GRANTEE AND APPLICANT PERCEPTION REPORT

Presentation Prepared for
May and Stanley Smith Charitable Trust
February 2021

CEP

THE CENTER FOR
EFFECTIVE PHILANTHROPY

ASSESSMENTS

PROGRAMMING

RESEARCH

ADVISORY SERVICES

Grantee Survey Population

Survey Fielded	Number of Grantees Surveyed	Responses Received	Response Rate
August and September 2020	277	230	83%

Subgroup Analysis

- Reviewed ratings by program area, number of grants and number of grants within specific program areas

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Grantee Comparative Dataset

More than 300 funders

More than 40,000 grantee responses

| Custom Cohort	
Evelyn and Walter Haas, Jr. Fund	Stuart Foundation
F. M. Kirby Foundation, Inc.	The George Gund Foundation
James Graham Brown Foundation, Inc.	The John A. Hartford Foundation, Inc.
Marguerite Casey Foundation	The John R. Oishei Foundation
Overdeck Family Foundation, Inc.	The Ralph M. Parsons Foundation
Peter Kiewit Foundation	Virginia G. Piper Charitable Trust

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IMPACT AND UNDERSTANDING

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

1 = No impact, 7 = Significant positive impact

0th (4.21)	25th (5.49)	50th (5.78)	75th (5.99)	100th (6.70)

MSSCT 2020

6.43
98th

Custom Cohort

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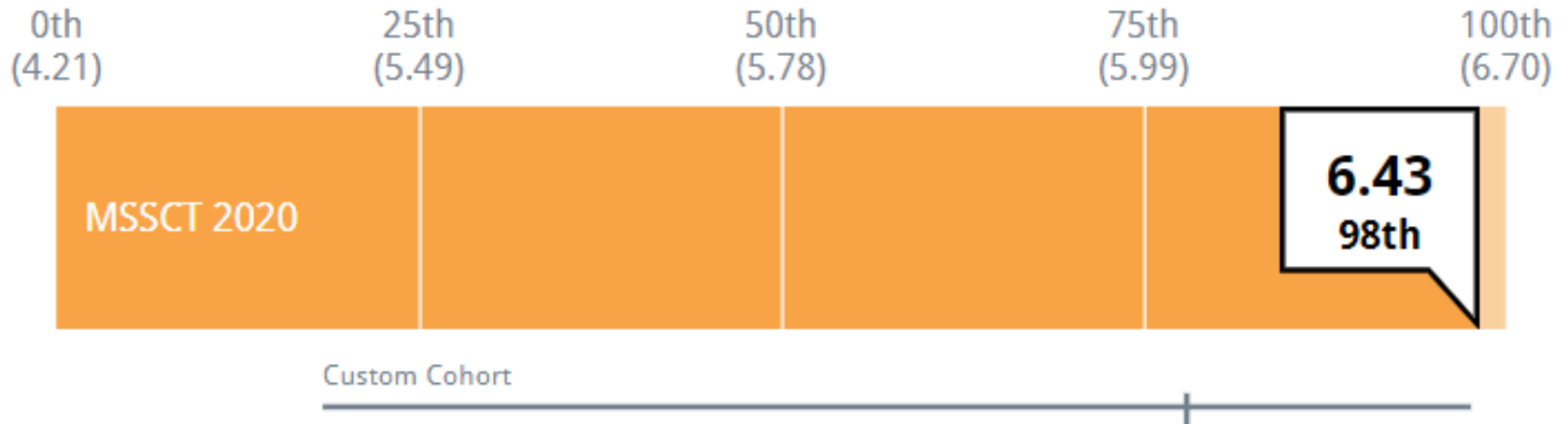
"Overall, how would you rate the Trust's impact on your organization?"

1 = No impact, 7 = Significant positive impact

0th (4.58)	25th (5.90)	50th (6.18)	75th (6.33)	100th (6.80)

MSSCT 2020

6.62
95th

Custom Cohort

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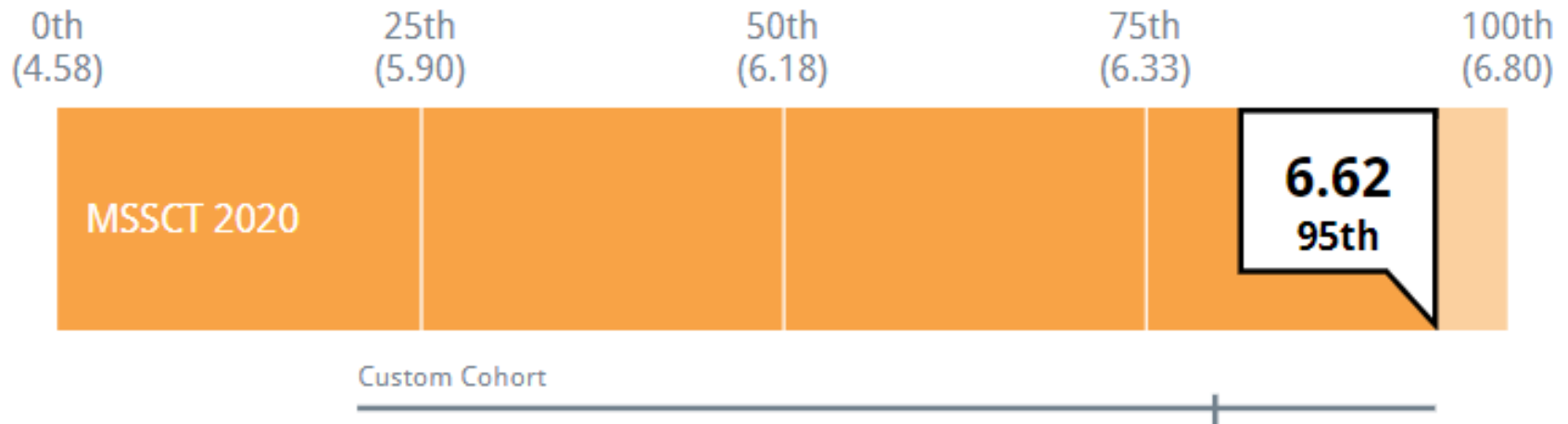
"The Trust has maintained a low profile publicly, but has **maintained significant influence in behind the scenes ways**. Our program officer understands those who are the experts are those with lived experience and those working in the field every day..."

"The Trust has had a **profound impact on [our organization].** It's one of our largest institutional donors and has created a solid funding foundation on which we've been able to build. [Our organization] is **stronger now thanks to the Trust, and better positioned to receive other grants**, based on the prestige of the Trust's support."

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Grantmaking Characteristics

Average Grant Length

2.3 yrs
at MSSCT

vs.

2.2 yrs
at the custom cohort

Average Grant Size

120K
at MSSCT

vs.

150K
at the custom cohort
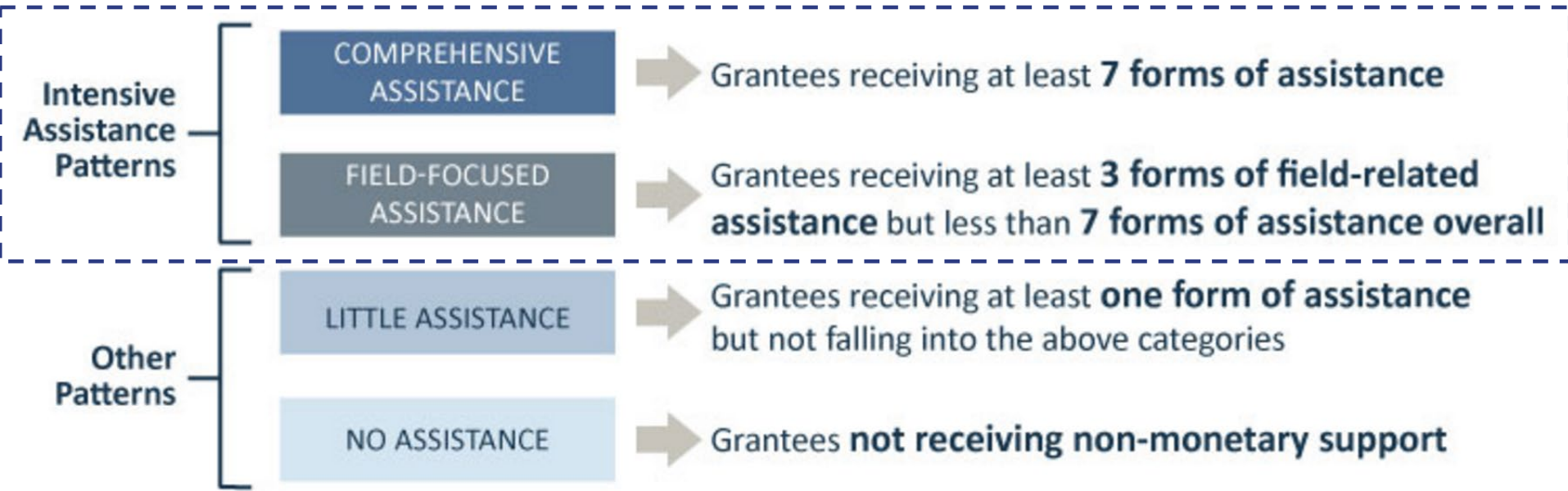
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Grantmaking Characteristics

46%

of MSSCT grantees report receiving unrestricted support

VS.

22%

of grantees at the typical funder report receiving unrestricted support

"*The Trust is having **enormous impact on our organization-- particularly in their unrestricted support** which has provided essential support for our patient families, particularly during this time as they face the disproportionate impacts of the pandemic.*"

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Patterns of Non-Monetary Support

Intensive Assistance Patterns

COMPREHENSIVE ASSISTANCE → Grantees receiving at least **7 forms of assistance**

FIELD-FOCUSED ASSISTANCE → Grantees receiving at least **3 forms of field-related assistance** but less than **7 forms of assistance overall**

Other Patterns

LITTLE ASSISTANCE → Grantees receiving at least **one form of assistance** but not falling into the above categories

NO ASSISTANCE → Grantees **not receiving non-monetary support**

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Opportunities to Provide Non-monetary Assistance

8%
of MSSCT grantees report receiving intensive non-monetary support

VS.

19%
of grantees at the median cohort funder report receiving intensive non-monetary support

MSSCT grantees who receive even just a few forms of support rate significantly higher than grantees who receive none for the Trust's **impact on their fields and organizations, understanding of their beneficiaries' needs**, and **aspects of relationships**.

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RELATIONSHIPS WITH GRANTEES

Funder-Grantee Relationships

INTERACTIONS

Fairness of treatment by foundation

Comfort approaching foundation if a problem arises
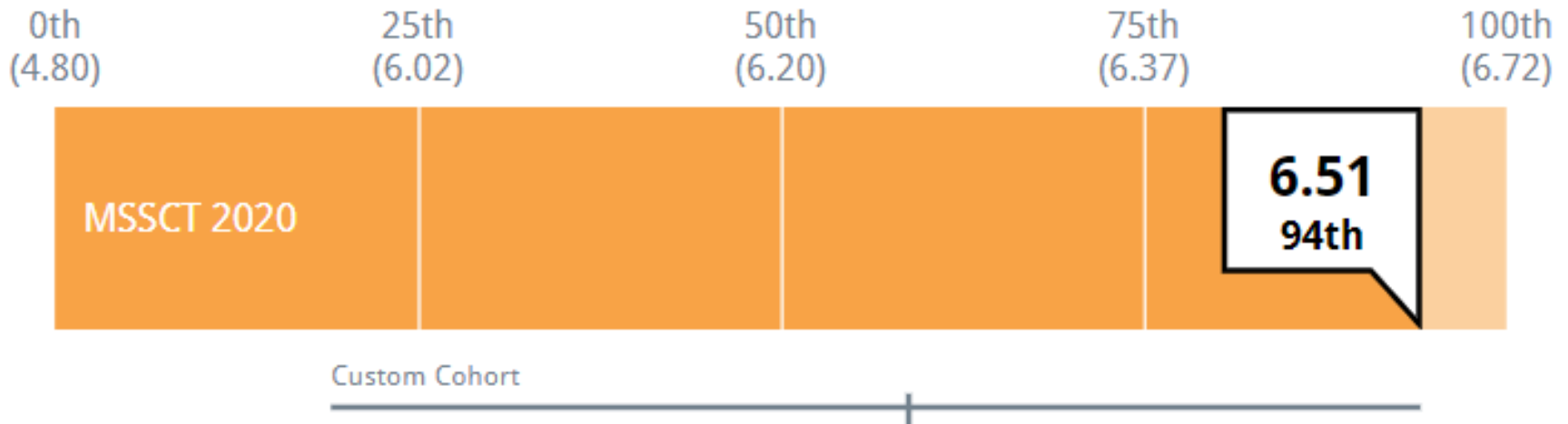
Responsiveness of foundation staff

COMMUNICATIONS

Clarity of communication of foundation's goals and strategy

**Consistency of information** provided by different communications

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Funder-Grantee Relationships
Summary Measure

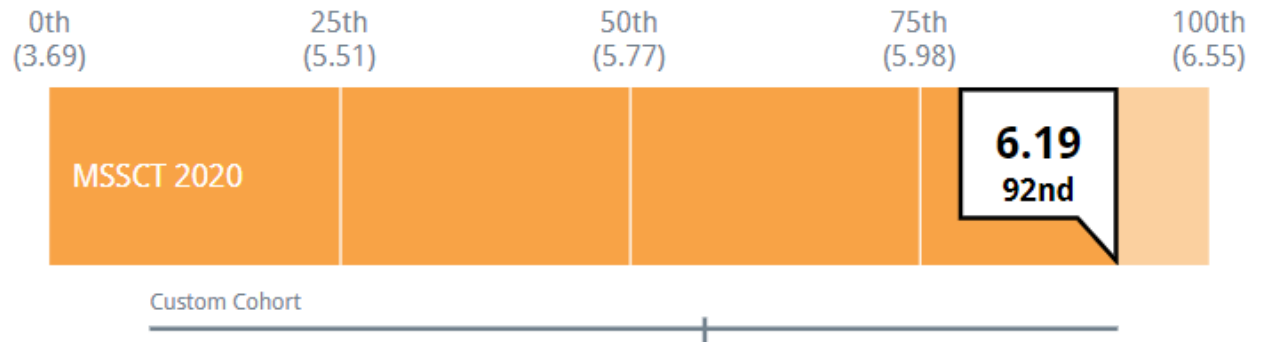*1 = Very negative, 7 = Very positive*

0th (4.80)	25th (6.02)	50th (6.20)	75th (6.37)	100th (6.72)

MSSCT 2020

6.51
94th

Custom Cohort

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Understanding and Transparency

Understanding Summary Measure
1 = Very negative
7 = Very positive

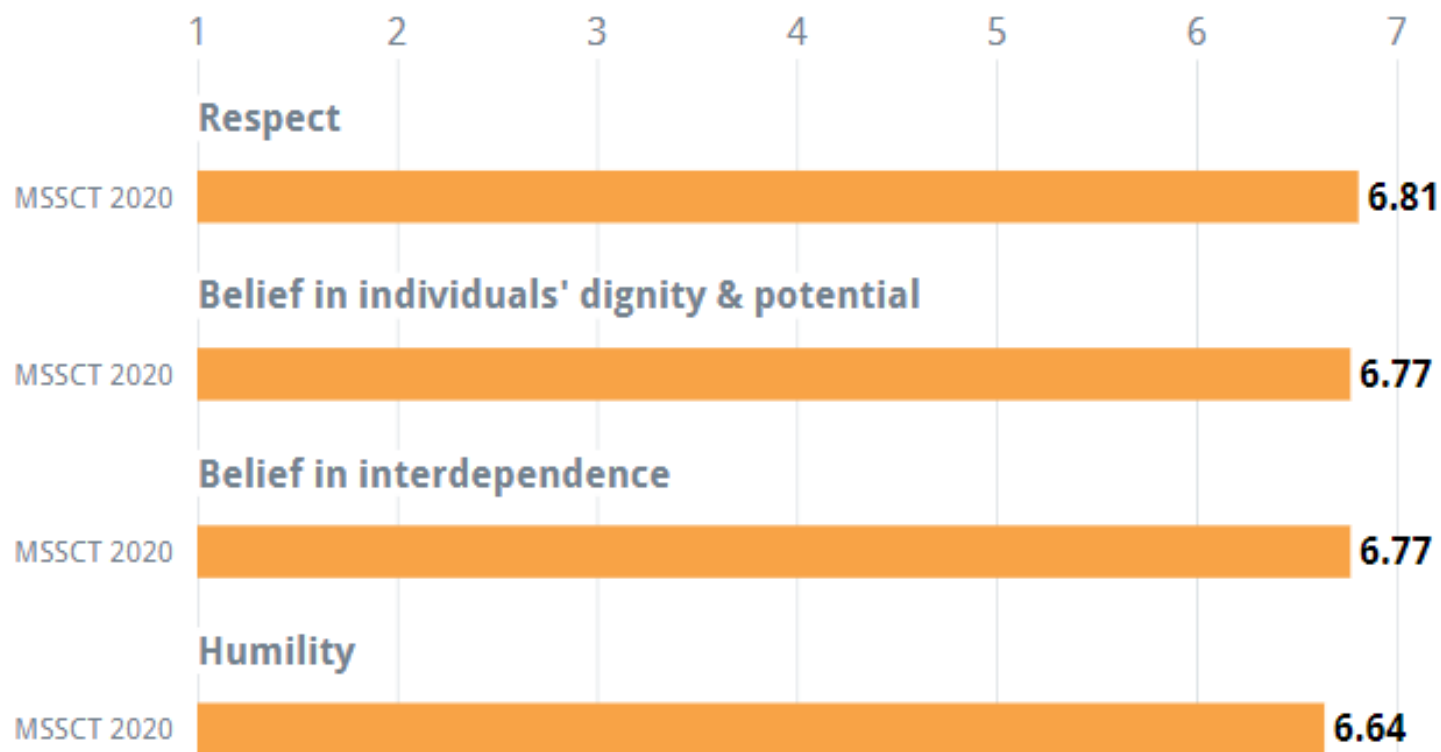| 0th (4.05) | 25th (5.48) | 50th (5.67) | 75th (5.84) | 100th (6.36) |

MSSCT 2020

6.10
98th

Custom Cohort
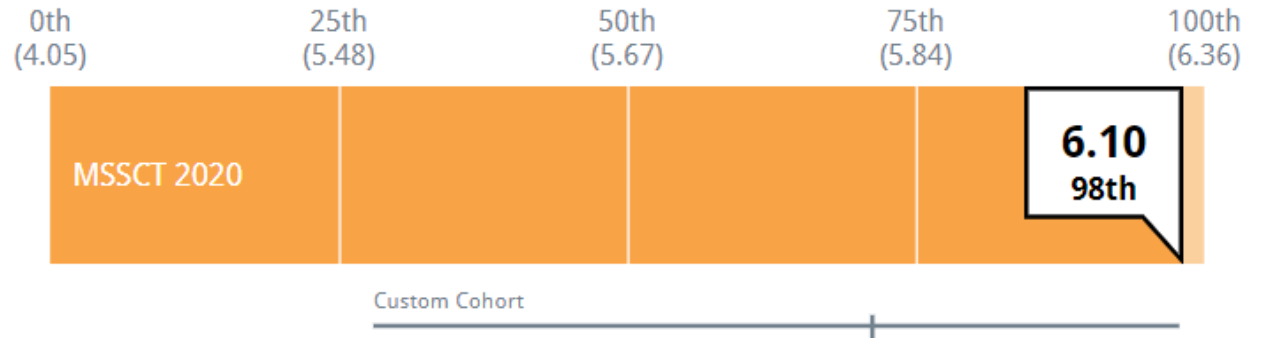
"Overall, how transparent is the Trust with your organization?"
1 = Not at all transparent
7 = Extremely transparent

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

MSSCT 2020

6.19
92nd

Custom Cohort

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"How well does the Trust embody its stated values and beliefs?"

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

Respect
MSSCT 2020: 6.81

Belief in individuals' dignity & potential
MSSCT 2020: 6.77

Belief in interdependence
MSSCT 2020: 6.77

Humility
MSSCT 2020: 6.64

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"*The May & Stanley Smith Charitable Trust has been an incredible partner to our organization and each step of the process has* **encouraged growth for us as an organization and has helped equip us to better perform our mission**.*"*

"*The* **relationship goes beyond funding** *and we value the regular exchange we have with our program officer who always keeps his finger on the pulse of our activities. We use the word* **"partnership" because we learn as much from the Trust as we believe they learn from us.** *Together, we make each other sharper and more effective.*"

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TRUST PROCESSES
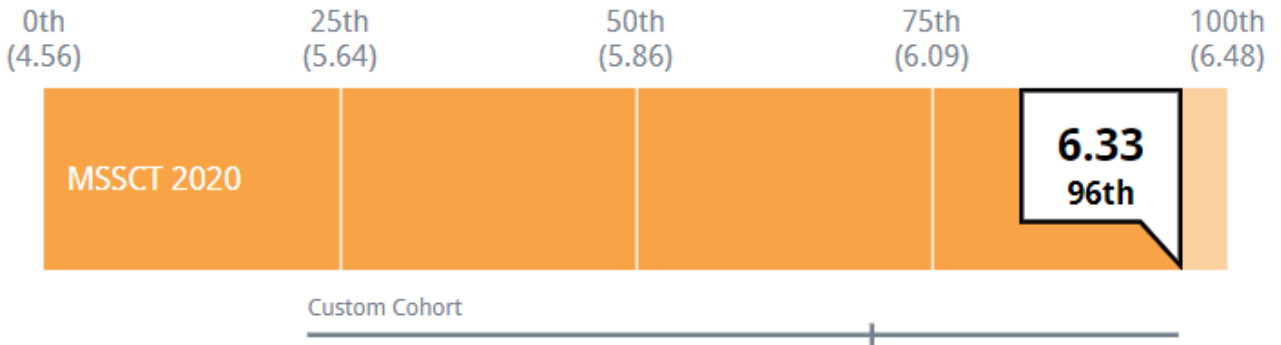
Trust Processes

"How helpful was participating in the Trust's selection process in strengthening the organization/program funded by the grant?"
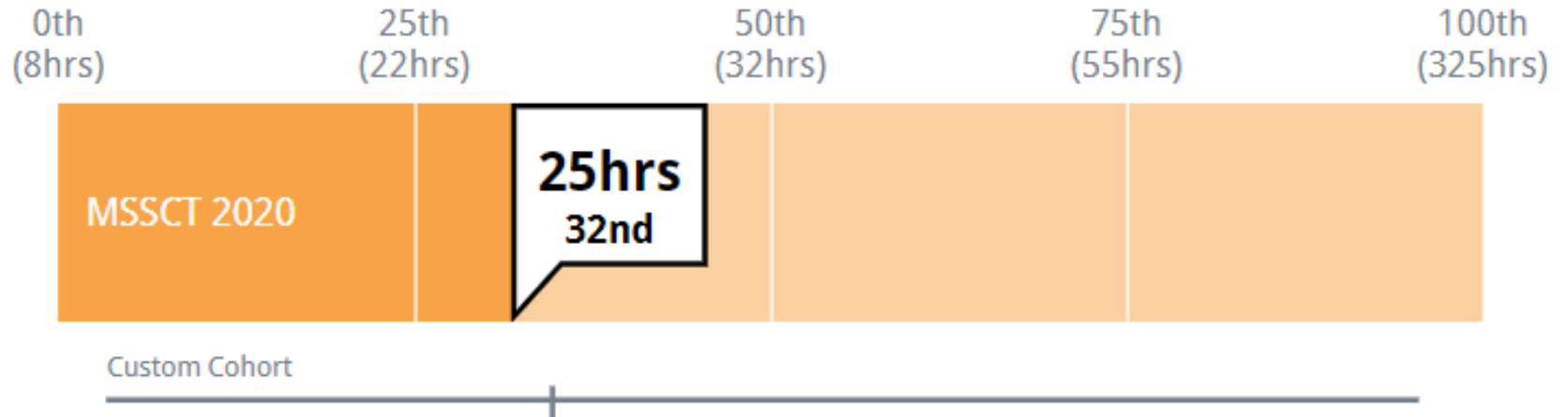
1 = Not at all helpful
7 = Extremely helpful

0th (3.45)	25th (4.72)	50th (5.06)	75th (5.28)	100th (6.25)

MSSCT 2020

5.58
92nd

Custom Cohort
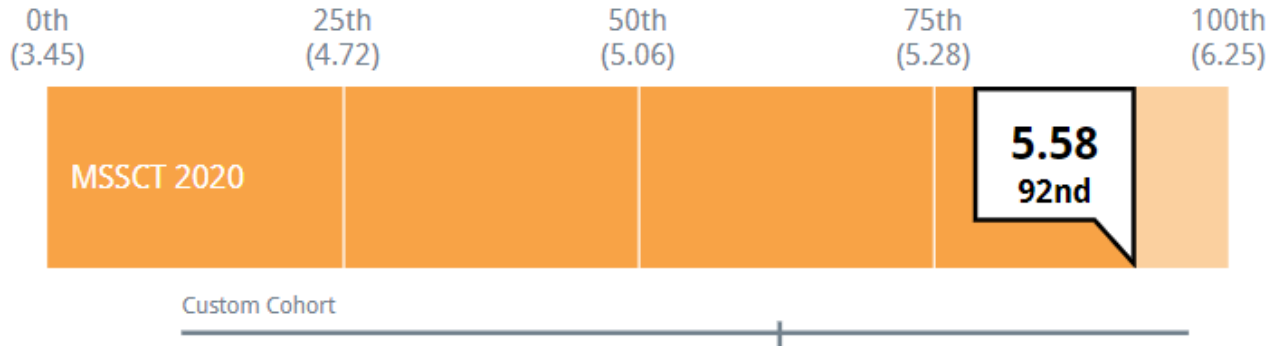
"To what extent was the Trust's reporting process a helpful opportunity for you to reflect and learn?"

1 = Not at all
7 = To a great extent

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

MSSCT 2020

6.33
96th

Custom Cohort

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Median hours spent by on funder requirements

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

MSSCT 2020
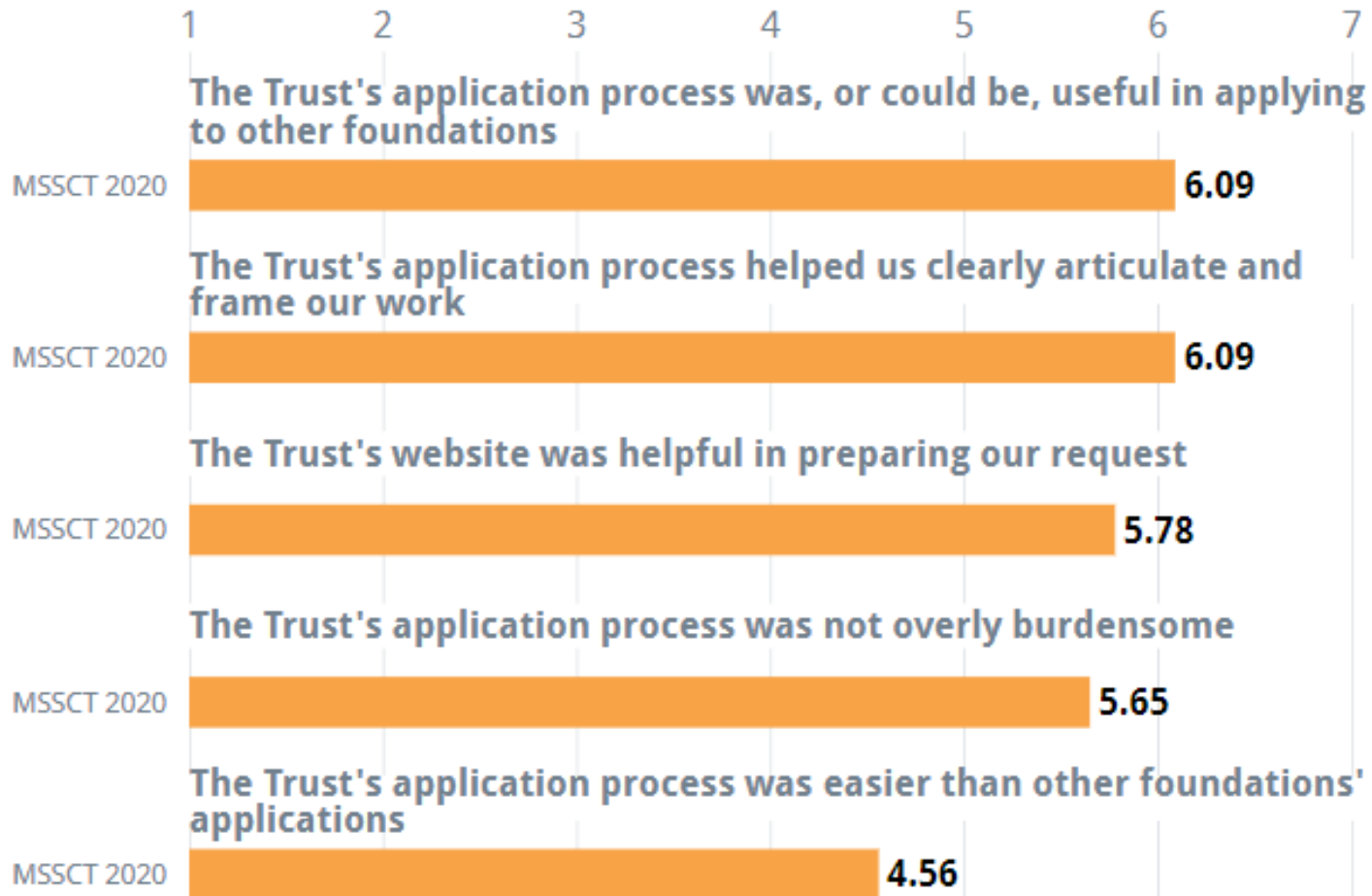
25hrs 32nd

Custom Cohort

32% of grantee suggestions

"...The numbers and types of attachments required are far and away more extensive and onerous than any other public or private funder to which we apply..."

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"To what extent do you agree or disagree with the following statements about the Trust's grant application process:"

1 = Strongly disagree, 7 = Strongly Agree

The Trust's application process was, or could be, useful in applying to other foundations

MSSCT 2020: 6.09

The Trust's application process helped us clearly articulate and frame our work

MSSCT 2020: 6.09

The Trust's website was helpful in preparing our request

MSSCT 2020: 5.78

The Trust's application process was not overly burdensome

MSSCT 2020: 5.65

The Trust's application process was easier than other foundations' applications

MSSCT 2020: 4.56

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"*I would suggest limiting the number of follow-up questions after a grant application is submitted to maybe one round of questions. I would also suggest not requiring the past month's financial statements and instead asking for the most recent that an agency has available.*"

"*Compared to other funders May and Stanley digs deep, requiring extensive research, data point reporting, and many follow-up questions - in short, a lot of work. Of course its their prerogative to ask a lot of questions about how their grant award is being used, but we don't look forward to the application and reporting process. It feels like they are holding our feet to the flames.*"

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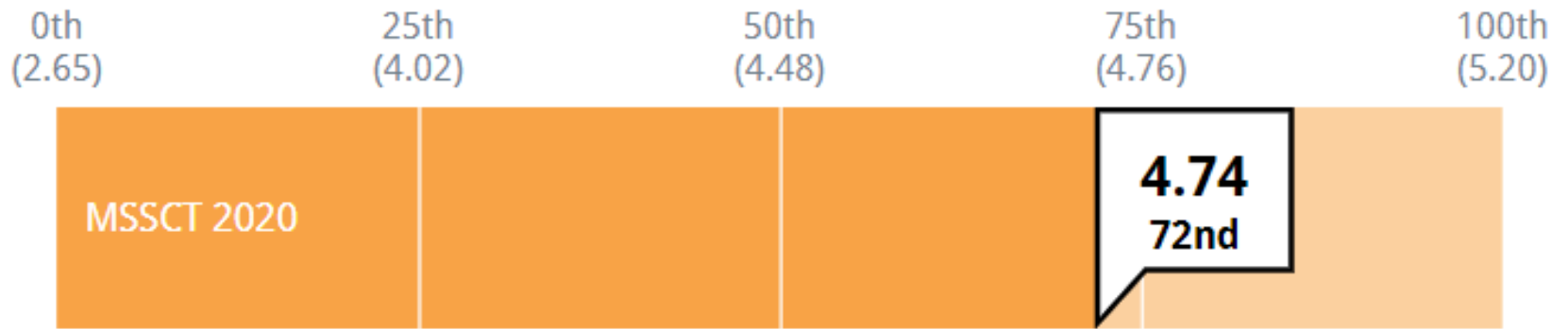# DECLINED APPLICANT PERCEPTIONS

Declined Applicant Survey Population

Survey Fielded	Number of Applicants Surveyed	Responses Received	Response Rate
August and September 2020	114	76	67%

Subgroup Analysis

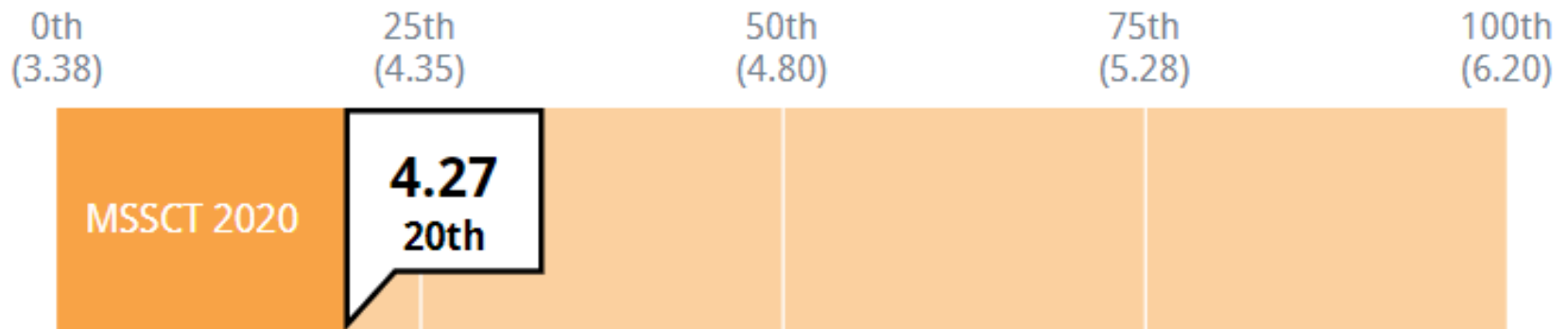- Reviewed ratings by program area.

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

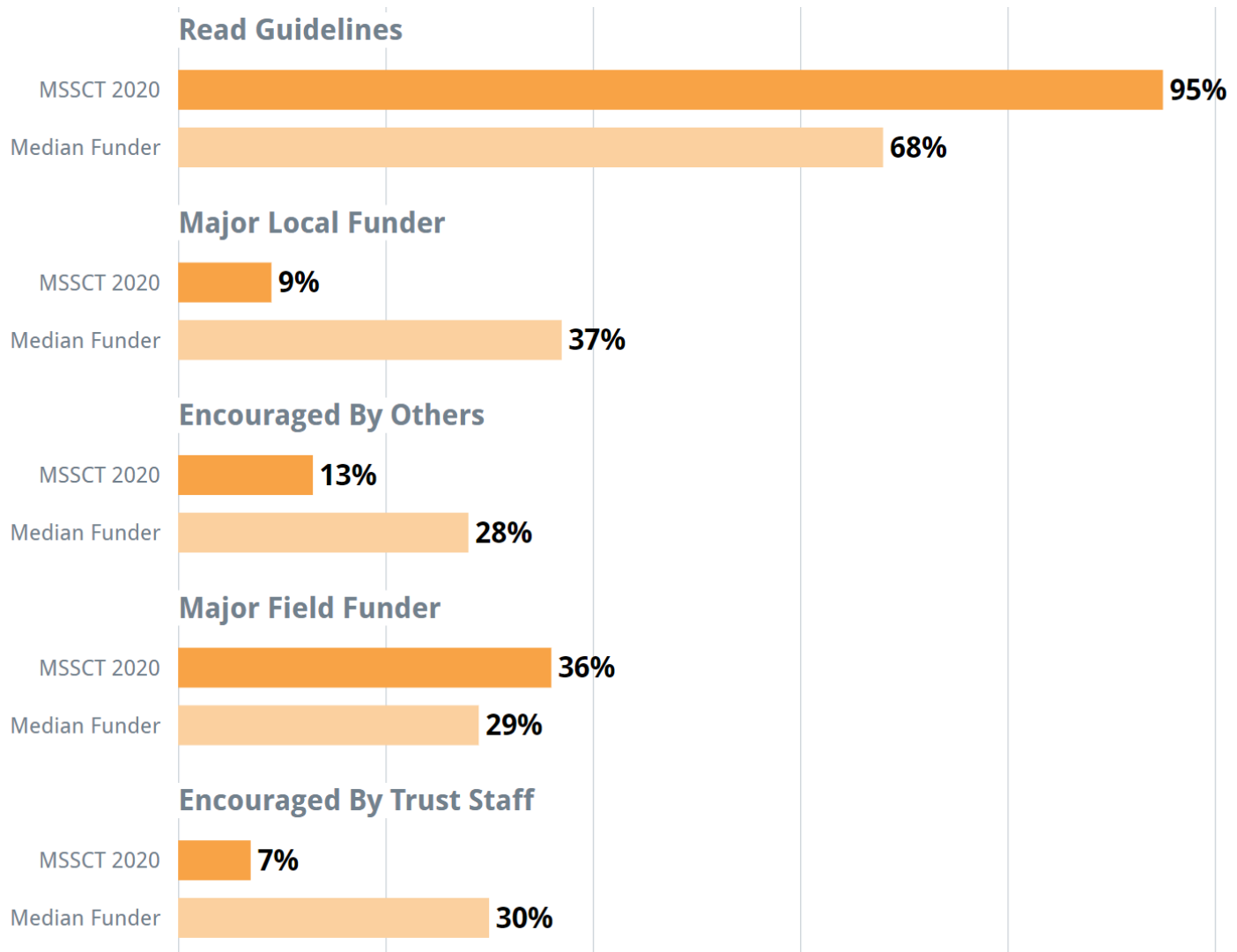*1 = No impact, 7 = Significant positive impact*

"Overall, how responsive was Trust staff?"

1 = Not at all responsive, 7 = Extremely responsive

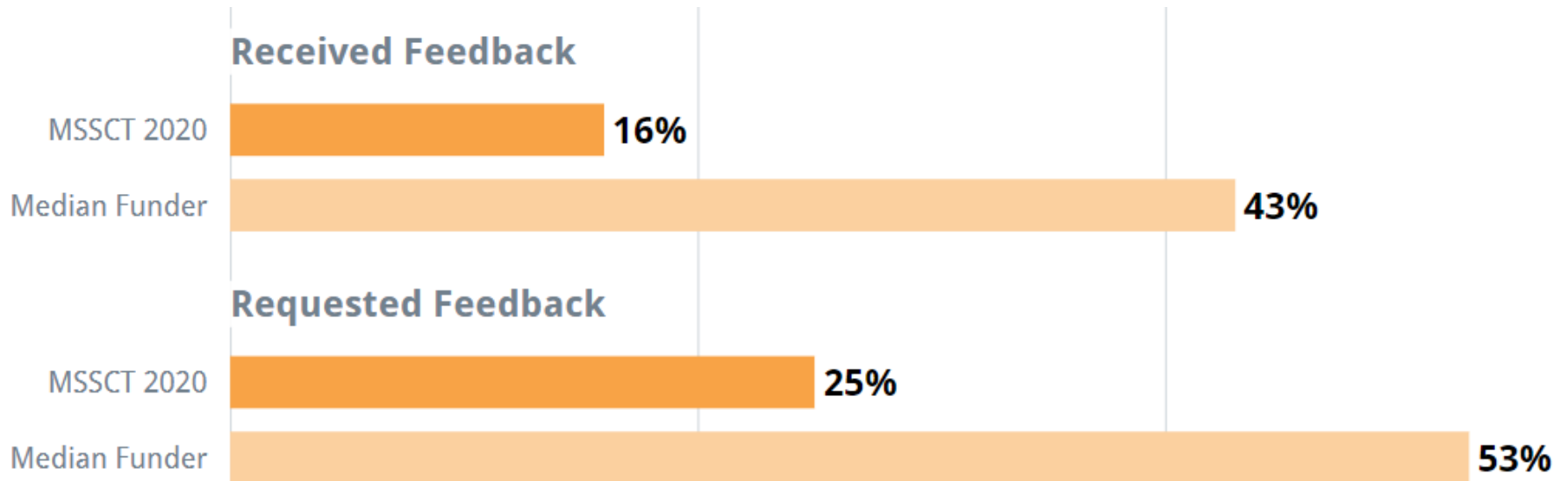| 0th (3.38) | 25th (4.35) | 50th (4.80) | 75th (5.28) | 100th (6.20) |

MSSCT 2020 — **4.27** 20th

> "If the Trust is going to continue to allow unsolicited proposals I believe it would be beneficial for staff to require interested applicants to have a conversation with them prior to submitting any formal LOI or application..."

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"Why did you apply to the Trust for funding?"

Read Guidelines

- MSSCT 2020: 95%
- Median Funder: 68%

Major Local Funder

- MSSCT 2020: 9%
- Median Funder: 37%

Encouraged By Others

- MSSCT 2020: 13%
- Median Funder: 28%

Major Field Funder

- MSSCT 2020: 36%
- Median Funder: 29%

Encouraged By Trust Staff

- MSSCT 2020: 7%
- Median Funder: 30%

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"After your request was declined did you request/receive any feedback or advice from the Trust?"

Received Feedback

MSSCT 2020	16%
Median Funder	43%

Requested Feedback

|	
MSSCT 2020	25%
Median Funder	53%

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Selection Process and Declination Findings

- On **selection process**, declined applicants:
    - Spend **less time** than is typical
    - Rate **typical for its helpfulness**

- After **declination**:
    - Out of the quarter of applicants who requested feedback, **40% of those applicants** report not receiving any
    - Ratings for **helpfulness of feedback** for strengthening future proposals are **higher than typical**
    - Those who **receive feedback rate the Trust higher** for its fairness, understanding, of communications, honesty in declination, and overall transparency

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"Would you consider applying for funding from the Trust in the future?"

Proportion that responded 'Yes'

| 0th (64%) | 25th (83%) | 50th (88%) | 75th (93%) | 100th (100%) |

MSSCT 2020 — 76% 20th

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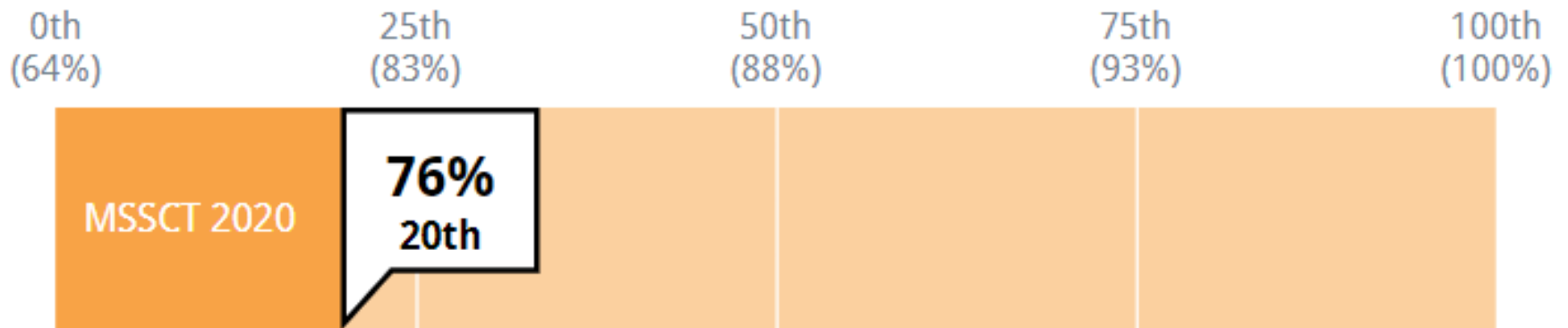
CEP Recommendations

- Celebrate the Trust's exceptionally strong perceptions and continue to reinforce the values and beliefs that have led that have led to this success.

- Build on the benefits that grantees receive from non-monetary support and where resources allow, consider increasing the facilitation of collaboration and connection amongst grantees.

- Streamline and simplify the Trust's administrative processes and the information required from grantees, particularly for long-time partners or organizations with limited resources.

- Consider providing a larger proportion of applicants with more detailed feedback on how their proposal can be improved, so that the Trust receives the most relevant and strongest proposals in the future.

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Thank You.