Rockefeller Brothers Fund 2023 Grantee Perception Report - Fund Level Results

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CEP

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

Interpreting Your Charts

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

Lowest Rated Funder

Average Rating of Funder

Median or "Typical" Funder

Highest Rated Funder

	0th (2.58)	25th (5.23)	50th (5.71)	75th (6.12)	100th (6.67)

Your Average Rating and Corresponding Percentile

Acme 2022 — **6.02** 66th

Highest in Cohort

Lowest in Cohort — Regional Funders — Median in Cohort

Past Results — Acme 2018 — **5.49**

Segmentation of Current Data by Group

Arts — **5.75**

Education — **5.95**

Environment — **6.06**

Health — **6.18**

6.02* 66th — Asterisk denotes a statistically significant difference between your current rating and your most recent past rating.

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

Key Measures	Trend Data	Average Rating	Percentile Rank
Field Impact Impact on Grantees' Fields		6.12	81st
Organizational Impact Impact on Grantees' Organizations		6.36	73rd
Diversity, Equity, Inclusion Demonstrates Explicit Commitment to DEI	N/A	6.30	83rd
Approachability Comfort Approaching the Foundation		6.51	82nd
Communications Clarity of Communications		5.85	61st
Selection Process Helpfulness of the Selection Process		5.95	91st

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
RBF 2023	February and March 2023	554	384	69%
RBF 2016	February and March 2016	415	275	66%
RBF 2010	February and March 2010	357	236	66%
RBF 2004	September and October 2004	303	195	64%

Survey Year	Year of Active Grants
RBF 2023	2022
RBF 2016	2015
RBF 2010	2009
RBF 2004	2003

Throughout this report, Rockefeller Brothers Fund'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 at https://cep.org/gpr-participants/.

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

Subgroups

In addition to showing RBF's overall ratings, this report shows ratings segmented by Sponsored Project. The online version of this report also shows ratings segmented by the following.

To protect grantee confidentiality, categories with 10 or fewer respondents are not included in segmentations - but are still included in RBF's overall ratings.

Sponsored Project	Number of Responses
Yes	50
No	327

Type of Support	Number of Responses
General/Operating Support	174
Program/Project Support	203

Past Grantee	Number of Responses
Yes	280
No	104

New/Renewed Support	Number of Responses
Renewed	210
New Purpose	174

Organization Budget	Number of Responses
$10,000,001 and over	92
$5,000,001 - $10,000,000	31
$2,500,001-$5,000,000	56
$1,000,001 - $2,500,000	54
$750,001 - $1,000,000	24
$500,001 - $750,000	31
$250,001 - $500,000	43
$250,000 and under	44

Experience with Pocantico	Number of Responses
Yes	55
No/Don't know	327

Geographic Focus	Number of Responses
United States	96
New York City	31
Global Programs	109
Afghanistan	11
Bosnia-Herzegovina	13
Central America	14
China	29
Israel/Palestine	27
Kosovo	15
Middle East Regional	23
Western Balkans	11

Subgroup Methodology and Differences

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

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

Subgroup Methodology

Using the grantee list provided by the Fund, CEP tagged grantees based on **Sponsored Project**, **Type of Support**, **Past Grantee**, **New/Renewed Support**, **Organization Budget**, and **Geographic Focus**.

Using data grantees provided in the survey, CEP tagged grantees based on whether they have had some type of **experience with the Pocantico Center**.

Subgroup Differences

Sponsored Project: There are no consistent, statistically significant differences when ratings are segmented by whether the grantee received a sponsored project.

Type of Support: Grantees that received General/Operating Support provide *significantly higher* ratings for understanding of grantees' goals and strategy, awareness of grantees' challenges, agreement that the Fund is committed to combatting racism, and association of RBF with commitment to racial, ethnic, and gender equity and justice.

- They also provide *significantly lower* ratings for the level of pressure felt to modify their organization's priorities in order to receive funding.
- Additionally, a significantly higher proportion of grantees who received General/Operating support also reported a site visit from Fund staff.

Past Grantee: Respondents who were identified in the Fund's list as past grantees provide *significantly higher* ratings for several report measures, including field-related measures, aspects of understanding, and association of RBF with balancing long-term commitment to issues with agile responses to changes in context.

- Additionally, a significantly higher proportion of past grantees report receiving multi-year, unrestricted support and a site visit from the Fund.

New/Renewed Support: Respondents who were identified in the Fund's list as receiving renewed support provide *significantly higher* ratings on most measures compared to grantees who received a grant for a new purpose.

- Relatedly, grantees who *self-report* in the survey that they have received consistent funding in the past from the Fund provide *significantly higher* ratings on most survey measures compared to grantees who self-report being first-time recipients or inconsistently funded in the past.

Organization Budget: There are no consistent, statistically significant differences when ratings are segmented by the organization budget size buckets displayed throughout the report.

- However, when ratings are analyzed by whether grantees have a budget size of at least $1M, grantees with budget sizes of less than $1M provide *significantly higher* ratings than respondents with budget sizes of at least $1M for many measures, including impact on grantees' fields and organizations, aspects of understanding, communications, and interactions, helpfulness of processes, aspects of DEI, and a custom question about association of RBF with specific values.

Geographic Focus: Internationally focused grantees provide *significantly higher* ratings compared to domestically focused grantees for most survey measures.

- Additionally, a significantly higher proportion of internationally focused grantees report multi-year, unrestricted support and being a repeat grantee of the Fund.
- There are no consistent, statistically significant differences when comparing ratings among the international geographic focus areas.

Experience with Pocantico: Grantees who report they have experience with Pocantico provide *significantly higher* ratings than those who said "No" or "Don't know" for several measures, including RBF's openness to feedback about non-monetary support and aspects of relationships.

Comparative Cohorts

Customized Cohort

RBF selected a set of 12 funders to create a smaller comparison group that more closely resembles RBF in scale and scope.

Custom Cohort
Andrew W. Mellon Foundation
Barr Foundation
Carnegie Corporation of New York
Ford Foundation
Oak Foundation
Porticus
Rockefeller Brothers Fund
Surdna Foundation, Inc.
The David and Lucile Packard Foundation
The Kresge Foundation
The Rockefeller Foundation
The William and Flora Hewlett 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 conversation 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

	0th ($2K)	25th ($40K)	50th ($110K)	75th ($243K)	100th ($3700K)
RBF 2023			**$100K** 46th		
RBF 2016		$75K			
RBF 2010			$100K		
RBF 2004		$80K			
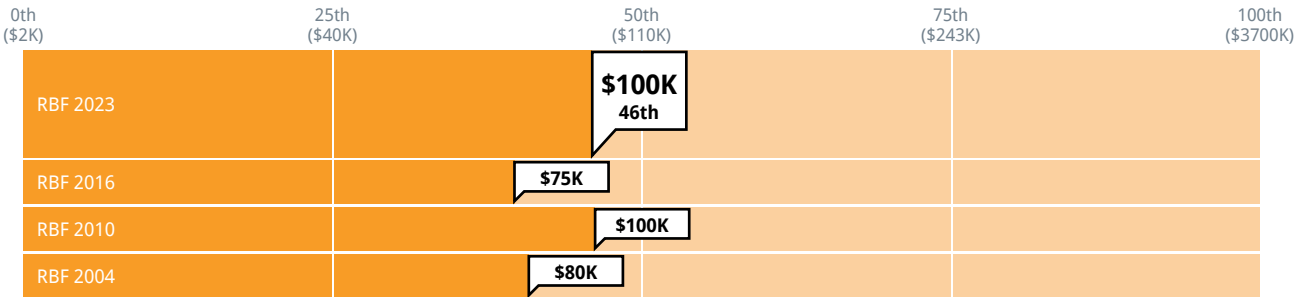
Cohort: None   **Past results:** on   **Subgroup:** None

Proportion of Multi-year Grants

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

	0th (3%)	25th (33%)	50th (52%)	75th (73%)	100th (100%)
RBF 2023				**62%*** 63rd	
RBF 2016		42%			
RBF 2010			55%		
RBF 2004			71%		
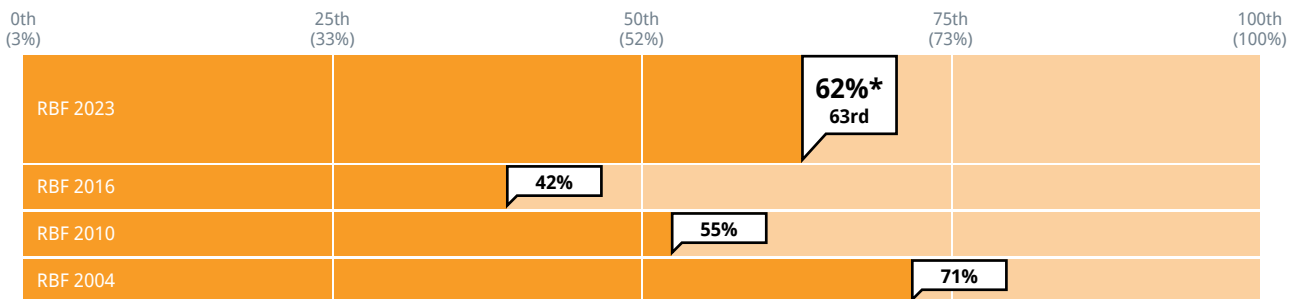
Cohort: None   **Past results:** on   **Subgroup:** None

Median Organizational Budget

	0th ($0.0M)	25th ($0.9M)	50th ($1.6M)	75th ($3.2M)	100th ($86.0M)
RBF 2023		**$1.3M** 38th			
RBF 2016		$1.3M			
RBF 2010			$1.5M		
RBF 2004		$1.2M			
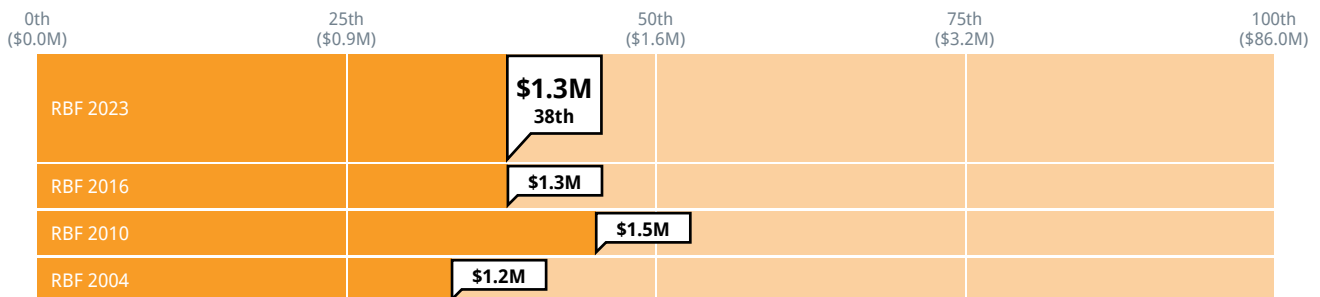
Cohort: None   **Past results:** on   **Subgroup:** None

Selected Cohort: None				
Grant History	**RBF 2023**	**RBF 2016**	**RBF 2010**	**Average Funder**
Percentage of first-time grants	32%	29%	29%	29%

Selected Cohort: None					
Program Staff Load	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Median Funder**
Dollars awarded per program full-time employee	$2.6M	$2.1M	$1.8M	$1.7M	$2.7M
Applications per program full-time employee	24	26	26	83	24
Active grants per program full-time employee	29	39	26	40	31

Proportion of Unrestricted Funding

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

0th (0%)	25th (8%)	50th (21%)	75th (44%)	100th (94%)

RBF 2023 — **50% 82nd**
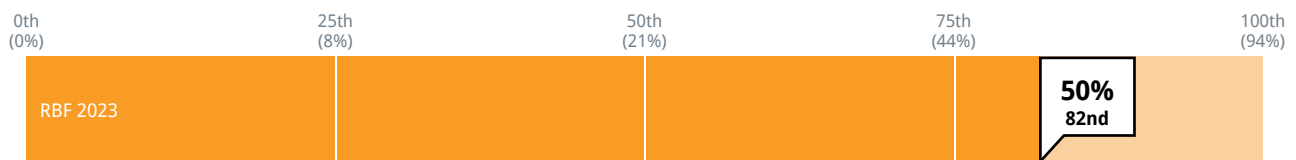
Cohort: None **Past results:** on **Subgroup:** None

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.

0th (0%)	25th (3%)	50th (9%)	75th (21%)	100th (83%)

RBF 2023 — **36% 90th**
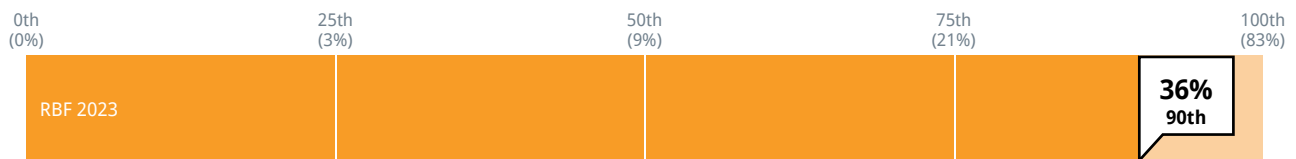
Cohort: None **Past results:** on **Subgroup:** None

Impact on and Understanding of Grantees' Fields

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

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

	0th (4.50)	25th (5.60)	50th (5.87)	75th (6.06)	100th (6.70)
RBF 2023				6.12* 81st	
RBF 2016		5.78			
RBF 2010		5.81			
RBF 2004	5.55				
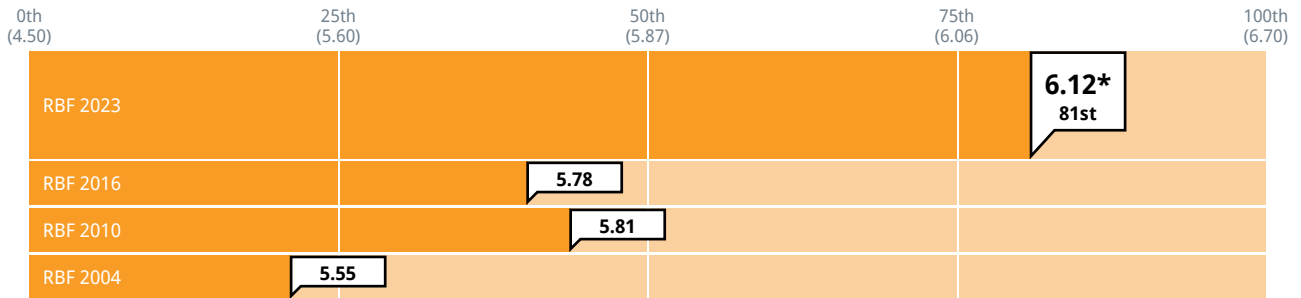
Cohort: None   **Past results:** on   **Subgroup:** None

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

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

	0th (4.66)	25th (5.47)	50th (5.73)	75th (5.97)	100th (6.63)
RBF 2023					6.18* 92nd
RBF 2016				6.01	
RBF 2010			5.88		
RBF 2004			5.77		
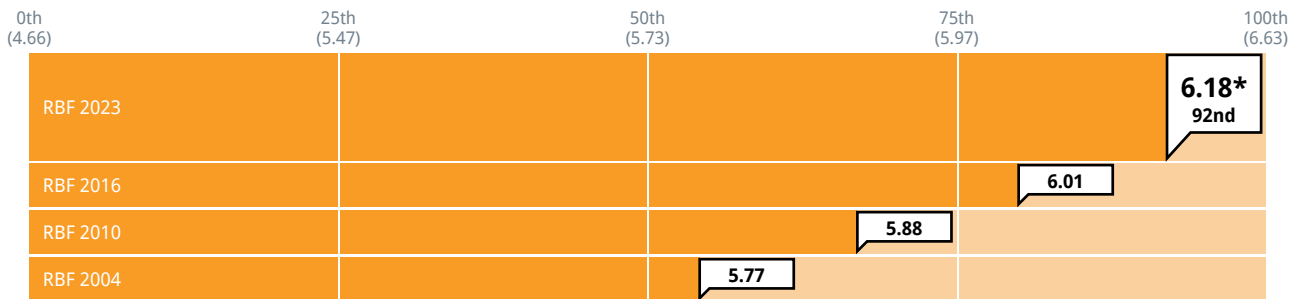
Cohort: None   **Past results:** on   **Subgroup:** None

Advancing Knowledge and Public Policy

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

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

	0th (3.58)	25th (4.77)	50th (5.15)	75th (5.49)	100th (6.44)
RBF 2023				5.66 84th	
RBF 2016				5.51	
RBF 2010				5.49	
RBF 2004			5.34		
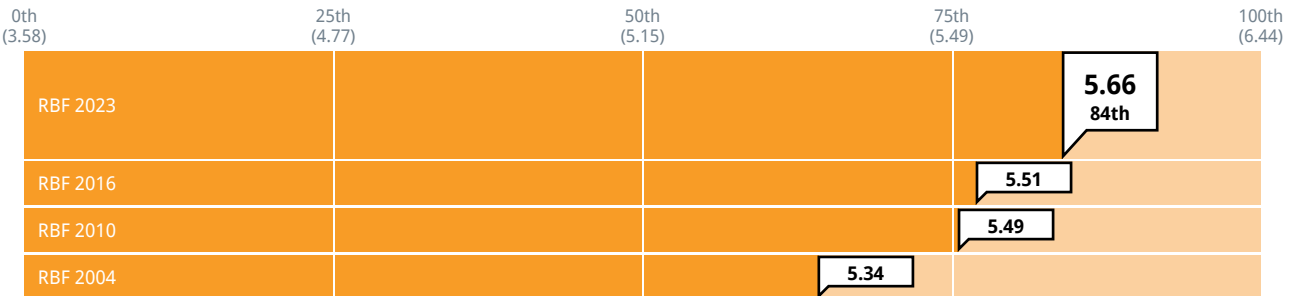
Cohort: None   **Past results:** on   **Subgroup:** None

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

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

	0th (3.05)	25th (4.13)	50th (4.66)	75th (5.08)	100th (6.11)
RBF 2023				5.15 78th	
RBF 2016				5.20	
RBF 2010				5.15	
RBF 2004			5.00		
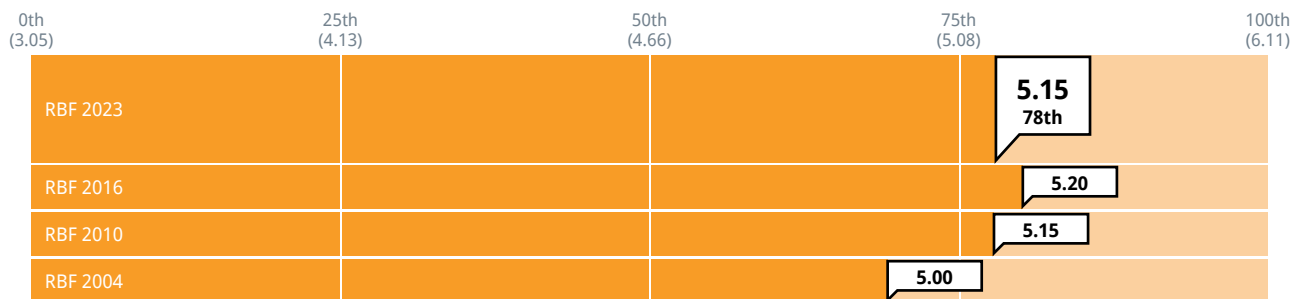
Cohort: None   **Past results:** on   **Subgroup:** None

Impact on and Understanding of Grantees' Local Communities

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

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

	0th (3.00)	25th (5.28)	50th (5.77)	75th (6.09)	100th (6.86)
RBF 2023		**5.46*** **32nd**			
RBF 2016	**4.91**				
RBF 2010	**5.03**				
RBF 2004	**4.87**				

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

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

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

	0th (3.61)	25th (5.17)	50th (5.59)	75th (5.94)	100th (6.72)
RBF 2023				**5.81*** **67th**	
RBF 2016		**5.43**			
RBF 2010			**5.55**		
RBF 2004		**5.15**			

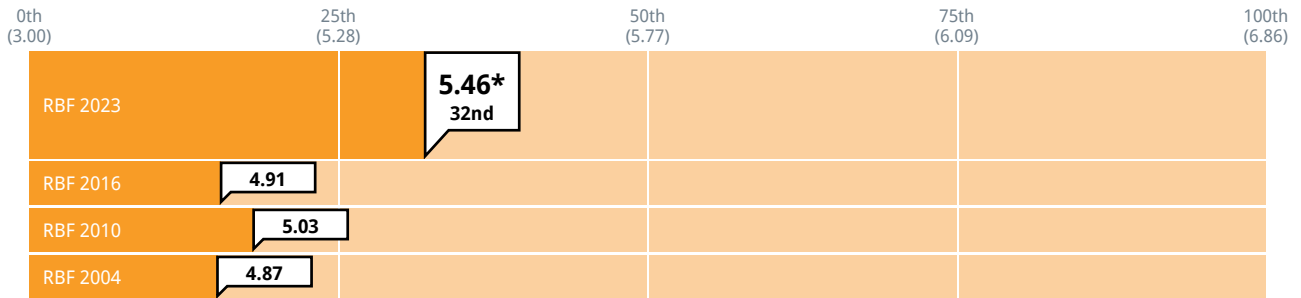**Cohort:** None   **Past results:** on   **Subgroup:** None

Impact on and Understanding of Grantees' Organizations

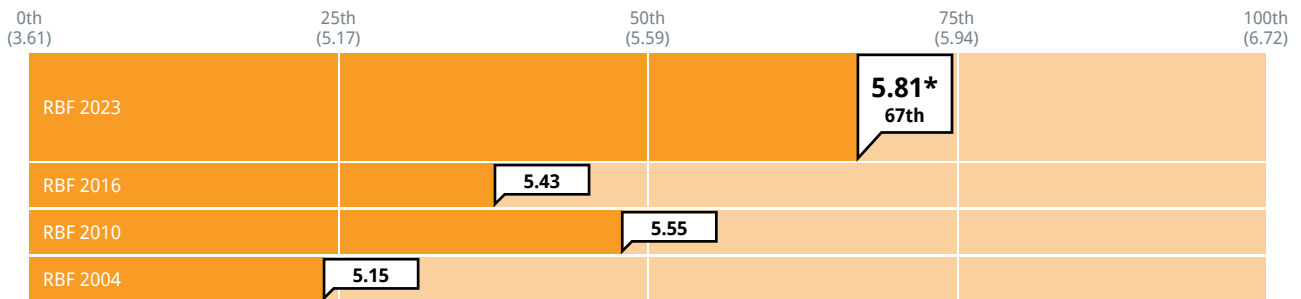### Overall, how would you rate the Fund's impact on your organization?

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

0th (4.43)	25th (5.98)	50th (6.22)	75th (6.39)	100th (6.81)

RBF 2023 — **6.36*** 73rd
RBF 2016 — 6.02
RBF 2010 — 6.28
RBF 2004 — 6.12
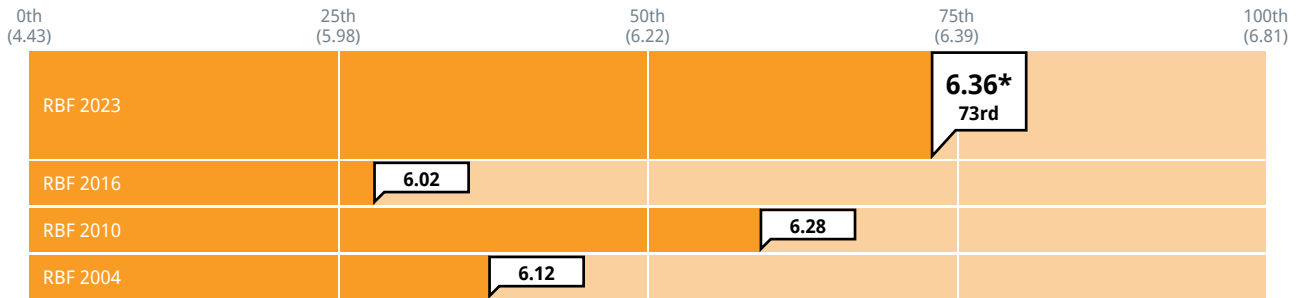
Cohort: None   **Past results:** on   **Subgroup:** None

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

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

0th (3.69)	25th (5.62)	50th (5.81)	75th (6.02)	100th (6.60)

RBF 2023 — **6.13** 89th
RBF 2016 — 6.05
RBF 2010 — 5.96
RBF 2004 — 5.91
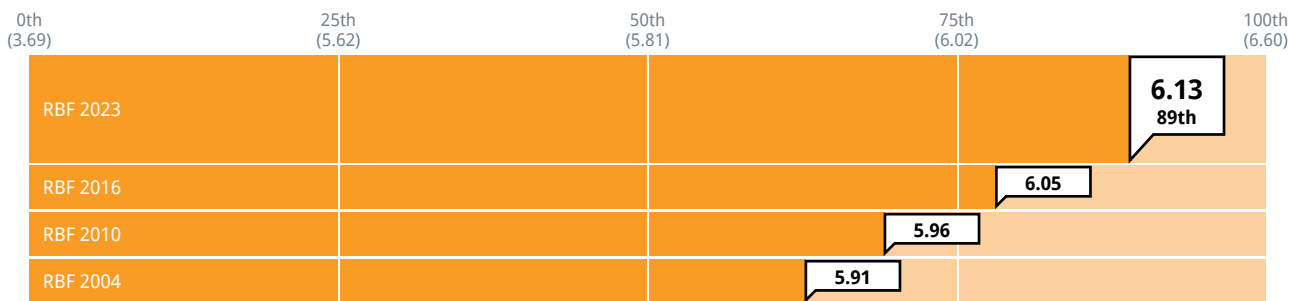
Cohort: None   **Past results:** on   **Subgroup:** None

Grantee Challenges

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

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

0th (4.00)	25th (5.07)	50th (5.34)	75th (5.58)	100th (6.29)

RBF 2023 — 5.66* 82nd

RBF 2016 — 5.38
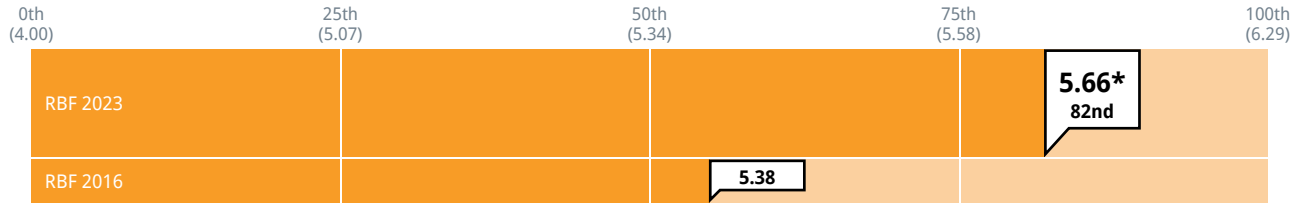
Cohort: None   **Past results:** on   **Subgroup:** None

Non-Monetary Assistance

Note: The following questions were recently added to the grantee survey and depict comparative data from fewer than 25 funders in the dataset.

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

■ RBF 2023   ■ Median Funder

Program-Related Assistance (e.g., advice on your program approach or efforts, program assessment or evaluation assistance, etc.)
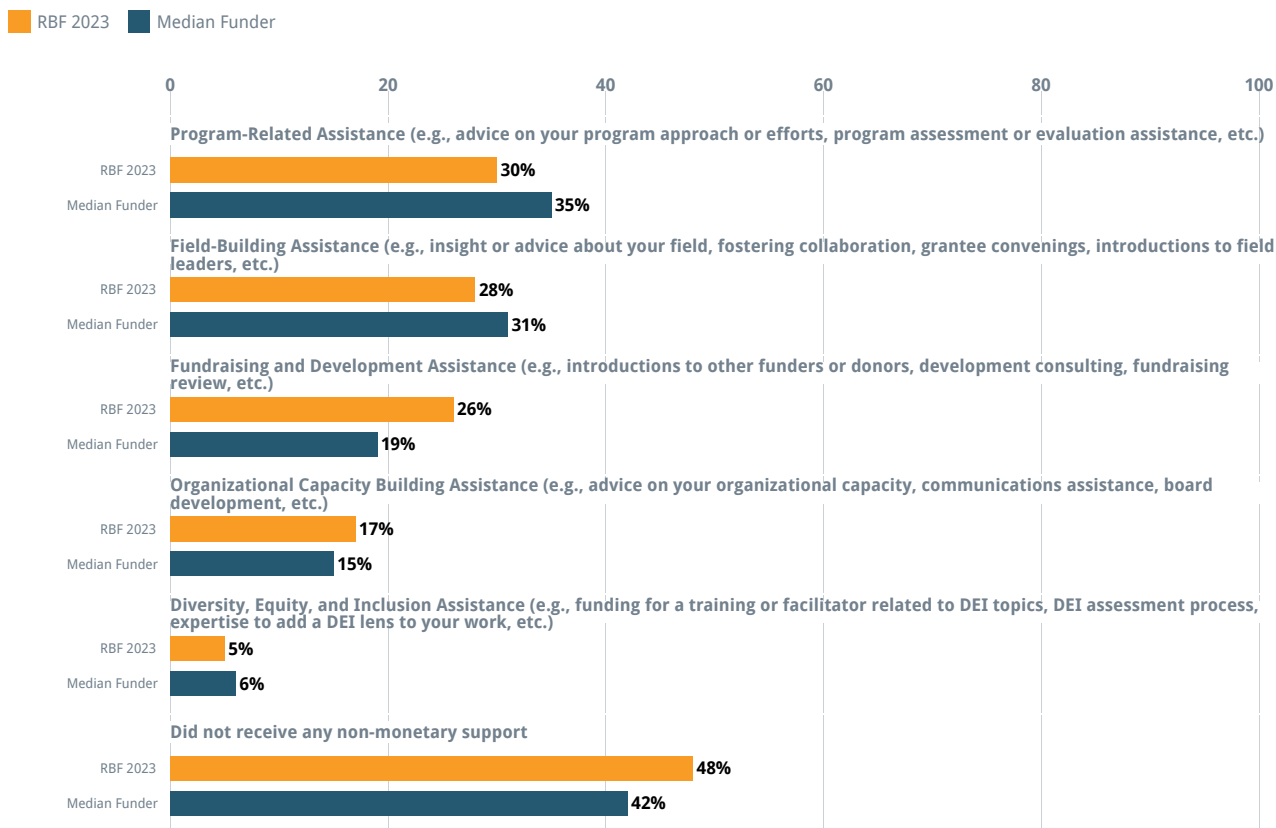
RBF 2023: 30%
Median Funder: 35%

Field-Building Assistance (e.g., insight or advice about your field, fostering collaboration, grantee convenings, introductions to field leaders, etc.)

RBF 2023: 28%
Median Funder: 31%

Fundraising and Development Assistance (e.g., introductions to other funders or donors, development consulting, fundraising review, etc.)

RBF 2023: 26%
Median Funder: 19%

Organizational Capacity Building Assistance (e.g., advice on your organizational capacity, communications assistance, board development, etc.)

RBF 2023: 17%
Median Funder: 15%

Diversity, Equity, and Inclusion Assistance (e.g., funding for a training or facilitator related to DEI topics, DEI assessment process, expertise to add a DEI lens to your work, etc.)

RBF 2023: 5%
Median Funder: 6%

Did not receive any non-monetary support

RBF 2023: 48%
Median Funder: 42%

Cohort: None   **Past results:** on

Note: Respondents could select all forms of non-monetary support they received in the previous question. 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

RBF 2023: 52% | 48%
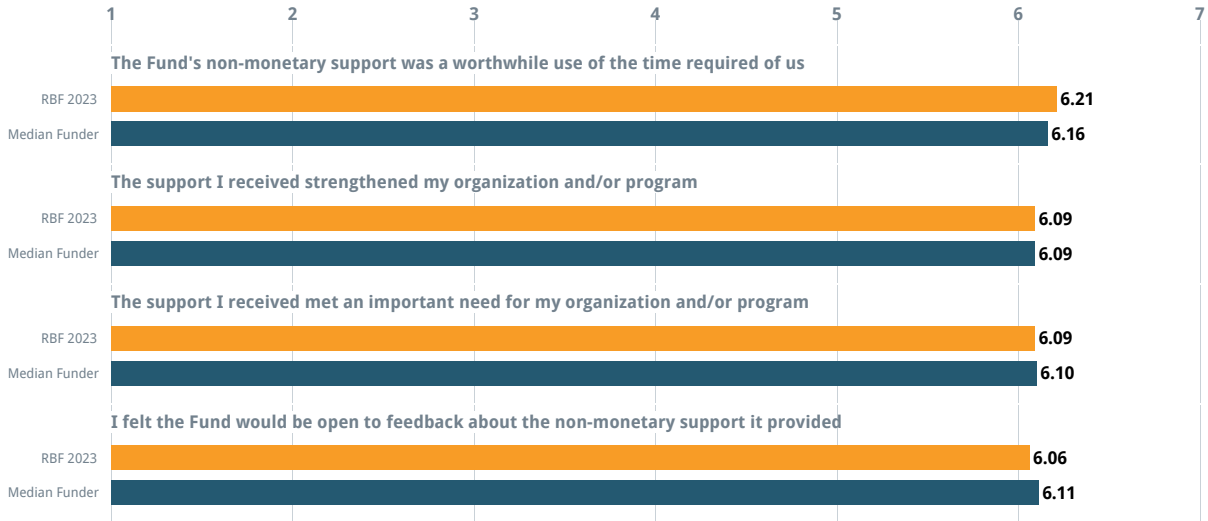Average Funder: 56% | 44%

Cohort: None   **Past results:** on

Note: 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 Fund:

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

🟧 RBF 2023 🟦 Median Funder

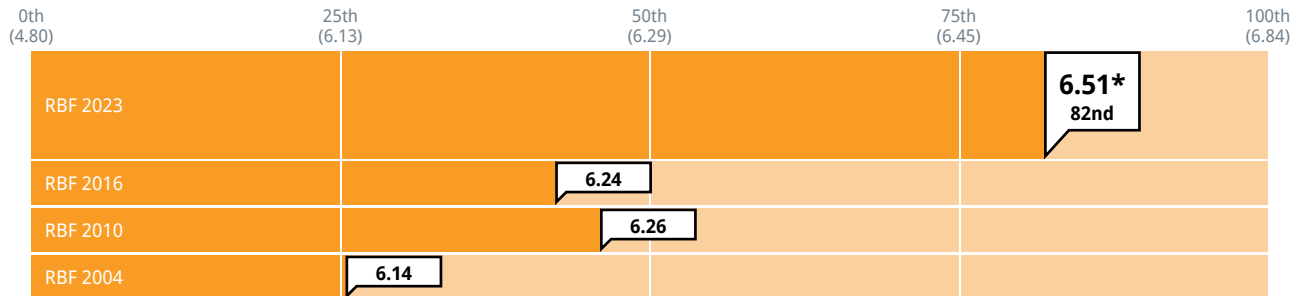|		
The Fund's non-monetary support was a worthwhile use of the time required of us		
RBF 2023		6.21
Median Funder		6.16
The support I received strengthened my organization and/or program		
RBF 2023		6.09
Median Funder		6.09
The support I received met an important need for my organization and/or program		
RBF 2023		6.09
Median Funder		6.10
I felt the Fund would be open to feedback about the non-monetary support it provided		
RBF 2023		6.06
Median Funder		6.11

Cohort: None   **Past results:** on

Funder-Grantee Relationships

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

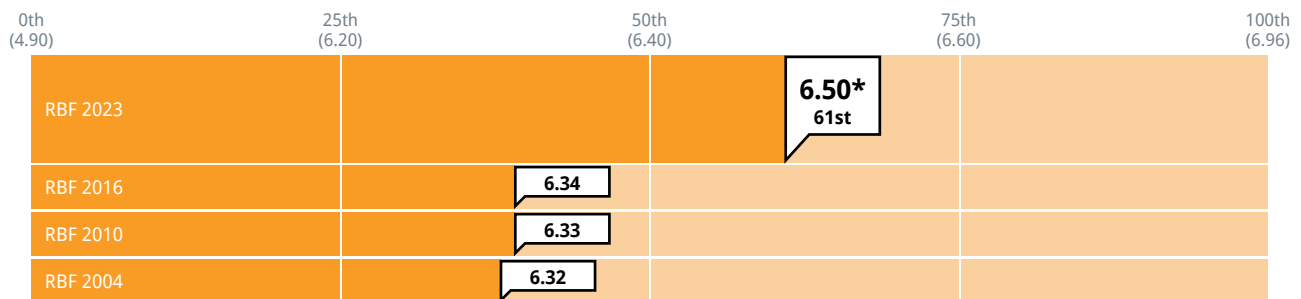**1** = Not at all comfortable   **7** = Extremely comfortable

	0th (4.80)	25th (6.13)	50th (6.29)	75th (6.45)	100th (6.84)
RBF 2023				6.51* 82nd	
RBF 2016		6.24			
RBF 2010		6.26			
RBF 2004	6.14				

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

Overall, how responsive was Fund staff?

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

	0th (4.90)	25th (6.20)	50th (6.40)	75th (6.60)	100th (6.96)
RBF 2023			6.50* 61st		
RBF 2016		6.34			
RBF 2010		6.33			
RBF 2004		6.32			

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

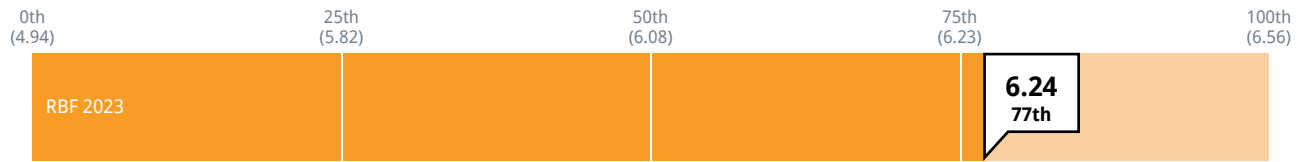### To what extent did the Fund exhibit trust in your organization's staff during this grant?

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

	0th (5.88)	25th (6.27)	50th (6.41)	75th (6.54)	100th (6.83)
RBF 2023				6.65 88th	
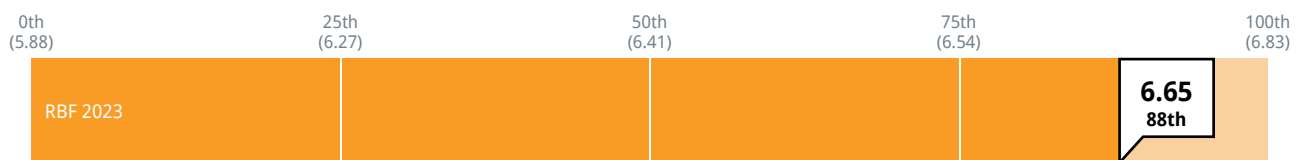
Cohort: None   **Past results:** on   **Subgroup:** None

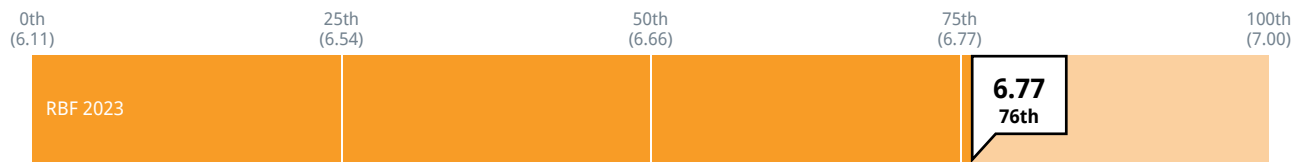**To what extent did the Fund exhibit candor about the Fund's perspectives on your work during this grant?**

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

0th (4.94)	25th (5.82)	50th (6.08)	75th (6.23)	100th (6.56)

RBF 2023 — **6.24** 77th

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

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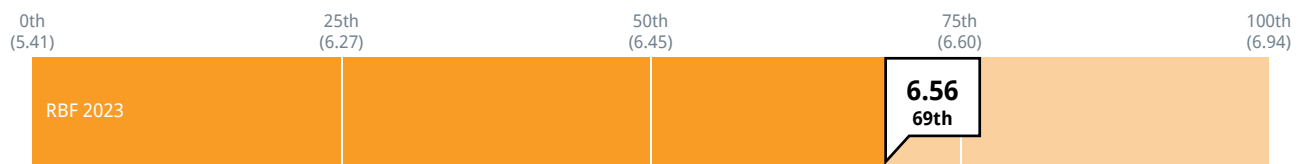
1 = Not at all   **4** = Somewhat   **7** = To a great extent

0th (6.11)	25th (6.54)	50th (6.66)	75th (6.77)	100th (7.00)

RBF 2023 — **6.77** 76th

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

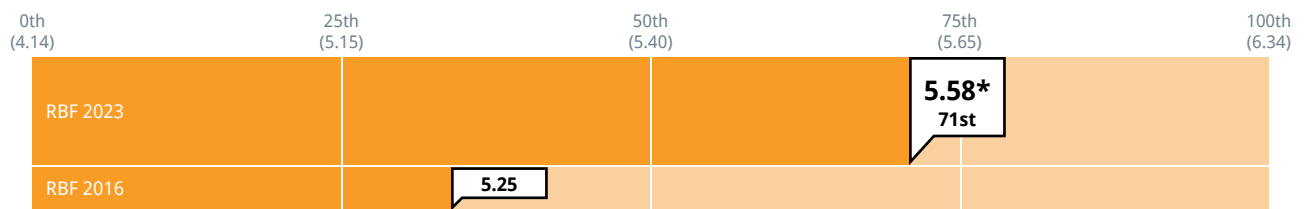**To what extent did the Fund exhibit compassion for those affected by your work during this grant?**

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

0th (5.41)	25th (6.27)	50th (6.45)	75th (6.60)	100th (6.94)

RBF 2023 — **6.56** 69th

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

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

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

0th (4.14)	25th (5.15)	50th (5.40)	75th (5.65)	100th (6.34)

RBF 2023 — **5.58*** 71st

RBF 2016 — **5.25**
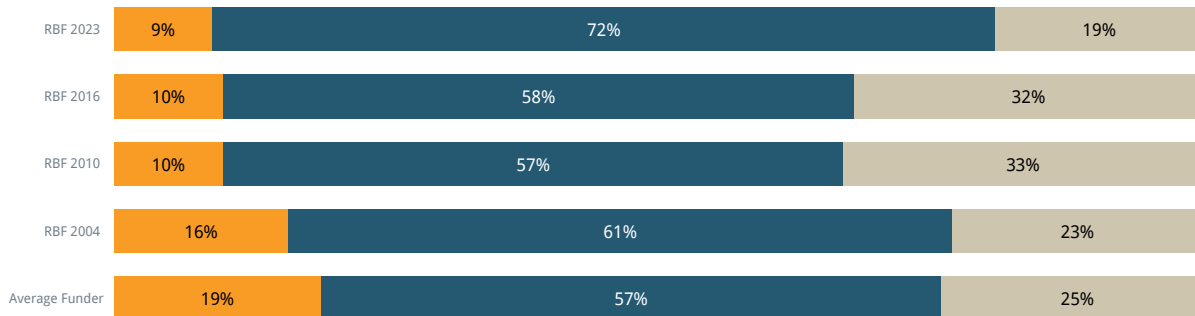
Cohort: None   **Past results:** on   **Subgroup:** None

Interaction Patterns

### How often do/did you have contact with program staff during this grant?

🟧 Yearly or less often   🟦 Once every few months   ⬜ Monthly or more often

RBF 2023	9%	72%	19%
RBF 2016	10%	58%	32%
RBF 2010	10%	57%	33%
RBF 2004	16%	61%	23%
Average Funder	19%	57%	25%

Cohort: None   **Past results:** on

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

🟧 Program Staff   🟦 Both of equal frequency   ⬜ Grantee

RBF 2023	11%	61%	28%
RBF 2016	4%	49%	48%
RBF 2010	7%	45%	49%
Average Funder	18%	51%	31%
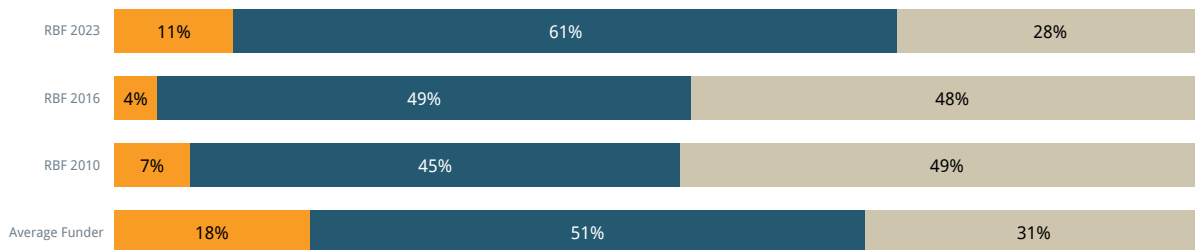
Cohort: None   **Past results:** on

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

Proportion of grantees responding 'Yes'

	0th (0%)	25th (6%)	50th (14%)	75th (25%)	100th (90%)
RBF 2023		4% 17th			
RBF 2016	3%				
RBF 2010		11%			
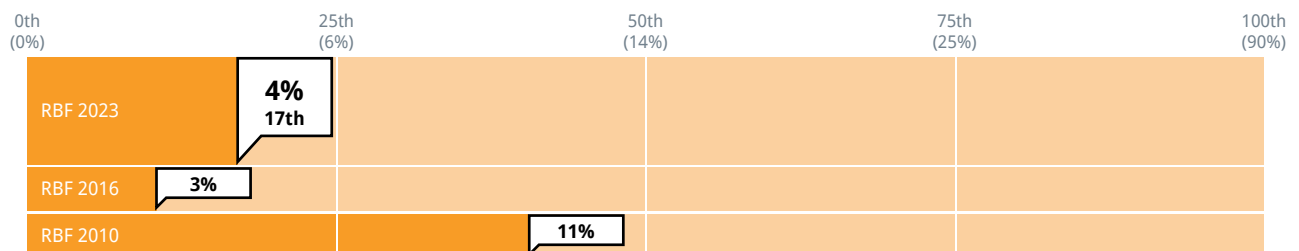
Cohort: None   **Past results:** on   **Subgroup:** None

Please note that CEP recently modified the following question. The prior question was: "At any point during this grant, including the selection process process, did the Foundation staff visit your offices or programs?" The question anchors have not been modified.

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

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

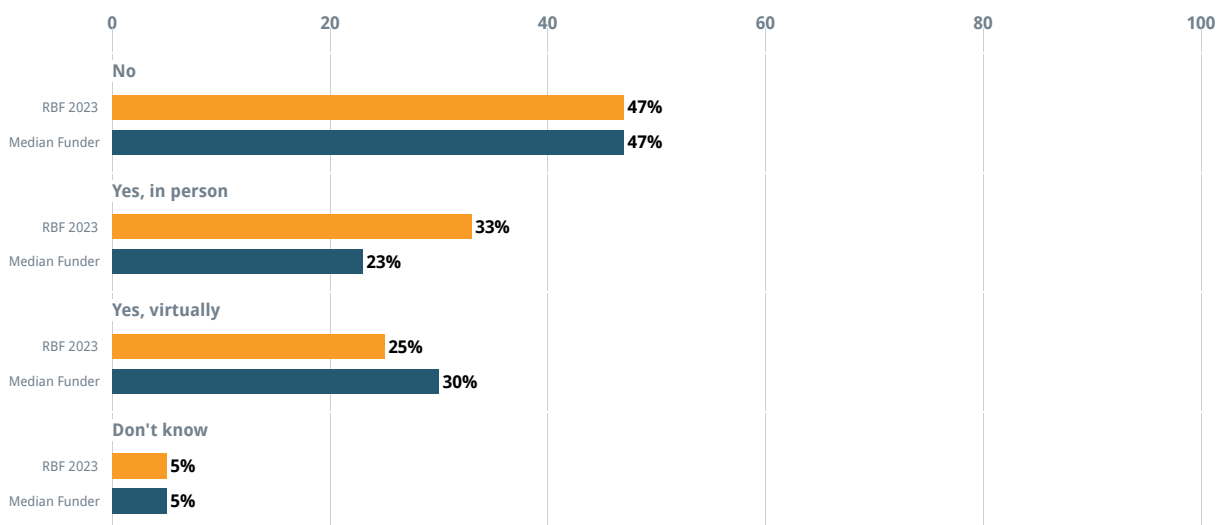|			
RBF 2023	48%	47%	5%
Average Funder	47%	47%	5%

Cohort: None   **Past results:** on

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

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

■ RBF 2023 ■ Median Funder
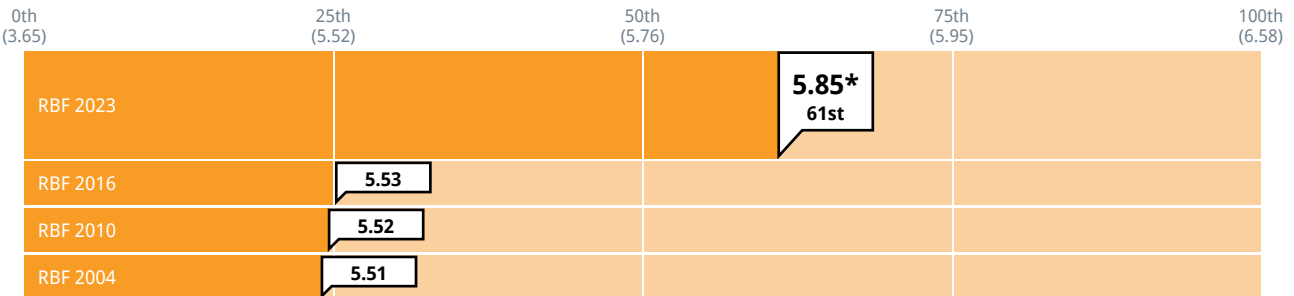
No
RBF 2023: 47%
Median Funder: 47%

Yes, in person
RBF 2023: 33%
Median Funder: 23%

Yes, virtually
RBF 2023: 25%
Median Funder: 30%

Don't know
RBF 2023: 5%
Median Funder: 5%

Cohort: None   **Past results:** on

Communication

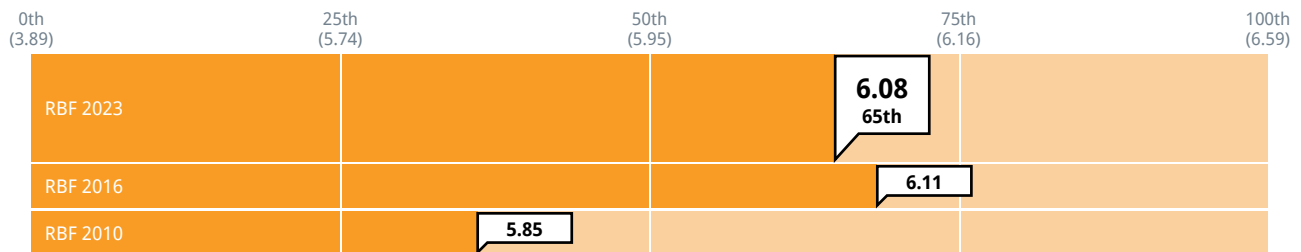### How clearly has the Fund communicated its goals and strategy to you?

1 = Not at all clearly   7 = Extremely clearly

	0th (3.65)	25th (5.52)	50th (5.76)	75th (5.95)	100th (6.58)
RBF 2023				5.85* 61st	
RBF 2016		5.53			
RBF 2010		5.52			
RBF 2004		5.51			

Cohort: None   **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 Fund?
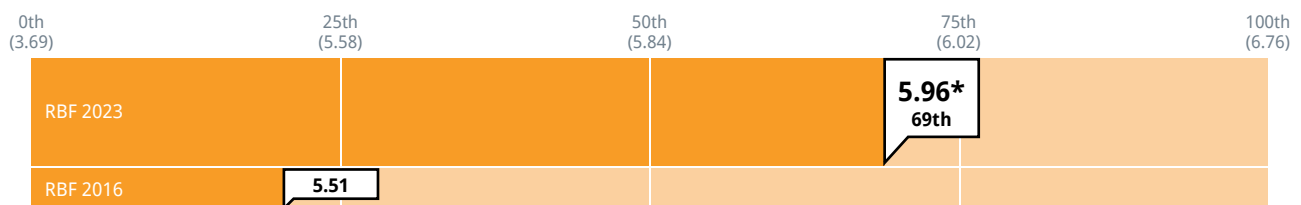
1 = Not at all consistent   7 = Completely consistent

	0th (3.89)	25th (5.74)	50th (5.95)	75th (6.16)	100th (6.59)
RBF 2023				6.08 65th	
RBF 2016				6.11	
RBF 2010			5.85		

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

Overall, how transparent is the Fund with your organization?

1 = Not at all transparent   7 = Extremely transparent

	0th (3.69)	25th (5.58)	50th (5.84)	75th (6.02)	100th (6.76)
RBF 2023				5.96* 69th	
RBF 2016		5.51			

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

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

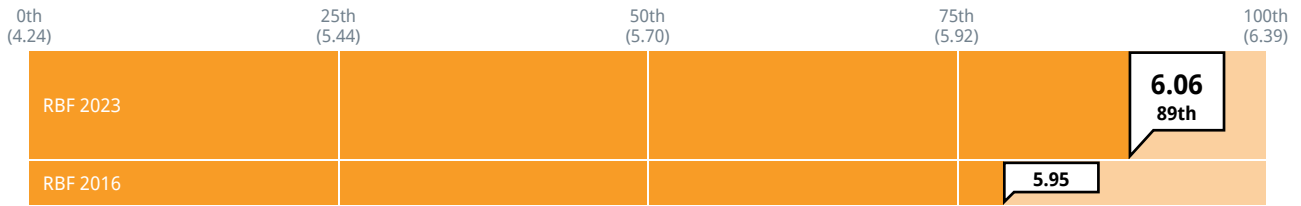**1** = Limited understanding   **7** = Thorough understanding

0th (4.25)	25th (5.22)	50th (5.43)	75th (5.61)	100th (6.32)

RBF 2023

5.28
36th
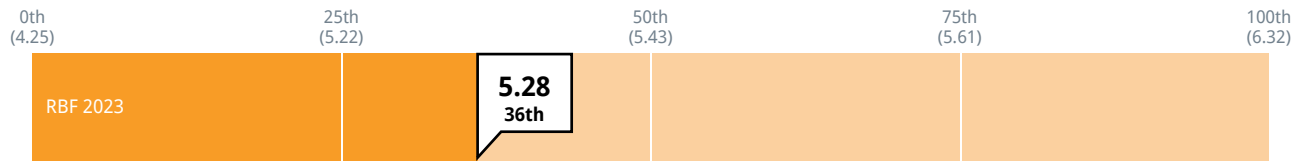
Cohort: None   **Past results:** on   **Subgroup:** None

Contextual Understanding

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

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

0th (4.24)	25th (5.44)	50th (5.70)	75th (5.92)	100th (6.39)

RBF 2023 — **6.06** 89th

RBF 2016 — 5.95

Cohort: None   **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 Fund understand the needs of the people and communities that you serve?

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

0th (4.00)	25th (5.47)	50th (5.69)	75th (5.87)	100th (6.43)

RBF 2023 — **5.99*** 87th

RBF 2016 — 5.78
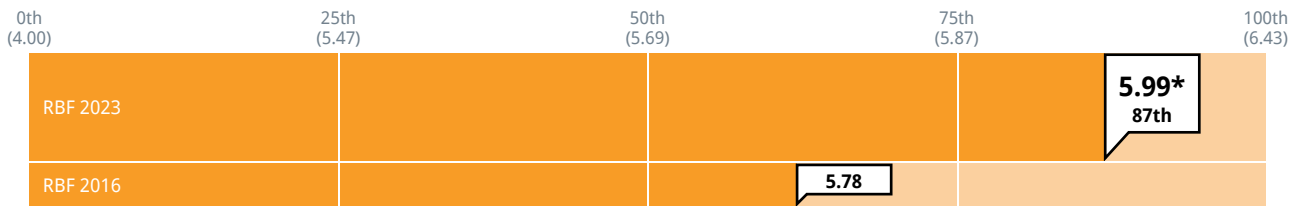
Cohort: None   **Past results:** on   **Subgroup:** None

To what extent do the Fund'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

0th (3.77)	25th (5.35)	50th (5.59)	75th (5.86)	100th (6.38)

RBF 2023 — **5.86** 76th

RBF 2016 — 5.72
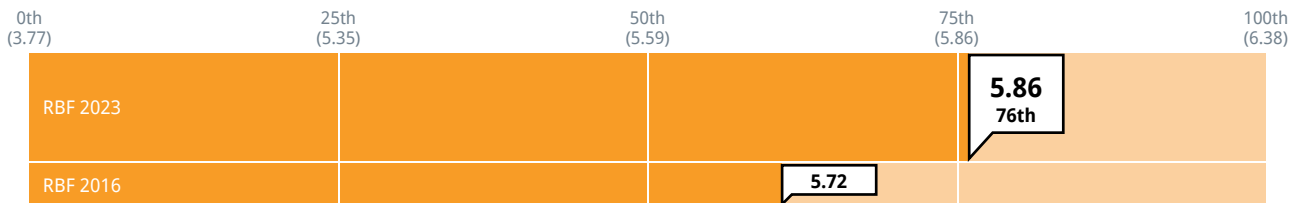
Cohort: None   **Past results:** on   **Subgroup:** None

Diversity, Equity, Inclusion

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

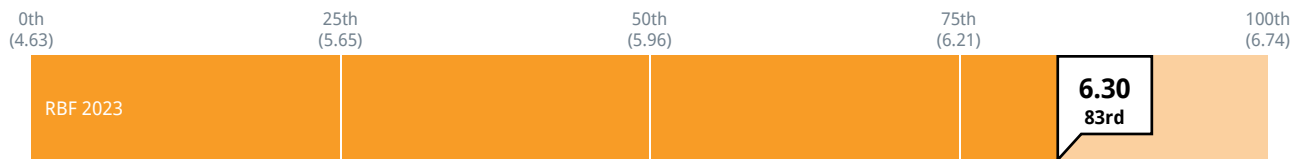### The Fund has clearly communicated what diversity, equity, and inclusion means for its work

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

| 0th (4.48) | 25th (5.31) | 50th (5.65) | 75th (5.96) | 100th (6.78) |

RBF 2023 — **6.05** **82nd**
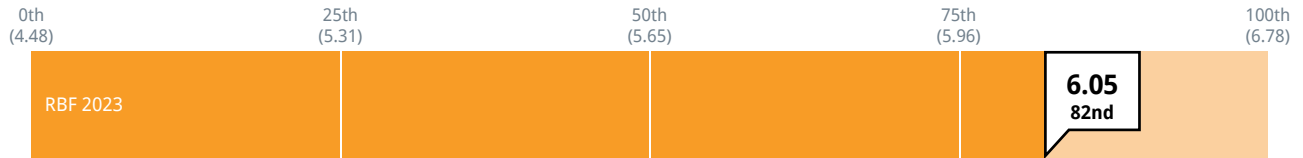
Cohort: None   **Past results:** on   **Subgroup:** None

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

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

| 0th (4.63) | 25th (5.65) | 50th (5.96) | 75th (6.21) | 100th (6.74) |

RBF 2023 — **6.30** **83rd**

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

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

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

| 0th (5.10) | 25th (6.02) | 50th (6.19) | 75th (6.43) | 100th (6.78) |

RBF 2023 — **6.44** **77th**
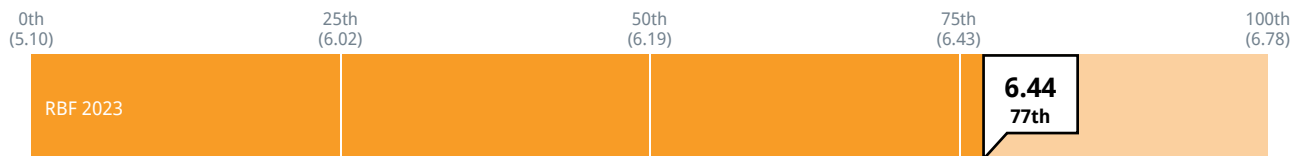
Cohort: None   **Past results:** on   **Subgroup:** None

I believe that the Fund is committed to combatting racism

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

| 0th (5.26) | 25th (5.93) | 50th (6.12) | 75th (6.36) | 100th (6.82) |

RBF 2023 — **6.47** **89th**
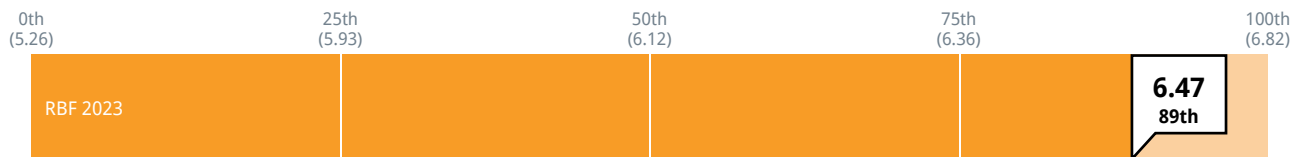
Cohort: None   **Past results:** on   **Subgroup:** None

Grant Processes

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

🟧 Submitted a proposal 🟦 Did not submit a proposal

RBF 2023	96%	4%
RBF 2016	99%	
RBF 2010	98%	
RBF 2004	94%	6%
Average Funder	93%	7%

Cohort: None   **Past results:** on

Selection Process

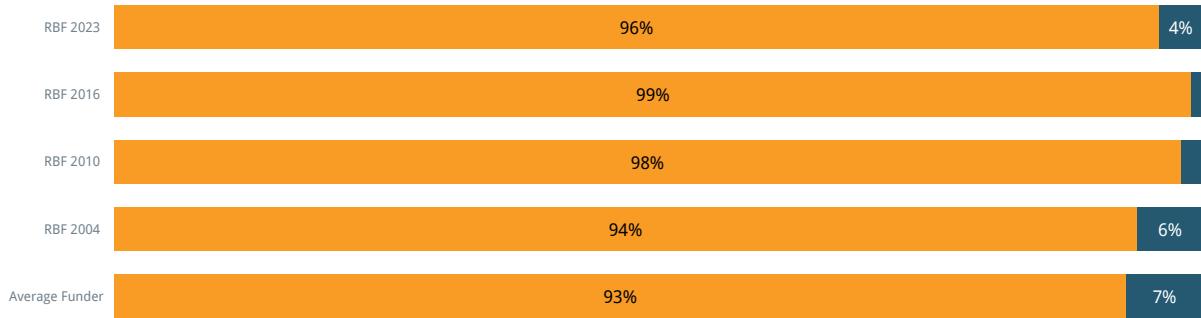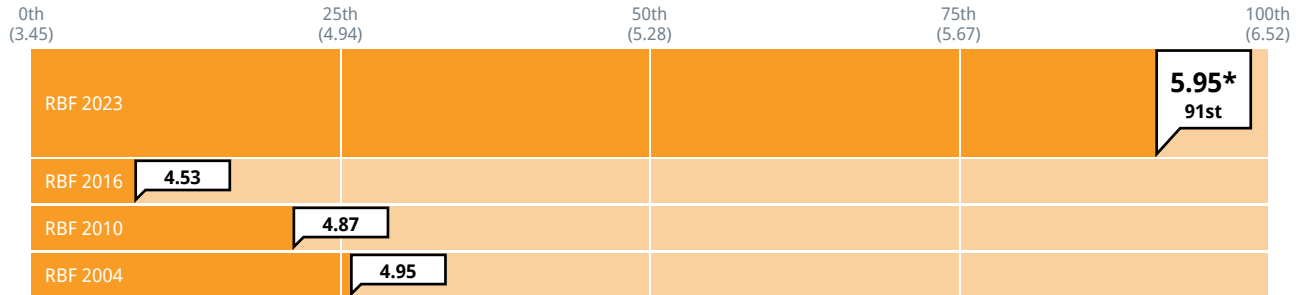Please note that CEP modified the following question in 2022. The prior question text was: "How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?" The corresponding anchors were "not at all helpful" and "extremely helpful."

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

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

0th (3.45)	25th (4.94)	50th (5.28)	75th (5.67)	100th (6.52)

RBF 2023 — **5.95*** 91st

RBF 2016 — **4.53**

RBF 2010 — **4.87**

RBF 2004 — **4.95**

Cohort: None   **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
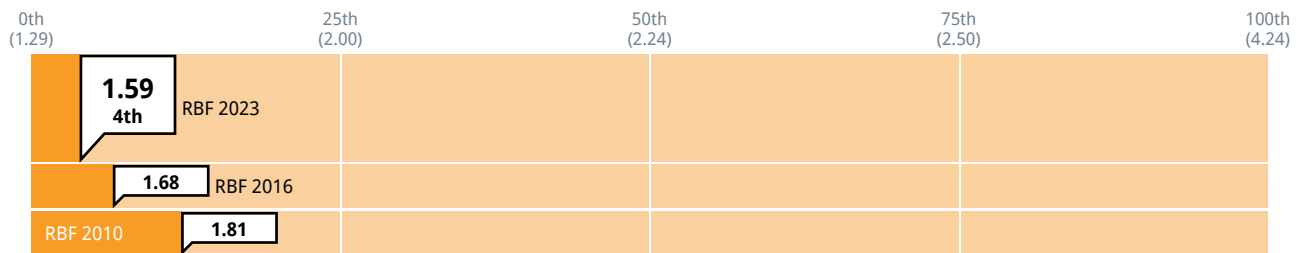
0th (1.29)	25th (2.00)	50th (2.24)	75th (2.50)	100th (4.24)

1.59 4th   RBF 2023

1.68   RBF 2016

RBF 2010   **1.81**

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

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

1 = Not at all   **7** = To a great extent
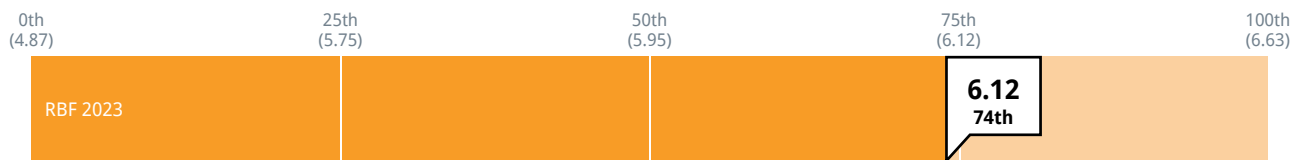
0th (4.87)	25th (5.75)	50th (5.95)	75th (6.12)	100th (6.63)

RBF 2023 — **6.12** 74th

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

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

1 = Not at all   **7** = To a great extent
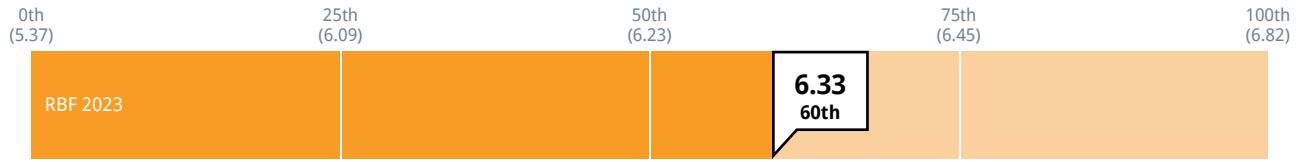
0th (5.37)	25th (6.09)	50th (6.23)	75th (6.45)	100th (6.82)

RBF 2023

6.33
60th

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

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

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

0th (4.52)	25th (5.42)	50th (5.65)	75th (5.82)	100th (6.43)

RBF 2023

5.88
82nd
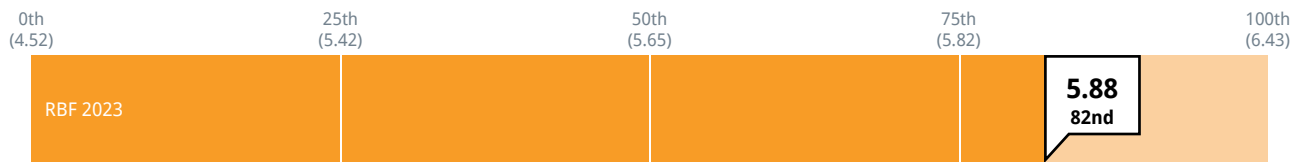
Cohort: None   **Past results:** on   **Subgroup:** None

Reporting and Evaluation Process

Definition of Reporting and Evaluation

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

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

Proportion of grantees responding 'Yes'

	0th (18%)	25th (56%)	50th (69%)	75th (80%)	100th (100%)
RBF 2023		**61%** 33rd			
RBF 2016		62%			
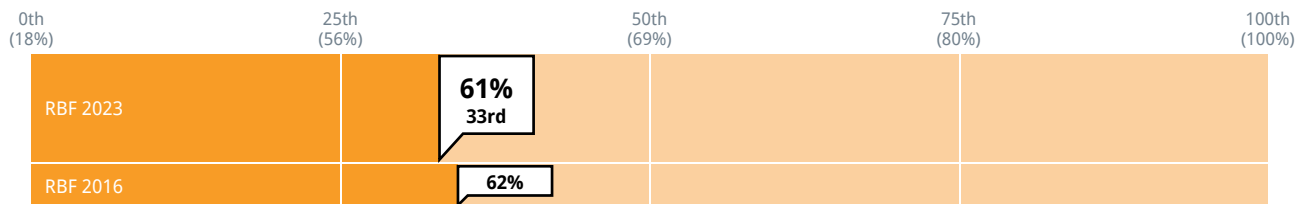
Cohort: None   **Past results:** on   **Subgroup:** None

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

RBF 2023	62%	15%	22%
Average Funder	57%	28%	14%

Cohort: None   **Past results:** on

Reporting Process

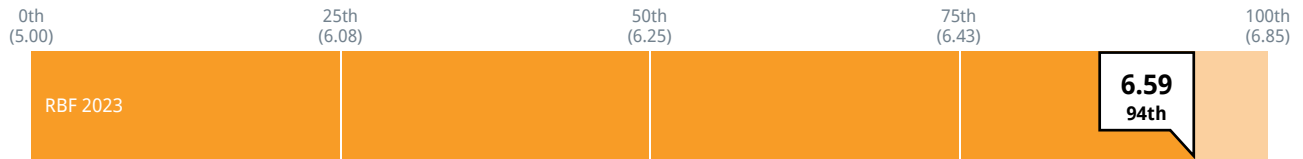The following questions were only asked of grantees that indicated having participated in a reporting process. See the "Reporting and Evaluation Process" page for data on the proportion of grantees participating in this process.

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

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

0th (5.00)	25th (6.08)	50th (6.25)	75th (6.43)	100th (6.85)

RBF 2023 — **6.59 94th**

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

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

1 = Not at all   **7** = To a great extent
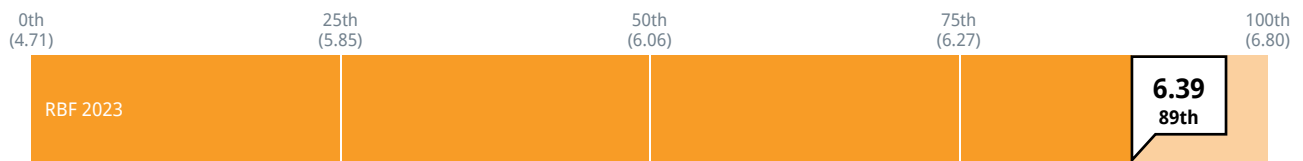
0th (4.71)	25th (5.85)	50th (6.06)	75th (6.27)	100th (6.80)

RBF 2023 — **6.39 89th**

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

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

1 = Not at all   **7** = To a great extent
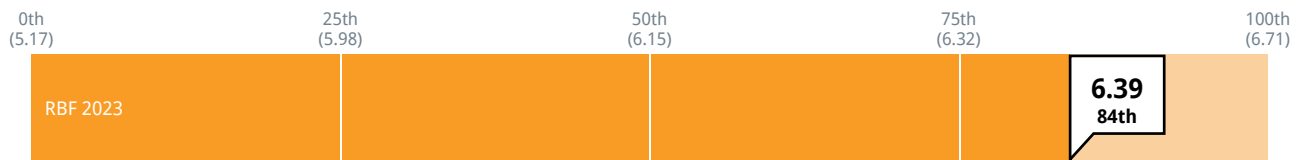
0th (5.17)	25th (5.98)	50th (6.15)	75th (6.32)	100th (6.71)

RBF 2023 — **6.39 84th**

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

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

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

0th (4.56)	25th (5.65)	50th (5.88)	75th (6.09)	100th (6.57)

RBF 2023 — **6.01 68th**
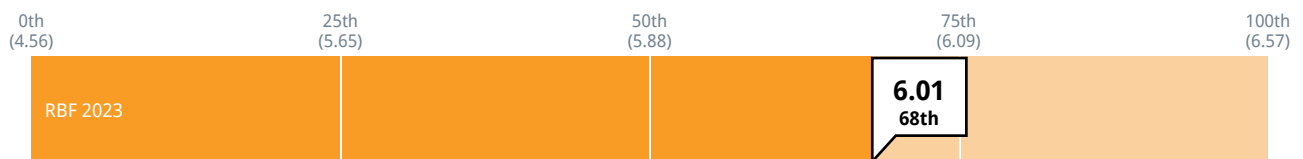
Cohort: None   **Past results:** on   **Subgroup:** None

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

0th (2.82)	25th (5.20)	50th (5.50)	75th (5.79)	100th (6.55)

RBF 2023 — **6.11** **95th**
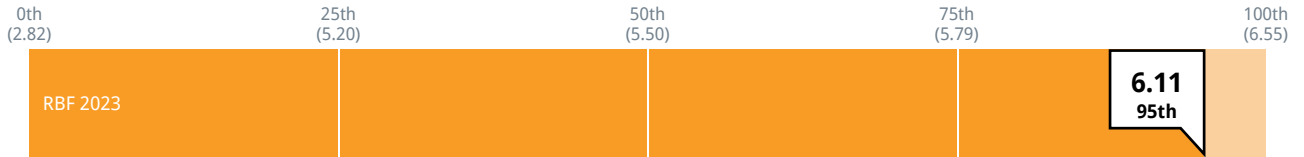
Cohort: None   **Past results:** on   **Subgroup:** None

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

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

0th (2.78)	25th (4.38)	50th (4.77)	75th (5.12)	100th (6.15)

RBF 2023 — **5.42** **90th**
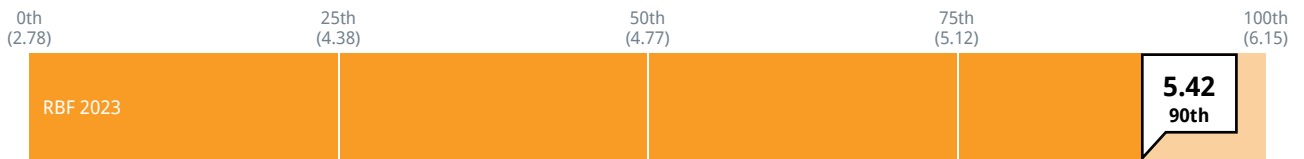
Cohort: None   **Past results:** on   **Subgroup:** None

Dollar Return and Time Spent on Processes

Dollar Return: Median grant dollars awarded per process hour required

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

	0th ($0.3K)	25th ($1.8K)	50th ($3.1K)	75th ($6.7K)	100th ($62.5K)
RBF 2023			$3.8K 57th		
RBF 2016		$2.3K			
RBF 2010			$2.5K		
RBF 2004		$2.3K			
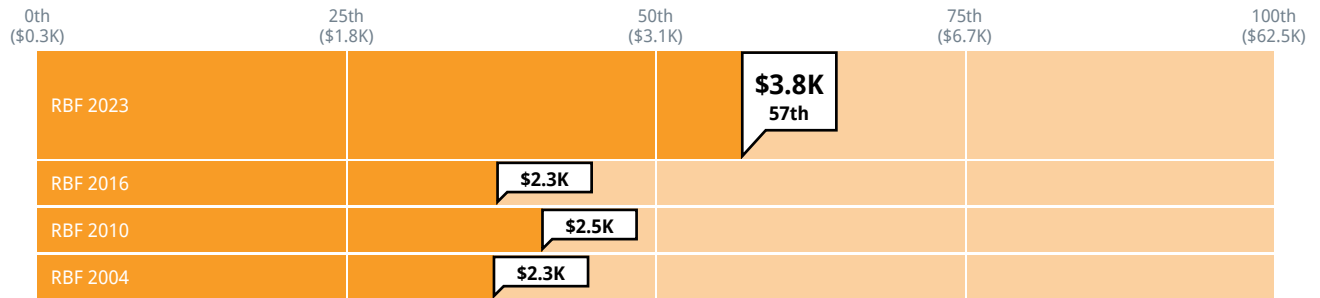
Cohort: None   **Past results:** on   **Subgroup:** None

Median Grant Size

	0th ($2K)	25th ($40K)	50th ($110K)	75th ($243K)	100th ($3700K)
RBF 2023			$100K 46th		
RBF 2016		$75K			
RBF 2010			$100K		
RBF 2004		$80K			
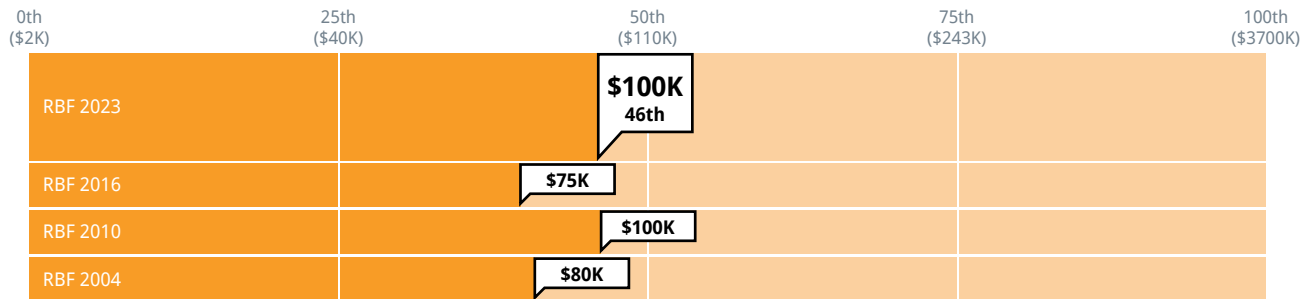
Cohort: None   **Past results:** on   **Subgroup:** None

Median hours spent by grantees on funder requirements over grant lifetime

	0th (5hrs)	25th (20hrs)	50th (30hrs)	75th (50hrs)	100th (304hrs)
RBF 2023			30hrs 52nd		
RBF 2016				40hrs	
RBF 2010				36hrs	
RBF 2004			31hrs		
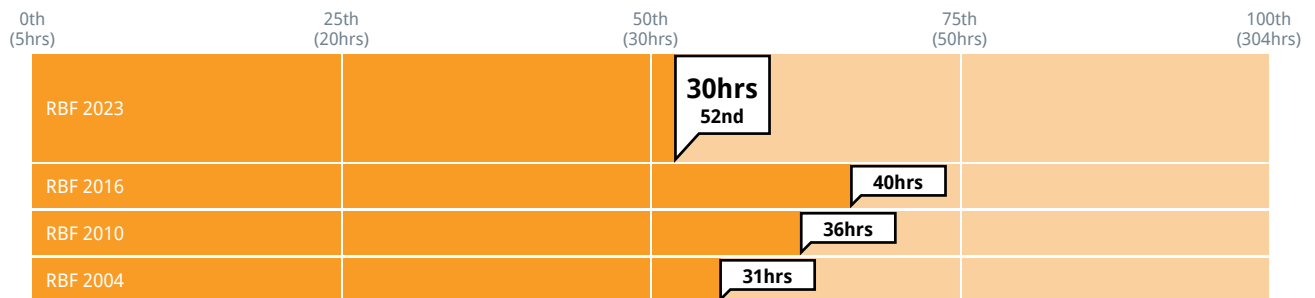
Cohort: None   **Past results:** on   **Subgroup:** None

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process
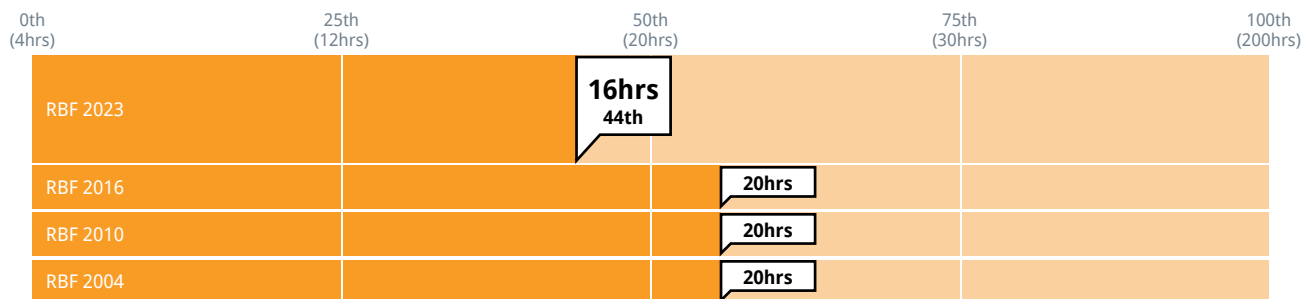
	0th (4hrs)	25th (12hrs)	50th (20hrs)	75th (30hrs)	100th (200hrs)

RBF 2023 — 16hrs 44th

RBF 2016 — 20hrs

RBF 2010 — 20hrs

RBF 2004 — 20hrs

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

Selected Cohort: None

Time Spent On Proposal and Selection Process	RBF 2023	RBF 2016	RBF 2010	RBF 2004	Average Funder
1 to 9 hours	24%	17%	18%	18%	25%
10 to 19 hours	27%	25%	21%	23%	22%
20 to 29 hours	20%	18%	18%	22%	17%
30 to 39 hours	7%	8%	8%	11%	7%
40 to 49 hours	9%	14%	13%	9%	11%
50 to 99 hours	7%	11%	14%	7%	10%
100 to 199 hours	5%	4%	5%	7%	6%
200+ hours	1%	3%	2%	2%	3%

Selected Subgroup: None

Time Spent On Proposal and Selection Process (By Subgroup)

1 to 9 hours

10 to 19 hours

20 to 29 hours

30 to 39 hours

40 to 49 hours

50 to 99 hours

100 to 199 hours

200+ hours

Time Spent on Reporting and Evaluation Process

Median Hours Spent on Monitoring, Reporting and Evaluation Process Per Year
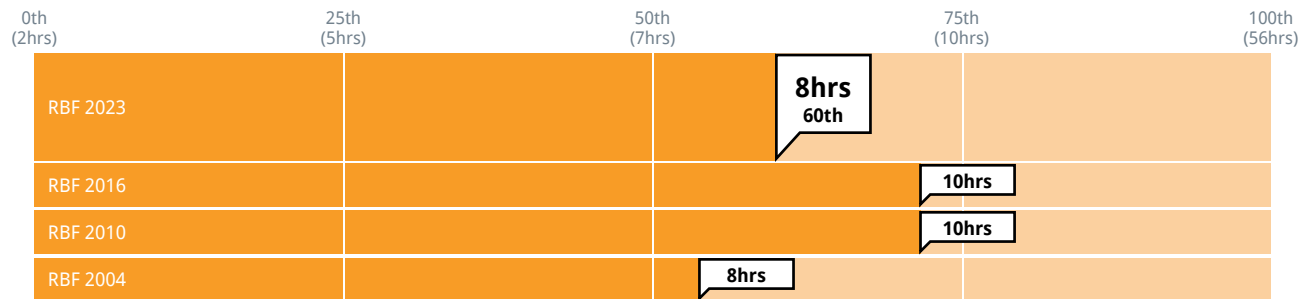
	0th (2hrs)	25th (5hrs)	50th (7hrs)	75th (10hrs)	100th (56hrs)
RBF 2023			8hrs 60th		
RBF 2016			10hrs		
RBF 2010			10hrs		
RBF 2004		8hrs			

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

Selected Cohort: None

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	RBF 2023	RBF 2016	RBF 2010	RBF 2004	Average Funder
1 to 9 hours	52%	47%	42%	56%	56%
10 to 19 hours	26%	24%	24%	24%	19%
20 to 29 hours	10%	11%	14%	10%	10%
30 to 39 hours	1%	3%	7%	3%	3%
40 to 49 hours	3%	5%	4%	3%	3%
50 to 99 hours	6%	6%	8%	4%	5%
100+ hours	2%	4%	2%	1%	4%

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

Customized Questions

Please indicate how strongly you associate the Rockefeller Brothers Fund with each of the following characteristics:

1 = Do not associate with RBF   **7** = Strongly associate with RBF

■ RBF 2023

Is committed to racial, ethnic, and gender equity and justice
RBF 2023 — 6.34

Balances long-term commitment to issues with agile responses to changes in context
RBF 2023 — 6.16

Develops deep understanding of issues to connect lived experience with policy
RBF 2023 — 6.12

Takes risks and provides leadership on challenging issues
RBF 2023 — 6.00
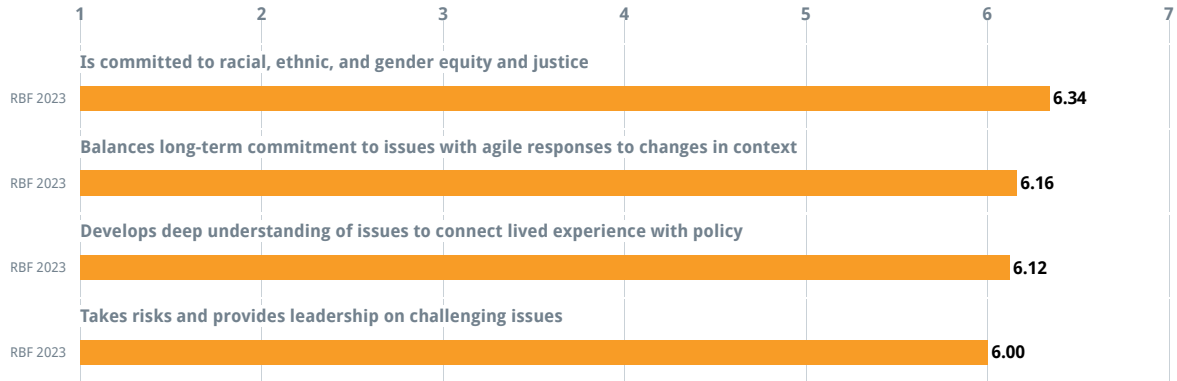
Cohort: None   **Past results:** on

To what extent did the Fund's support lend credibility to your organization's ability...

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

■ RBF 2023

...to address external threats that affect your ability to do your work
RBF 2023 — 6.00

...to obtain additional funding from other sources
RBF 2023 — 5.86

...to build relationships with other organizations and influencers
RBF 2023 — 5.78

Cohort: None   **Past results:** on

Customized Questions - Pocantico Center

Please indicate you or your organization's involvement with the Pocantico Center in the past year:	Yes	No	Don't know
I have attended a conference at the Pocantico Center	11%	85%	4%
I have organized a conference at the Pocantico Center	5%	91%	4%
I participated in a residency at the Pocantico Center	2%	93%	5%

The following question was only asked of grantees who selected "Yes" for any of the above statements.

Please rate the extent to which you agree or disagree with the following statements about the Pocantico Center:

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

■ RBF 2023

A conference/residency I attended/organized had a significant positive impact on my organization's ability to do its work
RBF 2023 — **6.33**

The conference/residency I attended/organized made a significant positive contribution to the field
RBF 2023 — **6.32**

As a result of attending a Pocantico conference/residency, my organization or I have engaged in new collaborations/developed new networks
RBF 2023 — **6.22**

The conference/residency spurred innovation/contributed to improved public policy
RBF 2023 — **6.11**

Cohort: None   **Past results:** on

Customized Questions - Equivalency Determination

The following questions are only asked of grantees based outside of the United States.

Have you participated in an equivalency determination process to establish whether your organization is the equivalent of a U.S. public charity?

- Yes, this process was facilitated through NGOsource and sponsored by the Fund
- Yes, this process was facilitated through NGOsource and sponsored by another funder
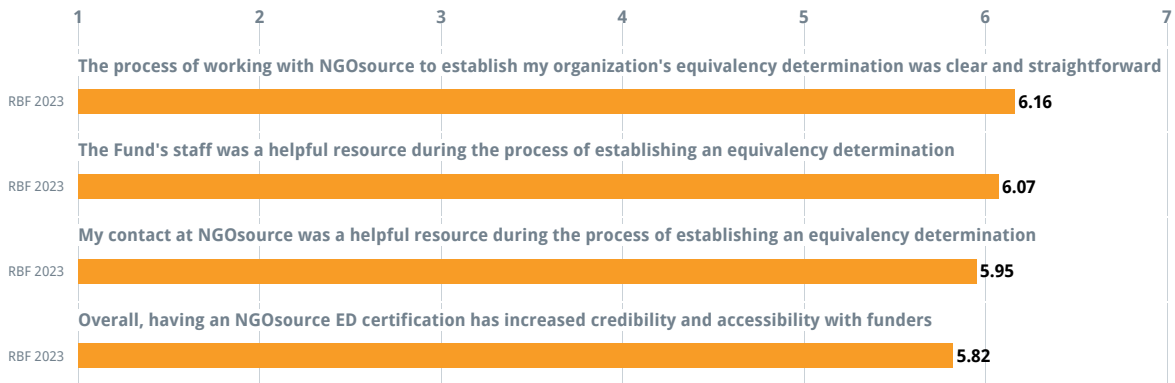- Yes, my organization participated in an equivalency determination process directly with the Fund

RBF 2023	72%	11%	17%

Cohort: None   **Past results:** on

How strongly do you agree or disagree with the following statements?

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

■ RBF 2023

The process of working with NGOsource to establish my organization's equivalency determination was clear and straightforward
RBF 2023 — **6.16**

The Fund's staff was a helpful resource during the process of establishing an equivalency determination
RBF 2023 — **6.07**

My contact at NGOsource was a helpful resource during the process of establishing an equivalency determination
RBF 2023 — **5.95**

Overall, having an NGOsource ED certification has increased credibility and accessibility with funders
RBF 2023 — **5.82**

Cohort: None   **Past results:** on

Have you used your NGOsource equivalency determination with any other funders besides the Fund?

■ Yes ■ No

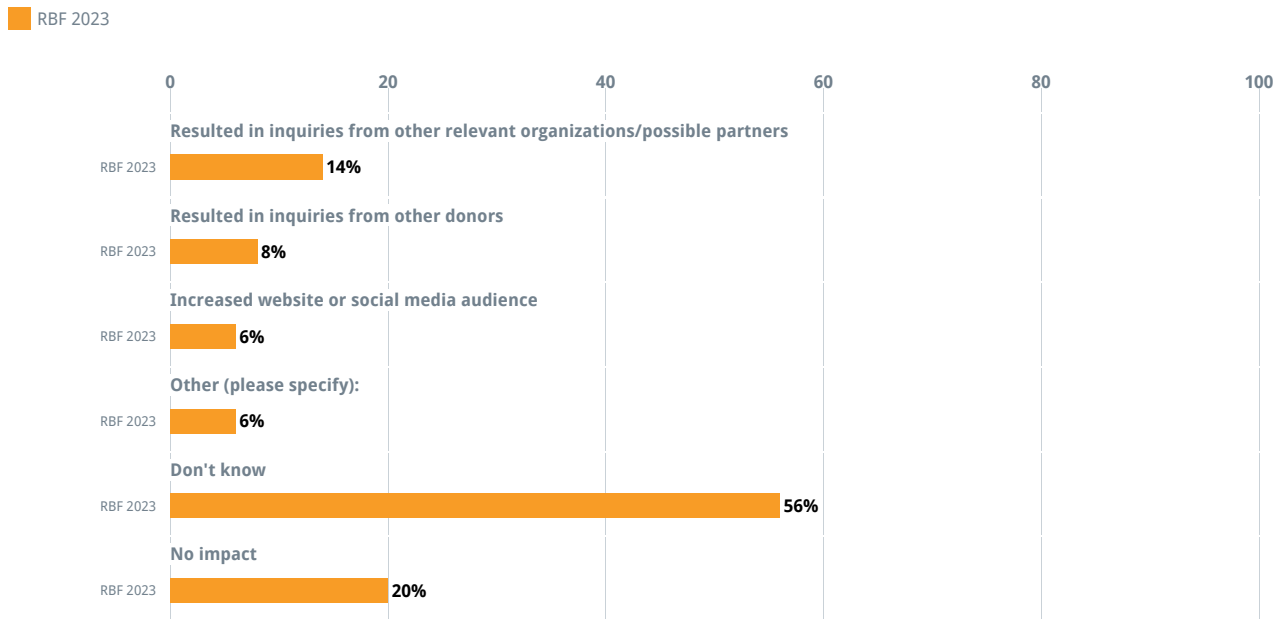|		
RBF 2023	48%	52%

Cohort: None   **Past results:** on

Customized Questions - RBF Communications and Legacy

Have the Fund's public communications about your grant (via the RBF website, social media, annual email, annual review, or other publications) had an impact for your work? (Please check all that apply)

🟧 RBF 2023

	0	20	40	60	80	100

Resulted in inquiries from other relevant organizations/possible partners
RBF 2023 — **14%**

Resulted in inquiries from other donors
RBF 2023 — **8%**

Increased website or social media audience
RBF 2023 — **6%**

Other (please specify):
RBF 2023 — **6%**

Don't know
RBF 2023 — **56%**

No impact
RBF 2023 — **20%**

Cohort: None   **Past results:** on

Grantees who selected "Other" wrote in that they were not aware of any public RBF communications about their grant, or that it was too soon to know the impact of any communications.

Does the Rockefeller family's history and legacy through their involvement with the RBF affect the value of your grant from the Fund?

🟧 Don't know   🟦 No impact   ⬜ It is an asset   🟥 It raises barriers or concerns   🟩 Other (please specify):

RBF 2023	29%	33%	31%	4%	

Cohort: None   **Past results:** on

Grantees who selected "Other" wrote in answers including it is both an asset and barrier, or it is too early in their grant relationship to have an opinion.

Grantees' Written Comments

In the Grantee Perception Report survey, CEP asks three written questions. RBF's grantee survey also included a fourth custom open-ended question:

1. "Please comment on the quality of the Fund's processes, interactions, and communications."
2. "Thinking beyond the grant you received, please comment on how the Fund influences your field, community, or organization."
3. "What specific improvements would you suggest that would make the Fund a better funder?"
4. "What can the Fund do to support your efforts related to racial, ethnic, and gender justice and equity?"

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

CEP's Qualitative Analysis

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

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

Quality of Processes, Interactions and Communications

Grantees were asked to comment on the quality of the Fund'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 Fund's Processes, Interactions, and Communications

■ Positive comment   ■ Comment with at least one constructive theme

RBF 2023	88%	12%
RBF 2016	85%	15%
Average Funder	75%	25%
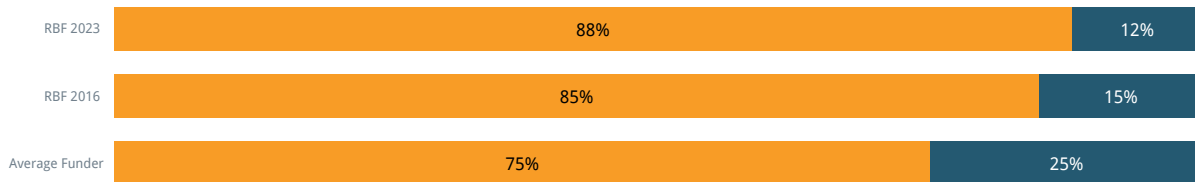
Cohort: None   **Past results:** on

Suggestion Topics

Grantees were asked to provide any suggestions for how the Fund could improve. The 384 grantees that responded to the survey provided 193 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
Assistance Beyond the Grant	26%
RBF-Grantee Interactions	26%
RBF Strategy	22%
Grantmaking Characteristics	15%
Grantmaking Processes	7%
Diversity, Equity, Inclusion	4%

Selected Suggestions

Grantees were asked to provide any suggestions for how the Fund could improve. The 384 grantees that responded to the survey provided a total of 193 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Assistance Beyond the Grant (26% N=50)

- Facilitate Convening and Collaboration Among Grantees and Other Stakeholders (N = 27)

  ◦ "Explore ways to connect grantees more effectively with one another. This could include organizing meetups, conferences or workshops that bring grantees together to share knowledge and experience on topics of mutual interest."
  ◦ "RBF organizing more frequent events with all its grantees (not only grantees in specific country or region, but grantees across the different RBF's portfolios)."
  ◦ "Being able to meet during the year with the Fund's recipients who work in the same sector or area, which allows for exchanging experiences and lessons learned, in addition to generating networks for exchange and dialogue."
  ◦ "Always good to think more about how to build connections and camaraderie across the program areas, and what shared learning opportunities there might be for leaders supported by RBF."
  ◦ "Communication and cooperation among different organizations funded by the Fund can be strengthened to create synergy."

- Introductions to Other Funders (N = 9)

  ◦ "Efforts to connect to other funders, as for our ecosphere/system there is a serious lack of support/donors."
  ◦ "As a growing organization we are always looking for new prospective donors to help strengthen and diversify our donor base."

- Capacity Building (N = 6)

  ◦ "Increase support in organizational growth and capacity building, staff development, and board development in order to help organizations meet the scale of the problems that they face."
  ◦ "Capacity building options - e.g. on the basis of needs identified by the organization."

- Publicly Promote Grantees' Work (N = 5)

  ◦ "Help us distribute our publications and messaging more."
  ◦ "Occasions or opportunities where we can share the work of the grantees."

- General Requests for Non-Monetary Support (N = 3)

  ◦ "Engage in more discussion on other non-monetary support either the Fund or someone the Fund knows could provide to organizations they fund, especially those who have recently become an organization."

RBF-Grantee Interactions (26% N=50)

- More Engaged Interactions that Develop RBF's Understanding of Grantees' Work (N = 21)

  ◦ "The Fund and its staff would benefit tremendously if they take a more active role in really engaging with us on the ongoing impact we are having and the programmatic work that has been made possible through the fund we have received from the Fund."
  ◦ "Can spend more time in understanding the challenges the funded organizations are facing."
  ◦ "The Fund should have more information and dialogue regarding my organization's strategic needs and scopes."
  ◦ "Interact with the beneficiaries."

- More Frequent Interactions (N = 12)

  ◦ "At least 1 or 2 check ins per grant term beyond just submitting a written report."
  ◦ "A mid-project meeting could be effective for an intermediate follow-up in order to be able to make or report the small adjustments that each project requires during the course of its implementation."
  ◦ "Additional brief check-ins through the year would help."

- Site Visits (N = 7)

  ◦ "Site visits by staff and board, to see the work being supported on the ground as well as analysis by the frontline groups."
  ◦ "More frequent field visits to the countries where the Fund supports organisations."

- In Person Interactions (N = 6)

  ◦ "Meet and communicate more in person."
  ◦ "More in-person contacts, if possible. The support we get through these interactions is sometimes equally important as financial support."

- Fund Staff Capacity (N = 2)

  ◦ "I worry about capacity within the incredibly talented and dedicated but quite small program staff team that are doing so much across many different issues and networks."

- Responsiveness (N = 2)

  ◦ "Some grant officers can at times be very slow to respond or hard to get ahold of when we send unscheduled updates."

RBF Strategy (22% N=43)

- Improve Clarity of Communication About RBF Strategy (N = 15)

  ◦ "It would be useful for the fund to share information on its funding strategy and limits for particular regions."
  ◦ "Greater clarity about the Fund's vision and future direction can be helpful."
  ◦ "Increased communications regarding the Fund's priorities and strategies."
  ◦ "Presenting their own strategy to new grantees."

- Miscellaneous Strategy Recommendations (N = 10)

  ◦ "Make a slightly narrower selection of grantees, but support each one to a greater extent."
  ◦ "Additional support to smaller organizations."
  ◦ "Focus on organizations that face obstacles receiving state funded grants such as USAID or EU grants."

- Build Grantees' Understanding of Fit Into RBF Strategy (N = 6)

  ◦ "More communication from the Fund with me as a grantee about what they are doing and how we fit into it besides receiving random generic email blasts."
  ◦ "Be more clear in how our grant fits into their portfolio."

- Center Grantee Experiences and Input in Development of Strategy (N = 6)

  ◦ "Hold consultation with grantees in specific areas of intervention to shape programmatic and strategic priorities."
  ◦ "Joint creation of a strategy or strategic directions, based on the experience and work of grant beneficiaries."

- Geographic Focus (N = 3)

  ◦ "Work done outside the USA has a big importance and it is too bad to see the fund walking out of European problematics and projects."

- More Innovative Approaches (N = 3)

  ◦ "It would be great to see the Fund invest larger dollar amounts (and unrestricted enough dollars) in new and innovative nonprofits/efforts."

Grantmaking Characteristics (15% N=29)

- Longer Term Funding (N = 11)

  ◦ "We have been receiving 2 year grants, and increasing to 3 years would be even better."
  ◦ "Multi-year grants would be extremely helpful for planning and hiring purposes."
  ◦ "Always a battle in our sector to think long term. Would be great if the Fund worked with us on longer-term plans and multi-year funding in order to have an impact."

- Multi-Year, Unrestricted Funding (N = 8)

  ◦ "Historically underfunded organizations benefit greatly from access to multi-year funding, especially if it is available in a flexible format such as GO."
  ◦ "Multi-year core funding!"

- Unrestricted Funding (N = 4)

  ◦ "Flexible and unrestricted funding approach is a surer way to continue fueling systemic change that is aligned with the needs of grassroots and frontline organizations."

- Larger Grants (N = 3)

  ◦ "Larger grants to make more of an impact."

- Repeat Funding (N = 3)

  ◦ "Consistency in funding is very important as it assures survival and development of organizations."

Grantmaking Processes (7% N=14)

- More Streamlined and Flexible Processes (N = 6)

  ◦ "The grant application...was a lot of work (compared to others we have seen)."
  ◦ "Any movement towards trust-based philanthropy would be most helpful for grantees, meaning reduced proposal and reporting paperwork."

- Transparency About Process for Repeat Funding (N = 4)

  ◦ "Information about renewing funding vs. re-applying for funding."

- Clarity of Process Requirements and Timelines (N = 2)

- - "More clarity around how proposals will be assessed and timelines for submitting applications."

- Feedback During Processes (N = 2)

  - - "It would be great to receive feedback on our annual reports."

Diversity, Equity, Inclusion (4% N=7)

- More Communication About RBF's DEI Commitments (N = 3)

  - - "I would like to know more about the Fund's commitment to DEI and to becoming an anti-racist organization and its support of BIPOC-led organizations."

- More Funding Dedicated to DEI (N = 3)

  - - "I was disappointed to hear that the Fund's racial equity initiative/program was ending. Restarting that and supporting a robust budget for it would be important to achieving the Fund's DEI goals."

- Other (N = 1)

Respondents and Communities Served

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

■ Yes ■ No ■ Don't know

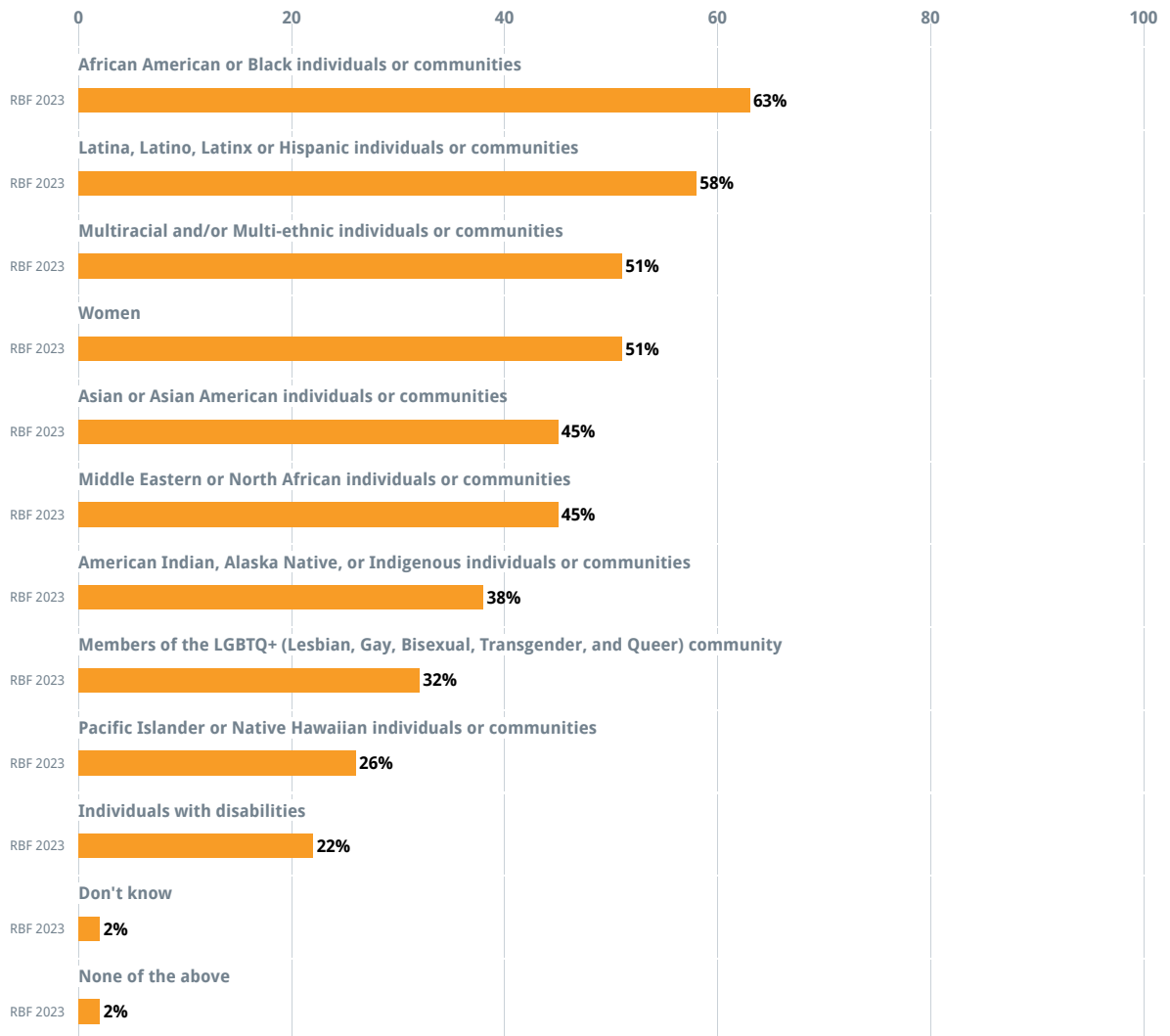|	Yes	No	Don't know
RBF 2023	63%	31%	7%
Average Funder	73%	20%	6%

Cohort: None   **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?

■ RBF 2023

African American or Black individuals or communities
RBF 2023 — **63%**

Latina, Latino, Latinx or Hispanic individuals or communities
RBF 2023 — **58%**

Multiracial and/or Multi-ethnic individuals or communities
RBF 2023 — **51%**

Women
RBF 2023 — **51%**

Asian or Asian American individuals or communities
RBF 2023 — **45%**

Middle Eastern or North African individuals or communities
RBF 2023 — **45%**

American Indian, Alaska Native, or Indigenous individuals or communities
RBF 2023 — **38%**

Members of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community
RBF 2023 — **32%**

Pacific Islander or Native Hawaiian individuals or communities
RBF 2023 — **26%**

Individuals with disabilities
RBF 2023 — **22%**

Don't know
RBF 2023 — **2%**

None of the above
RBF 2023 — **2%**

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?
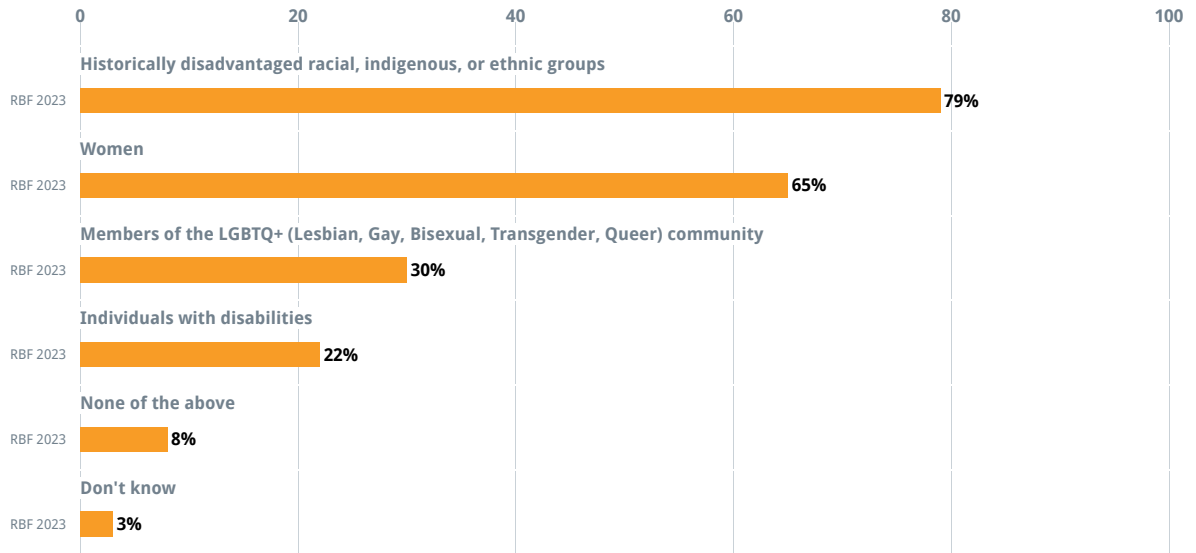
■ RBF 2023

Historically disadvantaged racial, indigenous, or ethnic groups
RBF 2023 — **79%**

Women
RBF 2023 — **65%**

Members of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, Queer) community
RBF 2023 — **30%**

Individuals with disabilities
RBF 2023 — **22%**

None of the above
RBF 2023 — **8%**

Don't know
RBF 2023 — **3%**

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 National Institutes of Health, Pew Research Center, Psi Chi Journal of Psychological Research, and the US Census Bureau.

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

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

Differences in Ratings by Respondent Demographics

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

Differences noted as "significant" reflect statistically significant findings from t-tests, ANOVAs, and chi-squared tests at a P-value less than or equal to .1.

Person of Color Identity (US Only): There are no consistent, statistically significant differences when grantee ratings are segmented by whether the respondent identifies as a person of color.

Race and/or Ethnic Identity (US Only):

- Ratings from grantees who identify as Asian or Asian American (N=17) are *significantly higher* than other grantees (N=183) for most measures across the survey.
- Ratings from grantees who identify as African American or Black (N=19) are *significantly lower* than other grantees (N=181) for aspects of understanding, trust, and a custom question about association of RBF with specific values.
- Ratings from grantees who identify as Middle Eastern or North African (N=11) are *significantly higher* than other grantees (N=189) for aspects of understanding and interactions.
- There are no consistent, statistically significant differences when grantee ratings are segmented by whether the respondent identifies as the following racial/ethnic identities: Hispanic or Latina, Latino, or Latinx; Multiracial and/or Multi-ethnic; White.
- There are not enough respondents who identify as the following racial/ethnic identities to run statistical tests (N<10): American Indian, Alaska Native, or Indigenous; Pacific Islander or Native Hawaiian; Race and/or ethnicity not included.

Gender Identity: There are no consistent, statistically significant differences when grantee ratings are segmented by respondent gender identity.
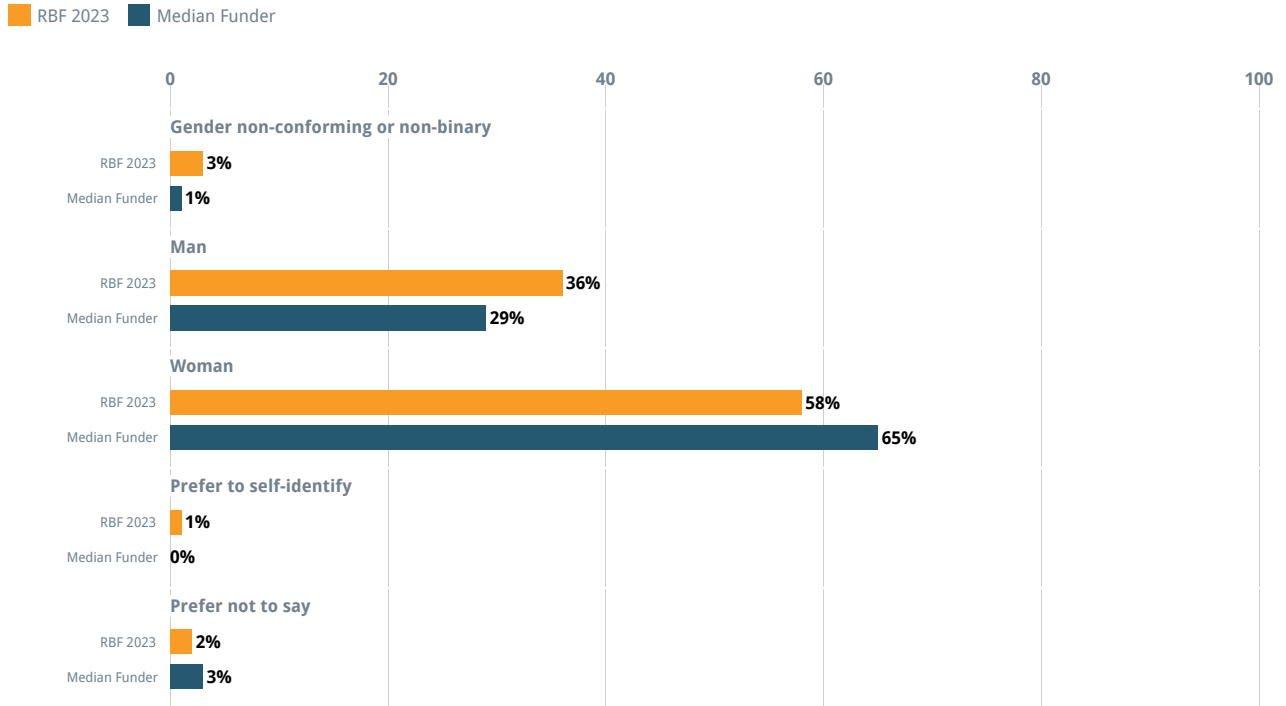
Transgender Identity: There are too few respondents to analyze results by whether respondents identify as transgender (N<10).

LGBTQ+ Identity: Ratings from respondents who identify as LGBTQ+ (N=50) are *significantly lower* than respondents who do not identify as LGBTQ+ (N=302) for many measures across the report, including aspects of understanding, responsiveness of RBF staff, RBF's openness to ideas from grantees, and a custom question about association of RBF with specific values.

- Additionally, a significantly lower proportion of respondents who identify as LGBTQ+ report receiving a $100K or more grant, multiyear funding, a site visit, and consistent funding in the past from the Fund.

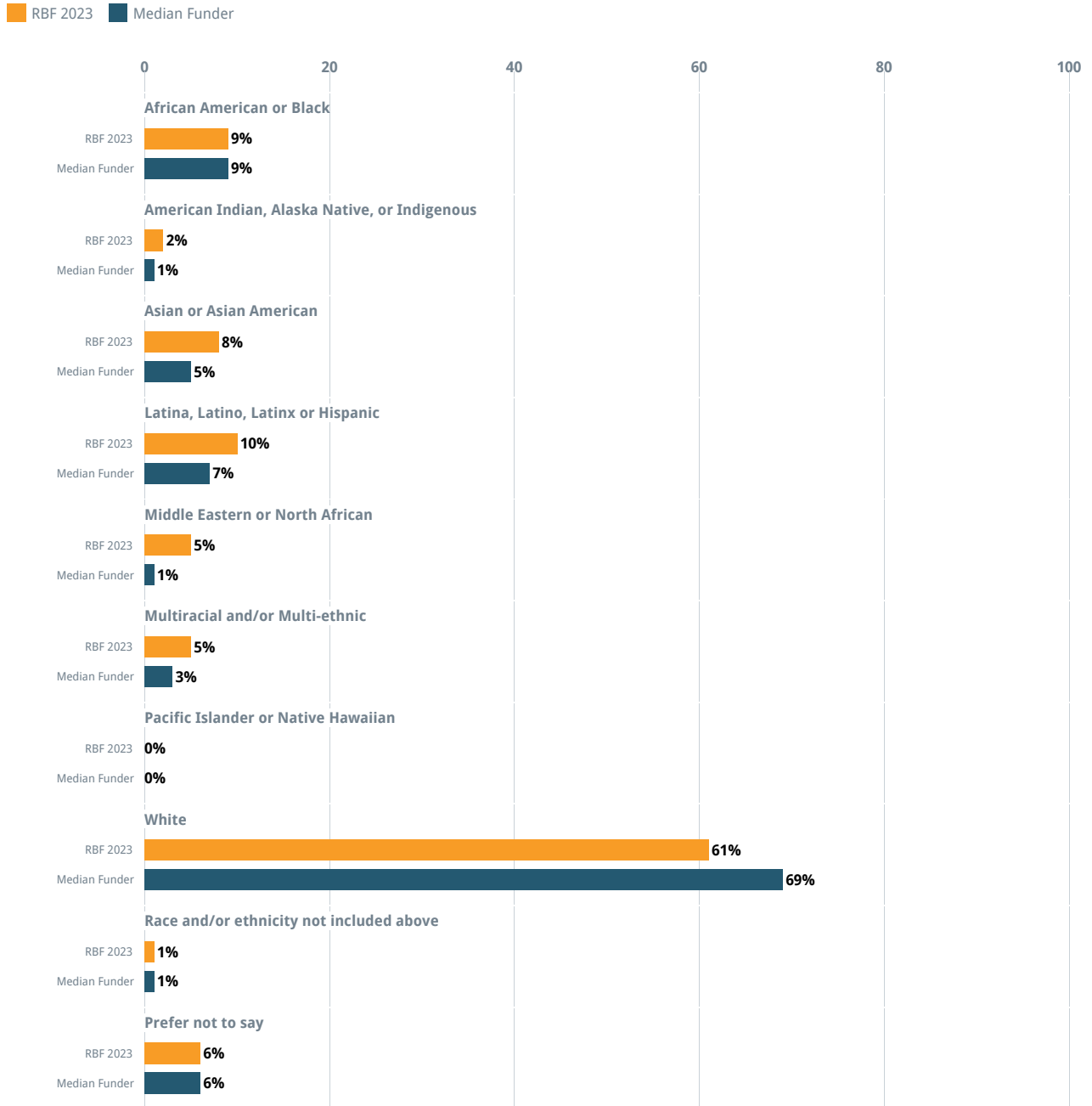**Disability Identity:** There are no consistent, statistically significant differences when grantee ratings are segmented by whether the respondent has a disability.

Please select the option that represents how you describe yourself:

How would you describe your race and/or ethnicity?

■ RBF 2023   ■ Median Funder

0   20   40   60   80   100

African American or Black
RBF 2023 — **9%**
Median Funder — **9%**

American Indian, Alaska Native, or Indigenous
RBF 2023 — **2%**
Median Funder — **1%**

Asian or Asian American
RBF 2023 — **8%**
Median Funder — **5%**

Latina, Latino, Latinx or Hispanic
RBF 2023 — **10%**
Median Funder — **7%**

Middle Eastern or North African
RBF 2023 — **5%**
Median Funder — **1%**

Multiracial and/or Multi-ethnic
RBF 2023 — **5%**
Median Funder — **3%**

Pacific Islander or Native Hawaiian
RBF 2023 — **0%**
Median Funder — **0%**

White
RBF 2023 — **61%**
Median Funder — **69%**

Race and/or ethnicity not included above
RBF 2023 — **1%**
Median Funder — **1%**

Prefer not to say
RBF 2023 — **6%**
Median Funder — **6%**

Cohort: None   **Past results:** on

Selected Cohort: None

Do you identify as a person of color?	RBF 2023	Average Funder
Yes	34%	24%
No	63%	71%
Prefer not to say	3%	5%

Selected Cohort: None

Are you transgender?	RBF 2023	Average Funder
Yes	1%	1%
No	95%	96%
Prefer not to say	4%	4%

Selected Cohort: None

Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community?	RBF 2023	Average Funder
Yes	14%	11%
No	82%	84%
Prefer not to say	4%	5%

Selected Cohort: None

Do you have a disability?	RBF 2023	Average Funder
Yes	3%	6%
No	92%	89%
Prefer not to say	5%	5%

Respondent Job Title

Job Title of Respondents	RBF 2023	RBF 2016	RBF 2010	RBF 2004	Average Funder
Executive Director/CEO	47%	53%	49%	56%	47%
Other Senior Team (i.e., reporting to Executive Director/CEO)	24%	13%	12%	13%	19%
Project Director	12%	9%	9%	6%	12%
Development Staff	14%	20%	23%	17%	16%
Volunteer	0%	0%	0%	0%	1%
Other	3%	4%	7%	8%	5%

Contextual Data

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

Grantmaking Characteristics

Average Grant Length
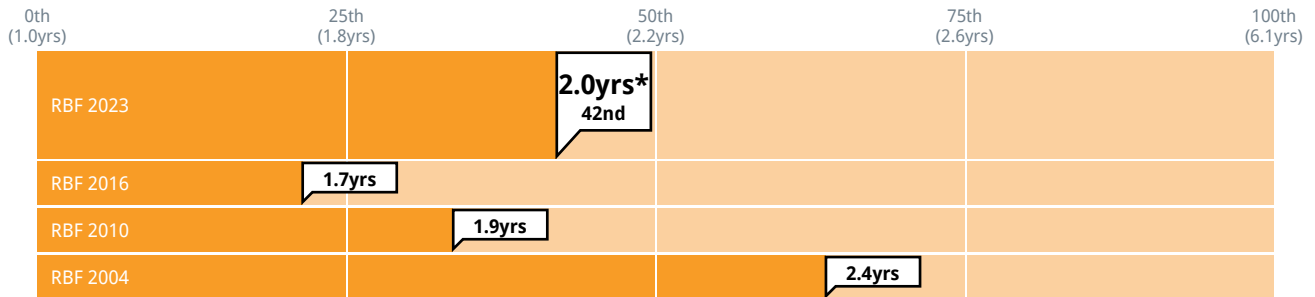
	0th (1.0yrs)	25th (1.8yrs)	50th (2.2yrs)	75th (2.6yrs)	100th (6.1yrs)
RBF 2023			**2.0yrs*** 42nd		
RBF 2016	**1.7yrs**				
RBF 2010		**1.9yrs**			
RBF 2004			**2.4yrs**		

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

Selected Cohort: None

Length of Grant Awarded	RBF 2023	RBF 2016	RBF 2010	RBF 2004	Median Funder
Average grant length	2 years	1.7 years	1.9 years	2.4 years	2.2 years

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Selected Cohort: None

Length of Grant Awarded	RBF 2023	RBF 2016	RBF 2010	RBF 2004	Average Funder
0 - 1.99 years	38%	58%	45%	29%	48%
2 - 2.99 years	47%	30%	34%	51%	22%
3 - 3.99 years	10%	6%	15%	12%	19%
4 - 4.99 years	2%	2%	2%	2%	3%
5 - 50 years	3%	4%	4%	6%	8%

Proportion of Unrestricted Funding	RBF 2023	Average Funder
Selected Cohort: None		
No, this funding was not restricted to a specific use (i.e., general operating, core support)	50%	27%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	50%	73%

Grantmaking Characteristics - By Subgroup

Selected Subgroup: None

Length of Grant Awarded (By Subgroup)

Average grant length

Selected Subgroup: None

Length of Grant Awarded (By Subgroup)

0 - 1.99 years

2 - 2.99 years

3 - 3.99 years

4 - 4.99 years

5 - 50 years

Selected Subgroup: None

Proportion of Unrestricted Funding (By Subgroup)

No, this funding was not restricted to a specific use (i.e., general operating, core support)

Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)

Grant Size

Selected Cohort: None					
Grant Amount Awarded	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Median Funder**
Median grant size	$100K	$75K	$100K	$80K	$110K

Selected Cohort: None					
Grant Amount Awarded	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Average Funder**
Less than $10K	2%	2%	2%	2%	8%
$10K - $24K	2%	8%	4%	11%	11%
$25K - $49K	8%	16%	11%	13%	12%
$50K - $99K	28%	31%	30%	30%	14%
$100K - $149K	18%	11%	14%	18%	10%
$150K - $299K	24%	19%	28%	17%	16%
$300K - $499K	10%	6%	8%	7%	10%
$500K - $999K	5%	5%	4%	1%	9%
$1MM and above	3%	2%	0%	1%	10%

Selected Cohort: None					
Median Percent of Budget Funded by Grant (Annualized)	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Median Funder**
Size of grant relative to size of grantee budget	7%	5%	4%	5%	4%

Grant Size - By Subgroup

Selected Subgroup: None	
Grant Amount Awarded (By Subgroup)	
Median grant size	

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

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

Grantee Characteristics

Selected Cohort: None					
Operating Budget of Grantee Organization	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Median Funder**
Median Budget	$1.3M	$1.3M	$1.5M	$1.2M	$1.6M

Selected Cohort: None					
Operating Budget of Grantee Organization	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Average Funder**
<$100K	8%	6%	4%	9%	8%
$100K - $499K	22%	22%	15%	19%	18%
$500K - $999K	14%	13%	18%	16%	13%
$1MM - $4.9MM	34%	37%	38%	36%	30%
$5MM - $24MM	16%	14%	17%	12%	19%
>=$25MM	6%	9%	9%	7%	12%

Grantee Characteristics - By Subgroup

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

Selected Subgroup: None

Operating Budget of Grantee Organization (By Subgroup)
<$100K
$100K - $499K
$500K - $999K
$1MM - $4.9MM
$5MM - $24MM
>=$25MM

Funding Relationship

Selected Cohort: None

Funding Status	RBF 2023	RBF 2016	RBF 2010	RBF 2004	Median Funder
Percent of grantees currently receiving funding from the Fund	91%	79%	69%	72%	82%

Selected Cohort: None

Pattern of Grantees' Funding Relationship with the Fund	RBF 2023	RBF 2016	RBF 2010	Average Funder
First grant received from the Fund	32%	29%	29%	29%
Consistent funding in the past	55%	51%	54%	53%
Inconsistent funding in the past	12%	19%	17%	18%

Funding Relationship - by Subgroup

Selected Subgroup: None

Funding Status (By Subgroup)

Percent of grantees currently receiving funding from the Fund

Selected Subgroup: None

Pattern of Grantees' Funding Relationship with the Fund (By Subgroup)

First grant received from the Fund

Consistent funding in the past

Inconsistent funding in the past

Funder Characteristics

Selected Cohort: None					
Financial Information	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Median Funder**
Total assets	$1334.2M	$847M	$726.1M	$709.7M	$281.7M
Total giving	$62.8M	$32.8M	$31.2M	$19.9M	$20.5M

Selected Cohort: None					
Funder Staffing	**RBF 2023**	**RBF 2016**	**RBF 2010**	**RBF 2004**	**Median Funder**
Total staff (FTEs)	58	60	49	12	17
Percent of staff who are program staff	41%	26%	35%	100%	44%

Selected Cohort: None			
Grantmaking Processes	**RBF 2023**	**RBF 2010**	**Median Funder**
Proportion of grants that are invitation-only	98%	90%	52%
Proportion of grantmaking dollars that are invitation-only	99%	N/A	68%

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 RBF's grantee survey was 384.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your field?	353
How well does the Foundation understand the field in which you work?	365
To what extent has the Foundation advanced the state of knowledge in your field?	299
To what extent has the Foundation affected public policy in your field?	263
Overall, how would you rate the Foundation's impact on your local community?	270
How well does the Foundation understand the local community in which you work?	296
How well does the Foundation understand your organization's strategy and goals?	372
Please rate the extent to which you agree with the following statements about the non-monetary support you received from the Foundation:	
The non-monetary support I received met an important need for my organization and/or program	191
The non-monetary support I received strengthened my organization and/or program	190
The Foundation's non-monetary support was a worthwhile use of the time required of us	190
I felt the Foundation would be open to feedback about the non-monetary support it provided	186
Who most frequently initiated the contact you had with program staff during this grant?	369
Has your main contact at the Foundation changed in the past six months?	376
At any point during this grant, including the selection process, did Foundation staff conduct a site visit?	378
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	339
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	373
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	369
How well does the Foundation understand the needs of the people and communities that you serve?	344
To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?	337
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	347
Overall, the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work	342
Overall, most staff I have interacted with at the Foundation embody a strong commitment to diversity, equity, and inclusion	340
I believe that the Foundation is committed to combatting racism	344
Did you submit a proposal to the Foundation for this grant?	383
To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?	322
To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?	335
To what extent was the Foundation clear and transparent about the selection process requirements and timelines?	362
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?	330
Have you participated in a reporting or evaluation process?	362
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?	330
To what extent was the Foundation's reporting process straightforward?	266

Question Text	Number of Responses
To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?	249
To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?	273
To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?	271
To what extent did the evaluation incorporate your input in the design of the evaluation?	46
To what extent did the evaluation result in you making changes to the work that was evaluated?	50
Are you currently receiving funding from the Foundation?	373
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	373
Primary Intended People and/or Communities	
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	382
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant? (US respondents)	130
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant? (International respondents)	109
Custom Questions	
Please indicate how strongly you associate the Rockefeller Brothers Fund with each of the following characteristics:	
Takes risks and provides leadership on challenging issues	326
Develops deep understanding of issues to connect lived experience with policy	327
Balances long-term commitment to issues with agile responses to changes in context	323
Is committed to racial, ethnic, and gender equity and justice	345
To what extent did the Fund's support lend credibility to your organization's ability...	
...to address external threats that affect your ability to do your work	331
...to obtain additional funding from other sources	352
...to build relationships with other organizations and influencers	357
Please indicate you or your organization's involvement with the Pocantico Center in the past year:	
I have attended a conference at the Pocantico Center	381
I have organized a conference at the Pocantico Center	380
I participated in a residency at the Pocantico Center	381
Please rate the extent to which you agree or disagree with the following statements about the Pocantico Center:	
The conference/residency spurred innovation/contributed to improved public policy	45
As a result of attending a Pocantico conference/residency, my organization or I have engaged in new collaborations/developed new networks	46
A conference/residency I attended/organized had a significant positive impact on my organization's ability to do its work	45
The conference/residency I attended/organized made a significant positive contribution to the field	47
Have you participated in an equivalency determination process to establish whether your organization is the equivalent of a U.S. public charity?	118
How strongly do you agree or disagree with the following statements?	
The process of working with NGOsource to establish my organization's equivalency determination was clear and straightforward	107
The Fund's staff was a helpful resource during the process of establishing an equivalency determination	97
My contact at NGOsource was a helpful resource during the process of establishing an equivalency determination	100
Overall, having an NGOsource ED certification has increased credibility and accessibility with funders	100
Have you used your NGOsource equivalency determination with any other funders besides the Fund?	104
Have the Fund's public communications about your grant (via the RBF website, social media, annual email, annual review, or other publications) had an impact for your work?	381
Does the Rockefeller family's history and legacy through their involvement with the RBF affect the value of your grant from the Fund?	381

About CEP and Contact Information

Mission:

CEP provides 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.

Vision:

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

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

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

About the GPR:

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

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

Additional CEP Resources

Assessment Tools

Donor Perception Report (DPR): The Donor Perception Report provides community foundations with comparative data on their donors' perceptions, preferences for engagement, and giving patterns. Based on research and guidance from a group of community foundation leaders, the DPR is the only survey process that provides comparative data for community foundations.

Staff Perception Report (SPR): The Staff Perception Report explores foundation staff members' perceptions of foundation effectiveness and job satisfaction on a comparative basis. The SPR is based on a survey specific to foundations that includes questions related to employees' impressions of their role in philanthropy, satisfaction with their jobs, their foundation's impact, and opportunities for foundation improvement.

Advisory Services

CEP's data-driven, customized advising leverages CEP's knowledge and experience to help funders answer pressing questions about their work, address existing challenges, hear from valued constituents, and learn and share with peers. Learn more at cep.org/advisoryservices.

Research

CEP's research projects delve into issues that are central to funder effectiveness, examining common practice and challenging conventional wisdom. Our research is informed by rigorous quantitative and qualitative analysis of large-scale data sets, in-depth qualitative interviews with philanthropic leaders, as well as by profiles of high-performing organizations and staff.

CEP's resource library offers resources for grantmakers, individual donors, and more. Explore the full range of resources available in CEP's resource library at cep.org/resources.

YouthTruth Student Survey

YouthTruth supports school systems in gathering and acting on student and stakeholder feedback, helping schools, districts, and education funders think through the ins-and-outs of actionable insights to drive improvement. Learn more at youthtruthsurvey.org.

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