
The David and Lucile Packard Foundation 2023 Grantee Perception Report - Public

Generated on August 12, 2024



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

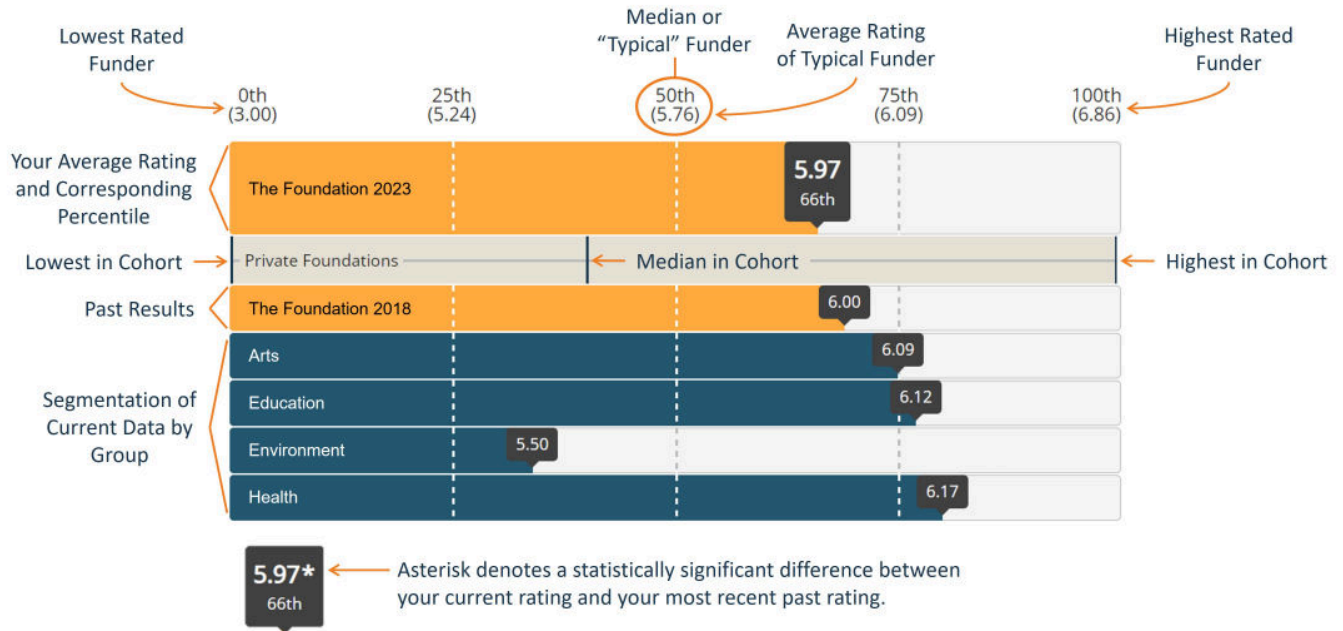
The online version of this report can be accessed at cep.surveymresults.org

Interpreting Your Charts	1
Key Ratings Summary	2
Survey Population	3
Comparative Cohorts	4
Grantmaking Characteristics	6
Impact on and Understanding of Grantees' Fields	10
Advancing Knowledge and Public Policy	11
Impact on and Understanding of Grantees' Local Communities	12
Impact on and Understanding of Grantees' Organizations	13
Grantee Challenges	14
Non-Monetary Assistance	14
Funder-Grantee Relationships	17
Interaction Patterns	19
Communication	23
Contextual Understanding	26
Diversity, Equity, and Inclusion	28
Grant Processes	30
Selection Process	30
Reporting and Evaluation Process	32
Reporting Process	33
Evaluation Process	35
Dollar Return and Time Spent on Processes	36
Time Spent on Selection Process	37
Time Spent on Reporting and Evaluation Process	38
Customized Questions	40

Grantees' Written Comments	41
Quality of Processes, Interactions, and Communications	41
Suggestion Topics.....	41
Selected Suggestions	42
Justice and Equity	47
Respondents and Communities Served	50
Respondent Demographics	52
Respondent Job Title.....	56
Contextual Data	57
Grantee Characteristics.....	61
Funder Characteristics	64
Additional Survey Information	66
About CEP and Contact Information.....	68

Interpreting Your Charts

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

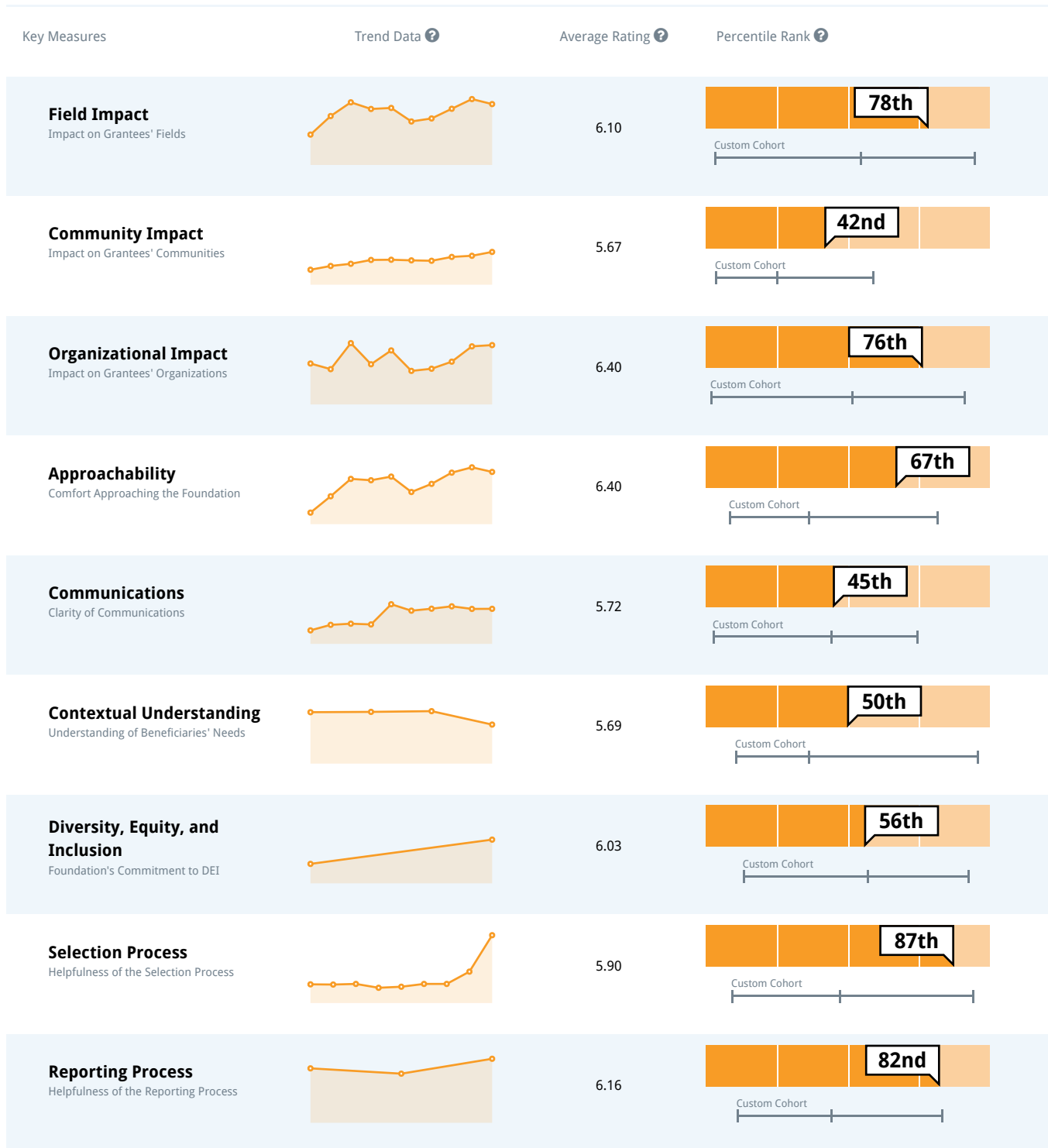


Note: Asterisk denotes a statistically significant difference at a P-value less than or equal to 0.05.

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.

Key Ratings Summary

The following chart highlights a selection of The David and Lucile Packard 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.



Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Packard 2023	September and October 2023	1379	865	63%
Packard 2020	August and September 2020	1283	750	58%
Packard 2018	May and June 2018	1082	629	58%
Packard 2016	May and June 2016	954	608	64%
Packard 2014	May and June 2014	1069	602	56%
Packard 2012	September and October 2012	627	428	68%
Packard 2010	September and October 2010	653	435	67%
Packard 2008	September and October 2008	508	343	68%
Packard 2006	September and October 2006	689	420	61%
Packard 2004	February and March 2004	488	331	68%

Survey Year	Year of Active Grants
Packard 2023	May 2022 - April 2023
Packard 2020	June 2019 - June 2020
Packard 2018	2017
Packard 2016	2015
Packard 2014	2013
Packard 2012	2011
Packard 2010	2009
Packard 2008	2007
Packard 2006	2005
Packard 2004	2003

Note: In Packard's 2023 GPR, grantees with multiple active grants during the survey period were prompted to think about a specific grant randomly selected by the Foundation when answering the survey. This is slightly different from the approach in 2020.

Throughout this report, The David and Lucile Packard Foundation's survey results are compared to CEP's broader dataset of more than 50,000 grantee responses from over 300 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 on [CEP's website](#).

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

Comparative Cohorts

Customized Cohort

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

Custom Cohort

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

Standard Cohorts

CEP also included 18 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	110	Funders with median grant size of \$200K or more
High Touch Funders	34	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Proactive Grantmakers	106	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	103	Funders that make at most 10% of grants by invitation only
Intermediary Funders	23	Funders that primarily regrant philanthropic dollars
International Funders	66	Funders that fund outside of their own country

European Funders

27

Funders that are headquartered in Europe

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	58	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	88	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	170	All private foundations in the GPR dataset
Family Foundations	85	All family foundations in the GPR dataset
Community Foundations	41	All community foundations in the GPR dataset
Health Conversion Foundations	30	All health conversion foundations in the GPR dataset
Corporate Foundations	25	All corporate foundations in the GPR dataset

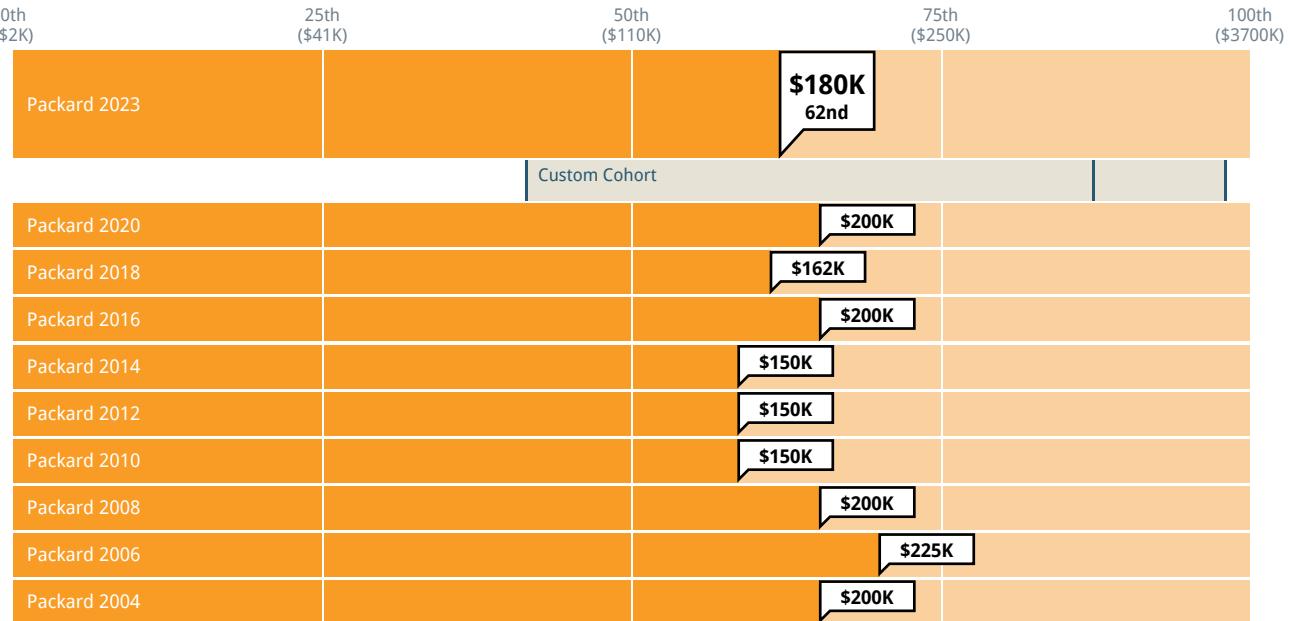
Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	42	Funders that are primarily based outside the United States
Recently Established Foundations	52	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	172	Funders who surveyed grantees during COVID-19 (2020 - 2022)

Grantmaking Characteristics

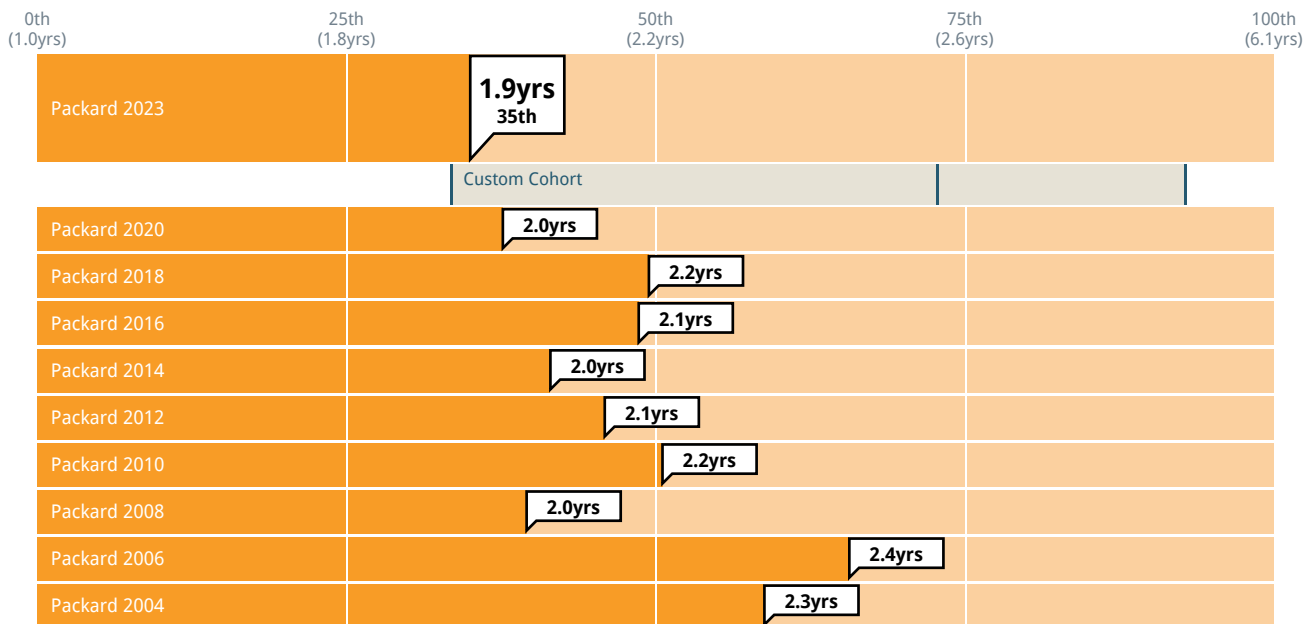
Funders make different choices about the ways they organize themselves, structure their grants, and the types of grantees they support. The following charts and tables show some of these important characteristics. The information is based on self-reported data from funders and grantees, and further detail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

Median Grant Size



Cohort: Custom Cohort Past results: on Subgroup: None

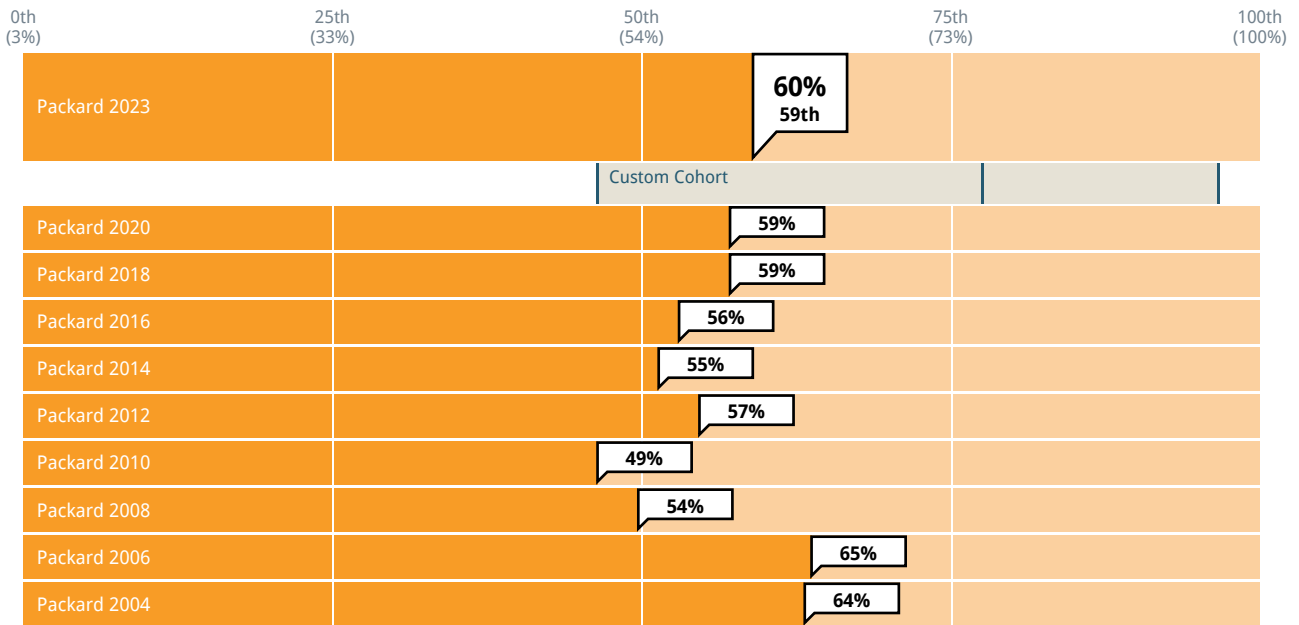
Average Grant Length



Cohort: Custom Cohort Past results: on Subgroup: None

Proportion of Multi-year Grants

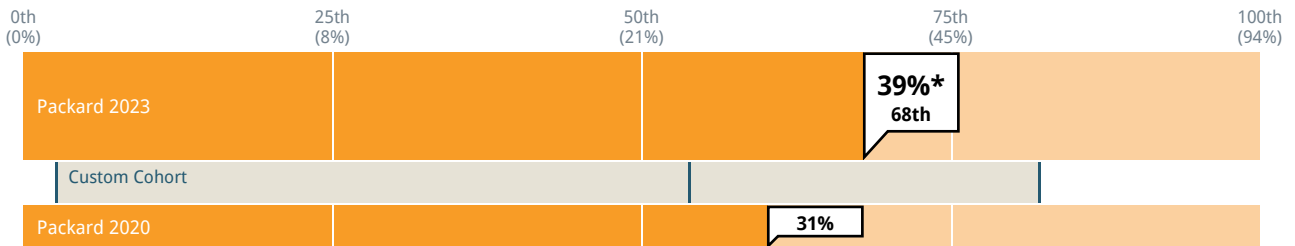
Proportion of grantees that report receiving grants for two years or longer



Cohort: Custom Cohort Past results: on Subgroup: None

Proportion of Unrestricted Funding

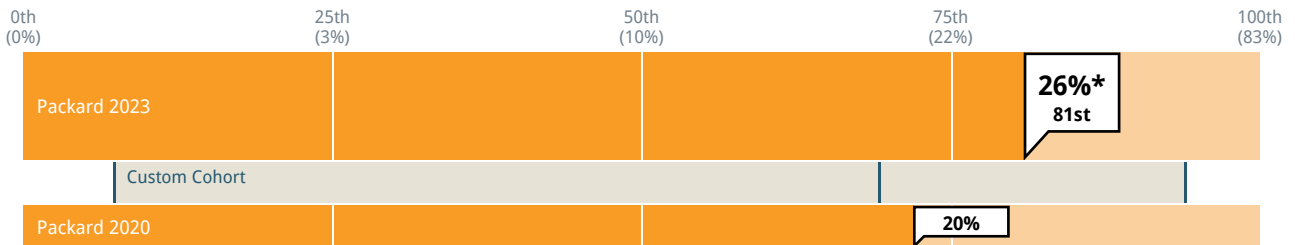
Proportion of grantees responding 'No, this funding was not restricted to a specific use (e.g., general operating, core support)'



Cohort: Custom Cohort Past results: on Subgroup: None

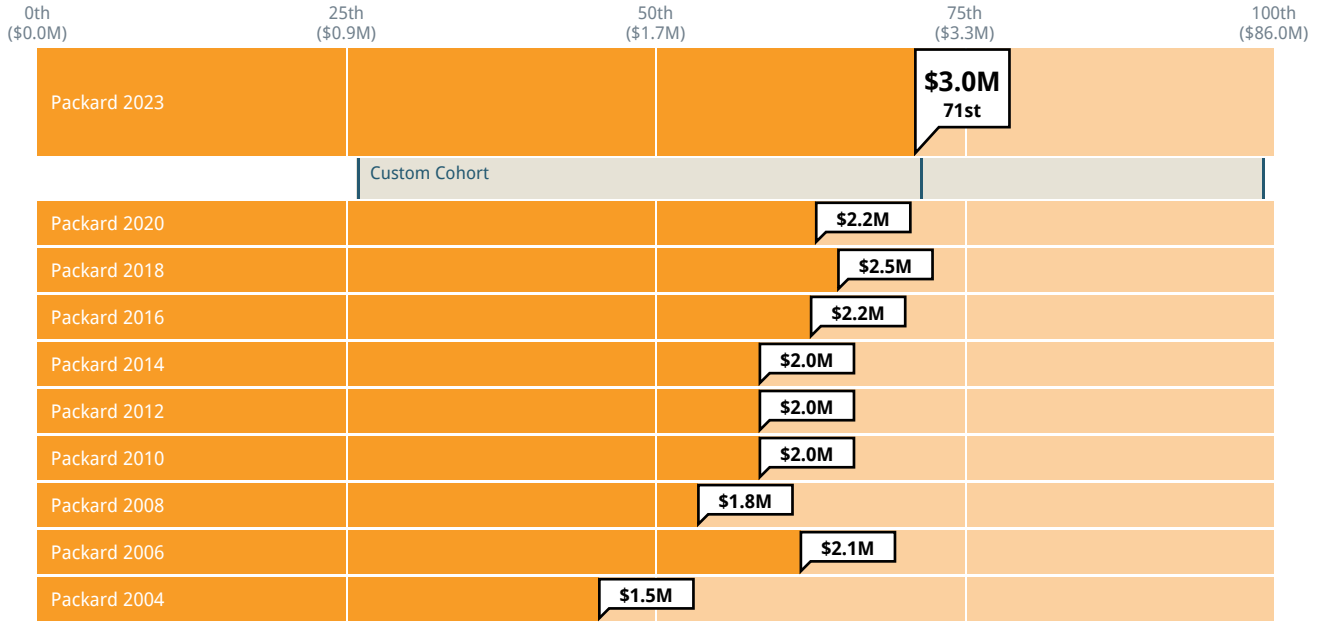
Proportion of Multi-year Unrestricted Grants

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: Custom Cohort Past results: on Subgroup: None

Median Organizational Budget



Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort	
Grant History	
Percentage of first-time grants	
Packard 2023	21%
Packard 2020	13%
Packard 2018	19%
Packard 2016	14%
Packard 2014	13%
Packard 2012	13%
Packard 2010	20%
Average Funder	29%
Custom Cohort	32%

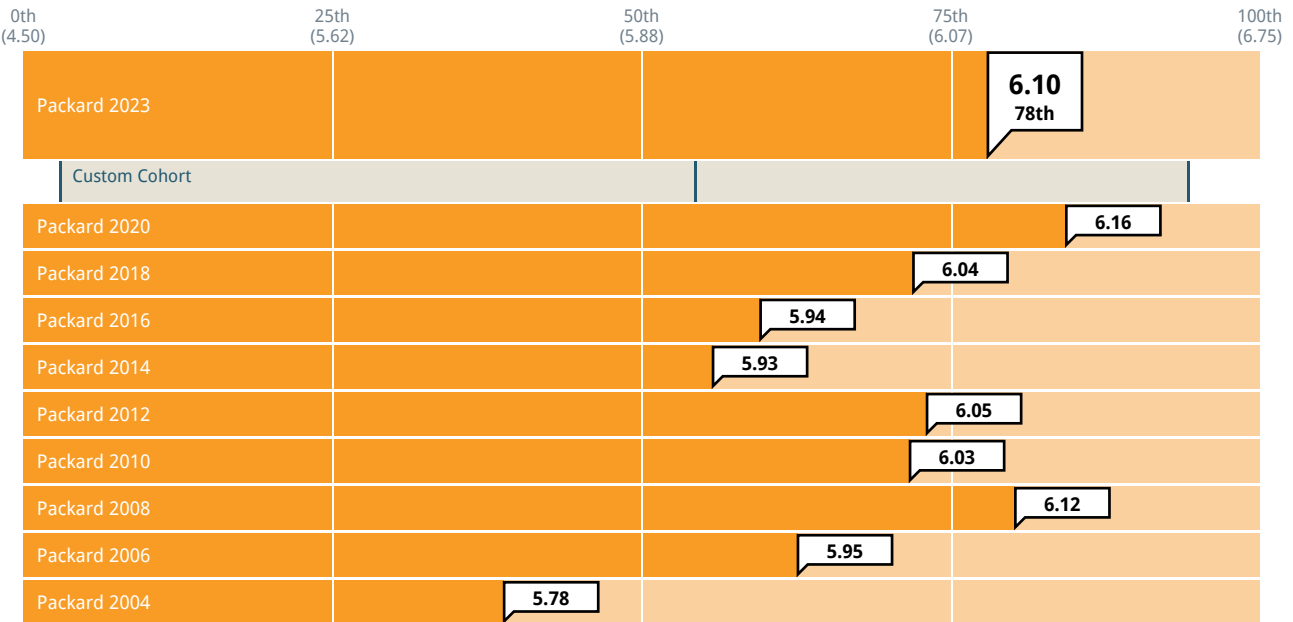
Selected Cohort: Custom Cohort

Program Staff Load			
	Dollars awarded per program full-time employee	Applications per program full-time employee	Active grants per program full-time employee
Packard 2023	\$5.9M	14	22
Packard 2020	\$5.1M	13	46
Packard 2018	\$5.9M	16	24
Packard 2016	\$6.5M	18	31
Packard 2014	\$6.3M	20	22
Packard 2012	\$6.8M	18	25
Packard 2010	\$6.9M	N/A	28
Packard 2008	\$7.7M	20	29
Packard 2006	\$3.7M	15	23
Packard 2004	\$5.7M	14	24
Median Funder	\$2.7M	24	31
Custom Cohort	\$4.8M	9	24

Impact on and Understanding of Grantees' Fields

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

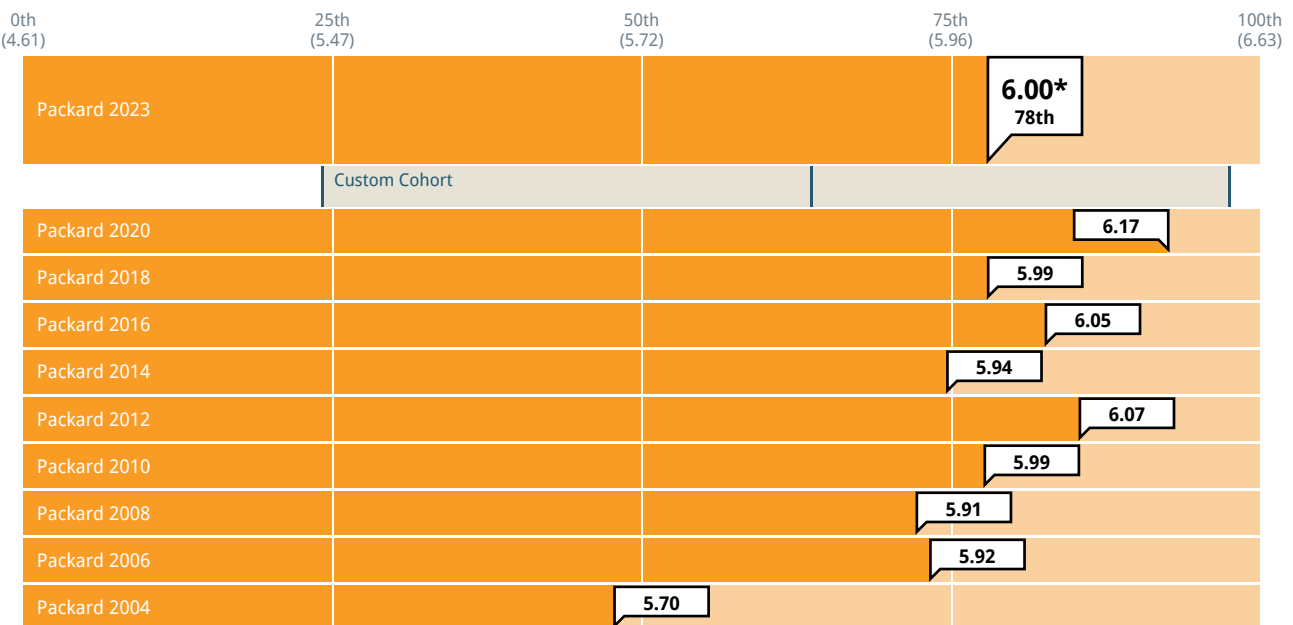
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

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

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

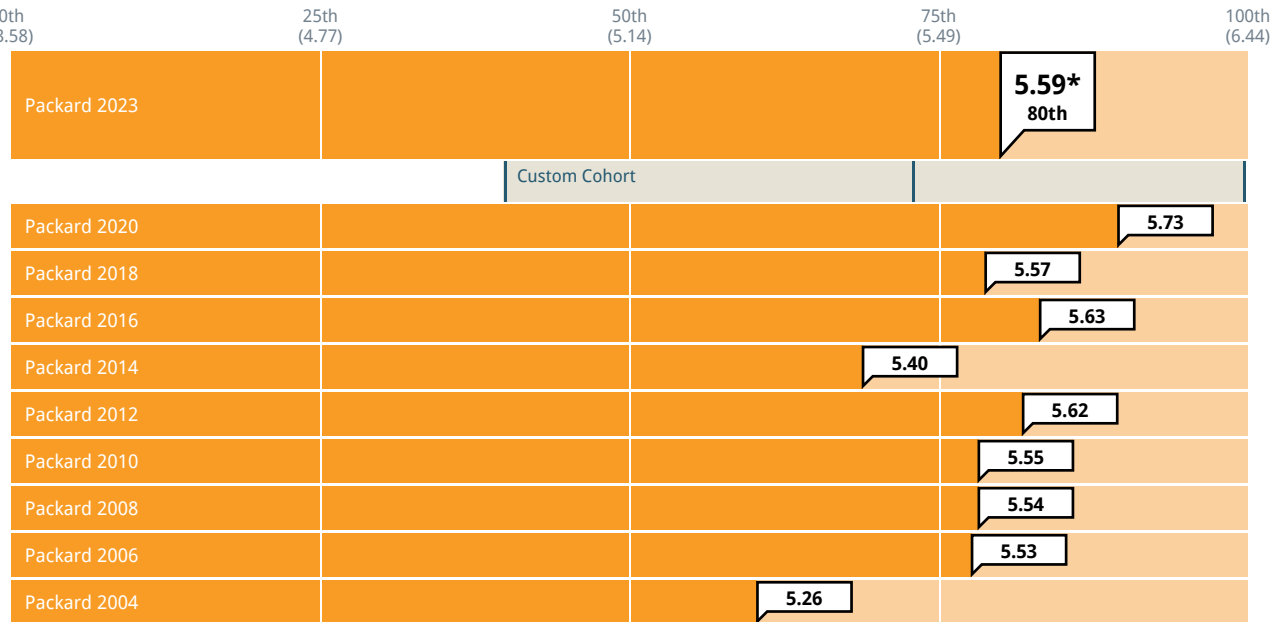


Cohort: Custom Cohort Past results: on Subgroup: None

Advancing Knowledge and Public Policy

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

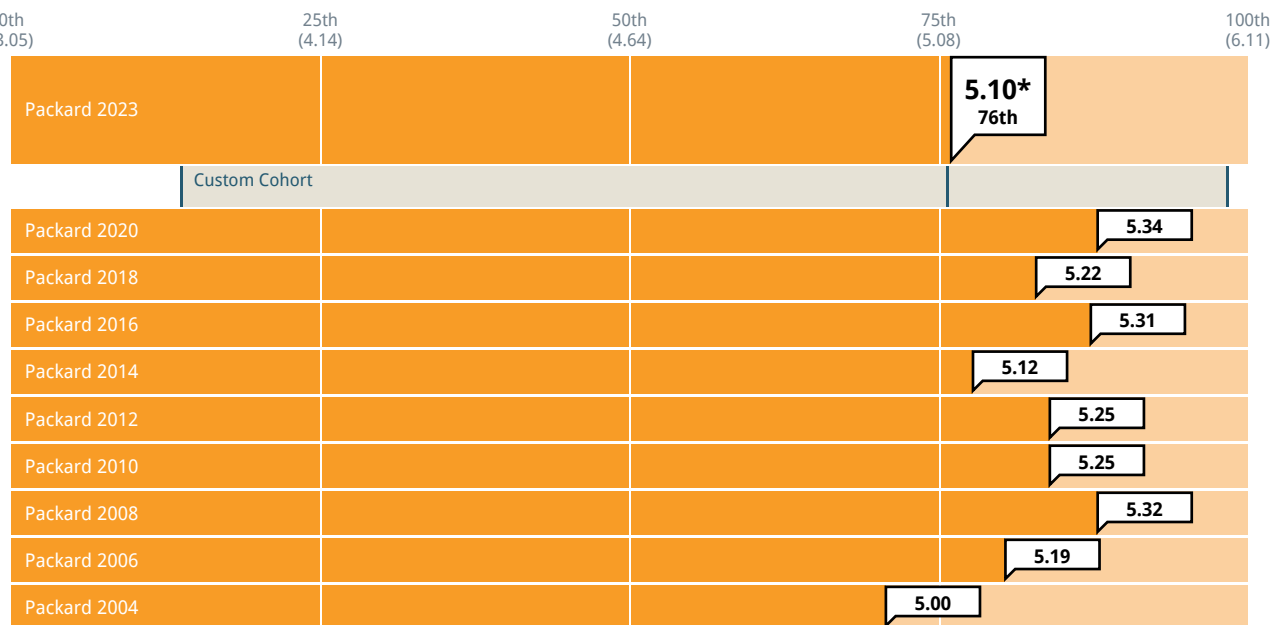
1 = Not at all 7 = Leads the field to new thinking and practice



Cohort: Custom Cohort Past results: on Subgroup: None

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

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

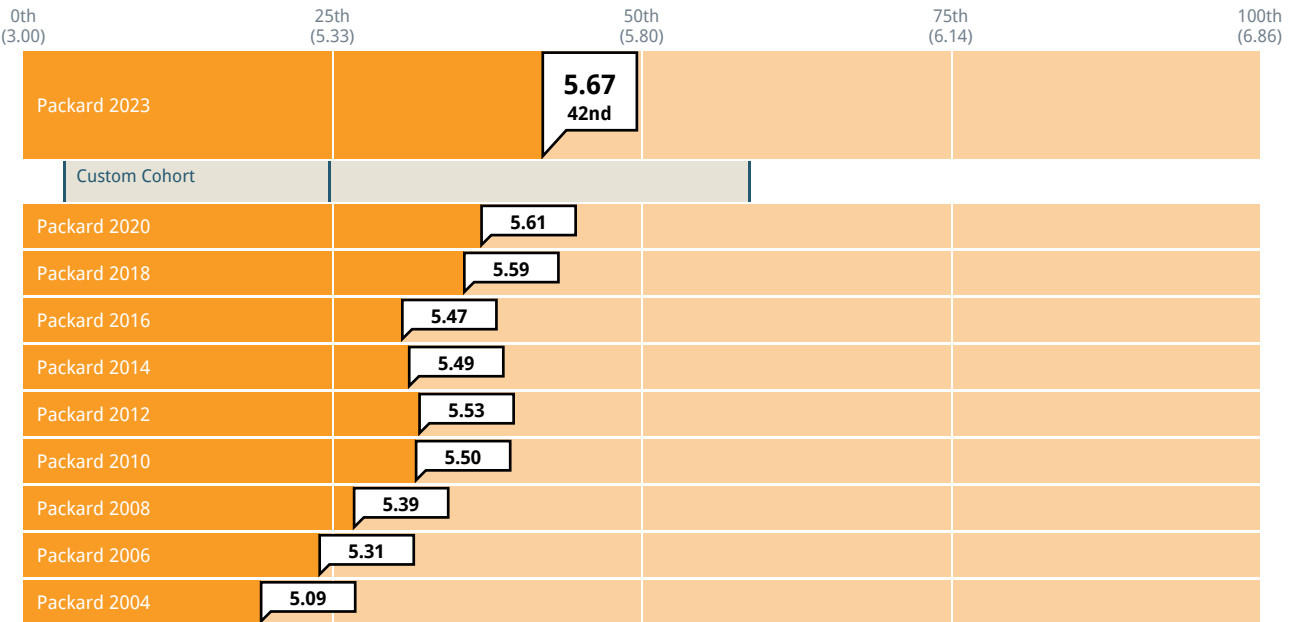


Cohort: Custom Cohort Past results: on Subgroup: None

Impact on and Understanding of Grantees' Local Communities

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

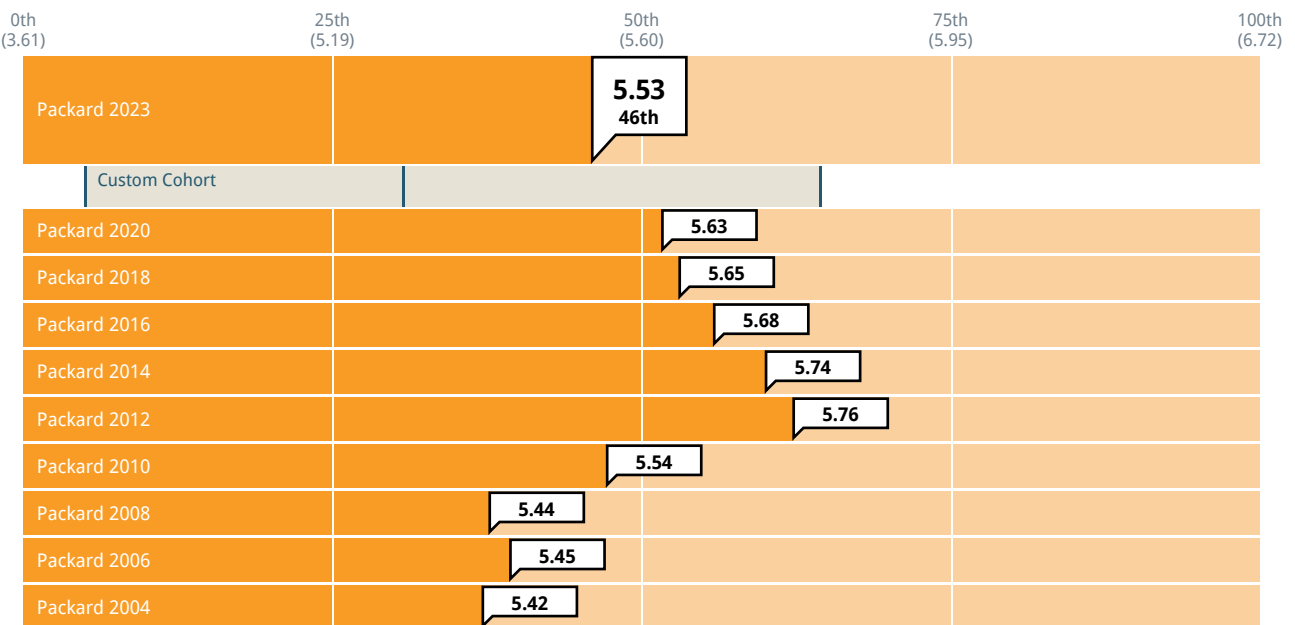
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

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

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

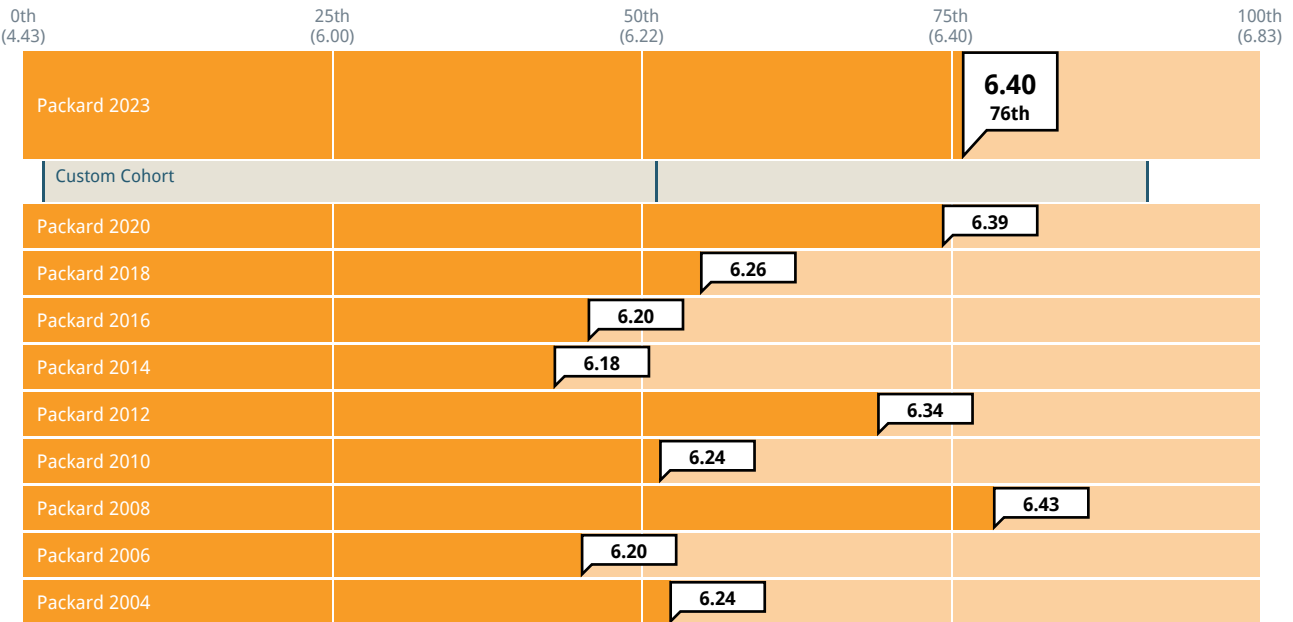


Cohort: Custom Cohort Past results: on Subgroup: None

Impact on and Understanding of Grantees' Organizations

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

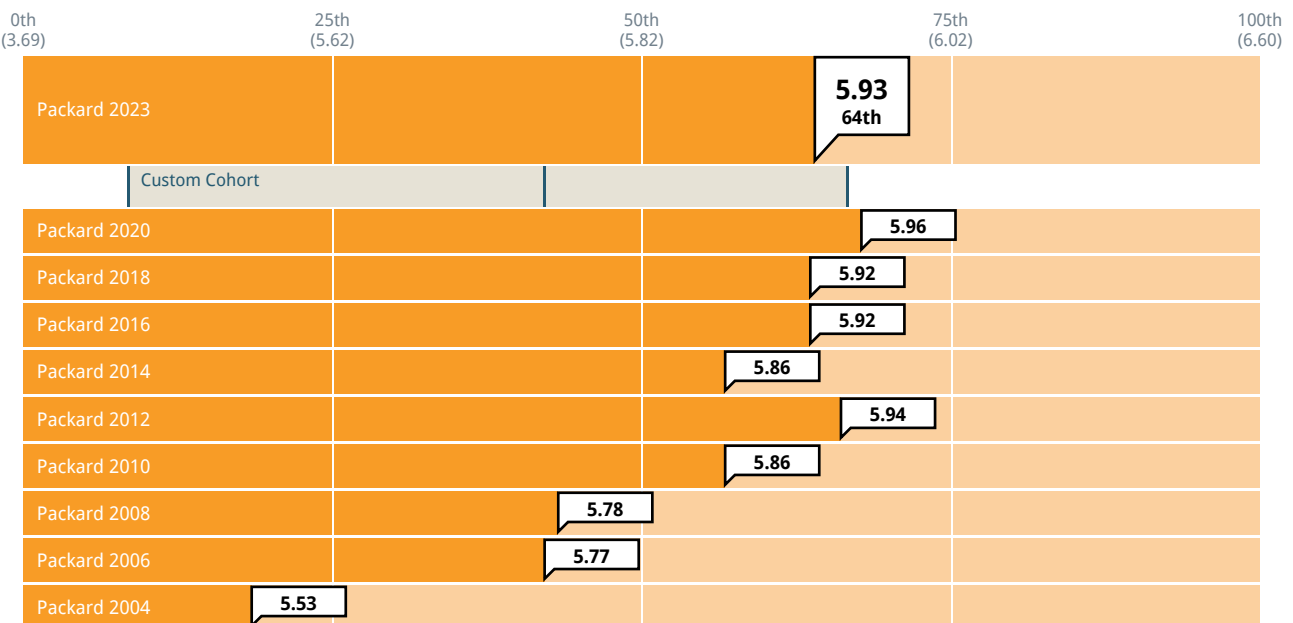
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: None

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

1 = Limited understanding 7 = Thorough understanding

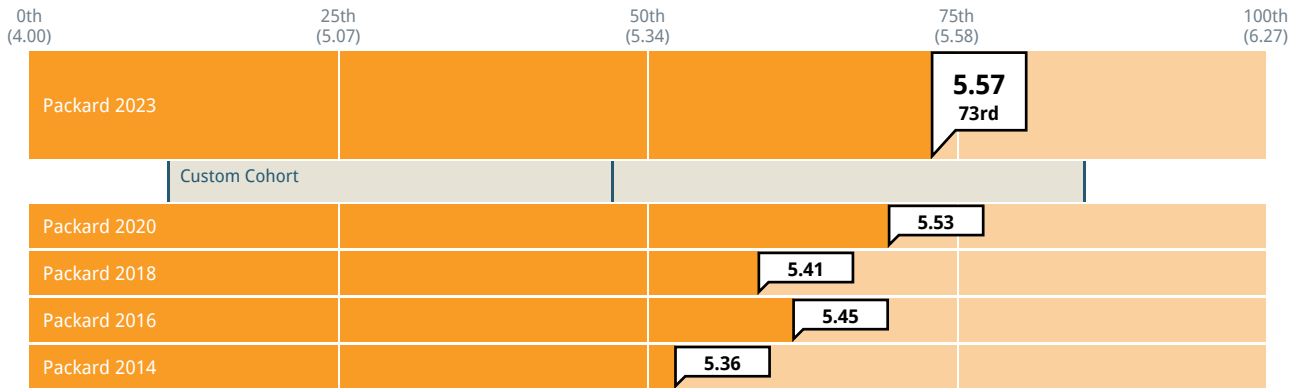


Cohort: Custom Cohort Past results: on Subgroup: None

Grantee Challenges

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

1 = Not at all aware 7 = Extremely aware



Cohort: Custom Cohort Past results: on Subgroup: None

Non-Monetary Assistance

The following questions were recently added to the grantee survey and depict comparative data from fewer than 60 funders in the dataset.

Note: Respondents could select all forms of non-monetary assistance they received in the survey. Therefore, the following chart provides a summary of the proportion of grantees who indicated that they received at least one form of non-monetary assistance.

Proportion of Grantees Receiving Non-Monetary Assistance

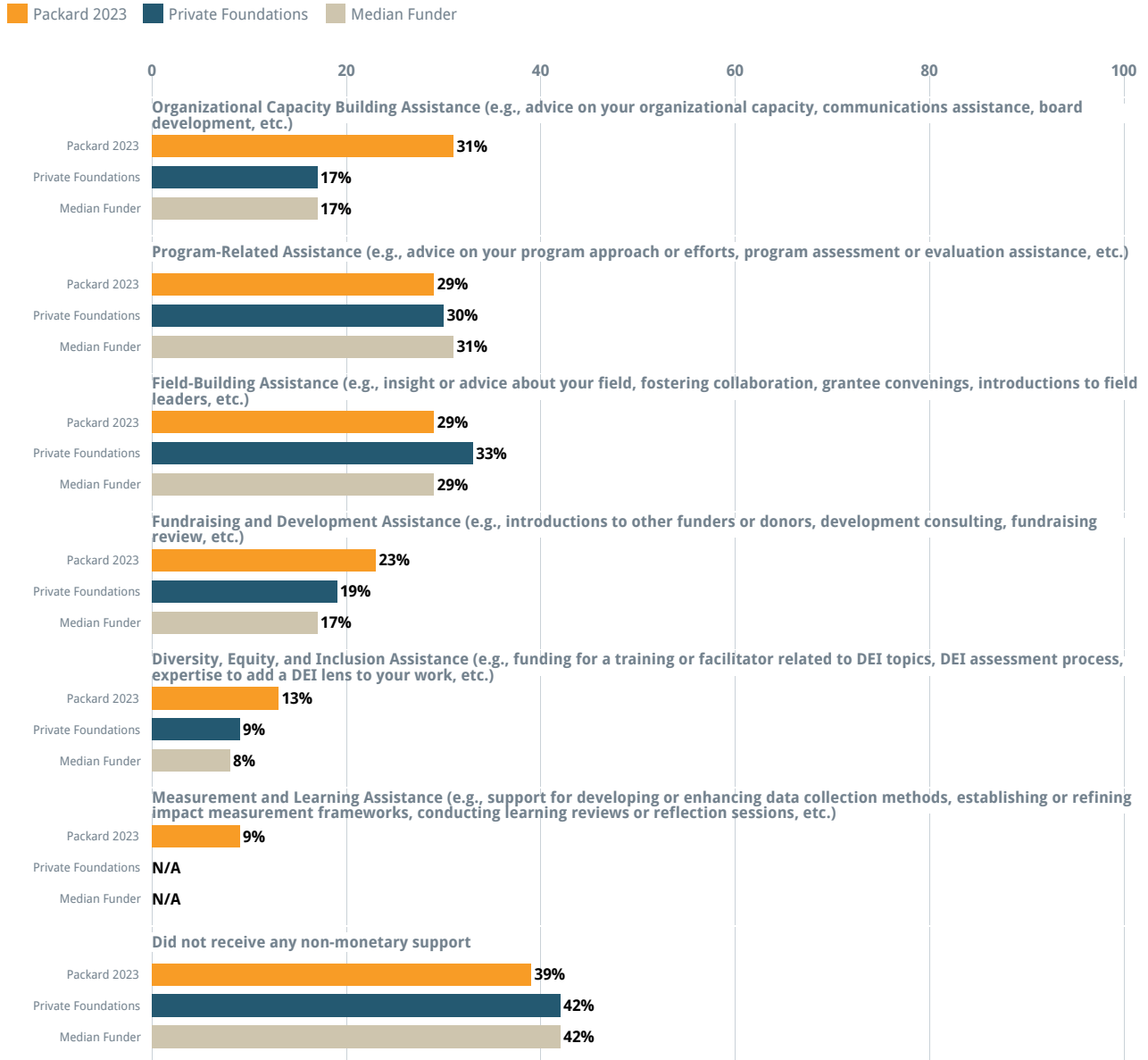
Received at least one form of non-monetary assistance Did not receive any non-monetary assistance



Cohort: Private Foundations Past results: on

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

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



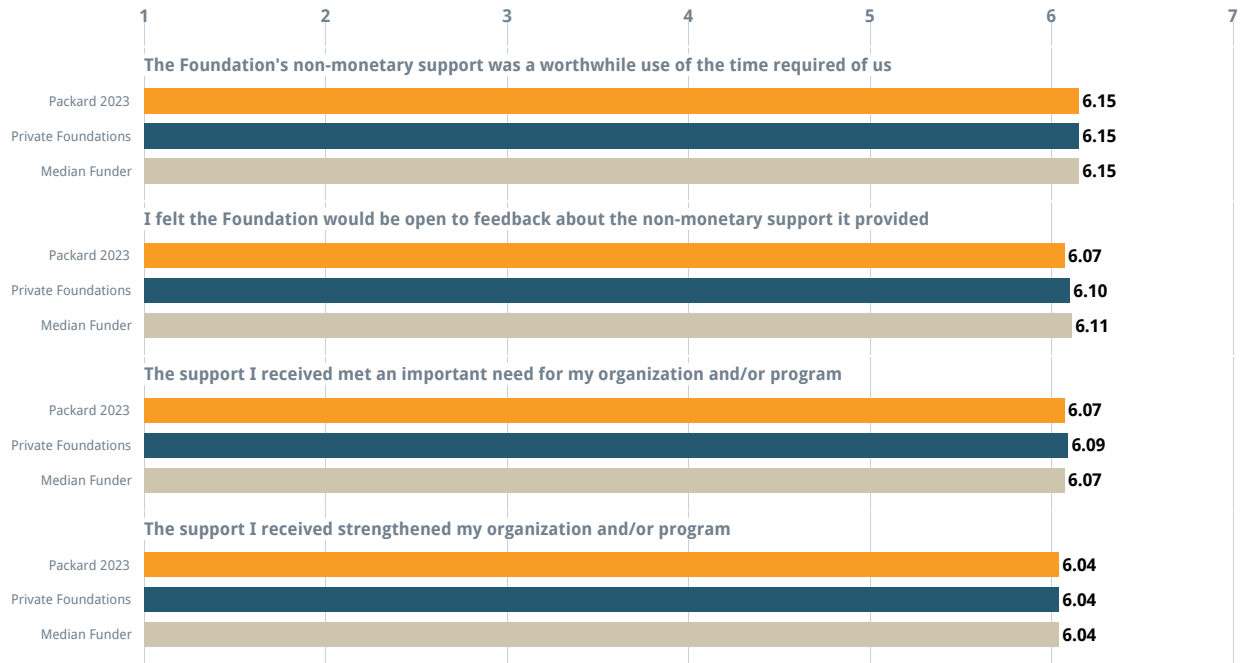
Cohort: Private Foundations Past results: on

The following question was asked only of grantees who indicated receiving at least one form of non-monetary assistance in the previous question.

Please rate the extent to which you agree with the following statements about the non-monetary support you received from the Foundation:

1 = Not at all 7 = To a great extent

Packard 2023 Private Foundations Median Funder

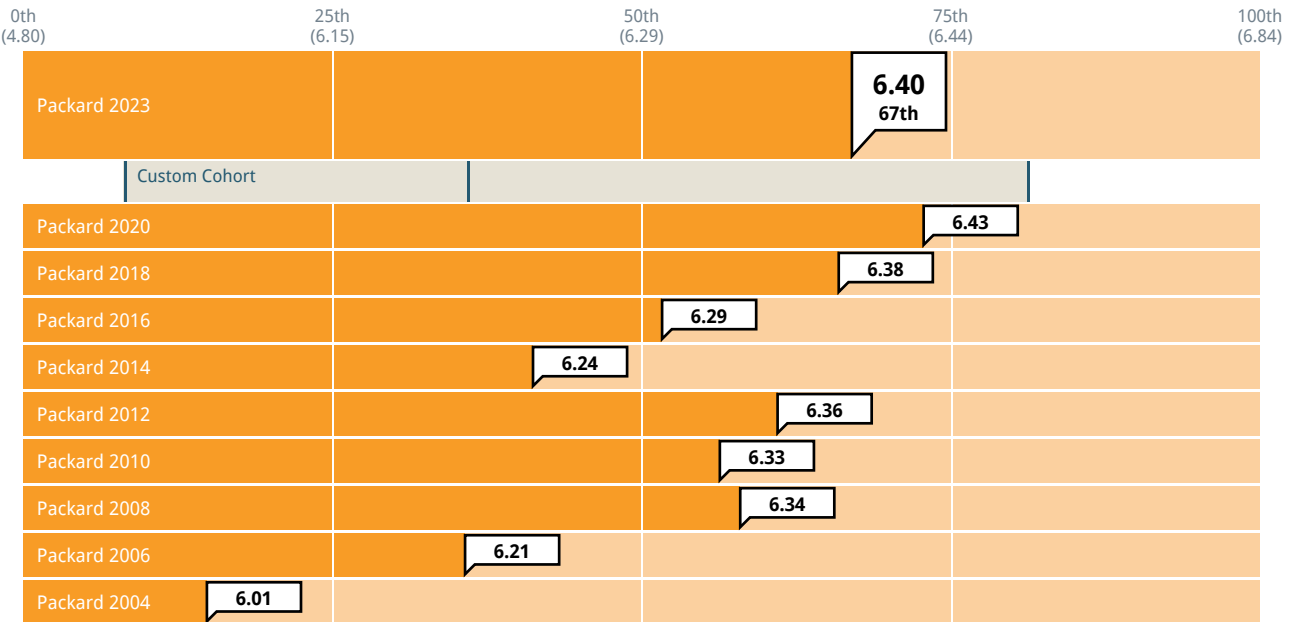


Cohort: Private Foundations Past results: on

Funder-Grantee Relationships

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

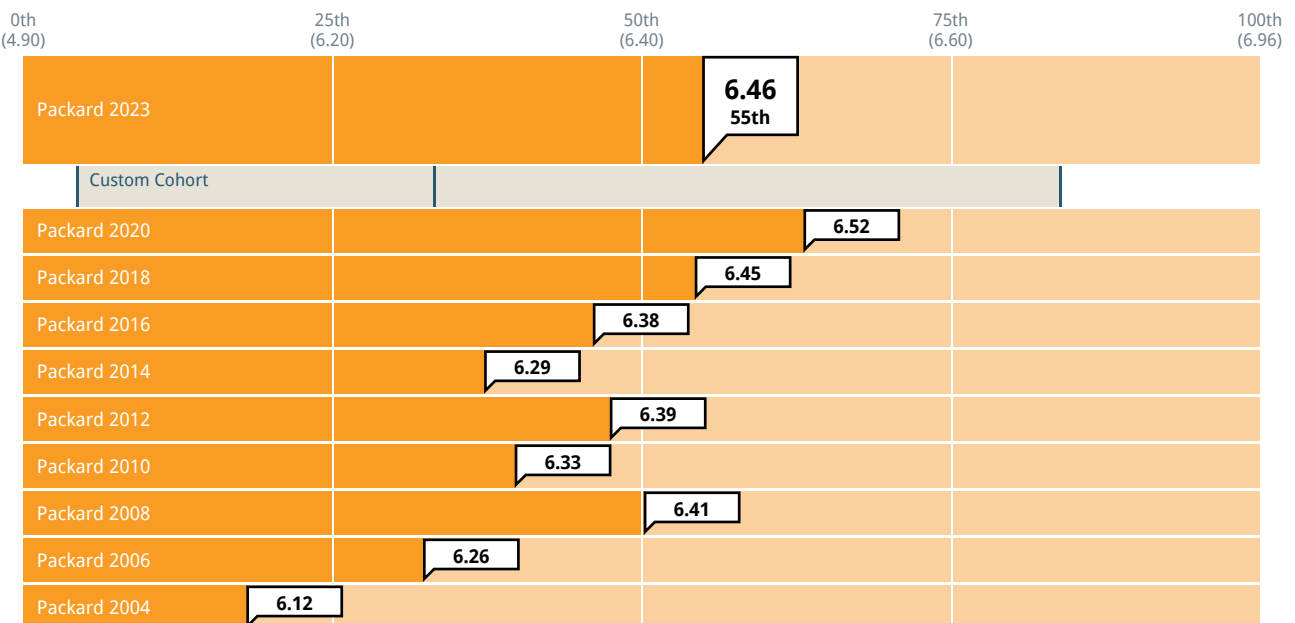
1 = Not at all comfortable 7 = Extremely comfortable



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, how responsive was Foundation staff?

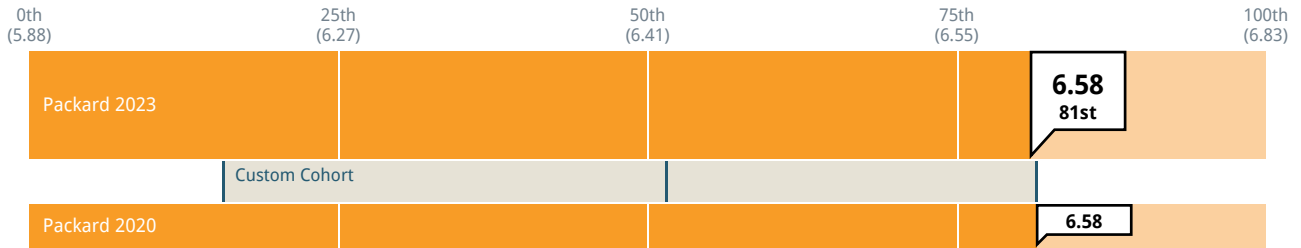
1 = Not at all responsive 7 = Extremely responsive



Cohort: Custom Cohort Past results: on Subgroup: None

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

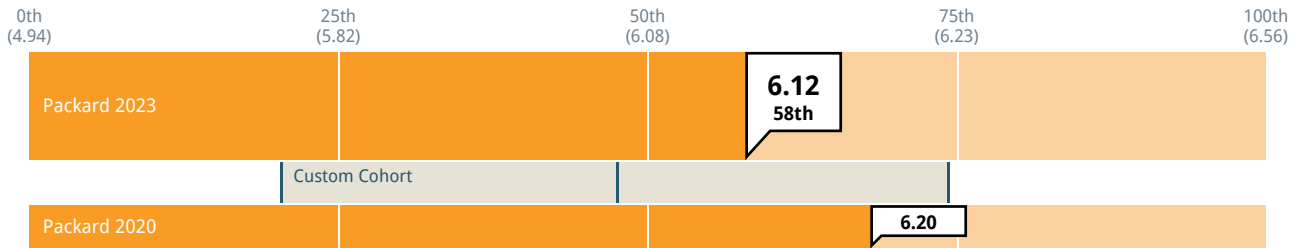
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

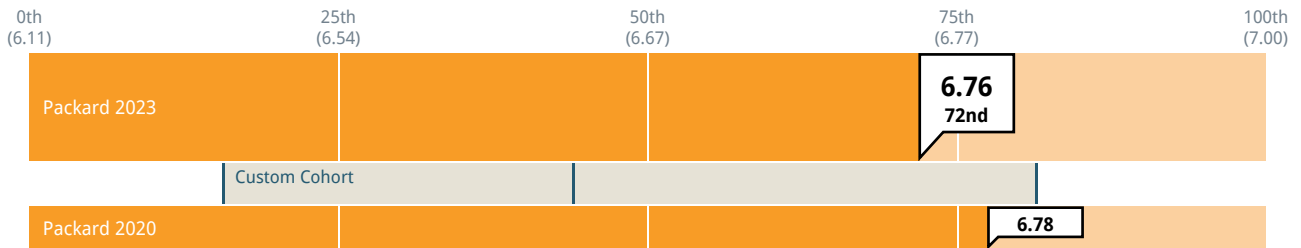
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent did the Foundation exhibit respectful interaction during this grant?

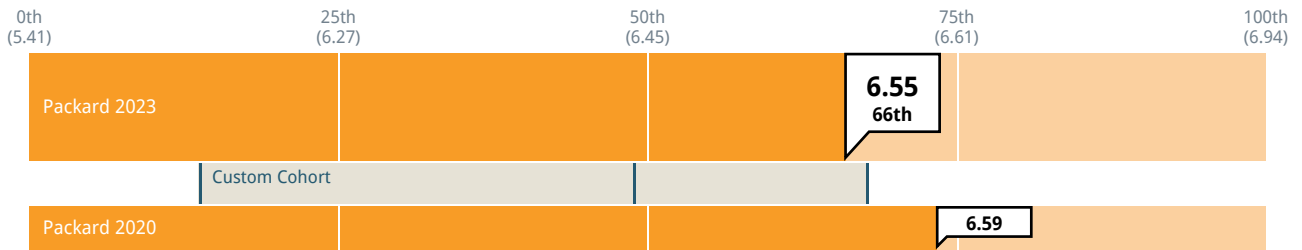
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

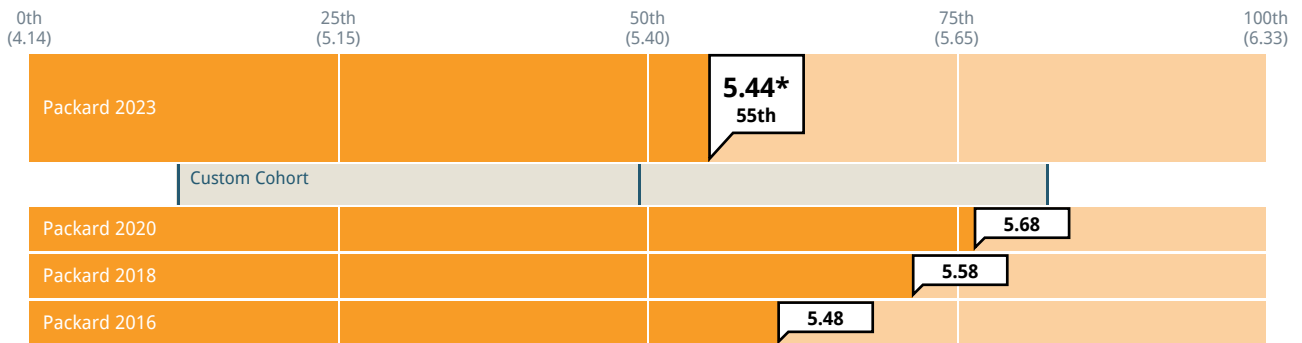
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort 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

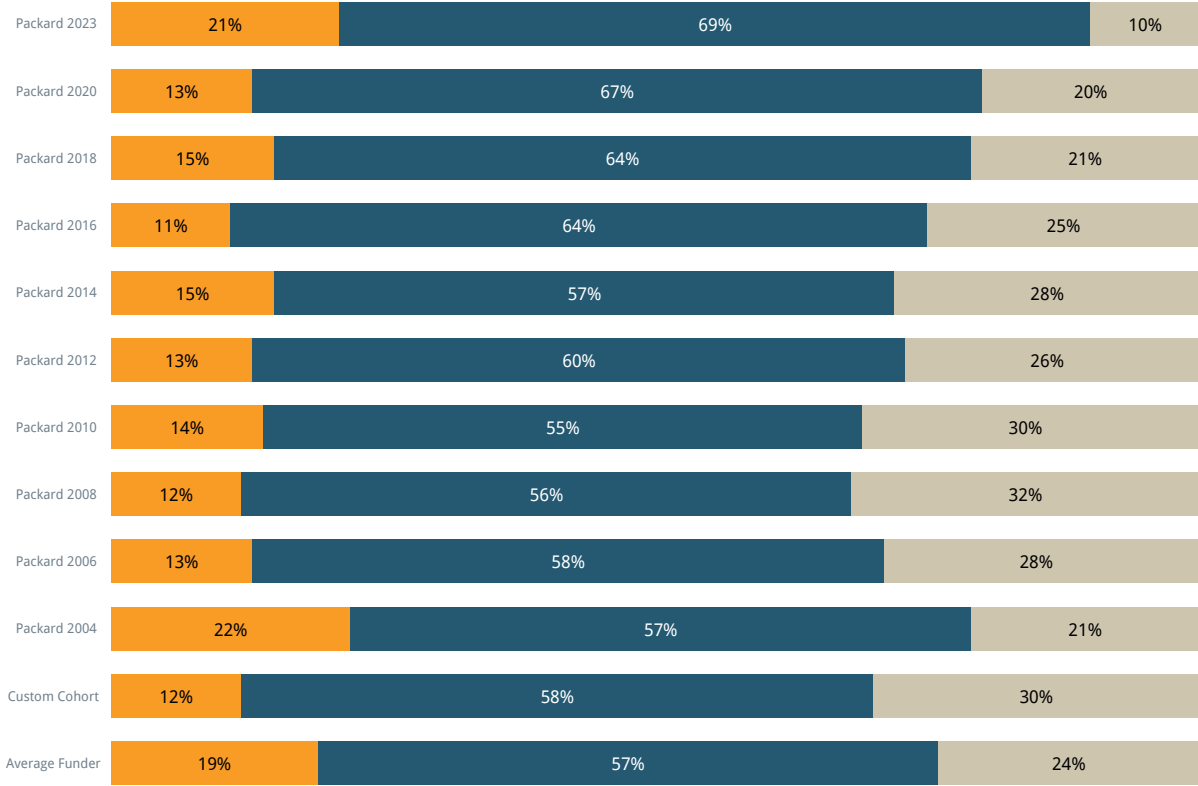


Cohort: Custom Cohort Past results: on Subgroup: None

Interaction Patterns

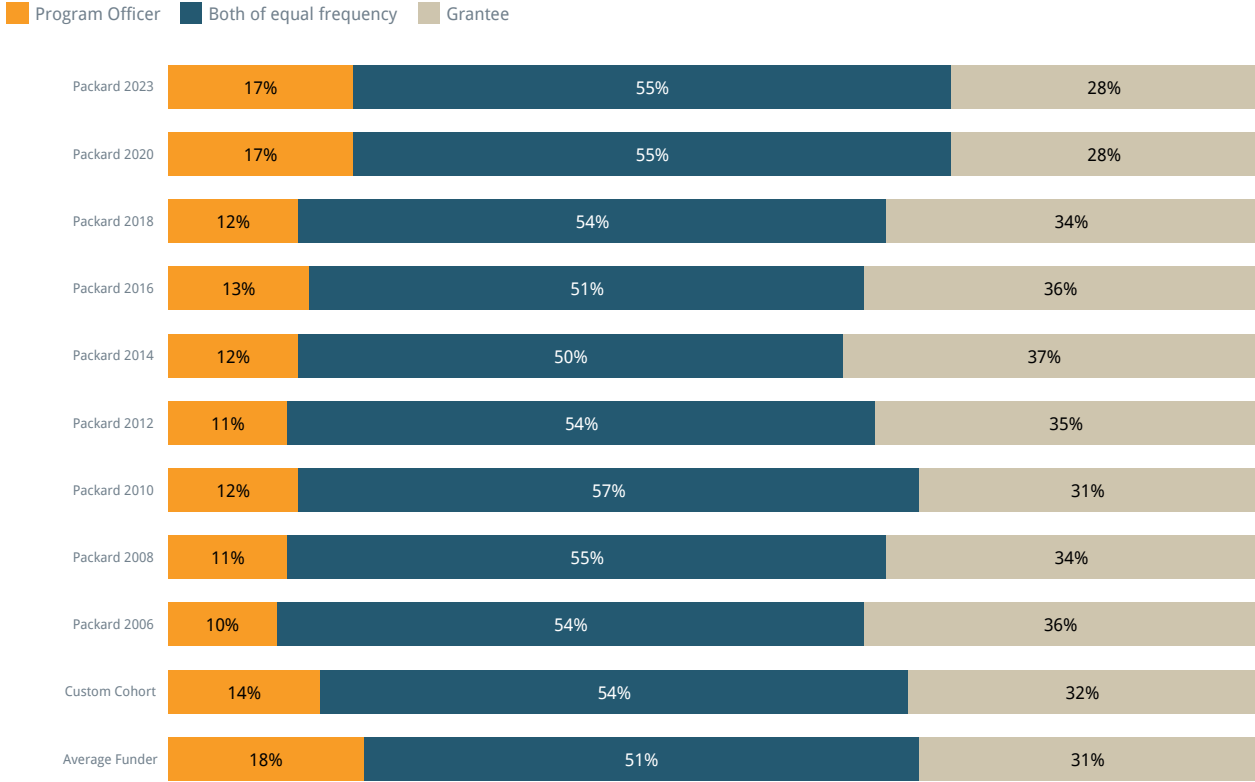
How often do/did you have contact with your program officer during this grant?

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



Cohort: Custom Cohort Past results: on

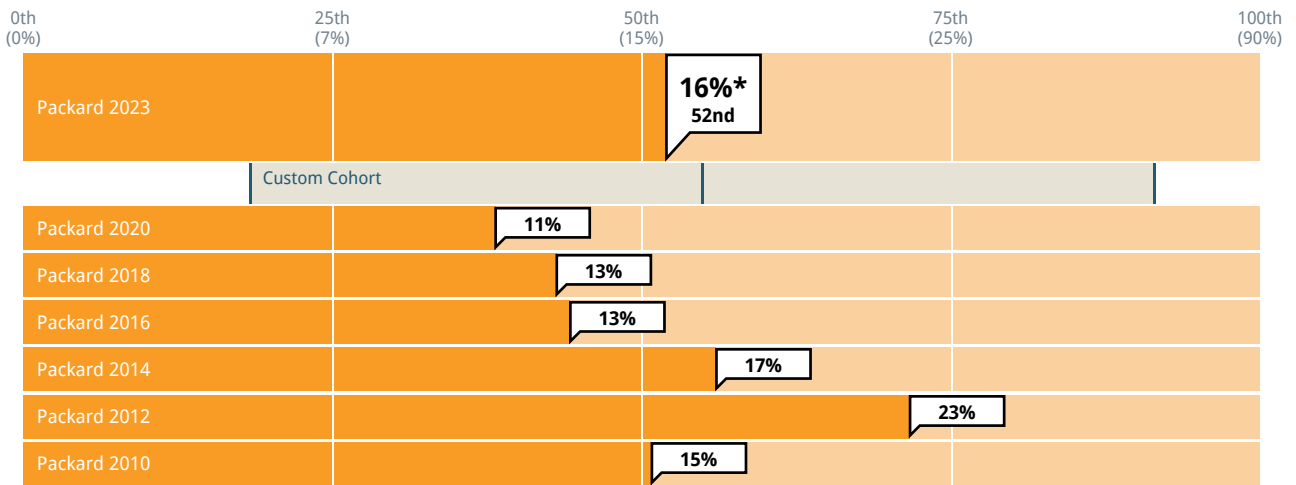
Who most frequently initiated the contact you had with your program officer during this grant?



Cohort: Custom Cohort Past results: on

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

Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: on Subgroup: None

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

■ Yes, in person and/or virtual
 ■ No
 ■ Don't know



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

Note: CEP recently modified the site visit question and its corresponding options. Therefore, Packard's prior results are not fully comparable to the current result and CEP's broader dataset.

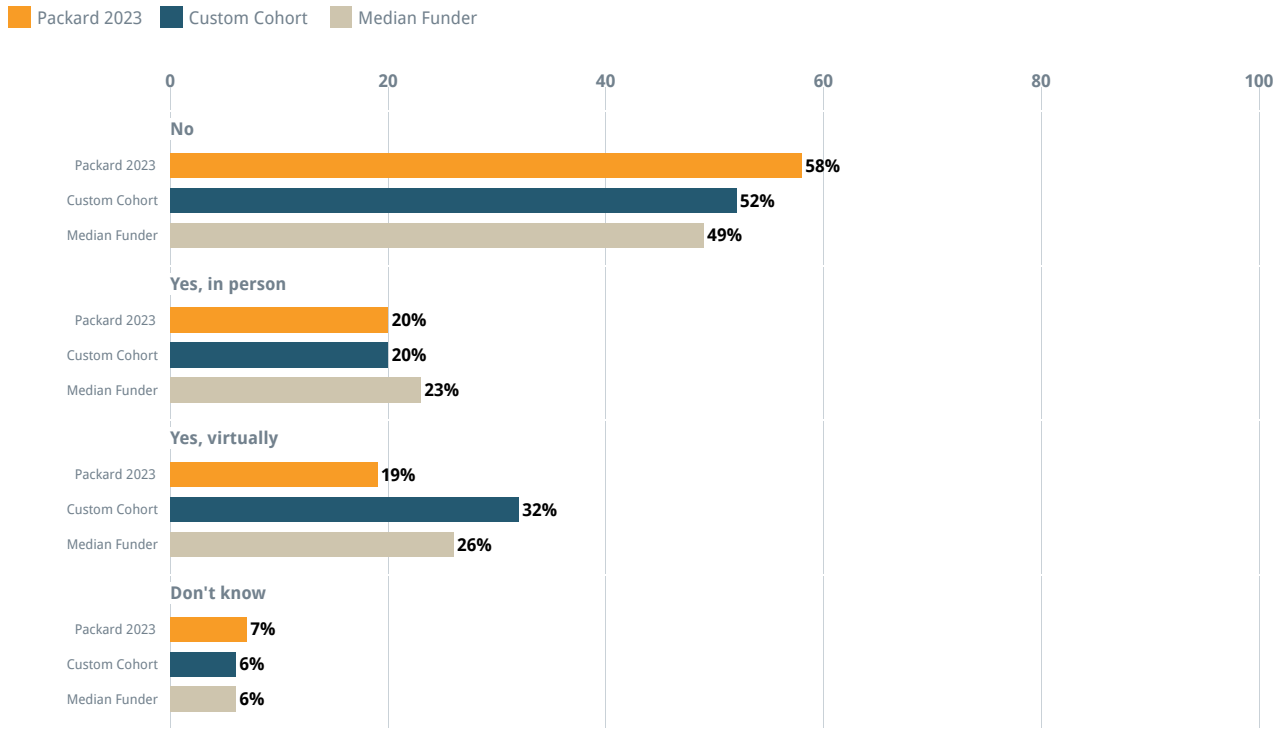
The prior question was: "Did the Foundation conduct a site visit during the selection process or during the course of this grant?" The corresponding options were "yes," "no," and "don't know."

Below are Packard's results of the prior site visit question in the past decade.

Survey Year	Proportion of grantees responding 'Yes'
Packard 2020	34%
Packard 2018	45%
Packard 2016	45%
Packard 2014	42%

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?

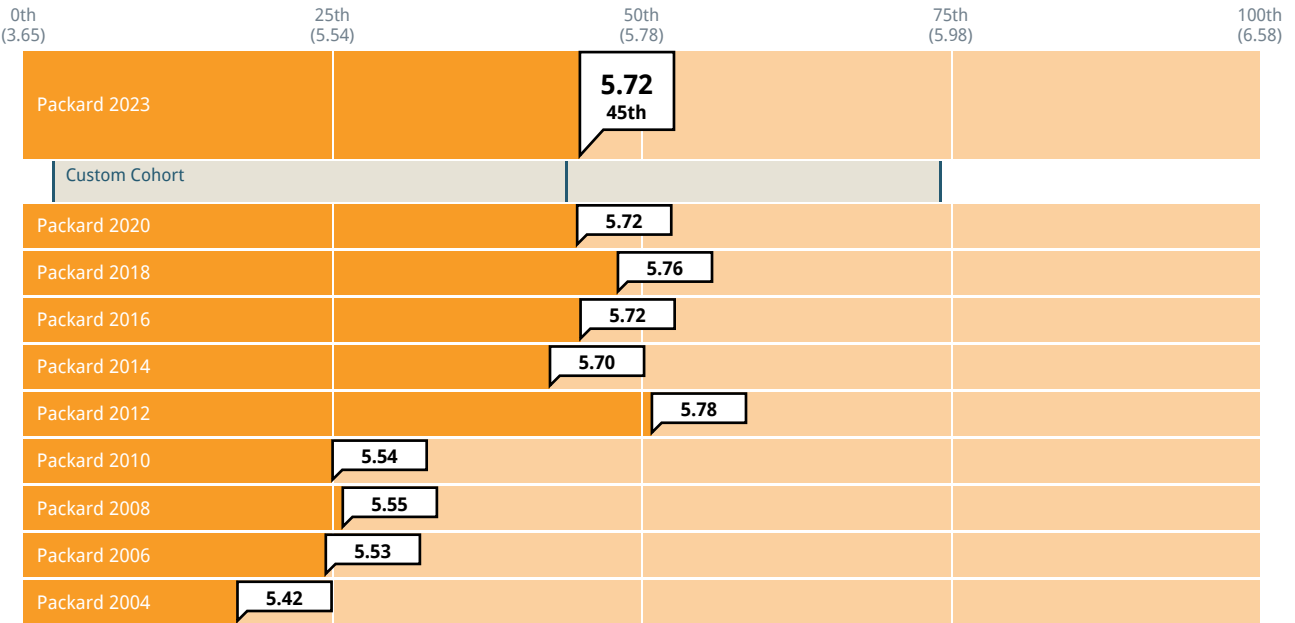


Cohort: Custom Cohort Past results: on

Communication

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

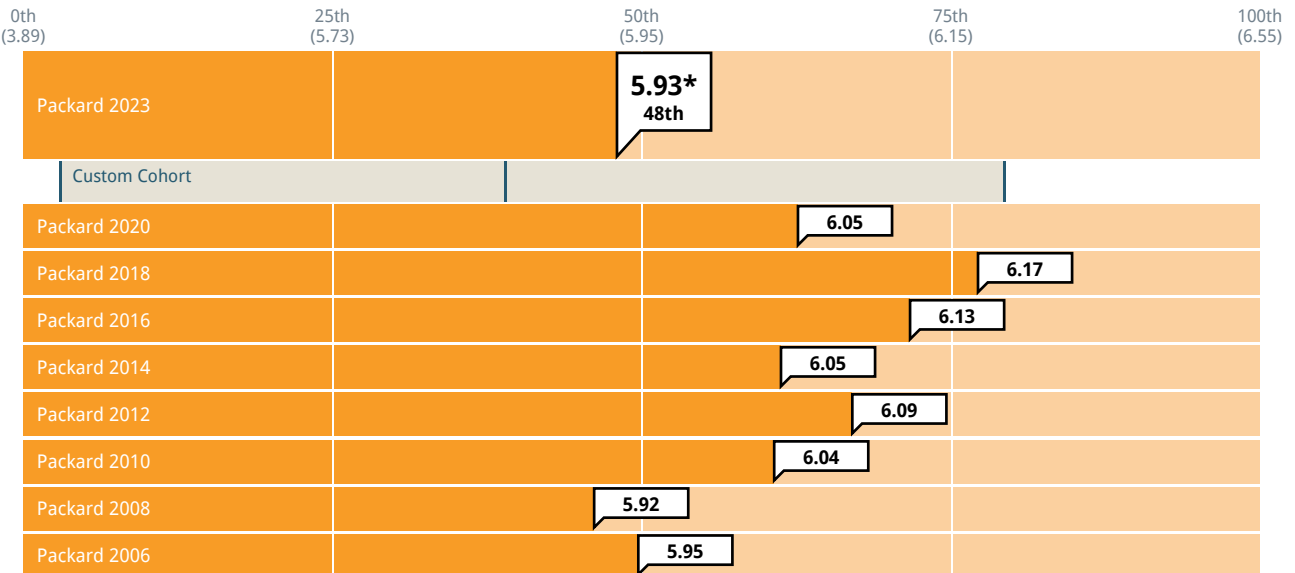
1 = Not at all clearly 7 = Extremely clearly



Cohort: Custom Cohort Past results: on Subgroup: None

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

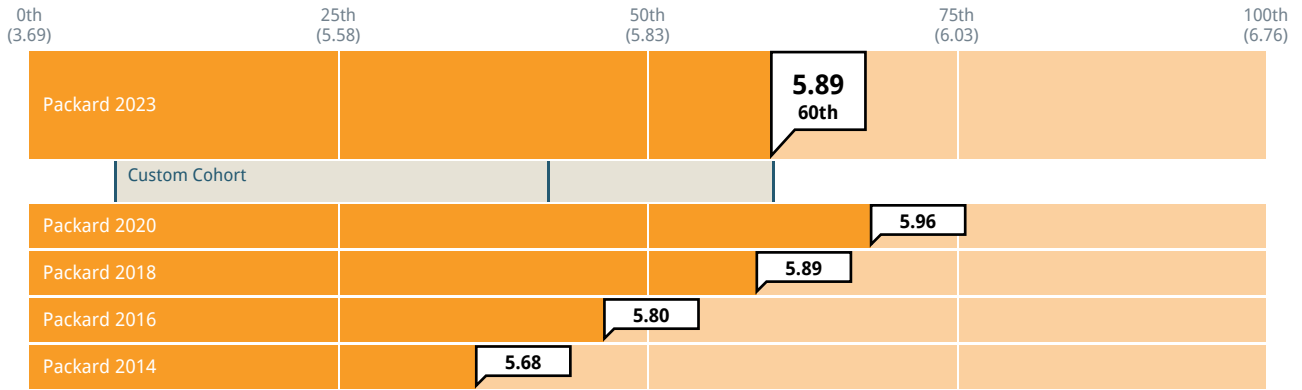
1 = Not at all consistent 7 = Completely consistent



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, how transparent is the Foundation with your organization?

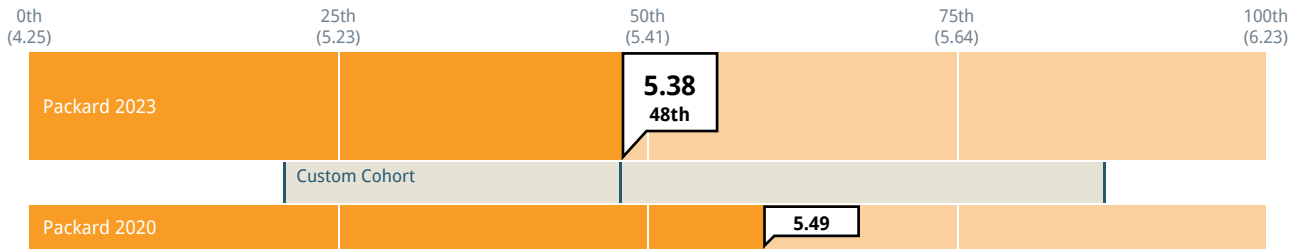
1 = Not at all transparent 7 = Extremely transparent



Cohort: Custom Cohort 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

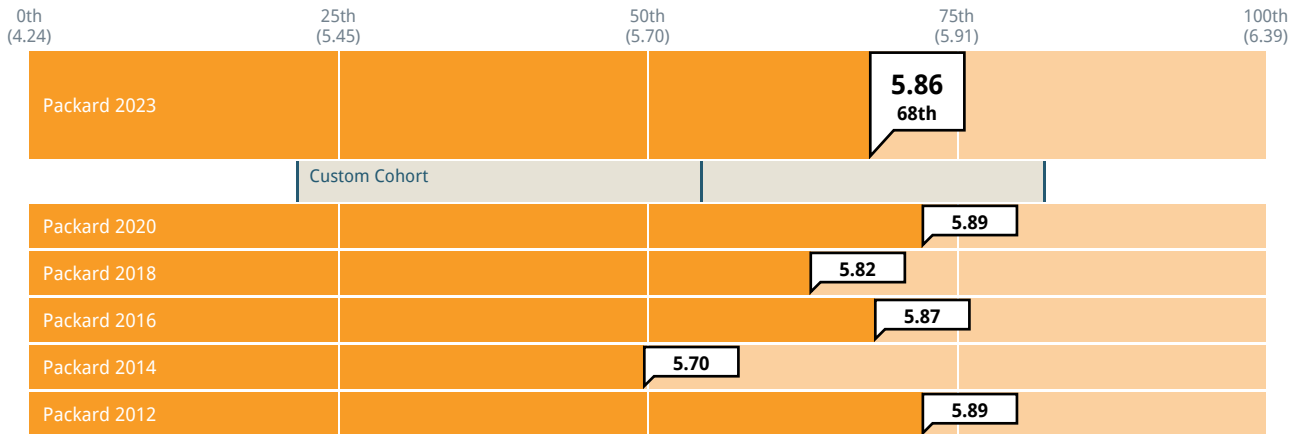


Cohort: Custom Cohort Past results: on Subgroup: None

Contextual Understanding

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

1 = Limited understanding 7 = Thorough understanding

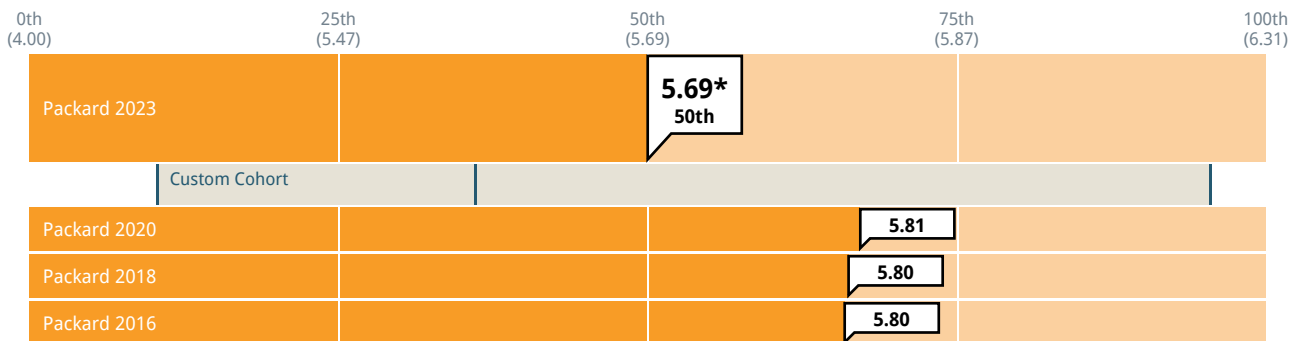


Cohort: Custom Cohort Past results: on Subgroup: None

In the following questions, 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?

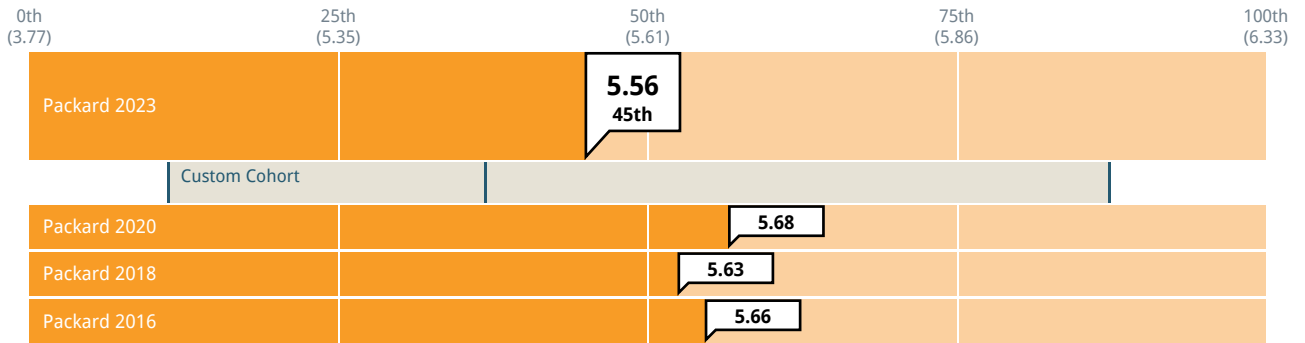
1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort Past results: on Subgroup: None

To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?

1 = Not at all 7 = To a great extent



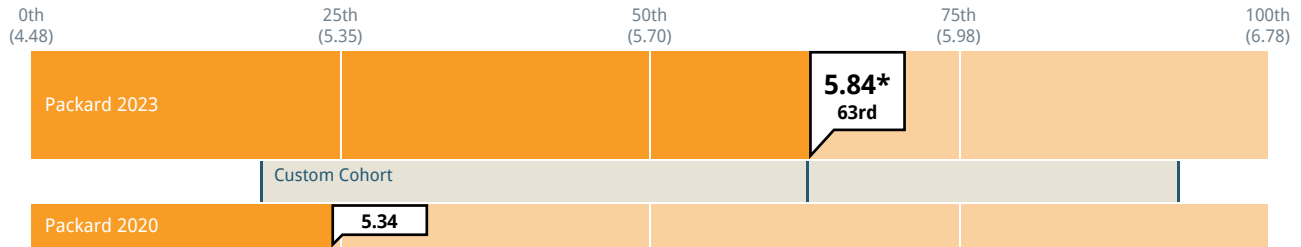
Cohort: Custom Cohort Past results: on Subgroup: None

Diversity, Equity, and Inclusion

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

The Foundation has clearly communicated what diversity, equity, and inclusion means for its work

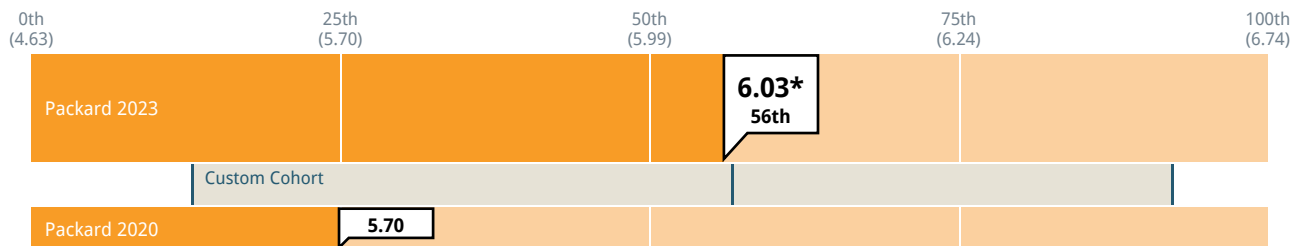
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: Custom Cohort Past results: on Subgroup: None

Overall, the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work

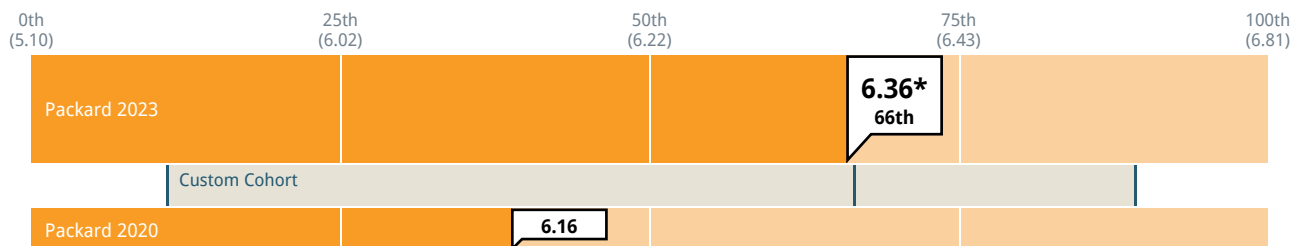
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: Custom Cohort Past results: on Subgroup: None

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

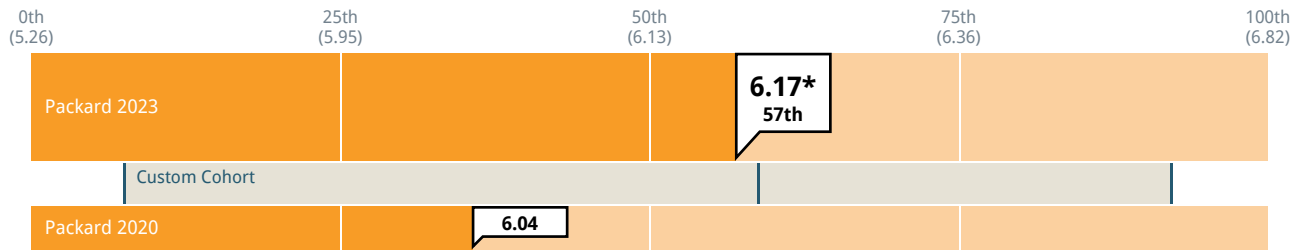
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: Custom Cohort Past results: on Subgroup: None

I believe that the Foundation is committed to combatting racism

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

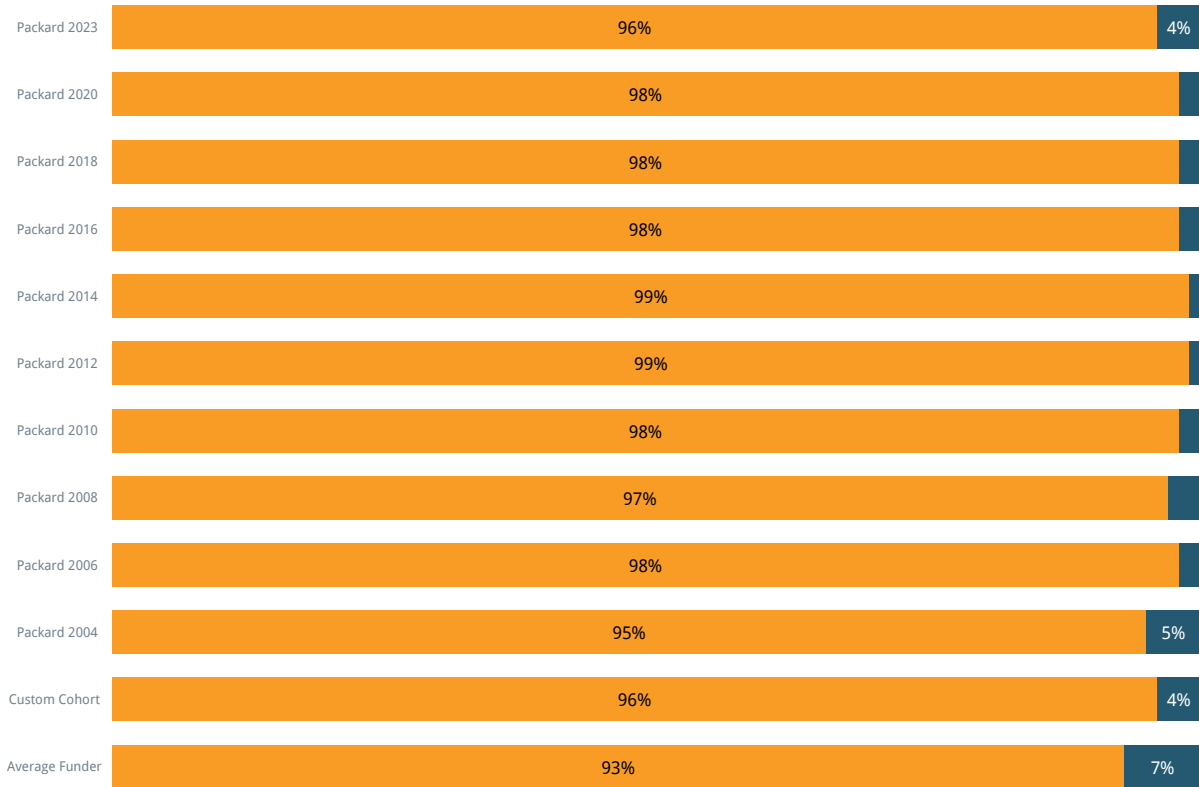


Cohort: Custom Cohort Past results: on Subgroup: None

Grant Processes

Did you submit a proposal to the Foundation for this grant?

Submitted a proposal Did not submit a proposal



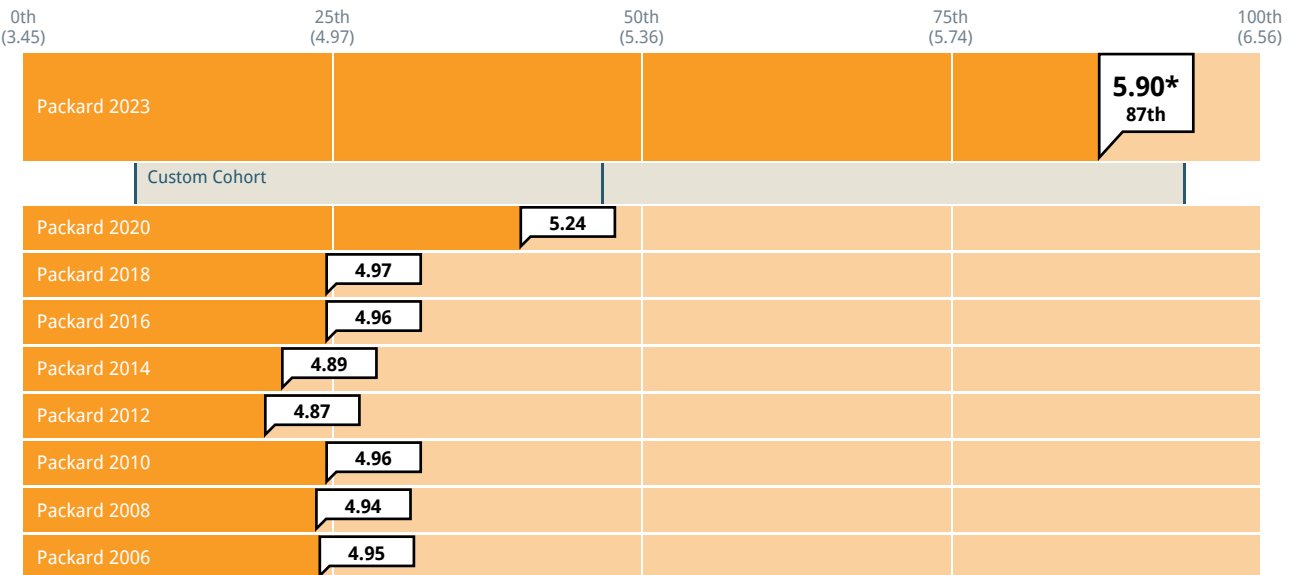
Cohort: Custom Cohort Past results: on

Selection Process

Note: CEP modified the following question in 2022. The prior question text was: "How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?" The corresponding anchors were "not at all helpful" and "extremely helpful."

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

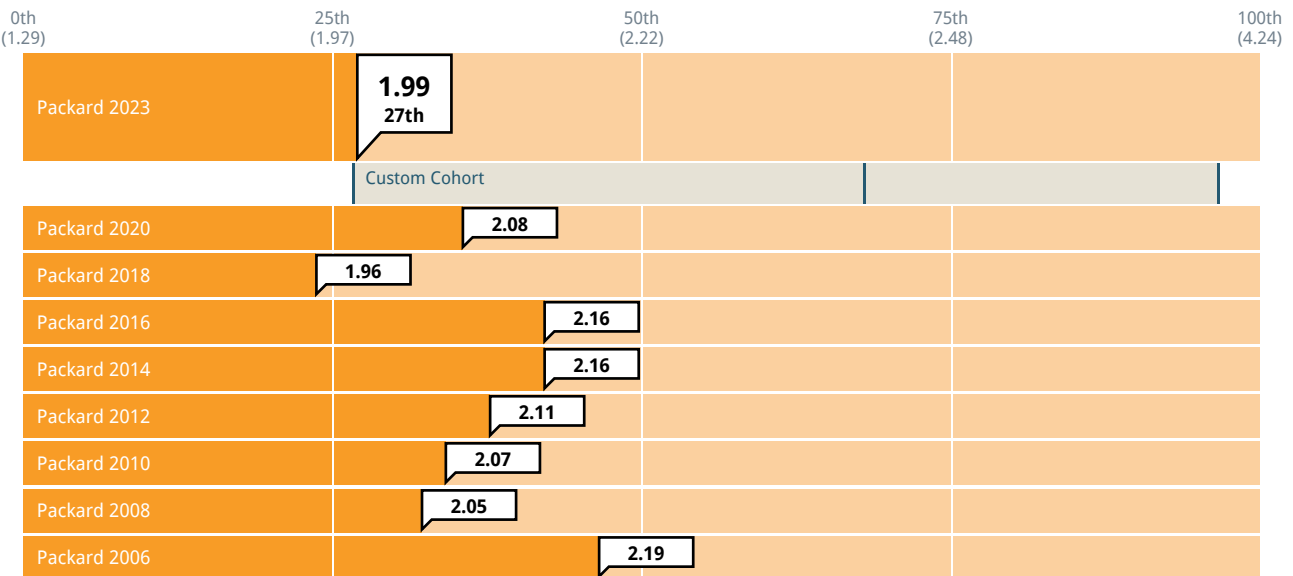
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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?

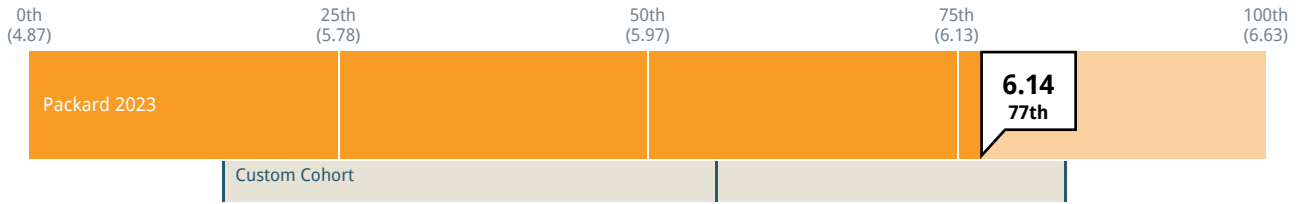
1 = No pressure 7 = Significant pressure



Cohort: Custom Cohort 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?

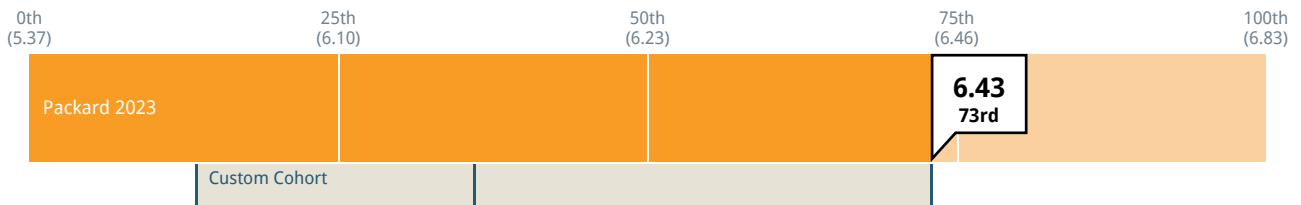
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

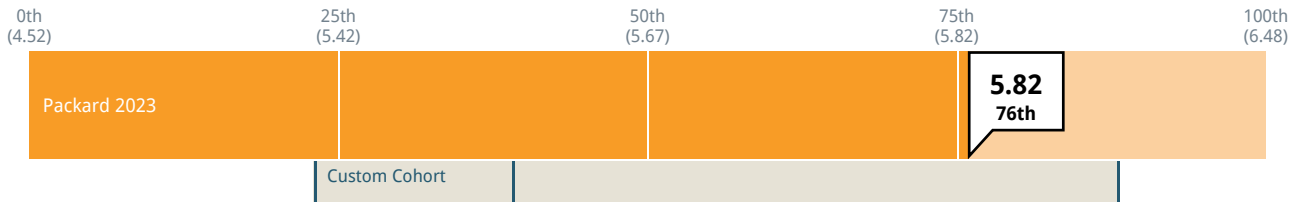
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

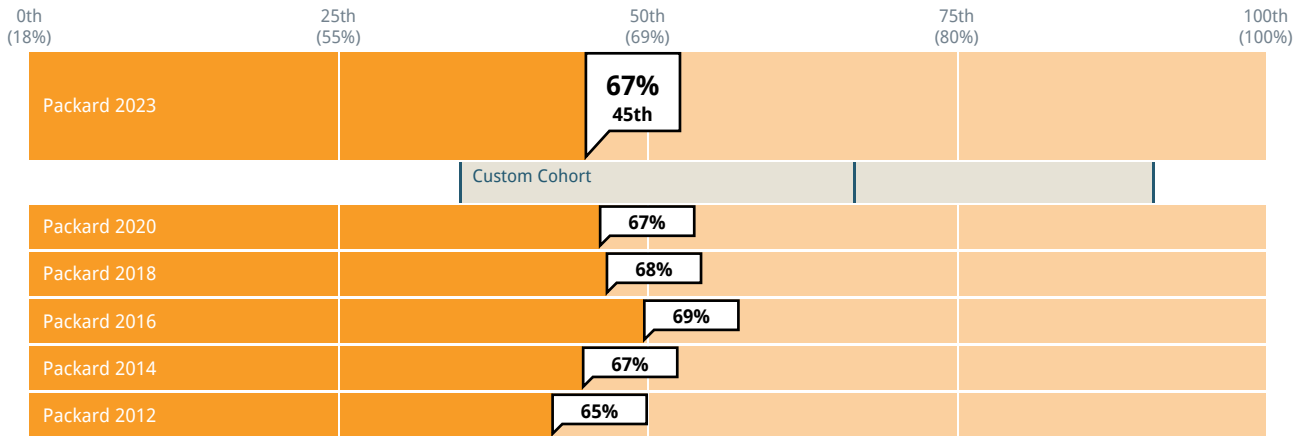
Reporting and Evaluation Process

Definition of Reporting and Evaluation

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

At any point during the proposal 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?

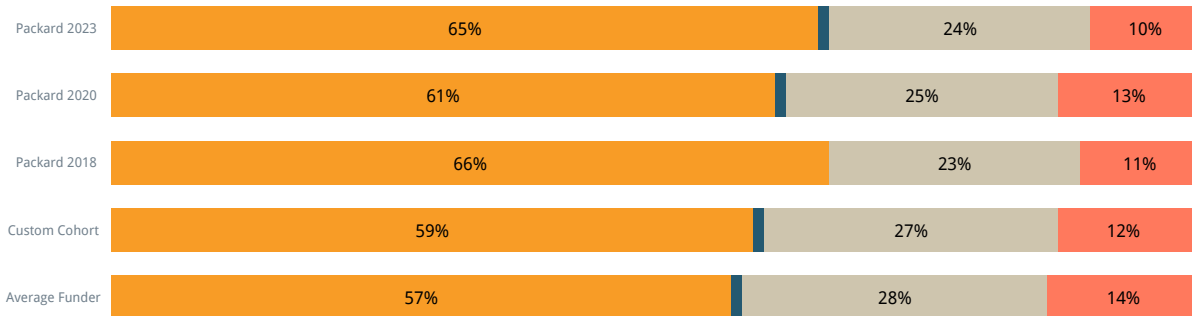
Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: on Subgroup: None

Participation in Reporting and/or Evaluation Processes

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



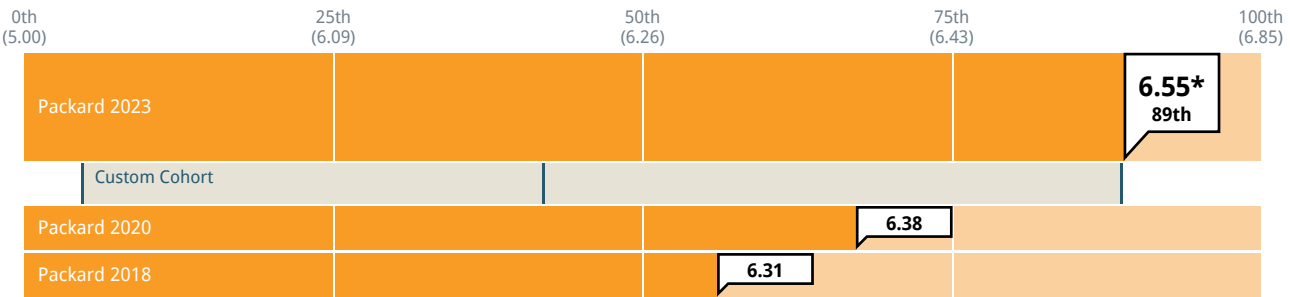
Cohort: Custom Cohort Past results: on

Reporting Process

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

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

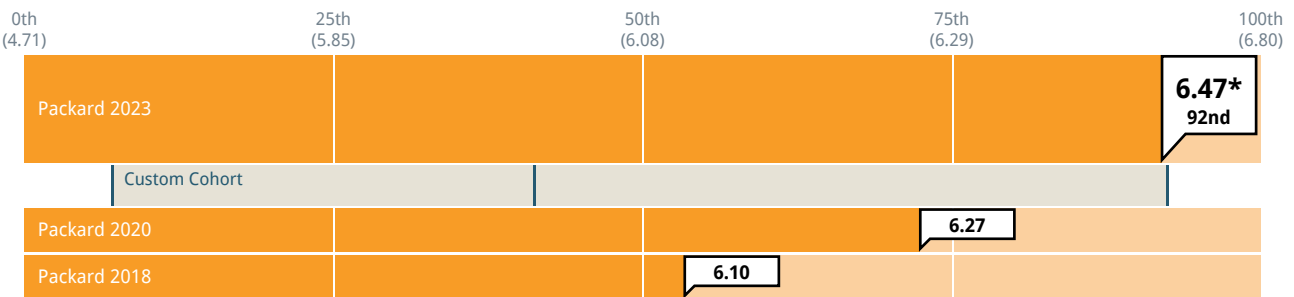
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

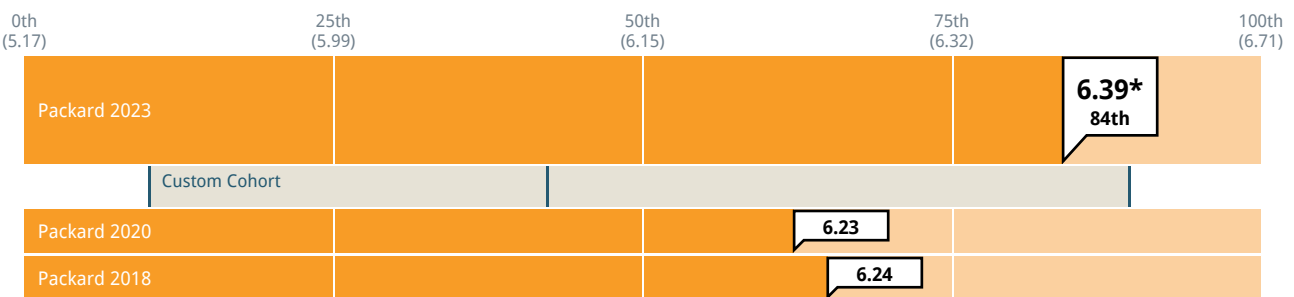
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

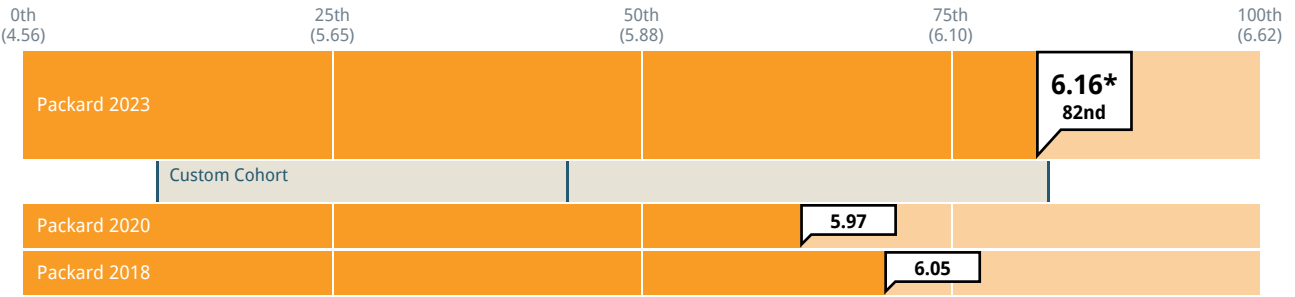
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

1 = Not at all 7 = To a great extent



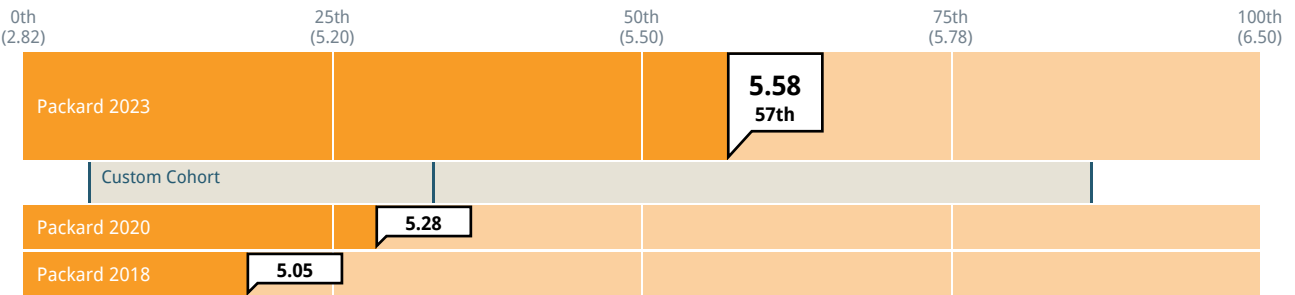
Cohort: Custom Cohort Past results: on Subgroup: None

Evaluation Process

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

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

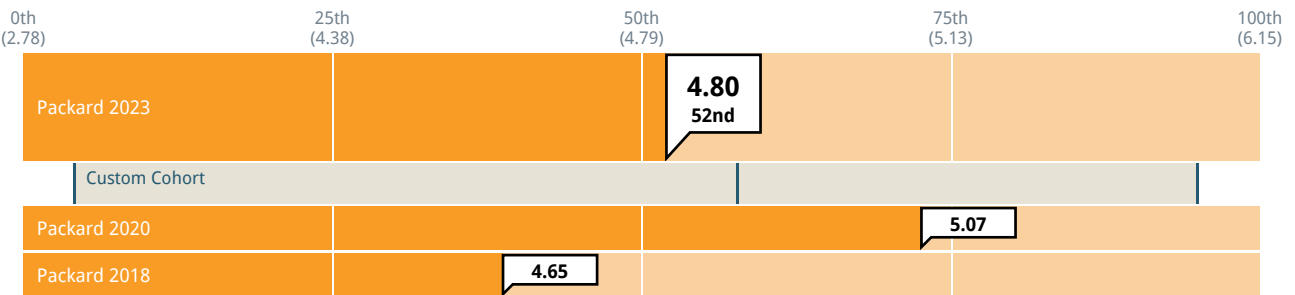
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: None

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

1 = Not at all 7 = To a great extent

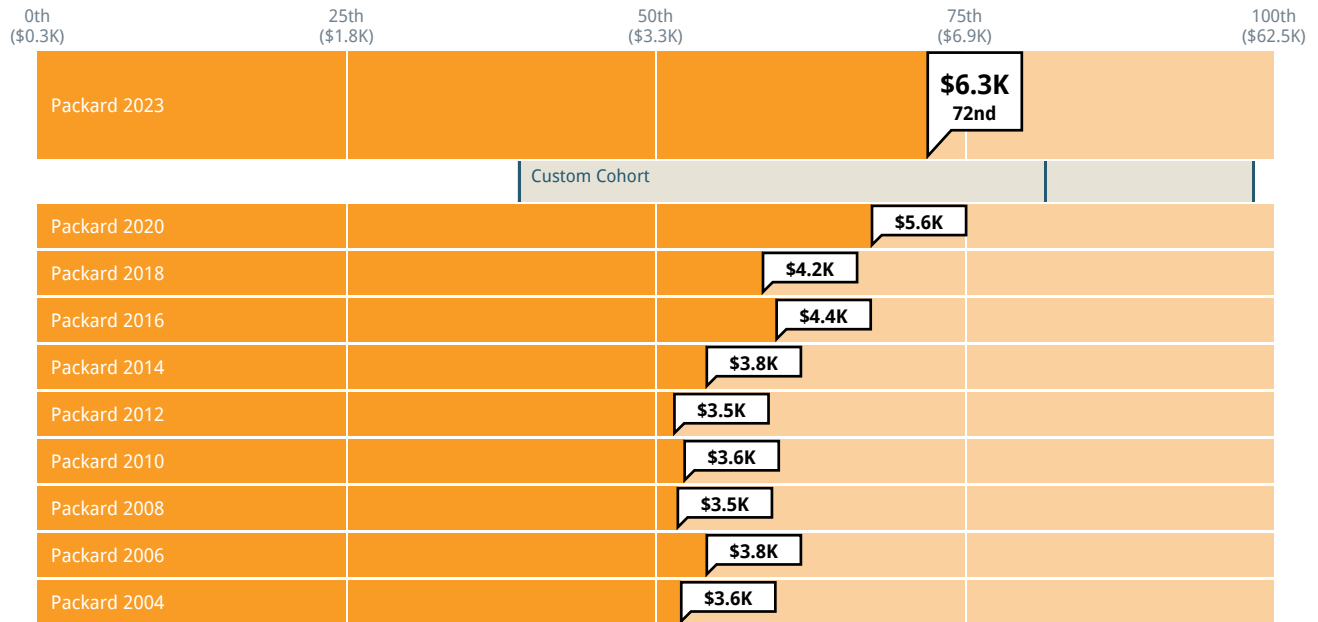


Cohort: Custom Cohort Past results: on Subgroup: None

Dollar Return and Time Spent on Processes

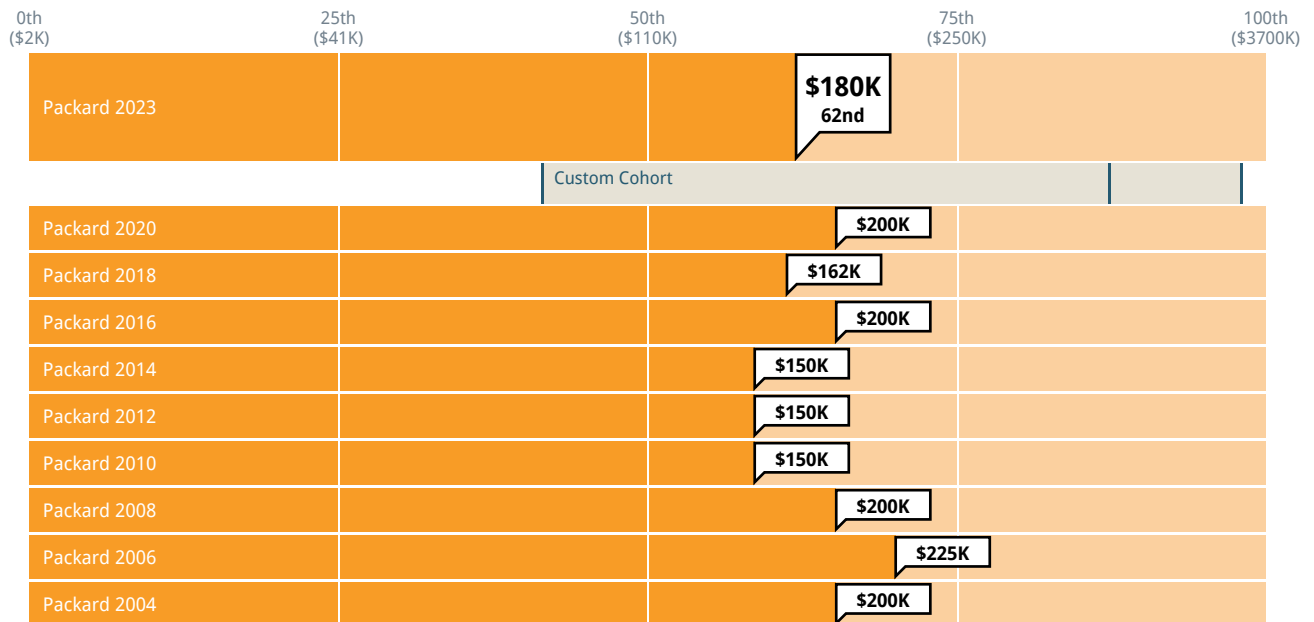
Dollar Return: Median grant dollars awarded per process hour required

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



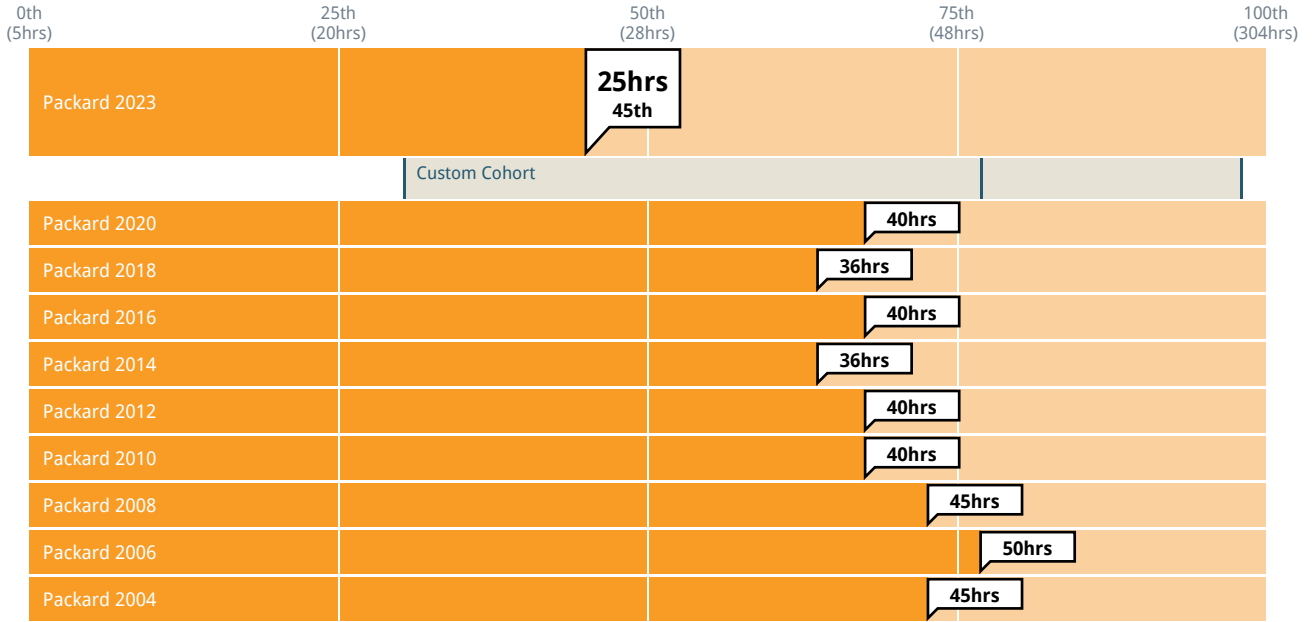
Cohort: Custom Cohort Past results: on Subgroup: None

Median Grant Size



Cohort: Custom Cohort Past results: on Subgroup: None

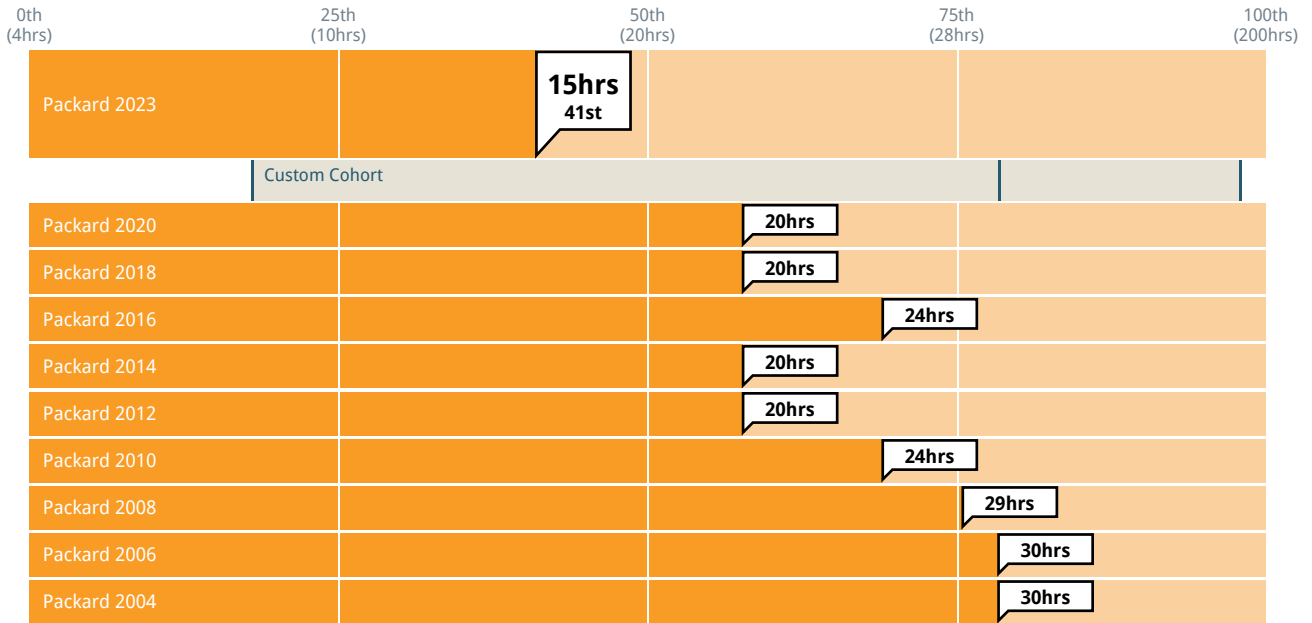
Median hours spent by grantees on funder requirements over grant lifetime



Cohort: Custom Cohort Past results: on Subgroup: None

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



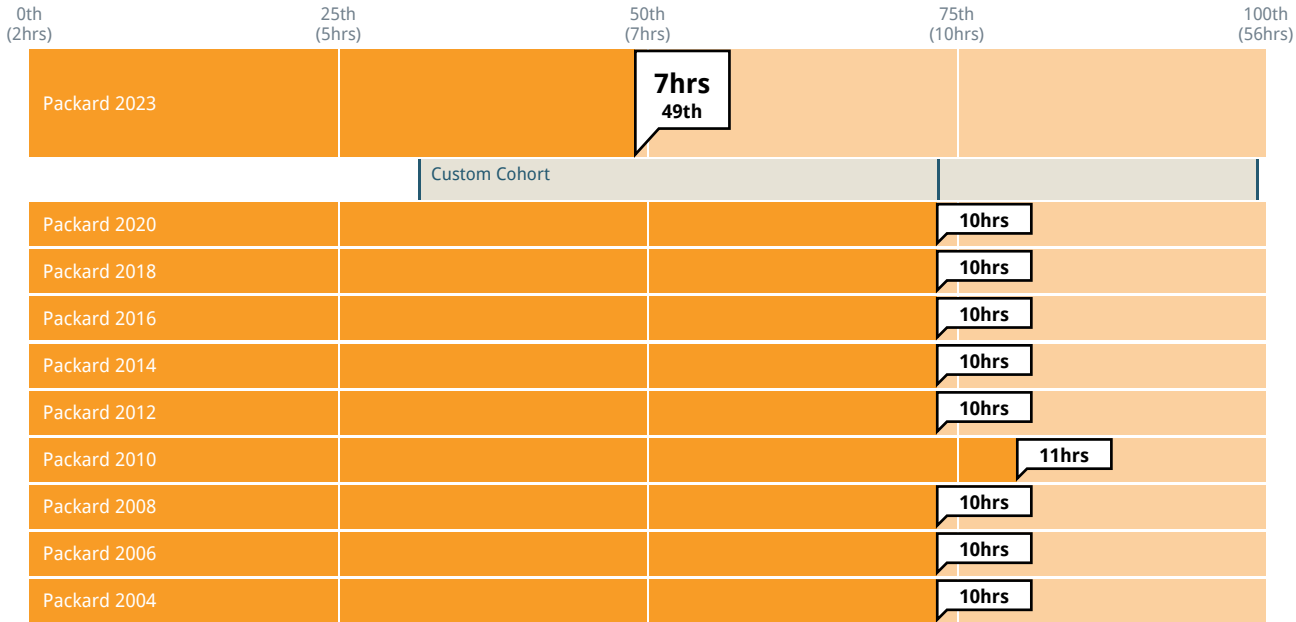
Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort

Time Spent On Proposal and Selection Process								
	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
Packard 2023	31%	25%	15%	7%	10%	7%	4%	1%
Packard 2020	22%	20%	18%	10%	12%	10%	6%	2%
Packard 2018	19%	22%	19%	6%	13%	13%	5%	2%
Packard 2016	13%	22%	19%	9%	16%	14%	5%	2%
Packard 2014	19%	20%	22%	9%	13%	9%	5%	3%
Packard 2012	18%	20%	22%	7%	14%	13%	3%	2%
Packard 2010	15%	19%	19%	8%	16%	15%	6%	2%
Packard 2008	15%	17%	18%	9%	15%	15%	8%	2%
Packard 2006	12%	19%	15%	8%	14%	18%	10%	4%
Packard 2004	10%	21%	18%	8%	12%	17%	10%	4%
Average Funder	26%	22%	16%	7%	10%	10%	5%	3%
Custom Cohort	13%	17%	16%	8%	14%	16%	10%	6%

Time Spent on Reporting and Evaluation Process

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



Cohort: Custom Cohort Past results: on Subgroup: None

Selected Cohort: Custom Cohort

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)

	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
Packard 2023	57%	19%	9%	2%	4%	5%	3%
Packard 2020	45%	25%	12%	4%	5%	5%	3%
Packard 2018	48%	23%	13%	3%	4%	7%	3%
Packard 2016	44%	20%	14%	4%	7%	7%	4%
Packard 2014	50%	19%	13%	3%	7%	3%	4%
Packard 2012	48%	18%	13%	5%	5%	7%	3%
Packard 2010	40%	23%	10%	6%	9%	6%	6%
Packard 2008	39%	25%	13%	5%	6%	4%	6%
Packard 2006	41%	25%	12%	7%	5%	3%	6%
Packard 2004	45%	27%	9%	2%	5%	7%	5%
Average Funder	57%	19%	9%	3%	3%	4%	4%
Custom Cohort	47%	22%	12%	4%	4%	6%	5%

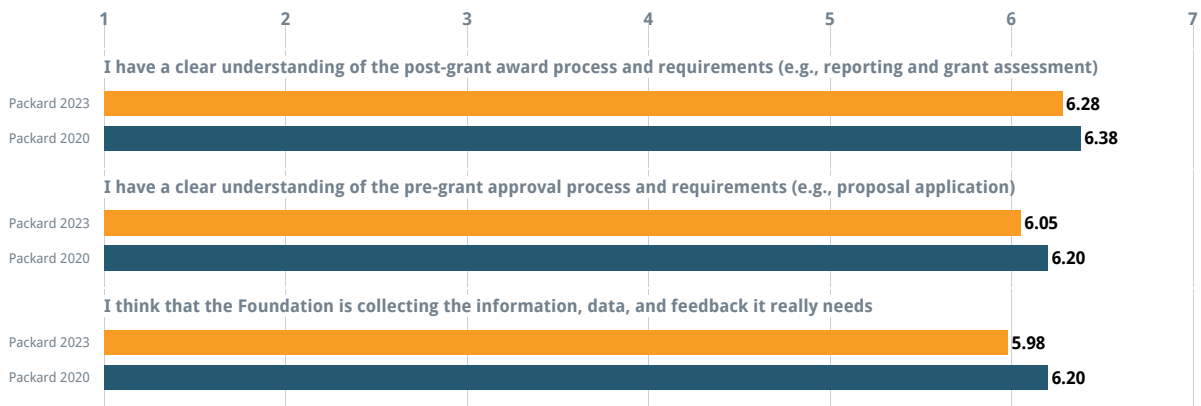
Customized Questions

In 2020, the third statement in the following question was written as: "I feel that the Foundation is thoughtful about collecting the information, data, and feedback it really needs."

Please rate the extent to which you agree or disagree with the following overall statements about the Foundation's grantmaking process:

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

■ Packard 2023 ■ Packard 2020



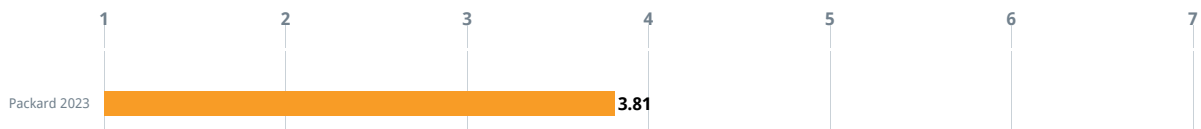
Cohort: None Past results: on

"The Foundation's new strategic framework includes updated vision and mission statements and three core goals. As such, grantmaking teams are developing new strategies consistent with this framework."

To what extent were you given the opportunity to provide input into a Foundation initiative strategy or theory of change for the area from which you receive funding?

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

■ Packard 2023



Cohort: None Past results: on

Grantees' Written Comments

In the Foundation's Grantee Perception Report survey, CEP asks four written questions to all grantees:

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. "In 2021, the Foundation committed to contributing resources and dedicating energy toward justice and equity. In your experience, what examples can you share of how the Foundation *is* or *is not* contributing to justice and equity?"

CEP's Qualitative Analysis

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

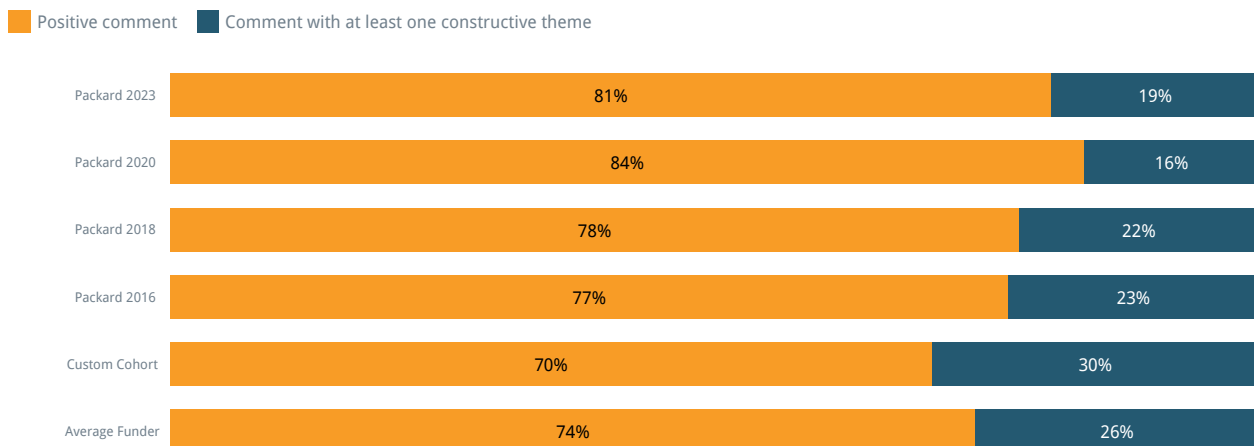
The following pages outline the results of CEP's analyses of written questions that all grantees responded to.

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: Custom Cohort Past results: on

Suggestion Topics

Grantees were asked to provide any suggestions for how the Foundation could improve. The 865 grantees that responded to the survey provided 386 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Grantmaking Characteristics	17%
Interactions with Grantees	13%
Non-Monetary Support	13%
The Foundation's Strategic Focus	12%

Topic of Suggestion	Proportion
Communication on Strategy	11%
Diversity, Equity, and Inclusion	8%
Grant Processes	7%
Sources of Learning for Strategy Development	7%
Communication on Funding	4%
The Foundation's Impact on the Field	4%
The Foundation's Impact on Grantee Organizations	4%
Other	1%

Selected Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. Out of all the suggestions from 865 grantees that responded to the survey, CEP coded a total of 386 distinct suggestions, which is a representative sample of grantee suggestions by Last Grant Status.

The 386 coded suggestions represent all "Last grant" grantees and 62% of the following grantee types: "Not last grant" grantees, grantees tagged as "Don't know," or those without a tag for Last Grant Status. These suggestions were thematically categorized by CEP and grouped into the topics below.

Grantmaking Characteristics (17% N=65)

- Longer grants (N = 20)
 - "Consider multi-year grants beyond 2 years, especially for long-term grantees."
 - "It would be great if the Foundation funds bigger and longer projects so that there is enough time and resources to demonstrate impact."
 - "Where possible, extending multi-year grants to longer grant periods to provide additional flexibility and planning for NGOs working in an increasingly uncertain and difficult funding environment."
 - "Maybe consider 4 or 5-year grants?"
 - "I wish [Packard] continues to support us without the time limit as they have been in past years."
- Larger grants (N = 16)
 - "Exploring avenues to increase overhead or indirect support could significantly enhance organizations' capacity to implement their work with greater flexibility. It would empower organizations to invest in essential infrastructure, technology, and administrative support, ultimately benefiting their efficiency and impact."
 - "Making larger grant awards and making unrestricted awards. The grant awards have not changed for many years and have been at the same levels since at least 2010. Grant awards need to increase since the cost of living has dramatically increased since 2010 including staff salaries and occupancy."
 - "The Foundation's grant amount is generally limited annually. Thus, I suggest increasing and/or varying the level of funding/grant amount, based on the valid proposal submitted as some period requires additional funding, especially in humanitarian settings."
 - "We, like many social services, are facing a drop in COVID-era funding at a time when the demand for our services continues to rise. As such, we would greatly appreciate and welcome an increase in funding, proportional to the growth of our operating budget."
- Unrestricted grants (N = 14)
 - "General operating support funds for small-staff, smaller-budget organizations."
 - "I would recommend increasing flexible funding opportunities to long-standing partners, like our organization. While project-specific grants are valuable, increasing the availability of unrestricted general operating funds can offer our organization the flexibility to allocate resources where they are most needed."
 - "We believe that a greater emphasis on core or general support grants would benefit so many of the organizations that the Foundation currently funds."
 - "Flexibility in Funding: Often, projects evolve and adapt based on various circumstances. Offering some flexibility in how funds are allocated (within limits) can allow for more agile responses to real-time challenges."
- Multi-year general operating support (N = 8)
 - "Larger and more multi-year grants with less restriction."
 - "Multi-year, unrestricted funding grants to grantees that have demonstrated their aligned values, goals, and demonstrated achievements with the Foundation."
- Other types of funding support (N = 7)
 - "The Foundation can provide more seed funding for piloting of projects."
 - "Funding should also support investing in the leaders who are working so hard to build a healthy vibrant safe community and homes for all."

Interactions with Grantees (13% N=52)

- Site visits (N = 14)
 - "Something [Packard] could do that would help us feel as though they understand our work and communities is to come on-site when activities and programs are taking place. I know they 'know' how important our work is and understand its value... there is just something so unique about seeing it in action and the real-time impact.... If you all do this already, then great!"
 - "Consider implementing a practice wherein [the Foundation] conducts site visits to assess and observe firsthand the effects of their support on the communities in which their grantees operate."
 - "Perhaps having a continuous presence in our county via, site visits or an office. I think it would be great to see each other in person."
 - "Now that the pandemic is less present, it would be good for the Foundation staff to have a site visit on site."
- More frequent interactions (N = 12)
 - "I hope for more interactions with the Foundation besides the Program Officer I interact with. It will be great to get to know our funder well and have more opportunities to connect."
 - "Maybe more conversations with Packard staff - not for evaluation, just to trade information and perspectives on our field."
 - "More frequent informal touch points so that we could really get the fullest benefit from each other. I'd love to have the opportunity to talk with my program officer about strategic directions for my organization, for example."
- Routine meetings (N = 9)
 - "I would have liked to check in with my program officer at least once or twice during the course of this 2.5-year grant. This would have been hugely helpful in guiding, and magnifying the impact of both our current and future work."
 - "It would be better if the Foundation organized an initial kick-off session with its grantees to make sure they understand the vision and objectives of the Foundation better."
- Candid feedback to grantees (N = 5)
 - "We are not sure if we matched the Foundation's expectations, as we have not received feedback. It would be good to be aware about how the Foundation perceives our work."
- Interactions beyond program officers (N = 4)
 - "Our organizations have been through a sea of transitions. I think from both our end and the Foundation's end to develop a better relationship with new leadership members would have been beneficial."
- Trust-based practices (N = 3)
 - "In the past, I have wished for greater responsiveness from the officers for my grant, which could indicate that their workloads and meeting loads may need to be lightened. But on the other hand, perhaps I should interpret their lack of attention as trust in our efforts. If that latter scenario is the case, it would be helpful for clearer communication of that trust, to reduce my nervousness about their approval of our efforts."
- Other considerations of Packard-grantee interactions (N = 5)
 - "More interaction with the staff of the organization outside of the liaisons or primary contacts, to get to know how the dynamics are lived. This includes at least one visit to the organization's facilities or regional offices. Reinforce a communication program that helps the people who interact with the Foundation to understand what it really wants to achieve. Have sessions to discuss progress, not only reports, and that do not influence the qualification or review of the project's progress."

Non-Monetary Support (13% N=49)

- Connection with other grantees (N = 24)
 - "I would suggest facilitating opportunities for grantees to connect and collaborate. Organizing events or forums where grantees can share their work, challenges, and successes would be valuable."
 - "The Foundation also may continue to facilitate grantee networking."
 - "Organizing strategic sessions with different grantees working in different regions about the same issue or topic."
 - "I suggest the Foundation also focus on its funded work's leaders to come together to share resources beyond its initiative; for example, fund individual leaders' work collaboration across sectors."
 - "The Foundation could establish a communication platform for grantees so that exchanges of information, ideas, agendas, and updates can take place. This can help bring about a common strategy and joint actions among grantees that in some fields are needed to either pressure decision-makers or develop solidarity and public support. This also can help the Foundation to keep up with all that's happening with the grants. If such platform is not possible, then an updated list of grantees, with details of work areas (theme and geography) would be helpful to connect with other organizations working for the same goals."
 - "Collaborative Learning: Facilitate opportunities for grantees to share experiences and best practices. Building a network of organizations working toward similar goals can foster collaboration and collective learning, ultimately benefiting the entire sector."
- Introduction to other funders (N = 10)
 - "Support us in the areas of Fundraising: introducing us to other funders or donors, fundraising reviews, and development consultancies to improve our fundraising strategies and financing architecture (our most urgent organizational need)."
 - "Connecting grantees to other funders opens up an opportunity to diversify funding sources and to reduce dependency on a small number of funders. In this case, it'd be beneficial for grantees if the Foundation could expose and introduce grantees to more philanthropic funders."
 - "As the Foundation has shared that they are shifting priorities and won't be continuing to fund us, we would appreciate introductions to others (funders or donors) that are still focused on environmental education."

- Capacity-building assistance (N = 9)
 - "Capacity Building: Consider investing in capacity-building initiatives for grant recipients. Offer training or workshops in areas such as organizational development, project management, or technology adoption to empower us to better execute our mission."
 - "Expanding support beyond financial grants to strengthen non-monetary support, including capacity-building opportunities, workshops, or resources tailored to the evolving needs of grantees could contribute significantly to the long-term success of funded projects."
- Other types of non-monetary assistance (N = 6)
 - "Provide more non-financial support to all existing or potential grantees. I feel more non-financial support is important for organizations to work better on their work."
 - "We would also really appreciate any of those 'non-material' supports as referenced in an earlier question in this survey. Organizational strategy and planning for next phases are needed and also usually difficult to support with project funding that has limited travel to get partners and staff together. Connections to other potential funding opportunities that Packard may think are a good fit. Seeing an organization as a potential partner in implementation - coming to us to ask whether there are areas that we have the expertise, the vision, the connections, etc. to engage in that are part of their priorities. It is more likely that we have not been able to engage in these not because of lack of interest, expertise, and passion - but, due to lack of funding and capacity to build program work."

The Foundation's Strategic Focus (12% N=45)

- Continuing topics (N = 17)
 - "Honestly, I believe it is a mistake to pull out of a region where you are having such a big impact, and where your departure will also have a big negative impact. Working at the regional level makes all the difference."
 - "The recent redirect of programs that largely leaves behind work in the US ocean and climate conservation effort seems a little confusing and a lost opportunity given how much had already been invested. It may be too late to reconsider this decision, but I feel compelled to mention it nonetheless."
 - "Continued focus on neglected and stigmatized areas like abortion."
 - "Keep funding culturally specific arts and culture as it is vital to healthy, vibrant communities."
- Expanding topics (N = 12)
 - "As the threats posed by climate change become more urgent, we would welcome a broader, more inclusive strategy, as opposed to focusing on a single issue/solution."
 - "More coordination of potential projects in the application stage, to encourage more collaboration between organisations on the same issues, rather than multiple applications competing for the same pot."
 - "It would be great if Packard set up an office in China."
- New topics (N = 8)
 - "Consider and enhance strategies such as increased system strengthening and national advocacy type, joining the call for a Decade of Action, and taking innovative approaches to ensure that it meets the SDG goals in the context of addressing unmet needs of the underserved target communities. By doing so, the Foundation can have a beneficial impact on the communities it supports while also helping to accomplish the SDGs."
 - "Efforts to encourage funding investments on SRHR in fragile and conflict-affected situations."
- Other considerations of Packard's focus (N = 8)
 - "Maybe it's important to evaluate how the grantee efforts of Packard in countries that are not in the selected zones of its new strategy could not be lost. The unsustainable efforts of working together (Packard-Grantees) in a long-term process could imply a lower impact of these initiatives."
 - "I suggest that the Foundation consider entering areas where there is the potential for mainstream change, rather than restricting its support to small groups within society. While addressing the needs of small groups is important, it is also vital to spread the thought process about women's equity and rights."

Communication on Strategy (11% N=42)

- New strategy and implications (N = 13)
 - "It is still very unclear to us what the new direction means for our field, in particular our work and options for where our program growth can work to support those priorities."
 - "It would be nice to have a better understanding of the overall strategy of the Foundation and what priorities are likely to emerge, change, or continue in the next few years."
 - "The Foundation recently released its renewed commitment to the work that we do. They narrowed their strategy, and it would be helpful to know if our organization still fits."
- Strategic transition (N = 12)
 - "It currently seems that there are changes coming; it's the first time that we are not aware of upcoming changes. Clarity about that direction will be helpful and we trust, given their history, that it will be forthcoming."
 - "I know that the Foundation went through a shift in its priorities this year and it could have been slightly more helpful to have a sense of where they were headed earlier in the process."
 - "Better communication about the continuation of funding or priorities. Felt like things were said that were a little confusing."
- Vision and goals (N = 9)
 - "Sharing a clearer vision of how Packard Foundation's different funding areas tie together for impact."
 - "Clearer communication of its strategy and the kind of work [Packard] wants to support."

- Grantees' work within Packard's strategy (N = 8)
 - "It would be helpful to understand how the Foundation thinks about our work in the context of their broader strategy. Having a better understanding of their thinking would allow us to better communicate how our work contributes."
 - "It would be helpful to have a better understanding of what projects, programs, or initiatives the Foundation is focused on supporting so that it doesn't feel as though we are receiving funding by happenstance."

Diversity, Equity, and Inclusion (8% N=30)

- Staff demographics (N = 7)
 - "Hire staff that reflect the grantees and communities the Foundation seeks to engage."
 - "A more diverse Board. An expanded local community support and representation from the local community on their Board."
- Working with grassroots or smaller organizations (N = 6)
 - "The Foundation should evaluate the fund recipients in terms of presence at the grassroots level with the community."
 - "Diversify - in demographics and simply in number - your trusted contacts on the ground. Too few folks have an outsized voice in informing Packard about the local community and those folks are coming with their own lens."
- Actions promoting DEI efforts (N = 5)
 - "[Packard] could provide training and capacity-building support to grantees and partners to enhance their understanding of diversity, equity, and inclusion (DEI) issues and strategies. Also, share their experience and best practices in DEI to promote broader adoption of inclusive practices."
- Communication on DEI priorities (N = 5)
 - "I would love to see a mission statement for funding priorities and understand the commitment to anti-racism work and to see anti-racist evaluation efforts (more focus on root cause analysis than on outcomes, for instance)."
- Grants supporting DEI work (N = 4)
 - "If the Foundation added a certain amount of funds to every grant (say \$50,000) to specifically be used toward DEIJ/antiracism work (hiring a consultant, staff training, etc.) that could go a long way."
- Working with national or large organizations (N = 3)
 - "While the donor landscape is shifting toward directing funding to local organizations, this is not enough, especially if it sacrifices the role of aggregator organizations which then allows for cross-country lessons learned, and allows for link-pinning the work done at local levels with regional and international networks. Otherwise, work at the local levels, especially on advocacy, becomes isolated and ultimately ineffective."

Grant Processes (7% N=27)

- Streamlining processes (N = 11)
 - "Streamline the proposal narrative and outcome table format, which currently lends itself to duplication of language and ideas. Simplifying the format could alleviate some workload for both donor and grantee as far as shorter, less repetitive proposal documents."
 - "Improvement in the grants portal, simplifying or eliminating reports or accepting an organization's already prepared reports such as annual reports and evaluations; simplifying the grant application."
 - "Verbal reporting on the grants."
- Reporting and evaluation metrics (N = 9)
 - "A periodic assessment of organizational ethos, culture, and effectiveness should be interposed so that the organization remains alive to the need to be responsive in its own field."
 - "Impact Measurement: Emphasizing impact measurement and providing guidance on effective ways to assess outcomes and share success stories could help both the foundation and grantee organizations better understand and showcase the results of funded projects."
- Grant portal (N = 4)
 - "The integration of a data tracking system within the grants portal. This system would allow grantees to easily upload their objectives and metrics, facilitating a more streamlined and efficient reporting process. This addition would not only assist grantees in effectively communicating their progress but also enable the Foundation to efficiently monitor and evaluate the impact of its funding."
- Grant administration (N = 3)
 - "Timely renewals."

Sources of Learning for Strategy Development (7% N=27)

- Thought partnership from grantees (N = 19)
 - "Including grantees in strategic planning efforts would improve future efforts and the evolution of its programs."
 - "We would have appreciated the opportunity to have input on strategy and to discuss how our organization may contribute to its goals."
 - "We would like to partner with the Foundation to contribute ideas and best practices to the field."
 - "More collaboration on our grants and checking in on the status or reaching out to brainstorm new ideas for funding opportunities."

- "Frontline community partners understand their community needs better than anyone. When funders are organizing their own agendas, this frontline perspective should be a strong aspect of any funders' agenda setting. Unconscious bias and privilege are tricky things, so just being aware and examining agenda-setting from this lens makes the Foundation stronger for all. It seems like this is something that the Foundation is paying attention to, and I appreciate this."
- Learning from the community (N = 7)
 - "Identifying opportunities to engage more with those directly impacted by the funding. Beyond meeting with staff, making the time to meet with community leaders."
 - "More and multiple public-facing programming in the region's most under-resourced communities where community members can provide direct feedback - maybe a town hall or host an education or civic engagement program - and Foundation staff can really see the impact that they make and whether or not community members even know who they are. Then incorporate those experiences and feedback into recommendations for the next 5 year's program priorities."
- Other (N = 1)

Communication on Funding (4% N=17)

- Funding guidelines (N = 9)
 - "Communicating with grantees more consistently, having clear processes outlined on the front end of a grant so both parties understand how they will interact with each other and what information needs to be communicated."
 - "While I have come to understand that funds [to support capacity building and technical assistance] are available, it is not clear what the process is to request that support."
- Funding opportunities (N = 8)
 - "Clearer understanding and transparency about their funding strategies and priorities.... Our experience or impression was that there was a sense of exclusivity in these areas where it requires special contacts or networks to be able to clearly understand what kinds of work they support and what their philanthropy approaches are."
 - "It would be good if the Foundation could communicate in advance the potential funding commitment."

The Foundation's Impact on the Field (4% N=15)

- Leadership in the field (N = 9)
 - "Consider how funded efforts can work together to achieve significant outcomes rather than making a series of standalone grants that may be less likely to support significant change."
 - "Could the Foundation play a more proactive role in convening and facilitating dialogue between partners in-country, that goes beyond lesson-sharing to include discussion of more difficult questions around: partners' positioning and approach in relation to questions of equality, diversity, and inclusion; and/or the state of civil society (where competition over resources, and the lack of 'safe spaces' otherwise reduces the incentive for partners to initiate such a discussion independently)?"
- Advancing knowledge and policy (N = 6)
 - "Advocating for state policy change to support programmatic funding would be helpful."
 - "Keep supporting research to test and support your theory of change. Packard also supported our evaluation of the extent to which advocacy efforts and results can be sustained once funding ends."

The Foundation's Impact on Grantee Organizations (4% N=14)

- Organizations' sustainability (N = 8)
 - "Programs with such significant impact should be funded at least for a reasonable period of time to ensure that the impact is sustainable and has long-lasting outcomes. The program is disrupted due to the strategic shift of the Foundation."
 - "Being more receptive to how our organization can support your new initiatives, instead of letting us know that the grant program we have been a part of is/has ended and good-bye. I asked if they knew of other grantors that would be open to supporting our important work and the answer was simply, 'No.'"
- The Foundation's understanding of organizations (N = 5)
 - "I believe [Packard] requires more staff to better understand and know what their partners do or do not. Sometimes, they oversee some organisations' experiences, but more due to lack of time."
- Other (N = 1)

Other (1% N=3)

- Other (N = 3)
 - "Don't overcorrect. It is admirable that the Foundation was willing to undergo a probing and honest self-evaluation regarding issues of DEI and how it serves historically underrepresented communities, but intensive organizational self-reflection seems to have paralyzed parts of the organization for the last couple of years. Lasting, meaningful change in this area will follow when the academic and philanthropic communities apply the same intellectual rigor to DEI initiatives as they do to scientific ones."

Justice and Equity

Grantees were asked to comment on how the Foundation is or is not contributing to justice and equity. The 865 grantees who responded to the survey provided 479 comments on this question. Out of all the comments, CEP coded a total of 250 distinct comments.

The 250 coded comments were then categorized by the nature of their content, specifically whether the content is positive, neutral, or constructive.

Proportion of Grantee Comments on Justice and Equity

Packard's Contribution to Justice and Equity	Proportion
Positive Examples	72%
Mixed Sentiment	7%
Constructive Suggestions	6%
No Example / Unsure	15%

In addition to categorizing by the nature of the comment's content, CEP thematically categorized the coded comments and grouped 198 positive comments and 33 constructive comments into the topics below.

Examples of Packard Contributing to Justice and Equity (N=198)

By Its Choice of Issues (27% N=52)

Packard's support of specific focuses and communities, including but not limited to sexual and reproductive health, young people, women and girls, and Indigenous people.

- "Addressing SRH needs of working youth who are denied due to the nature of their work condition is a good example."
- "Our target community is a highly diverse, low-income population of families with young children. Foundation staff are highly committed to ensuring their funding aligns with our goals of equitable access for all."

By Partnering with Equity-Focused Grantees (25% N=49)

Partnering with grantees for work that grantees see as focused on justice and equity, including a focus on their local communities.

- "Just by funding us and other similar organizations, the Foundation is demonstrating these two goals."
- "Their support of our proposal clearly demonstrates their contribution to justice and equity."

By Developing Targeted Foundation Strategy (17% N=34)

Closely related to the choice of topics, grantees also comment on the development of strategies that directly connect to justice and equity, coupled with explicit communication on and commitment to this topic. For example, Packard revised its funding priorities to align with justice and equity and communicated clearly about the changes and expectations with grantees.

- "Establishing and communicating to grantees its new strategic framework, which is all about justice and equity in ocean resources, is such an example by the Foundation."
- "The Foundation was clear about its expectations that grantee work supported justice and equity and exhibited these values on its grantmaking."

By Adjusting Internal Practices (15% N=30)

Foundation practices that encourage justice and equity, including learning from grantees and local communities, adjusting grant process requirements and formats, and Foundation staff's interactions with grantee partners.

- "[Foundation staff] have supported grantees by encouraging and allowing flexible use of resources to address injustice without visibly taking the center stage."
- "Our program officer listens to the needs that come up directly from our community, and offers resources when available to support addressing those needs."

By Supporting Grantees' Justice and Equity Efforts (8% N=16)

Packard's strategies to support grantees that help advance justice and equity, including providing capacity-building support, training opportunities, and network events to convene grantees doing similar work.

- "The Foundation is investing in our organizational capacity, providing general operating support, as well as other connections to external resources that help us lean into this important work with strength."
- "The DEI training and investment we received demonstrated the Foundation's contribution to justice and equity."

Multiple Examples (7% N=14)

Suggestions for Packard to Deepen Contribution to Justice and Equity (N=33)

In Its Overall Foundation Strategy (30% N=10)

More communication on what justice and equity means to Packard and how it shows up in Packard's funded efforts. Invite grantees into the Foundation's strategy conversations.

- "I'm not sure what actions the Foundation has taken, but I am just not knowledgeable of these items - they could be shared more with grantees."
- "Many [organizations] have years of experience in justice and equity work, and this knowledge and experience were overlooked by the Foundation when they provided this support."

In Who Is Funded (27%, N=9)

More focus on funding local and/or grassroots organizations, as well as partnering with organizations led by people of color.

- "I am not sure how the new focus on state-level support, which it seems could look like voter engagement, has as strong a racial justice focus."
- "Since many organizations led by people of color are grassroots-based and may have difficulty garnering funding from a traditional philanthropic organization, it

is important to consider how to make grants more accessible and less cumbersome for those communities."

During Strategic Transition (18% N=6)

Mitigate the influence of strategic transition away from grantees' work on grantee organizations and communities they serve.

- "Some paths towards change come at greater personal cost to the activists who walk them.... Putting the hope of an entire movement on them and not funding a diverse array of approaches, no matter how unlikely they are to result in proactive legislation, should be considered with gravity and empathy."

In Its Internal Practices (15% N=5)

More data specific to justice and equity goals. Refine articulation of tracked justice and equity metrics in grant process documents.

- "It is difficult to answer this question without seeing a theory of change that includes concrete examples/indicators of what justice and equity mean in practice. How will know that you have supported these issues in line with the priorities of those whose experiences are least just or equitable? The statements are sound, but the desired outcomes are unclear."

In How to Support Grantees (9% N=3)

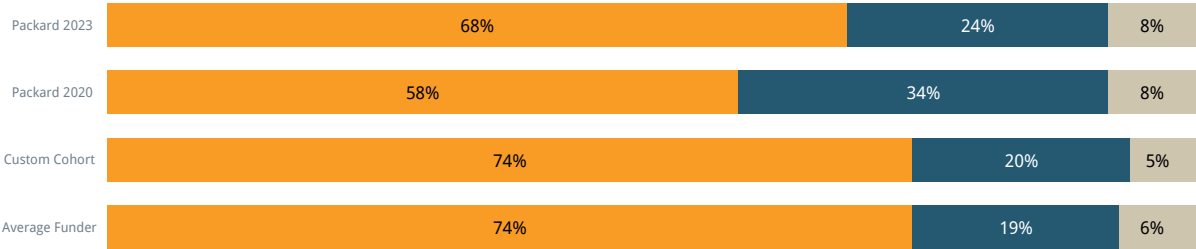
More opportunities to connect like-minded grantee organizations to collaborate with each other.

- "Might the Foundation see itself as a potential co-convenor of collaborative community partners in addressing specific issues of justice and equity in the community?"

Respondents and Communities Served

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

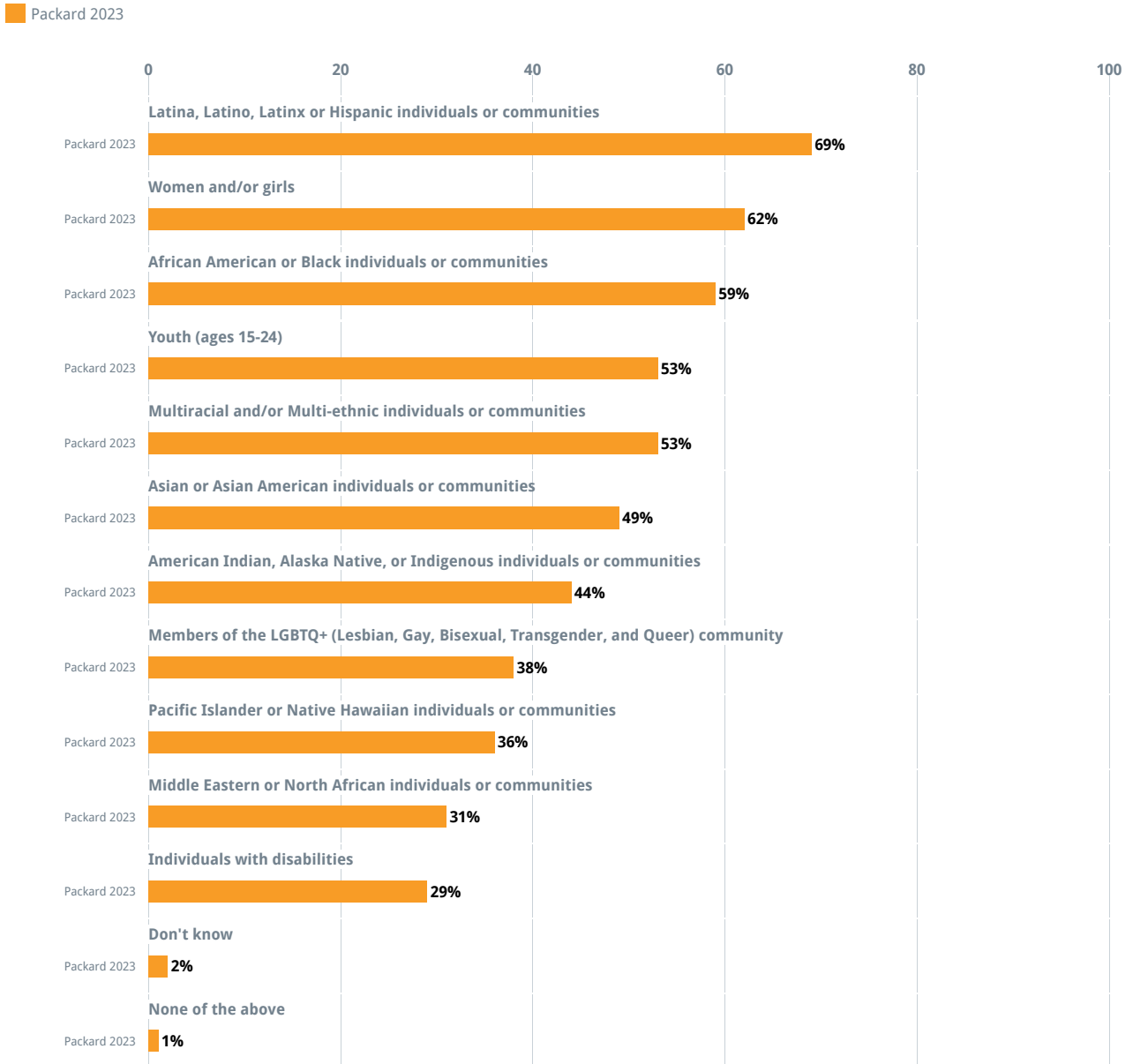
Yes No Don't know



Cohort: Custom Cohort Past results: on

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

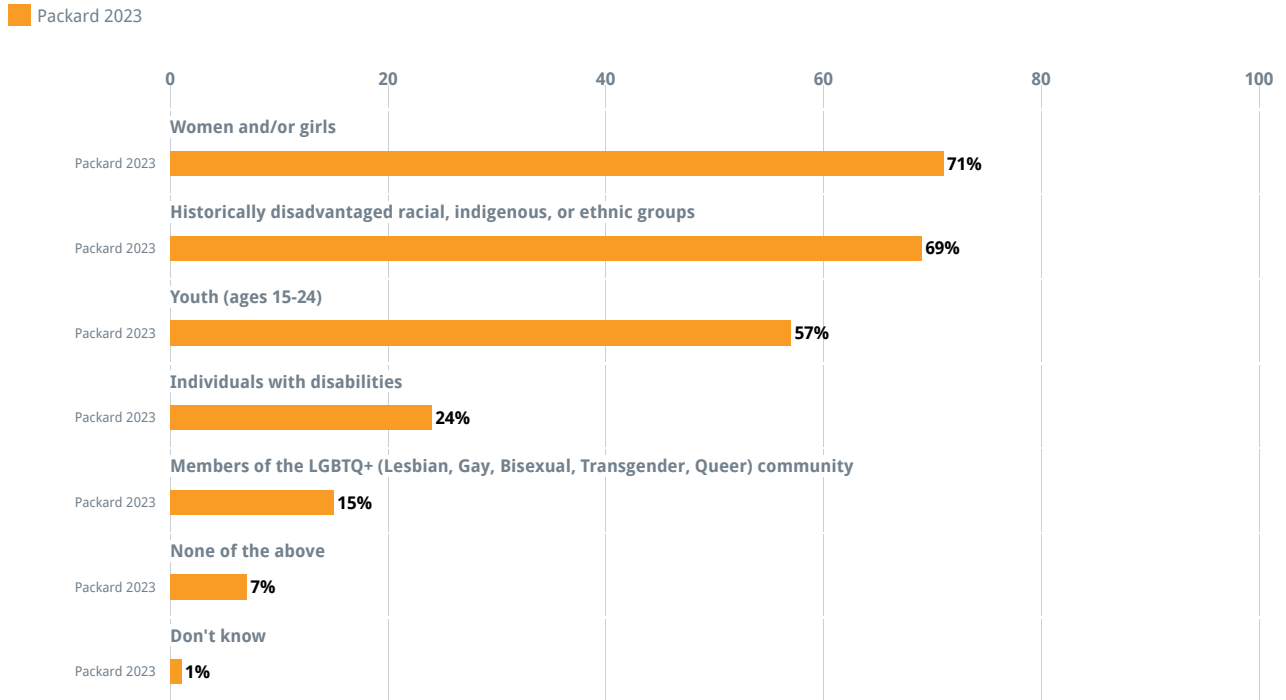
Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant?



Cohort: None Past results: on

The following question is asked only of grantees based outside of the U.S. 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

Respondent Demographics

Note: Demographic questions related to grantees' POC and racial/ethnic identity are only asked of respondents in the United States.

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

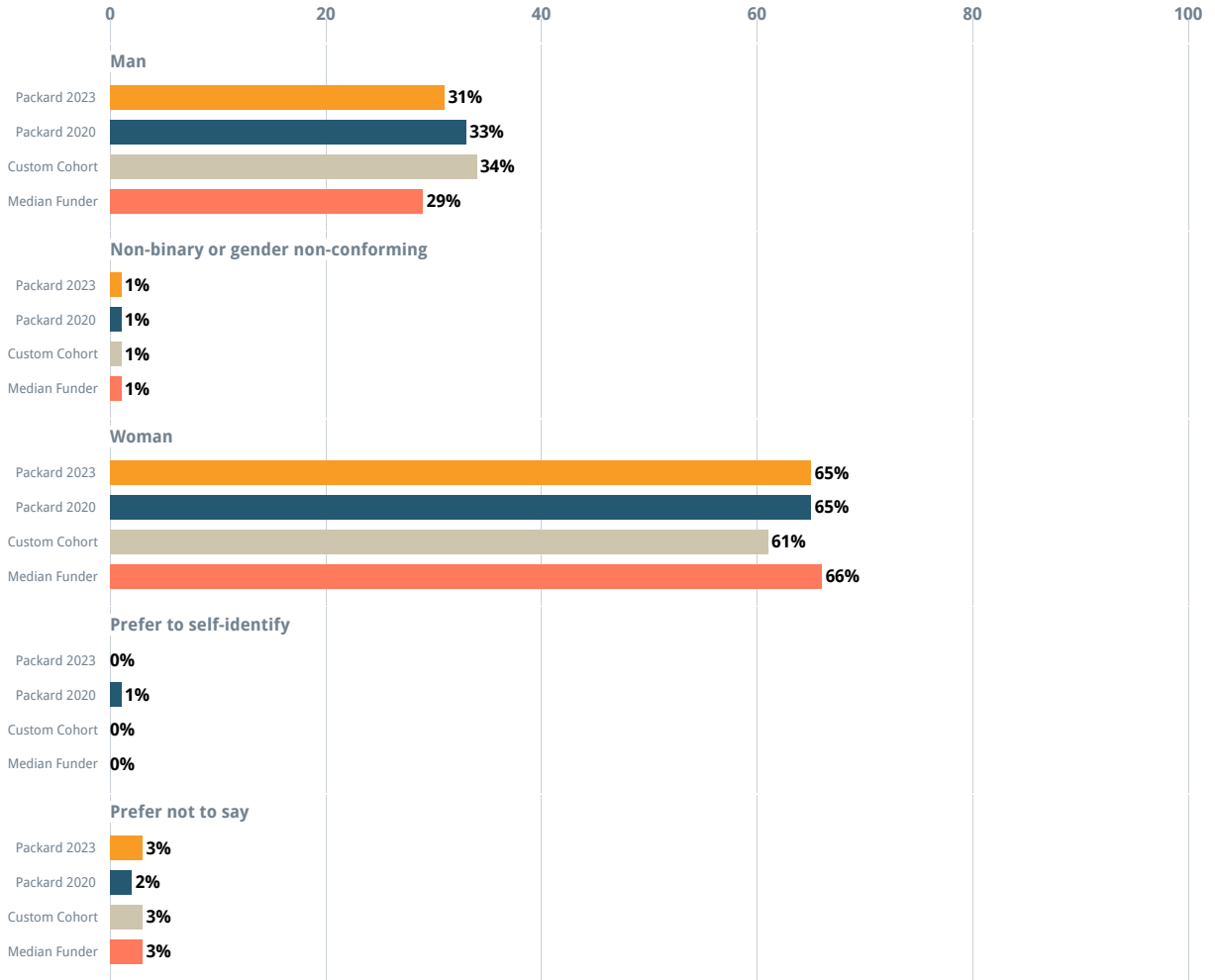
Survey language and response options for questions about gender and LGBTQ+ identity are guided by best practices shared by [Fundors For LGBTQ Issues](#), [HRC Foundation's Welcoming Schools](#), and the [Williams Institute of the University of California – Los Angeles School of Law](#).

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 answers on demographic identity are optional. International survey respondents were asked to opt-in to respond to questions on gender, transgender, disability, and LGBTQ+ identities.

Please select the option that represents how you describe yourself:

■ Packard 2023
 ■ Packard 2020
 ■ Custom Cohort
 ■ Median Funder

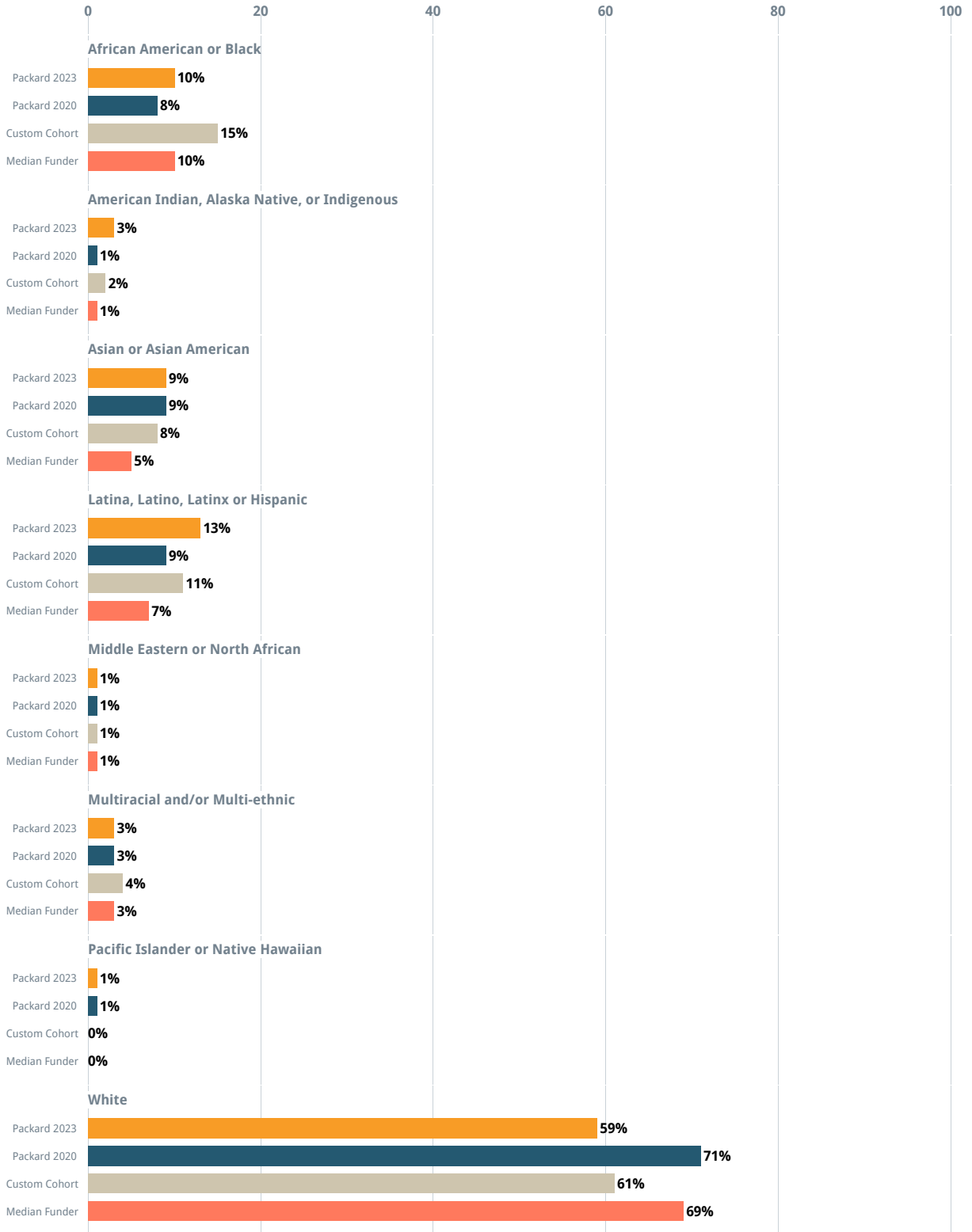


Cohort: Custom Cohort Past results: on

Selected Cohort: Custom Cohort				
Do you identify as a person of color?	Packard 2023	Packard 2020	Average Funder	Custom Cohort
Yes	31%	23%	25%	34%
No	62%	73%	69%	60%
Prefer not to say	6%	4%	6%	6%

How would you describe your race and/or ethnicity?

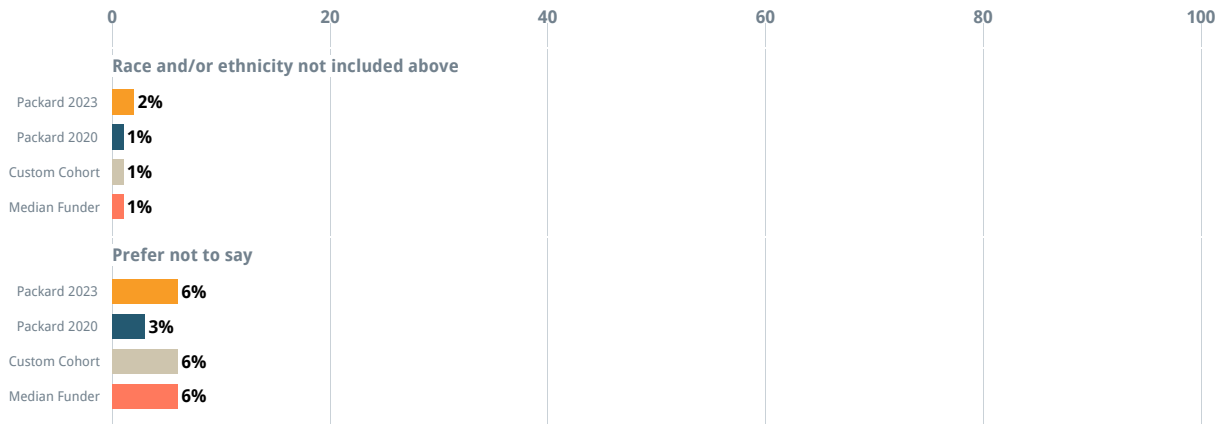
■ Packard 2023
 ■ Packard 2020
 ■ Custom Cohort
 ■ Median Funder



Cohort: Custom Cohort Past results: on

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

■ Packard 2023
 ■ Packard 2020
 ■ Custom Cohort
 ■ Median Funder



Cohort: Custom Cohort Past results: on

Selected Cohort: Custom Cohort			
Are you transgender?	Packard 2023	Average Funder	Custom Cohort
Yes	0%	1%	0%
No	97%	96%	96%
Prefer not to say	3%	4%	3%

Selected Cohort: Custom Cohort			
Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community?	Packard 2023	Average Funder	Custom Cohort
Yes	9%	11%	11%
No	85%	84%	84%
Prefer not to say	5%	5%	5%

Selected Cohort: Custom Cohort			
Do you have a disability?	Packard 2023	Average Funder	Custom Cohort
Yes	6%	6%	6%
No	89%	89%	89%
Prefer not to say	5%	5%	5%

Respondent Job Title

Selected Cohort: Custom Cohort						
Job Title of Respondents						
	Executive Director/CEO	Other Senior Team (i.e., reporting to Executive Director/CEO)	Project Director	Development Staff	Volunteer	Other
Packard 2023	36%	27%	17%	16%	0%	4%
Packard 2020	41%	22%	17%	16%	0%	4%
Packard 2018	52%	18%	12%	18%	1%	0%
Packard 2016	48%	16%	13%	13%	1%	9%
Packard 2014	47%	15%	14%	15%	2%	7%
Packard 2012	45%	16%	15%	15%	0%	9%
Packard 2010	50%	17%	10%	16%	1%	7%
Packard 2008	44%	15%	14%	18%	0%	9%
Packard 2006	40%	17%	16%	14%	0%	13%
Packard 2004	53%	12%	10%	13%	0%	11%
Average Funder	47%	19%	11%	16%	1%	5%
Custom Cohort	38%	24%	19%	14%	0%	5%

Contextual Data

Note: All information below is based on self-reported data from grantees.

Grantmaking Characteristics

Selected Cohort: Custom Cohort	
	Length of Grant Awarded
	Average grant length
Packard 2023	1.9 years
Packard 2020	2 years
Packard 2018	2.2 years
Packard 2016	2.1 years
Packard 2014	2 years
Packard 2012	2.1 years
Packard 2010	2.2 years
Packard 2008	2 years
Packard 2006	2.4 years
Packard 2004	2.3 years
Median Funder	2.2 years
Custom Cohort	2.6 years

Selected Cohort: Custom Cohort					
Length of Grant Awarded					
	0 - 1.99 years	2 - 2.99 years	3 - 3.99 years	4 - 4.99 years	5 - 50 years
Packard 2023	40%	47%	9%	1%	3%
Packard 2020	41%	44%	10%	2%	3%
Packard 2018	41%	44%	8%	2%	5%
Packard 2016	44%	40%	8%	0%	7%
Packard 2014	45%	37%	9%	3%	6%
Packard 2012	43%	36%	13%	2%	6%
Packard 2010	51%	31%	12%	2%	4%
Packard 2008	46%	31%	15%	4%	4%
Packard 2006	35%	30%	19%	3%	13%
Packard 2004	36%	28%	24%	5%	8%
Average Funder	47%	22%	19%	3%	8%
Custom Cohort	26%	34%	26%	5%	9%

Selected Cohort: Custom Cohort				
Proportion of Unrestricted Funding	Packard 2023	Packard 2020	Average Funder	Custom Cohort
No, this funding was not restricted to a specific use (i.e., general operating, core support)	39%	31%	28%	24%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	61%	69%	72%	76%

Grant Size

Selected Cohort: Custom Cohort	
	Grant Amount Awarded
	Median grant size
Packard 2023	\$180K
Packard 2020	\$200K
Packard 2018	\$162.4K
Packard 2016	\$200K
Packard 2014	\$150K
Packard 2012	\$150K
Packard 2010	\$150K
Packard 2008	\$200K
Packard 2006	\$225K
Packard 2004	\$200K
Median Funder	\$110.2K
Custom Cohort	\$437.4K

Selected Cohort: Custom Cohort									
	Grant Amount Awarded								
	Less than \$10K	\$10K - \$24K	\$25K - \$49K	\$50K - \$99K	\$100K - \$149K	\$150K - \$299K	\$300K - \$499K	\$500K - \$999K	\$1MM and above
Packard 2023	1%	2%	11%	17%	13%	21%	14%	14%	7%
Packard 2020	1%	3%	6%	14%	12%	27%	13%	15%	9%
Packard 2018	0%	2%	9%	16%	16%	24%	11%	12%	8%
Packard 2016	1%	3%	9%	18%	11%	23%	12%	14%	9%
Packard 2014	1%	7%	15%	16%	10%	24%	10%	9%	8%
Packard 2012	0%	4%	12%	16%	15%	25%	9%	12%	7%
Packard 2010	3%	7%	8%	15%	15%	25%	10%	8%	10%
Packard 2008	4%	6%	8%	15%	11%	23%	13%	11%	10%
Packard 2006	2%	6%	8%	13%	10%	23%	11%	11%	17%
Packard 2004	3%	8%	10%	12%	8%	25%	9%	8%	17%
Average Funder	8%	11%	12%	15%	10%	17%	10%	9%	10%
Custom Cohort	1%	1%	4%	7%	8%	18%	15%	19%	27%

Selected Cohort: Custom Cohort	
	Median Percent of Budget Funded by Grant (Annualized)
	Size of grant relative to size of grantee budget
Packard 2023	3%
Packard 2020	5%
Packard 2018	4%
Packard 2016	4%
Packard 2014	4%
Packard 2012	4%
Packard 2010	4%
Packard 2008	5%
Packard 2006	5%
Packard 2004	5%
Median Funder	4%
Custom Cohort	5%

Grantee Characteristics

Note: All information below is based on self-reported data from grantees.

Selected Cohort: Custom Cohort	
Operating Budget of Grantee Organization	
Median Budget	
Packard 2023	\$3M
Packard 2020	\$2.2M
Packard 2018	\$2.5M
Packard 2016	\$2.2M
Packard 2014	\$2M
Packard 2012	\$2M
Packard 2010	\$2M
Packard 2008	\$1.8M
Packard 2006	\$2.1M
Packard 2004	\$1.5M
Median Funder	\$1.7M
Custom Cohort	\$3M

Selected Cohort: Custom Cohort						
Operating Budget of Grantee Organization						
	<\$100K	\$100K - \$499K	\$500K - \$999K	\$1MM - \$4.9MM	\$5MM - \$24MM	>=\$25MM
Packard 2023	4%	12%	11%	32%	23%	18%
Packard 2020	2%	14%	10%	38%	20%	15%
Packard 2018	2%	10%	14%	34%	23%	16%
Packard 2016	2%	12%	13%	36%	22%	15%
Packard 2014	5%	15%	15%	32%	20%	14%
Packard 2012	4%	14%	16%	31%	21%	14%
Packard 2010	3%	16%	16%	31%	22%	12%
Packard 2008	4%	14%	14%	34%	20%	13%
Packard 2006	4%	14%	14%	29%	19%	19%
Packard 2004	3%	22%	14%	35%	14%	13%
Average Funder	8%	18%	13%	30%	19%	12%
Custom Cohort	3%	11%	10%	30%	24%	22%

Funding Relationship

Selected Cohort: Custom Cohort	
Funding Status	
Percent of grantees currently receiving funding from the Foundation	
Packard 2023	83%
Packard 2020	91%
Packard 2018	88%
Packard 2016	86%
Packard 2014	83%
Packard 2012	88%
Packard 2010	85%
Packard 2008	89%
Packard 2006	75%
Packard 2004	78%
Median Funder	82%
Custom Cohort	85%

Selected Cohort: Custom Cohort			
Pattern of Grantees' Funding Relationship with the Foundation			
	First grant received from the Foundation	Consistent funding in the past	Inconsistent funding in the past
Packard 2023	21%	67%	12%
Packard 2020	13%	74%	13%
Packard 2018	19%	67%	14%
Packard 2016	14%	70%	16%
Packard 2014	13%	70%	17%
Packard 2012	13%	73%	14%
Packard 2010	20%	65%	15%
Average Funder	29%	53%	18%
Custom Cohort	32%	49%	19%

Funder Characteristics

Note: All information below is based on self-reported data from The David and Lucile Packard Foundation.

Selected Cohort: Custom Cohort		
Financial Information		
	Total assets	Total giving
Packard 2023	\$8300M	\$354M
Packard 2020	\$7423.4M	\$350M
Packard 2018	\$7102.4M	\$319M
Packard 2016	\$7025.8M	\$307.3M
Packard 2014	\$6456.6M	\$294.7M
Packard 2012	\$5797.4M	\$265.1M
Packard 2010	\$5699.2M	\$282.8M
Packard 2008	\$6594.4M	\$307.9M
Packard 2006	\$5788.5M	\$150.1M
Packard 2004	\$5982.5M	\$277.9M
Median Funder	\$290.4M	\$20.3M
Custom Cohort	\$6704M	\$255.6M

Selected Cohort: Custom Cohort		
Funder Staffing		
	Total staff (FTEs)	Percent of staff who are program staff
Packard 2023	138	43%
Packard 2020	131	53%
Packard 2018	127	42%
Packard 2016	120	39%
Packard 2014	114	41%
Packard 2012	96	40%
Packard 2010	92	45%
Packard 2008	81	49%
Packard 2006	84	49%
Packard 2004	49	100%
Median Funder	18	44%
Custom Cohort	99	44%

Selected Cohort: Custom Cohort		
Grantmaking Processes		
	Proportion of grants that are invitation-only	Proportion of grantmaking dollars that are invitation-only
Packard 2023	98%	98%
Packard 2020	90%	90%
Packard 2018	70%	80%
Packard 2016	70%	80%
Packard 2014	70%	80%
Packard 2008	N/A	0%
Median Funder	50%	70%
Custom Cohort	90%	98%

Additional Survey Information

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

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Packard's grantee survey was 865.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your field?	809
How well does the Foundation understand the field in which you work?	807
To what extent has the Foundation advanced the state of knowledge in your field?	709
To what extent has the Foundation affected public policy in your field?	601
Overall, how would you rate the Foundation's impact on your local community?	667
How well does the Foundation understand the local community in which you work?	685
How well does the Foundation understand your organization's strategy and goals?	819
The non-monetary support I received met an important need for my organization and/or program	514
The non-monetary support I received strengthened my organization and/or program	511
The Foundation's non-monetary support was a worthwhile use of the time required of us	513
I felt the Foundation would be open to feedback about the non-monetary support it provided	507
Who most frequently initiated the contact you had with your program officer during this grant?	832
Has your main contact at the Foundation changed in the past six months?	831
At any point during this grant, including the selection process, did Foundation staff conduct a site visit?	863
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	788
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	827
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	834
How well does the Foundation understand the needs of the people and communities that you serve?	789
To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?	776
The Foundation has clearly communicated what diversity, equity, and inclusion means for its work	773
Overall, the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work	767
Overall, most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity, and inclusion	781
I believe that the Foundation is committed to combatting racism	744
Did you submit a proposal to the Foundation for this grant?	852
To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?	744
To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?	776
To what extent was the Foundation clear and transparent about the selection process requirements and timelines?	805
To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether a proposal would be funded or declined?	738
Have you participated in a reporting or evaluation process?	830
At any point during the proposal 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?	723
To what extent was the Foundation's reporting process straightforward?	676
To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?	672
To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?	709

Question Text	Number of Responses
To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?	722
To what extent did the evaluation incorporate your input in the design of the evaluation?	172
To what extent did the evaluation result in you making changes to the work that was evaluated?	177
Are you currently receiving funding from the Foundation?	846
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	840
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	850
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant? (Domestic grantees only)	434
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant? (International grantees only)	143
I have a clear understanding of the pre-grant approval process and requirements (e.g., proposal application)	822
I have a clear understanding of the post-grant award process and requirements (e.g., reporting and grant assessment)	830
I think that the Foundation is collecting the information, data, and feedback it really needs	736
To what extent were you given the opportunity to provide input into a Foundation initiative strategy or theory of change for the area from which you receive funding?	646
How did you hear about this strategic transition?	124
How clearly did the Foundation communicate the rationale for the transition to you?	123
How clearly did the Foundation communicate the timeline of the transition to you?	123
How clearly did the Foundation communicate how this transition affects the funding your organization will receive from the Foundation to you?	123
How clearly did the Foundation communicate how the Foundation can support your organization during this transition to you?	123

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

Kevin Bolduc
Vice President, Assessment and Advisory Services
kevinb@cep.org

Joyce Cheng
Senior Analyst, Assessment and Advisory Services
joycec@cep.org