Foundation clearly communicated what aspects of the strategic plan were a change from the past	93
The Foundation's strategy reflects the most pressing community needs and builds on existing community assets	99
The strategy positions the Foundation to be a stronger catalyst for change in the community	97
The Foundation's strategy will have a positive effect on my organization's impact	92
To what extent were you given the opportunity to provide input into the Foundation's strategic plan?	105
Please rate your level of agreement or disagreement with each of the following statements regarding your perceptions of the Foundation as a whole:	
The Foundation takes risks on projects that might fail	83
The Foundation effectively elevates and integrates community voices to frame issues, co-design solutions, and shape strategies	93
The Foundation understands the impact of policy and legislative systems on our local community	91
The Foundation effectively illuminates health disparities and the impacts of inequitable systems to the public and policymakers	86
The Foundation effectively measures outcomes, strives for high-impact work, and makes data-driven decisions aligned with evidence, strategy, and community voice	94
The Foundation clearly and transparently shares what it does and does not support	94
Please indicate which of the following offerings, if any, would be most helpful in strengthening your organization's work (Please check up to three options):	
Overall, how would you rate your experience with the grants management systems and technologies used during the following stages of this grant:	105
General grantee portal experience and navigation	99
Submitting the grant application	99
Submitting grant reports	93
Signing the grant contract	101
Receipt of payments	99

## About CEP and Contact Information

The Center for Effective Philanthropy's mission is to provide data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness. We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.

CEP pursues this mission through several core activities:

**Assessment and Advisory Services:** Our [assessments](#) provide actionable insights on funders' work with and influence on key stakeholders through comparative benchmarking. Our assessments include the Grantee and Declined Applicant Perception Reports (GPR/APR), Donor Perception Report (DPR) for community foundations, and Staff Perception Report (SPR) for foundation staff. Our customized [advisory projects](#) offer data-driven services to help funders answer pressing questions about their work.

**CEP Learning Institute:** The [CEP Learning Institute](#) draws on CEP's rigorous research and decades of experience advising foundations to offer learning cohorts, trainings, and custom workshops for individuals and groups looking to improve philanthropic practice.

**Programming and External Relations:** CEP works to promote philanthropic effectiveness through resources such as our [website](#), [blog](#), [podcast](#), [newsletter](#), speaking engagements, social media, free webinars, and biennial national conferences.

**Research:** CEP's research provides data-based insights about effective foundation practices and trends in the philanthropic sector. All of CEP's research reports can be downloaded for free at our online [resource library](#).

**YouthTruth:** The [YouthTruth](#) initiative partners with schools, districts, states, educational organizations, and education funders to enhance learning for all young people through validated survey instruments for students, families, and staff, as well as tailored advisory services.

## Contact Information

Joseph Lee  
Manager, Assessment and Advisory Services  
[josephl@cep.org](mailto:josephl@cep.org)

Erin Fitzgerald  
Senior Analyst, Assessment and Advisory Services  
[erinf@cep.org](mailto:erinf@cep.org)