

Grantee Perception Report[®]

PREPARED FOR
Josiah Macy Jr. Foundation

June 2017



THE CENTER FOR
EFFECTIVE PHILANTHROPY

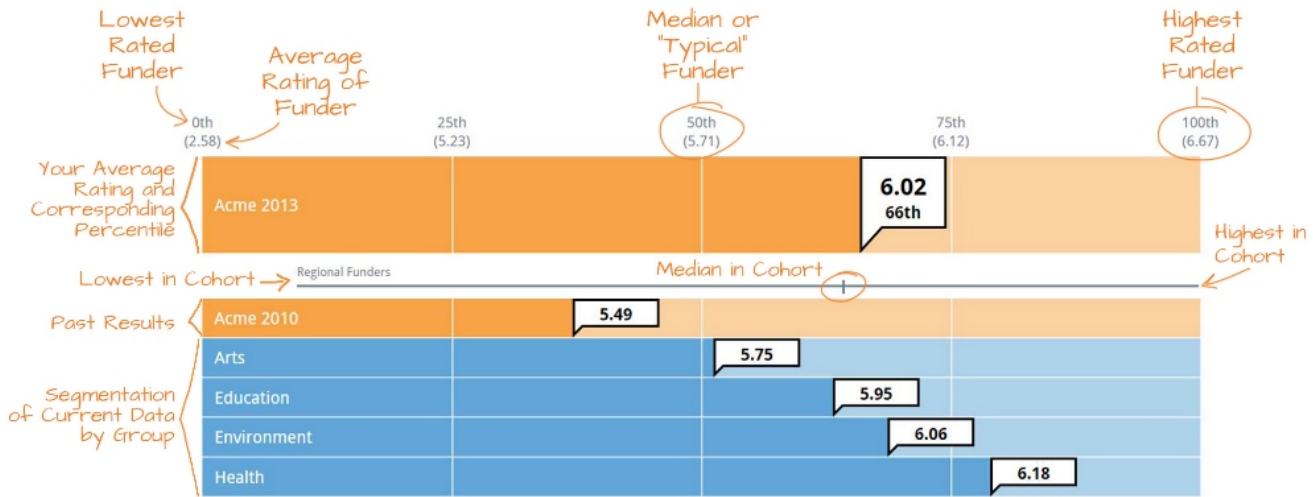
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Interpreting Your Charts

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



Missing data: Selected grantee ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.



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.



Word Cloud

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



This image was produced using a free tool available at www.tagxedo.com. Copyright (c) 2006, ComponentAce. <http://www.componentace.com>.

Survey Population

| Survey | Survey Fielded | Survey Population | Number of Responses Received | Survey Response Rate |
|-----------|-------------------------|-------------------|------------------------------|----------------------|
| Macy 2017 | February and March 2017 | 80 | 62 | 78% |
| Macy 2009 | February and March 2009 | 69 | 48 | 70% |

| Survey Year | Year of Active Grants |
|-------------|-----------------------|
| Macy 2017 | 2009-2016 |
| Macy 2009 | 2000-2008 |

Throughout this report, Josiah Macy Jr. Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantees built up over more than a decade of grantee surveys of more than 250 funders. The full list of participating funders can be found at <http://www.effectivephilanthropy.org/assessments/gpr-apr/>.

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

Subgroups

In addition to showing Macy's overall ratings, this report shows ratings segmented by Grant Type. The online version of this report also shows ratings segmented by Grant Period.

| Grant Type | Number of Responses |
|-----------------------|---------------------|
| Macy Board Grant | 36 |
| Macy Faculty Scholars | 26 |

| Grant Period | Number of Responses |
|-----------------------|---------------------|
| Period I (2009-2012) | 25 |
| Period II (2013-2016) | 37 |

Summary of Differences by Subgroup

While no group consistently rates higher or lower than the other, there are a few differences in grantees' ratings based on the type of grant they received from the Foundation and the year of their grant award.

Grant Type

- Macy Board Grant recipients rate the Foundation significantly more positively for its understanding of their fields, the level of staff involvement in their grant proposals, and aspects of the Foundation's evaluation process. Macy Board Grant recipients are more likely to have received a site visit from the Foundation.
- Macy Faculty Scholar grantees provide significantly higher ratings for staff responsiveness and received a significantly higher proportion of field-focused or comprehensive non-monetary assistance. They also provide significantly higher ratings for the Foundation's impact on their career development.

Grant Period

- Grantees who were awarded their grant in the years 2013-2016 (Period II grantees) rate the Foundation significantly more positively on the responsiveness of Foundation staff, consistency of the Foundation's communication resources, overall transparency, aspects of the reporting and evaluation process, and Macy's impact on their fields of work.

Comparative Cohorts

Customized Cohort

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

Custom Cohort

| |
|------------------------------------------|
| Connecticut Health Foundation, Inc. |
| F. M. Kirby Foundation, Inc. |
| Gordon and Betty Moore Foundation |
| Jessie Smith Noyes Foundation |
| Josiah Macy Jr. Foundation |
| Kenneth Rainin Foundation |
| New York State Health Foundation |
| Robert Wood Johnson Foundation |
| SC Ministry Foundation |
| The Educational Foundation of America |
| The F.B. Heron Foundation |
| The Gill Foundation |
| The John A. Hartford Foundation, Inc. |
| The Nord Family Foundation |
| The Teagle Foundation |
| William G. McGowan Charitable Fund, Inc. |

Standard Cohorts

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

Strategy Cohorts

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

Annual Giving Cohorts

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

Foundation Type Cohorts

| Cohort Name | Count | Description |
|-------------------------------|-------|--------------------------------------------------------|
| Private Foundations | 140 | All private foundations in the GPR dataset |
| Family Foundations | 62 | All family foundations in the GPR dataset |
| Community Foundations | 35 | All community foundations in the GPR dataset |
| Health Conversion Foundations | 30 | All health conversation foundations in the GPR dataset |
| Corporate Foundations | 20 | All corporate foundations in the GPR dataset |

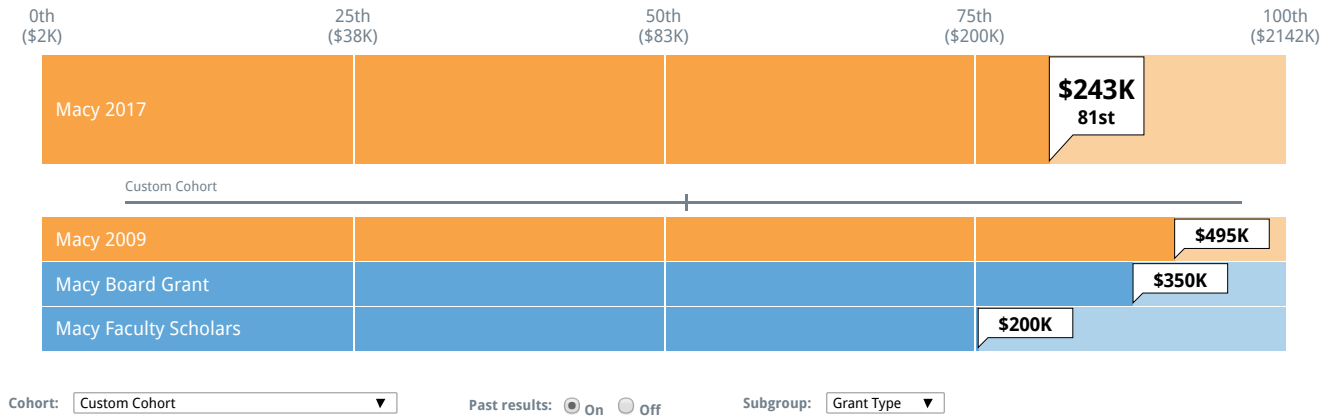
Other Cohorts

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

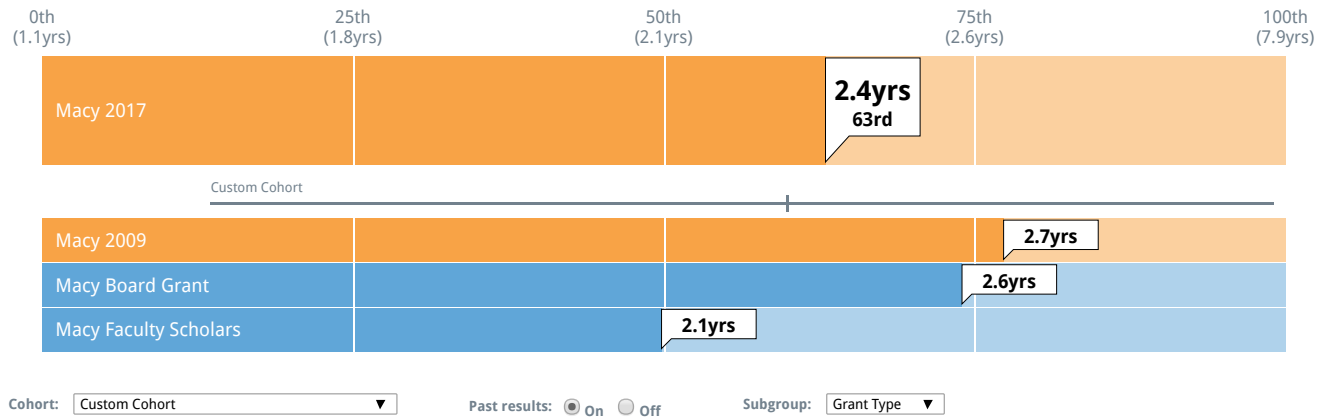
Grantmaking Characteristics

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

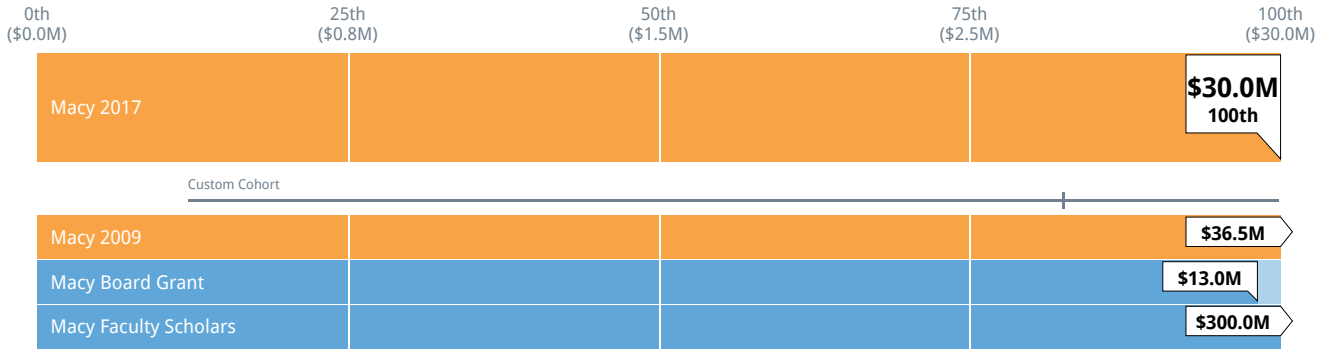
Median Grant Size



Average Grant Length



Median Organizational Budget



Cohort:

Past results: On Off

Subgroup:

| Type of Support | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|--------------------------------------------------------------|-----------|-----------|----------------|---------------|
| Percent of grantees receiving general operating/core support | 2% | 0% | 21% | 17% |
| Percent of grantees receiving program/project support | 55% | 91% | 65% | 66% |
| Percent of grantees receiving other types of support | 44% | 9% | 14% | 14% |

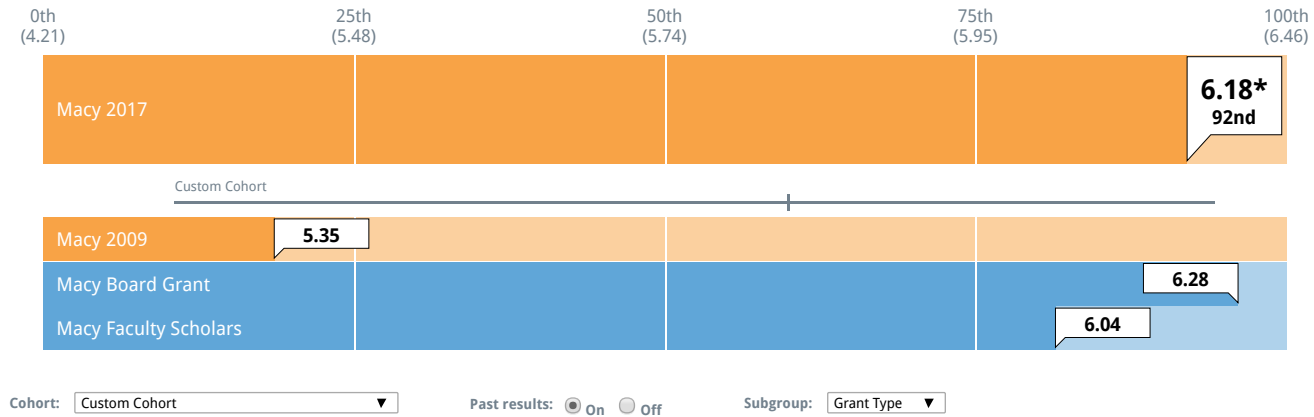
| Grant History | Macy 2017 | Average Funder | Custom Cohort |
|---------------------------------|-----------|----------------|---------------|
| Percentage of first-time grants | 41% | 29% | 30% |

| Program Staff Load | Macy 2017 | Median Funder | Custom Cohort |
|------------------------------------------------------|-----------|---------------|---------------|
| Dollars awarded per program staff full-time employee | \$2M | \$2.6M | \$2M |
| Applications per program full-time employee | 64 | 31 | 23 |
| Active grants per program full-time employee | 24 | 33 | 26 |

Impact on and Understanding of Grantees' Fields

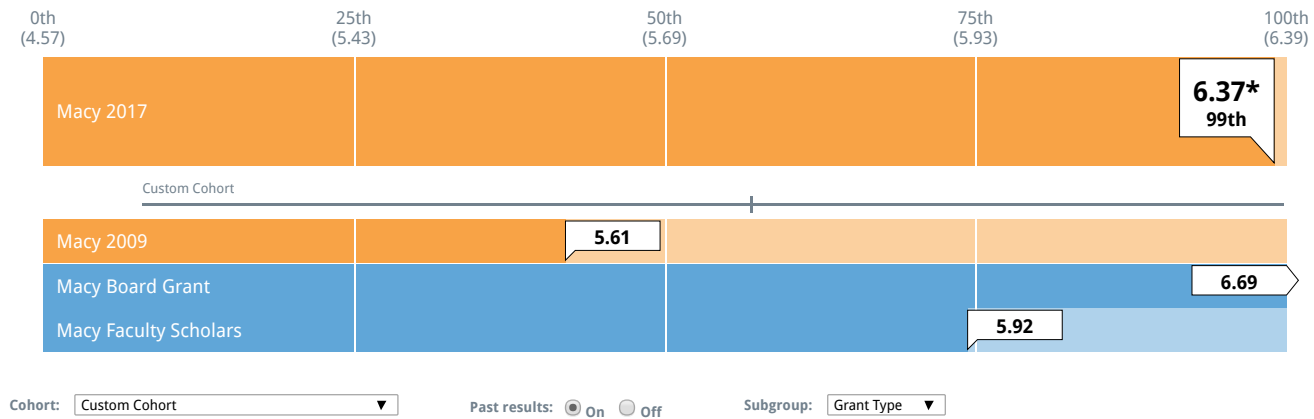
“Overall, how would you rate the Foundation’s impact on your field?”

1 = No impact 7 = Significant positive impact



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

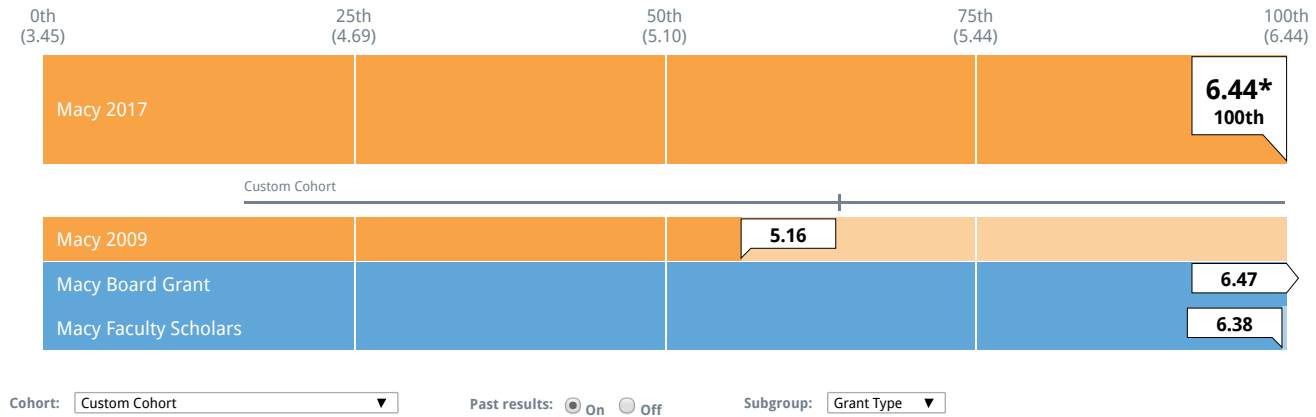
1 = Limited understanding of the field 7 = Regarded as an expert in the field



Advancing Knowledge and Public Policy

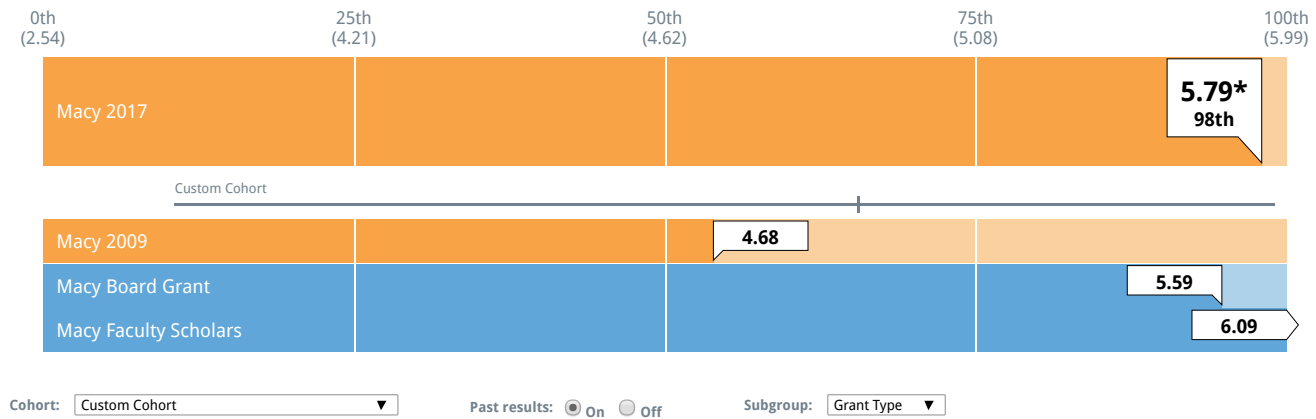
"To what extent has the Foundation advanced the state of knowledge in your field?"

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



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

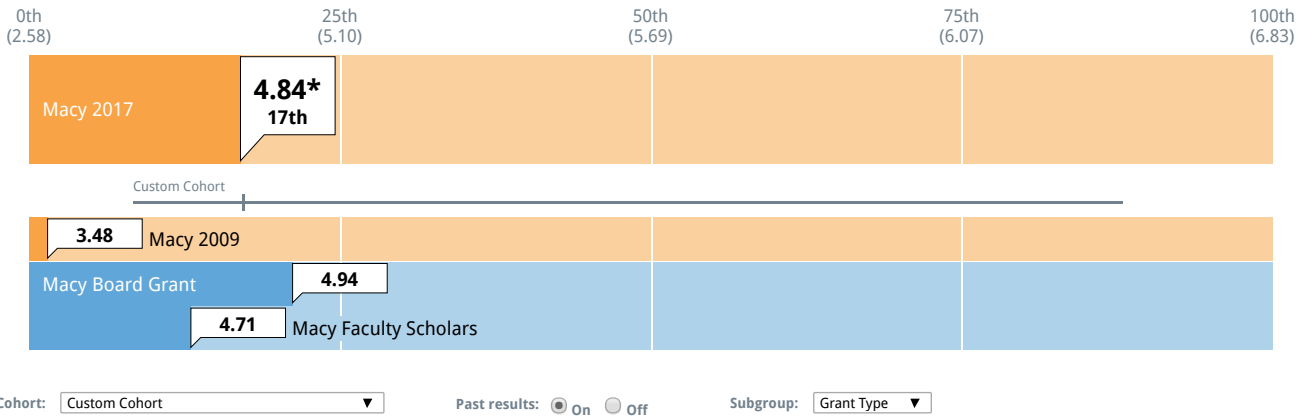
1 = Not at all 7 = Major influence on shaping public policy



Impact on and Understanding of Grantees' Local Communities

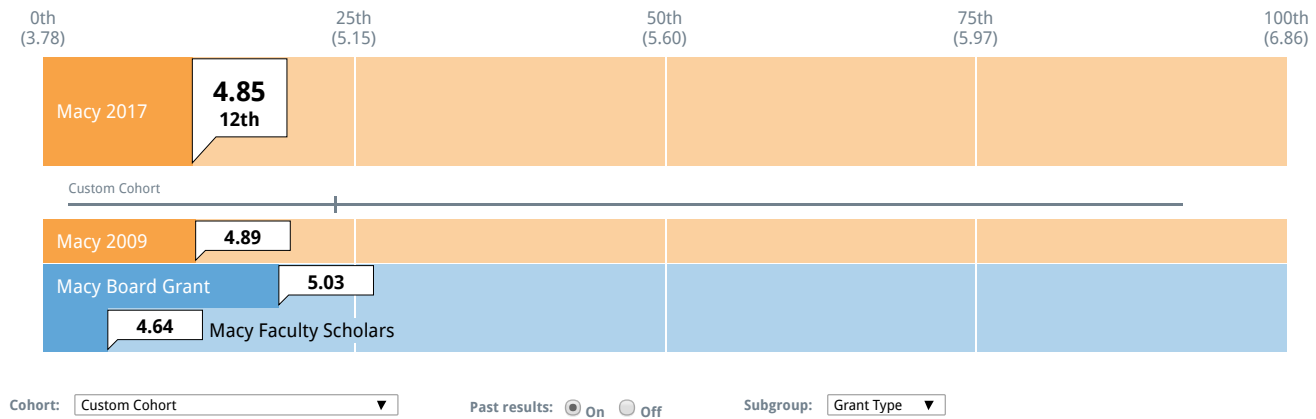
“Overall, how would you rate the Foundation’s impact on your local community?”

1 = No impact 7 = Significant positive impact



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

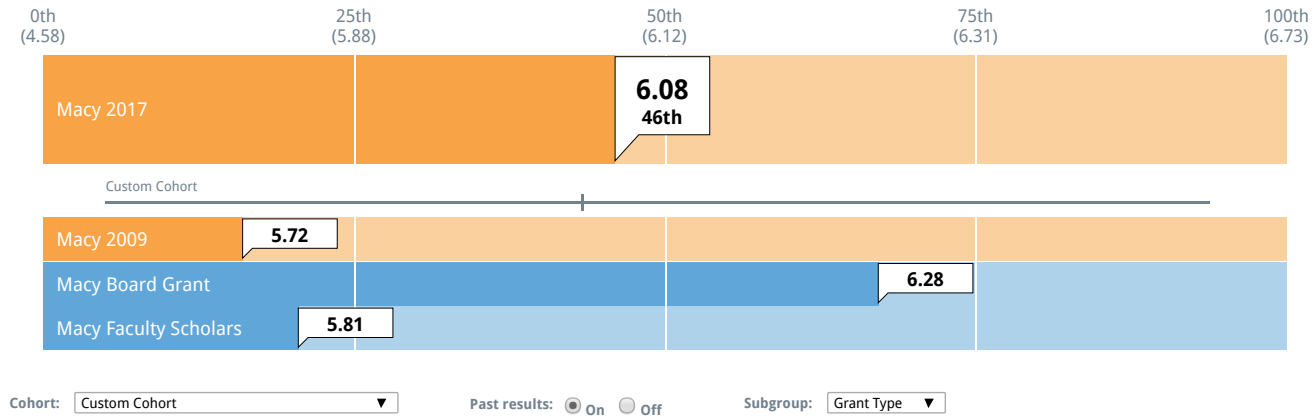
1 = Limited understanding of the community 7 = Regarded as an expert on the community



Impact on and Understanding of Grantees' Organizations

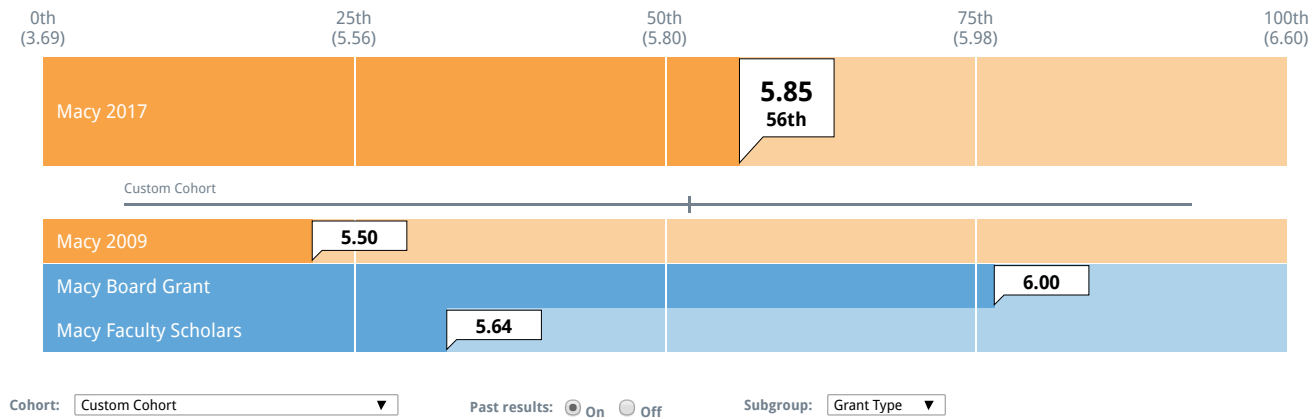
“Overall, how would you rate the Foundation’s impact on your organization?”

1 = No impact 7 = Significant positive impact



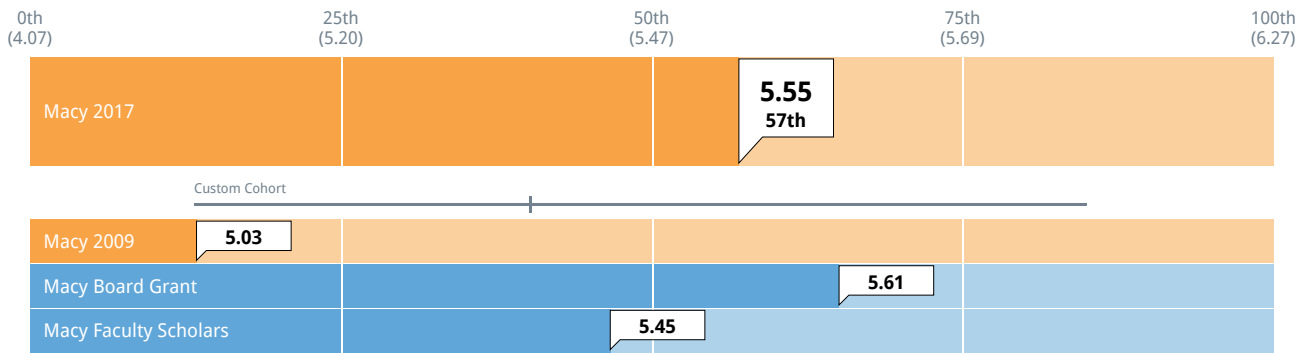
“How well does the Foundation understand your organization’s strategy and goals?”

1 = Limited understanding 7 = Thorough understanding



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

1 = Did not improve ability 7 = Substantially improved ability



Cohort: Custom Cohort

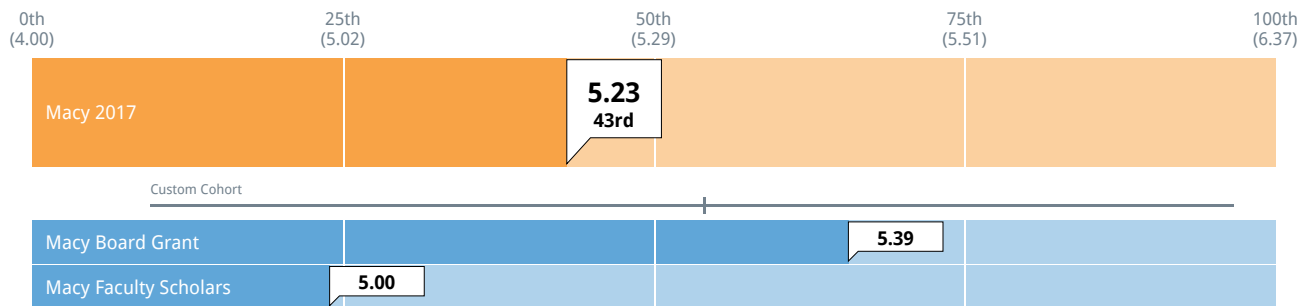
Past results: On Off

Subgroup: Grant Type

Grantee Challenges

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

1 = Not at all aware 7 = Extremely aware



Cohort: Custom Cohort ▼

Past results: On Off

Subgroup: Grant Type ▼

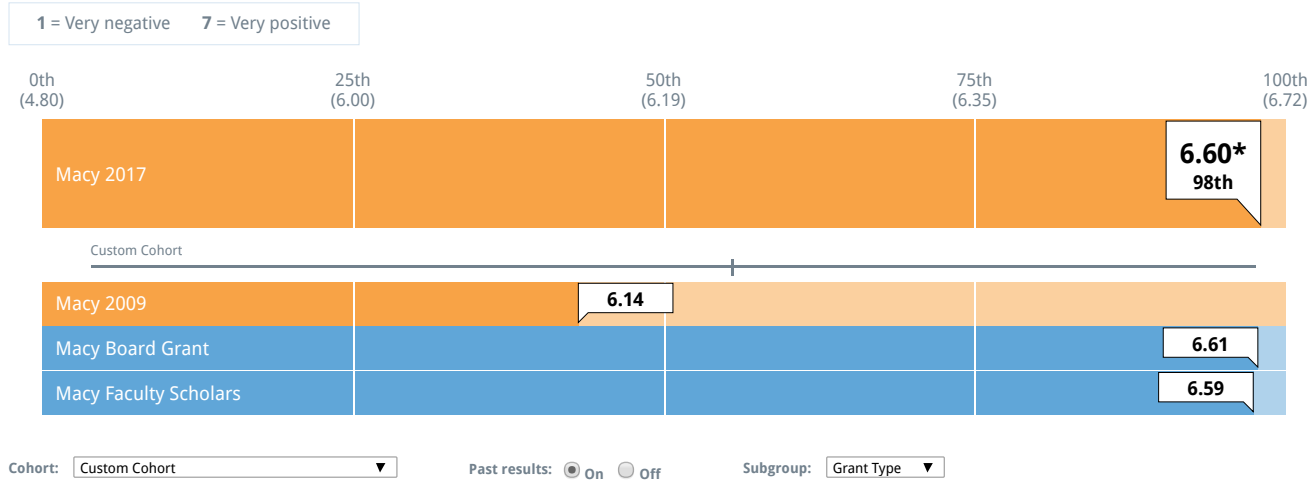
Funder-Grantee Relationships

Funder-Grantee Relationships Summary Measure

The quality of interactions and the clarity and consistency of communications together create the larger construct that CEP refers to as “relationships.” The relationships measure below is an average of grantee ratings on the following measures:

1. Fairness of treatment by the foundation
2. Comfort approaching the foundation if a problem arises
3. Responsiveness of foundation staff
4. Clarity of communication of the foundation's goals and strategy
5. Consistency of information provided by different communications

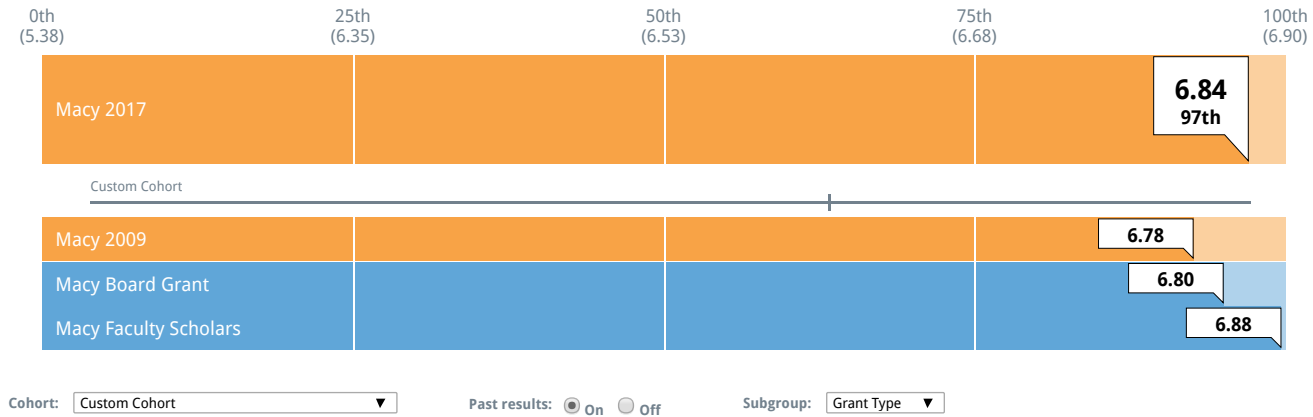
Funder-Grantee Relationships Summary Measure



Quality of Interactions

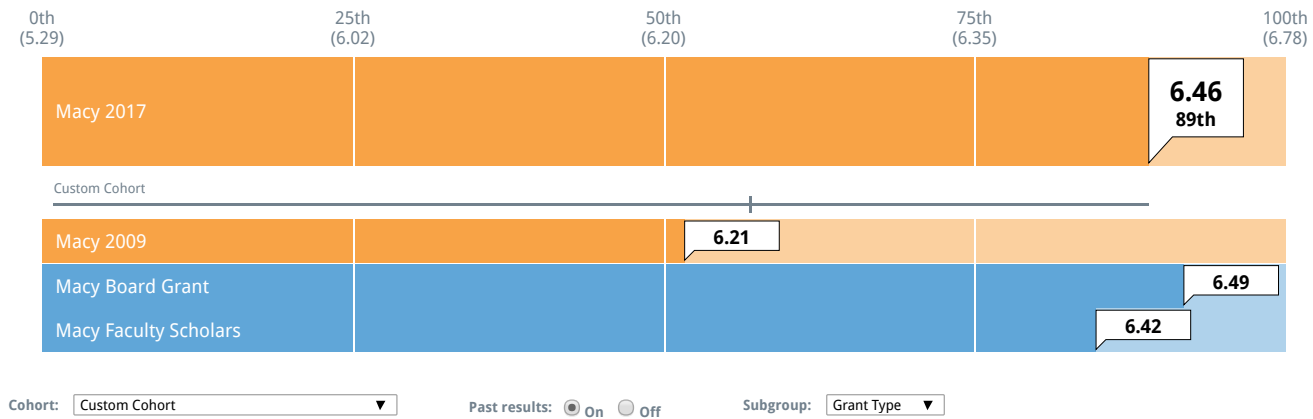
“Overall, how fairly did the Foundation treat you?”

1 = Not at all fairly 7 = Extremely fairly



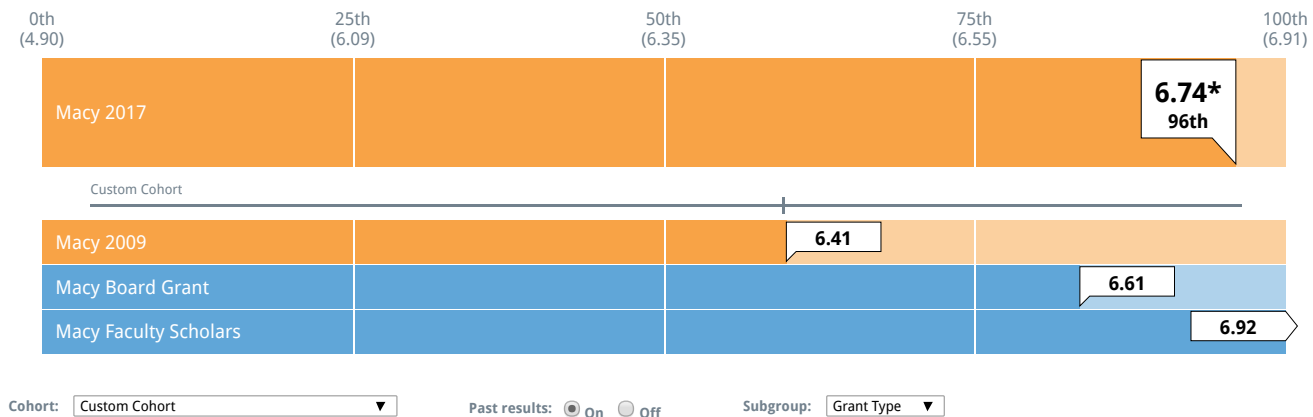
“How comfortable do you feel approaching the Foundation if a problem arises?”

1 = Not at all comfortable 7 = Extremely comfortable



“Overall, how responsive was the Foundation staff?”

1 = Not at all responsive 7 = Extremely responsive



Interaction Patterns

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

| Frequency of Contact with Program Officer | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|-------------------------------------------|-----------|-----------|----------------|---------------|
| Weekly or more often | 0% | 0% | 3% | 2% |
| A few times a month | 3% | 4% | 11% | 10% |
| Monthly | 11% | 6% | 15% | 14% |
| Once every few months | 58% | 51% | 52% | 53% |
| Yearly or less often | 27% | 38% | 18% | 20% |

| Frequency of Contact with Program Officer (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|---------------------------------------------------------|------------------|-----------------------|
| Weekly or more often | 0% | 0% |
| A few times a month | 6% | 0% |
| Monthly | 6% | 19% |
| Once every few months | 50% | 69% |
| Yearly or less often | 39% | 12% |

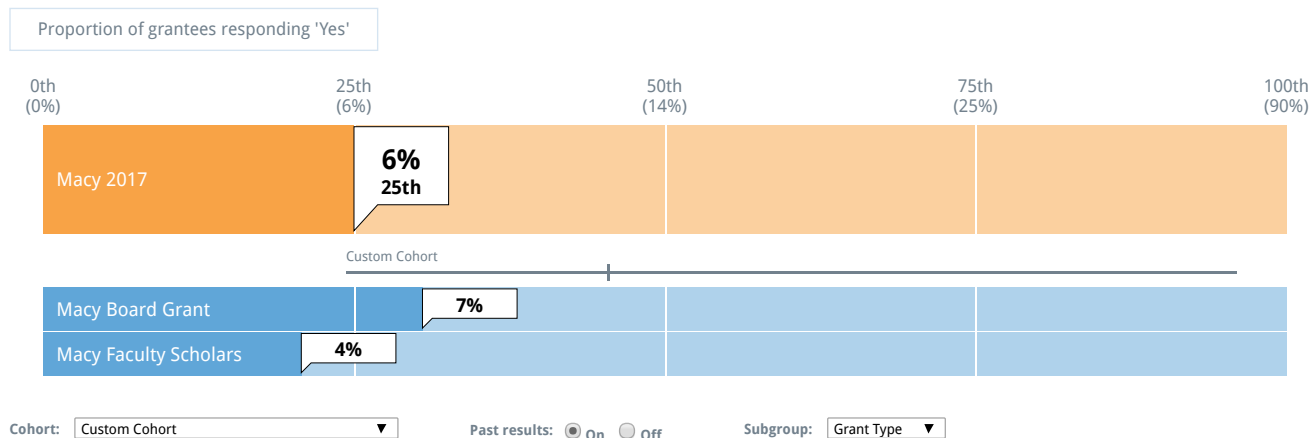
"Who most frequently initiated the contact you had with your program officer?"

| Initiation of Contact with Program Officer | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|--------------------------------------------|-----------|-----------|----------------|---------------|
| Program Officer | 29% | 8% | 15% | 17% |
| Both of equal frequency | 44% | 25% | 50% | 49% |
| Grantee | 27% | 67% | 35% | 33% |

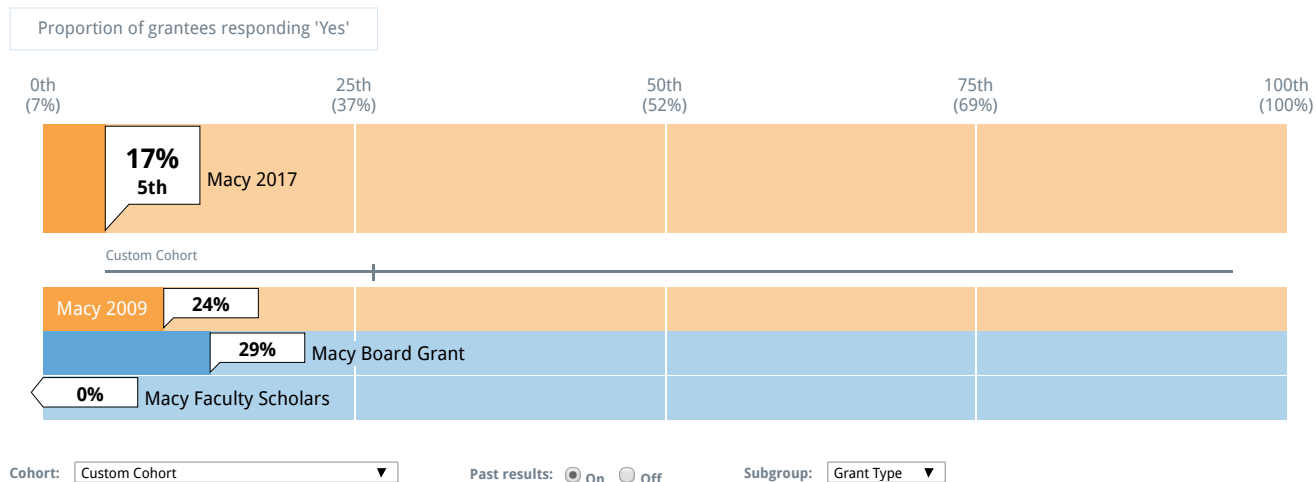
| Initiation of Contact with Program Officer (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|----------------------------------------------------------|------------------|-----------------------|
| Program Officer | 16% | 46% |
| Both of equal frequency | 48% | 38% |
| Grantee | 35% | 17% |

Contact Change and Site Visits

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



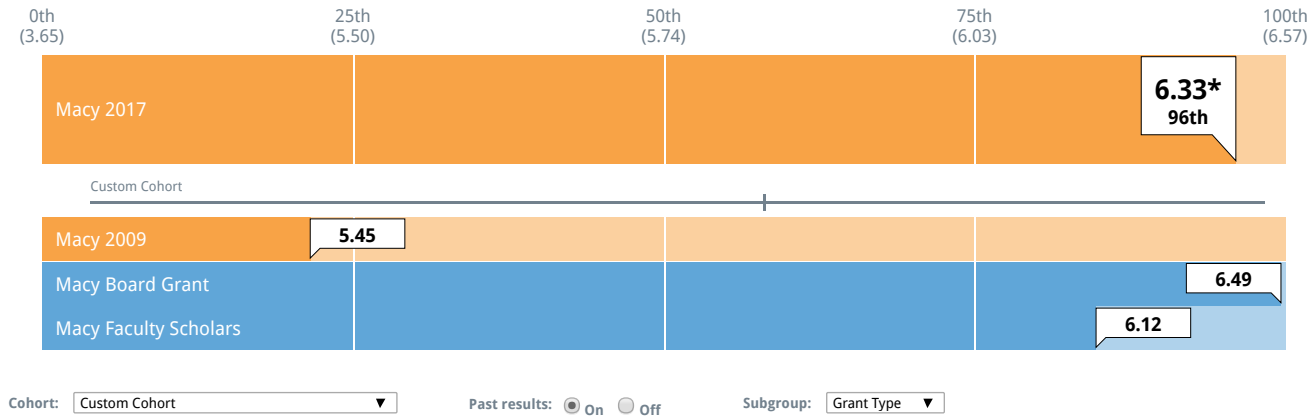
“Did the Foundation conduct a site visit during the course of this grant?”



Foundation Communication

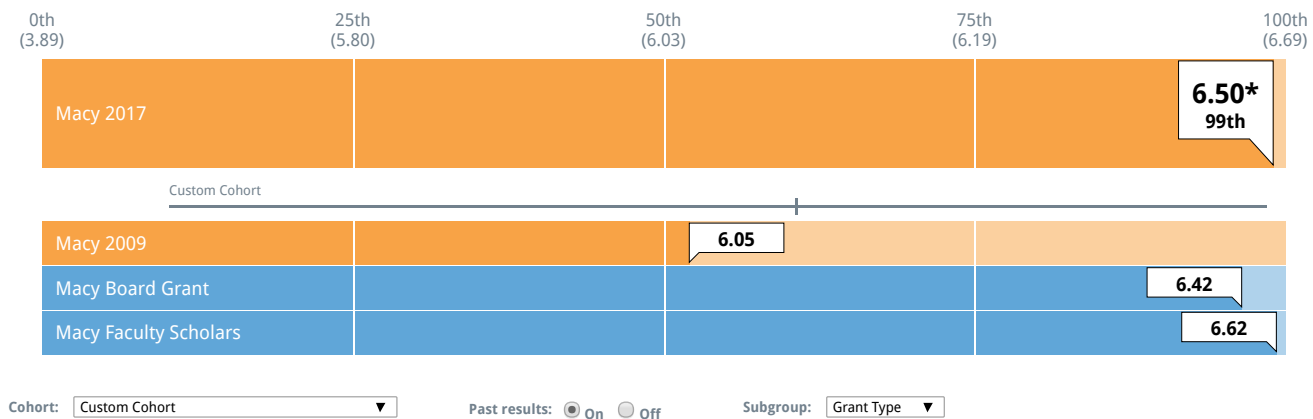
“How clearly has the Foundation communicated its goals and strategy to you?”

1 = Not at all clearly 7 = Extremely clearly



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

1 = Not at all consistent 7 = Completely consistent

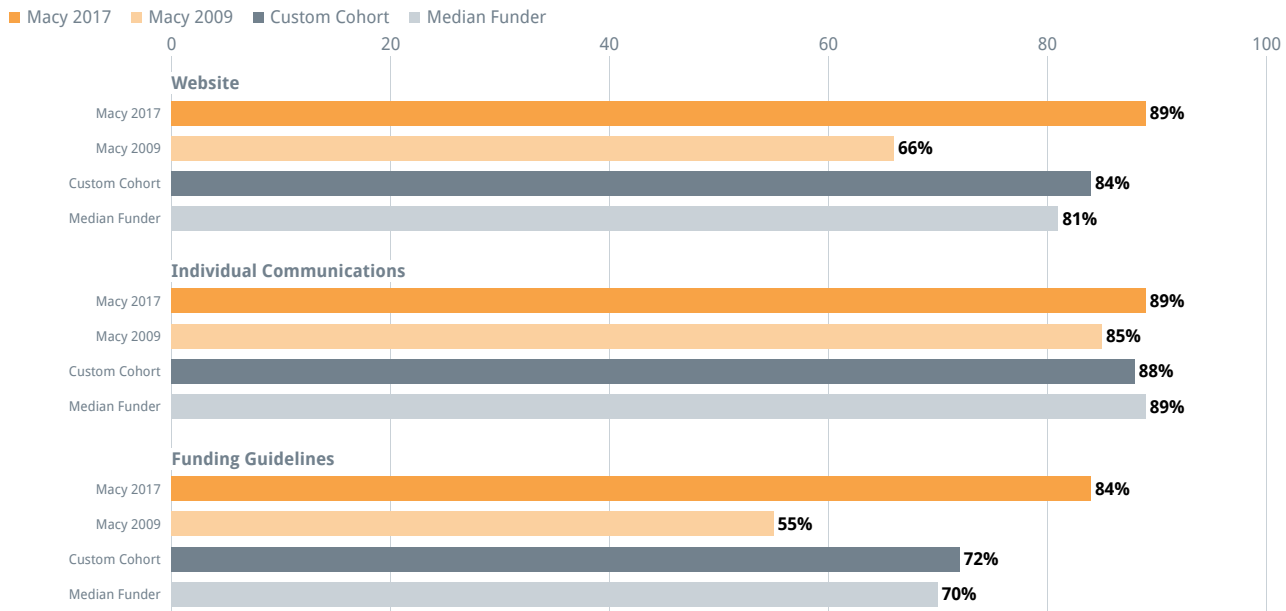


Communication Resources

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

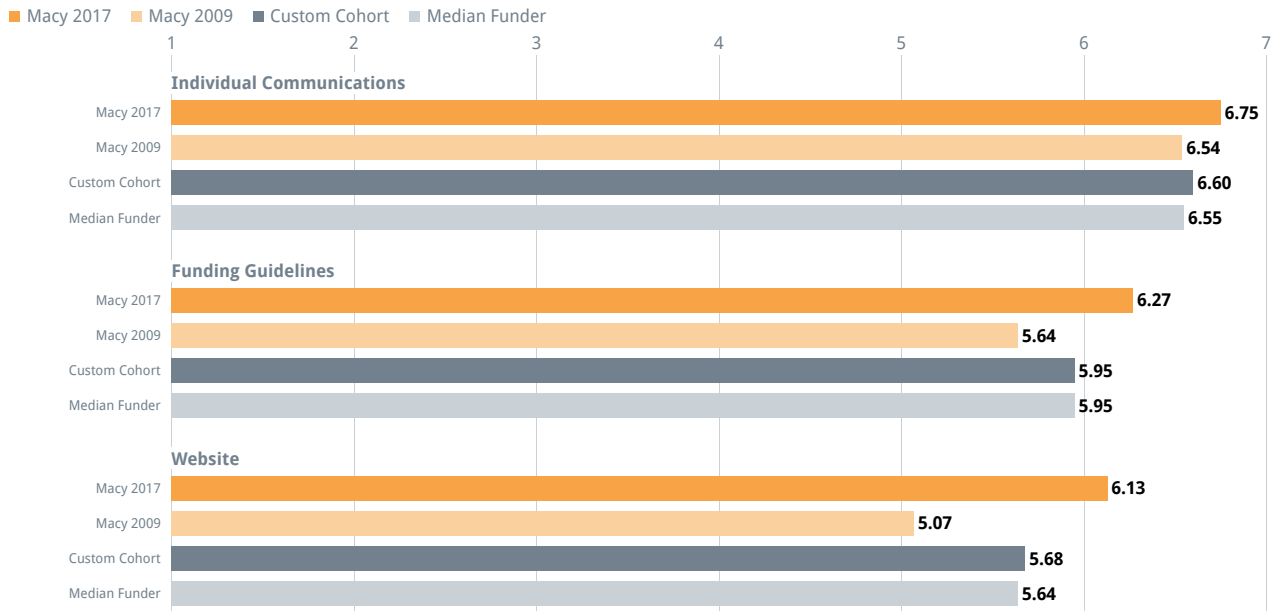
"Please indicate whether you used any of the following resources, and if so how helpful you found each."

Usage of Communication Resources - Overall



Helpfulness of Communication Resources - Overall

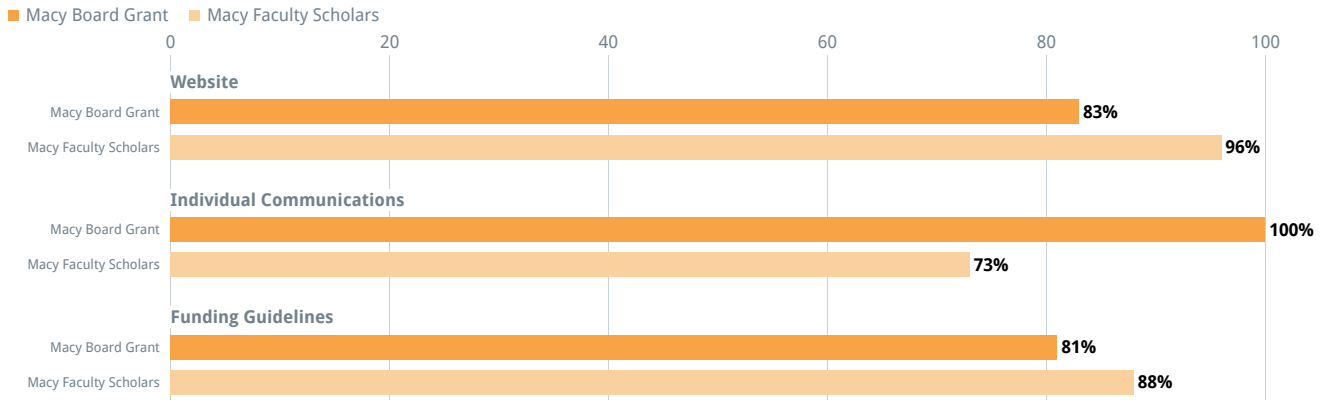
1 = Not at all helpful 7 = Extremely helpful



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

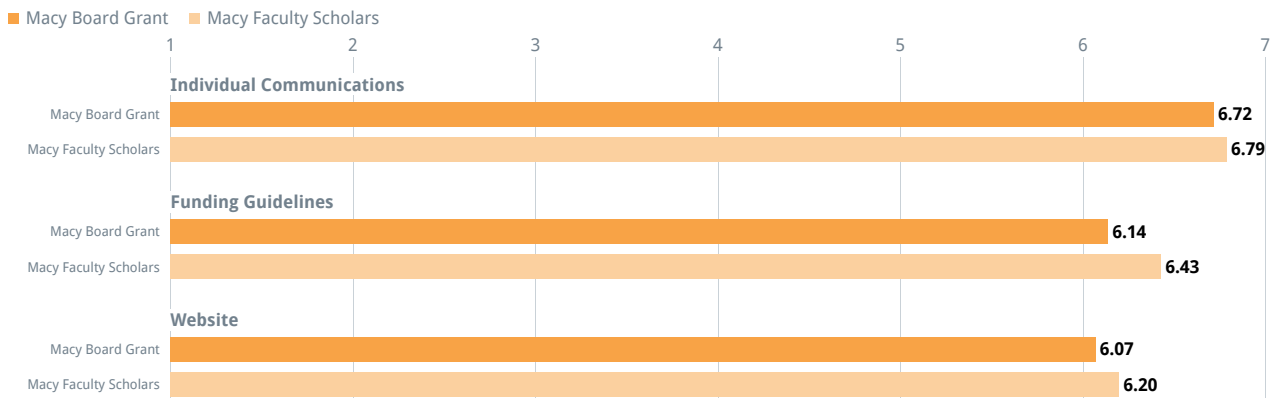
"Please indicate whether you used any of the following resources, and if so how helpful you found each."

Usage of Communication Resources - By Subgroup



Helpfulness of Communication Resources - By Subgroup

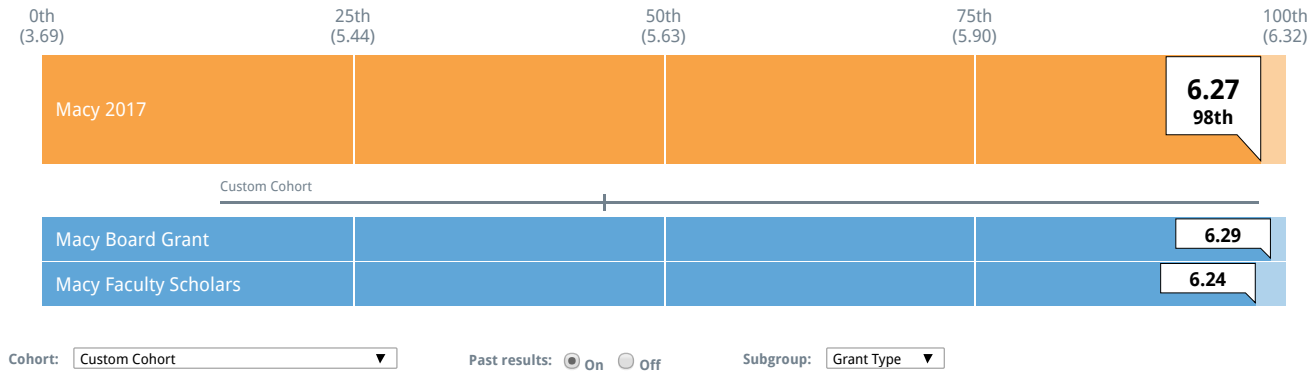
1 = Not at all helpful 7 = Extremely helpful



Funder Transparency

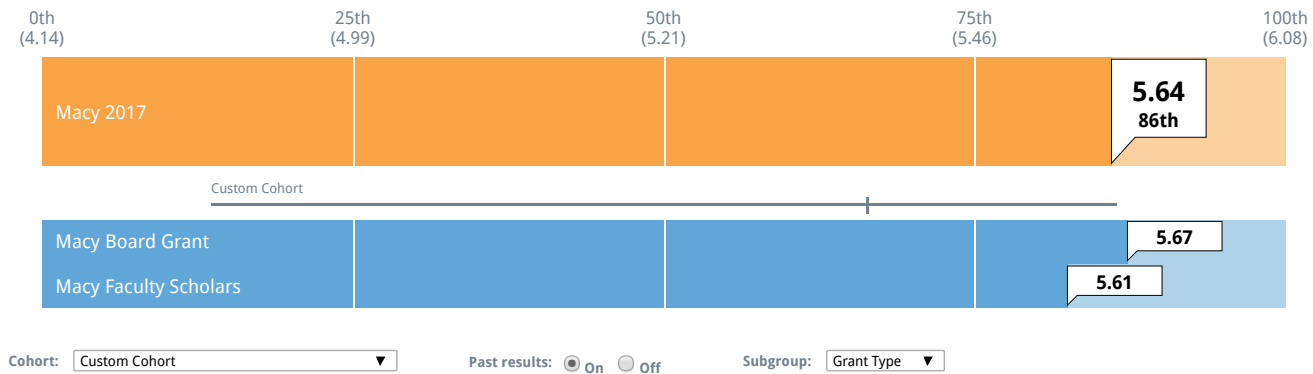
"Overall how transparent is the Foundation with your organization?"

1 = Not at all transparent 7 = Extremely transparent



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

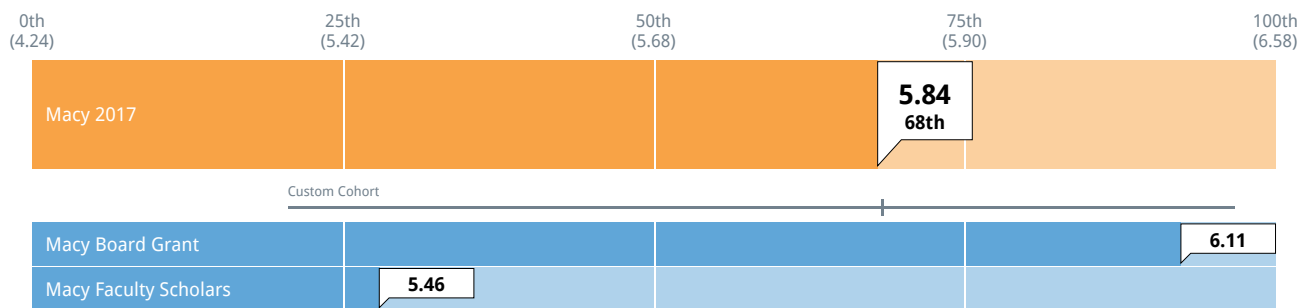
1 = Not at all 7 = To a great extent



Beneficiary and Contextual Understanding

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

1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort

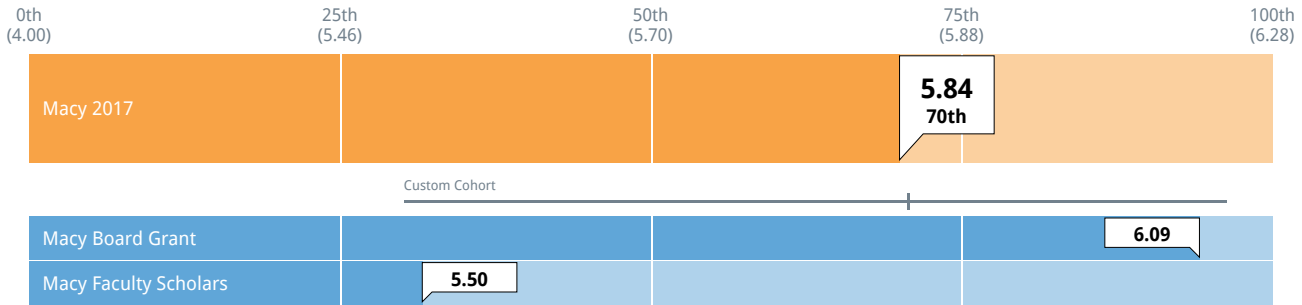
Past results: On Off

Subgroup: Grant Type

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

"How well does the Foundation understand your intended beneficiaries' needs?"

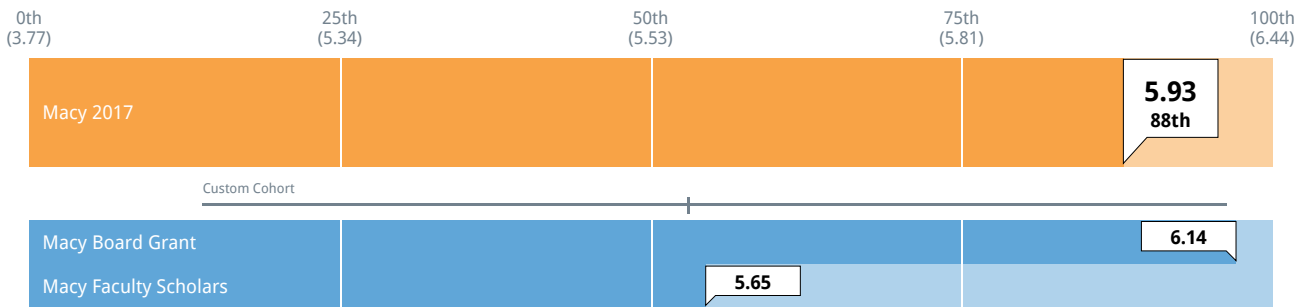
1 = Limited understanding 7 = Thorough understanding



Cohort: Past results: On Off Subgroup:

"To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?"

1 = Not at all 7 = To a great extent

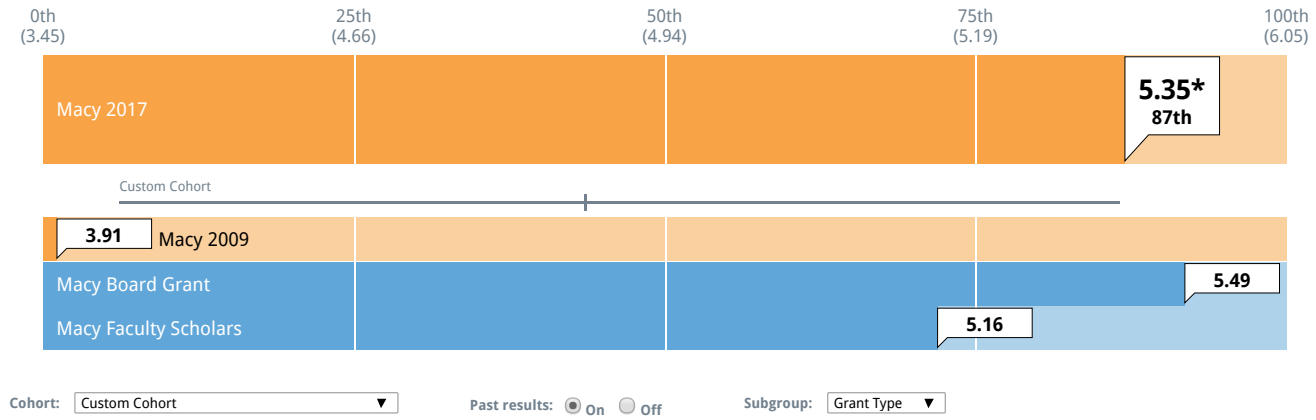


Cohort: Past results: On Off Subgroup:

Grant Processes

"How helpful was participating in the Foundation's selection process in strengthening the organization/program funded by the grant?"

1 = Not at all helpful 7 = Extremely helpful

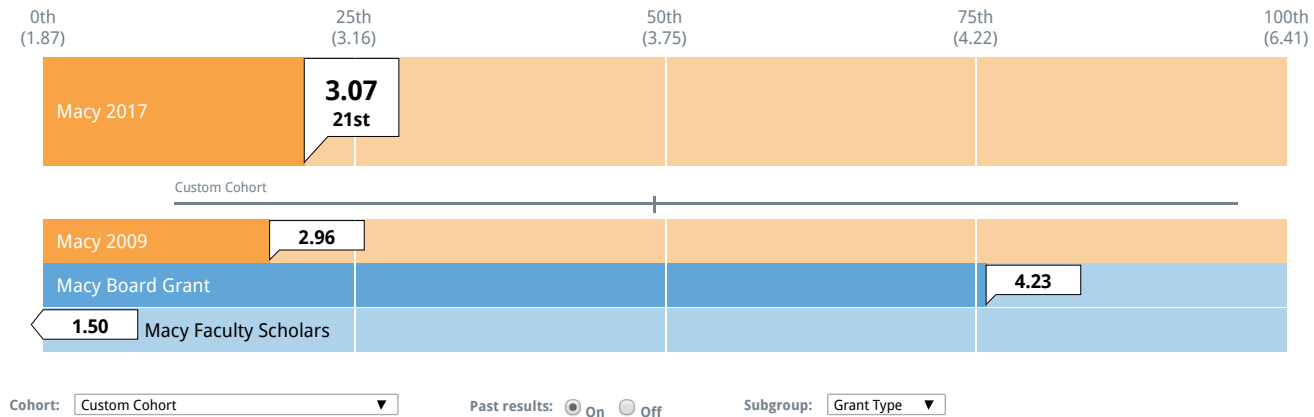


Selection Process

| Did you submit a proposal for this grant? | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|-------------------------------------------|-----------|-----------|----------------|---------------|
| Submitted a Proposal | 98% | 100% | 95% | 96% |
| Did Not Submit a Proposal | 2% | 0% | 5% | 4% |

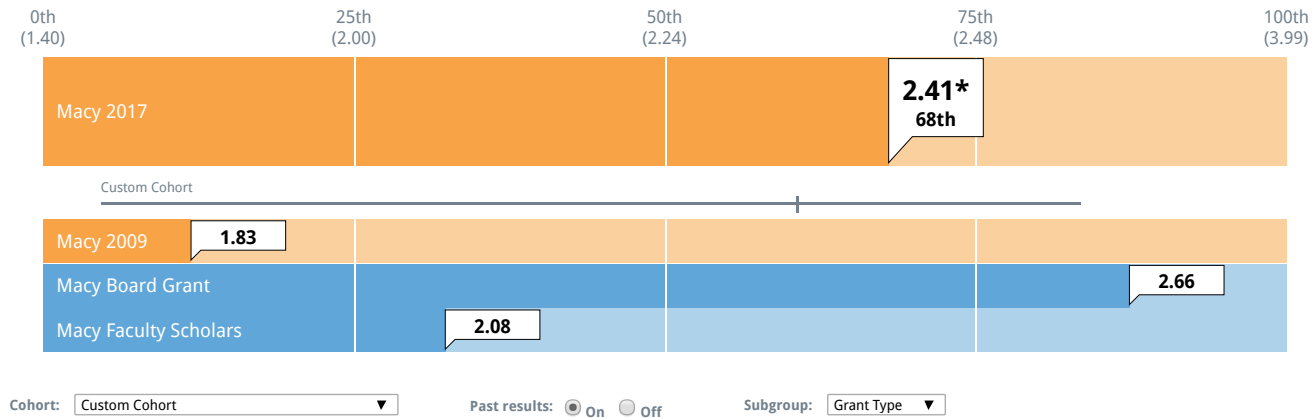
“How involved was the Foundation staff in the development of your proposal?”

1 = No involvement 7 = Substantial involvement



“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



Time Between Submission and Clear Commitment

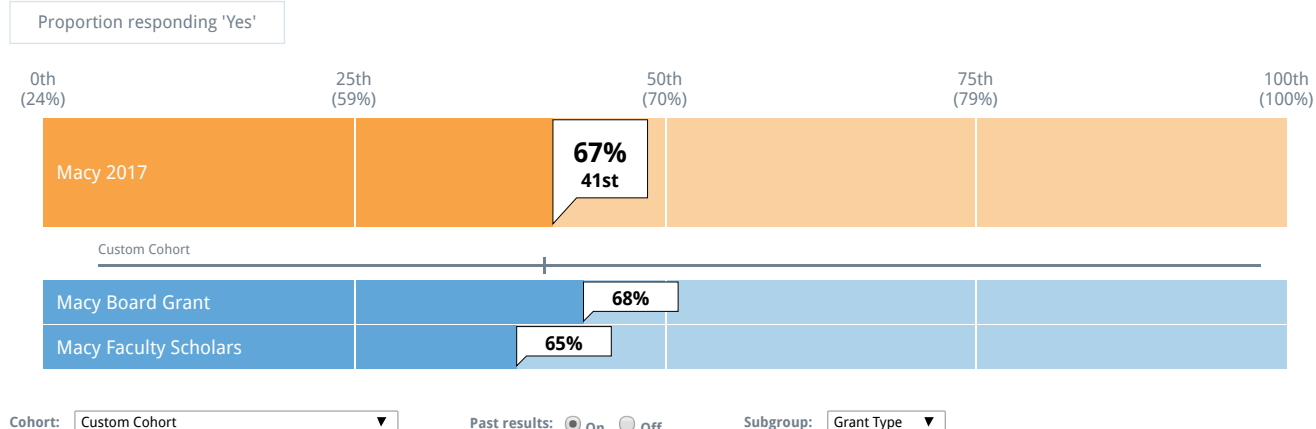
“How much time elapsed from the submission of the grant proposal to clear commitment of funding?”

| Time Elapsed from Submission of Proposal to Clear Commitment of Funding | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|-------------------------------------------------------------------------|-----------|-----------|----------------|---------------|
| Less than 1 month | 5% | 0% | 6% | 6% |
| 1 - 3 months | 38% | 38% | 55% | 54% |
| 4 - 6 months | 51% | 43% | 30% | 31% |
| 7 - 9 months | 4% | 13% | 5% | 5% |
| 10 - 12 months | 2% | 5% | 2% | 2% |
| More than 12 months | 0% | 3% | 2% | 1% |

| Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|---------------------------------------------------------------------------------------|------------------|-----------------------|
| Less than 1 month | 10% | 0% |
| 1 - 3 months | 61% | 8% |
| 4 - 6 months | 23% | 88% |
| 7 - 9 months | 3% | 4% |
| 10 - 12 months | 3% | 0% |
| More than 12 months | 0% | 0% |

Reporting and Evaluation Process

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



***The following questions were recently added to the grantee survey and depict comparative data from 18 funders in the dataset.**

| Participation in Reporting and/or Evaluation Processes | Macy 2017 | Average Funder |
|---------------------------------------------------------------|-----------|----------------|
| Participated in a reporting process only | 54% | 57% |
| Participated in an evaluation process only | 2% | 1% |
| Participated in both a reporting and an evaluation process | 41% | 29% |
| Participated in neither a reporting nor an evaluation process | 3% | 13% |

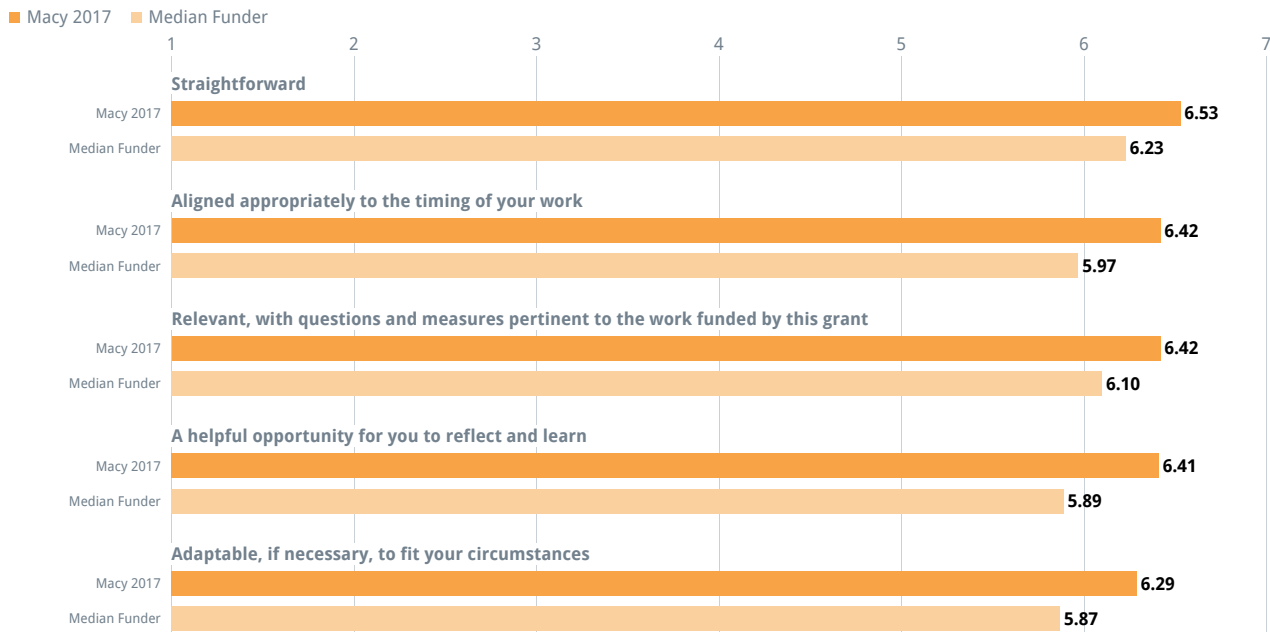
| Participation in Reporting and/or Evaluation Processes (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|----------------------------------------------------------------------|------------------|-----------------------|
| Participated in a reporting process only | 56% | 52% |
| Participated in an evaluation process only | 0% | 4% |
| Participated in both a reporting and an evaluation process | 44% | 36% |
| Participated in neither a reporting nor an evaluation process | 0% | 8% |

Reporting Process

*The following questions were recently added to the grantee survey and depict comparative data from 18 funders in the dataset.

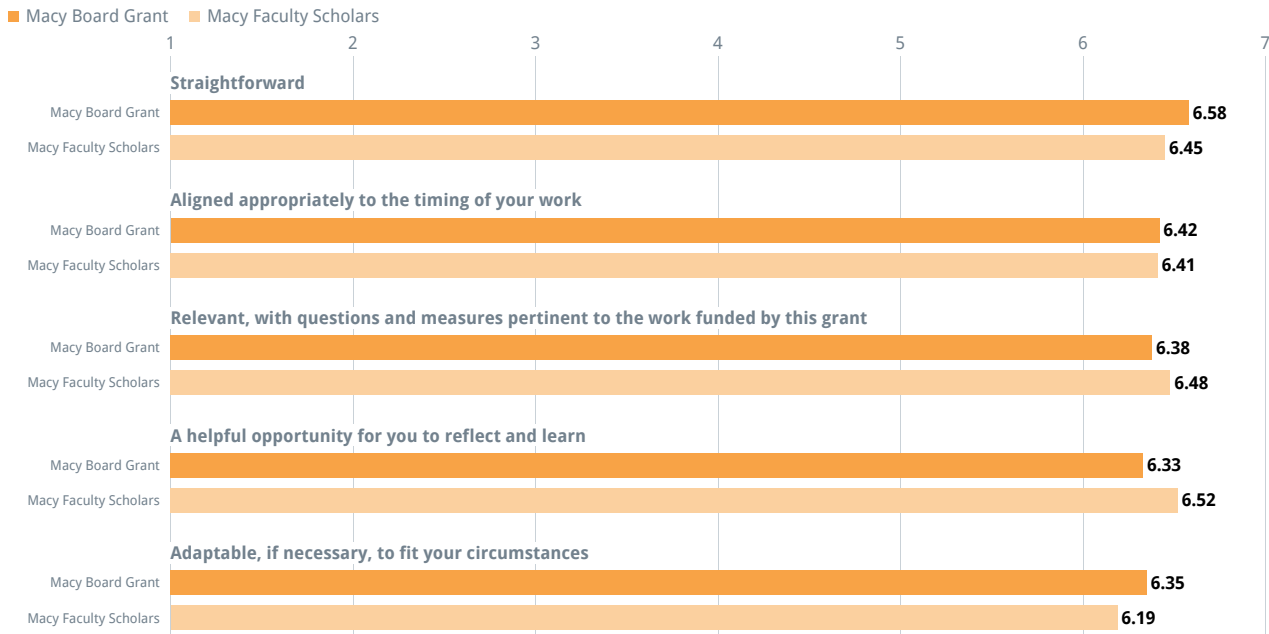
"To what extent was the Foundation's reporting process..." - Overall

1 = Not at all 7 = To a great extent



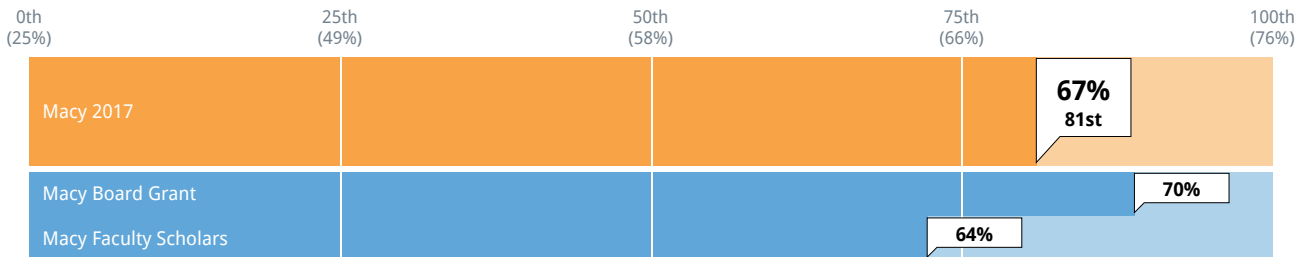
"To what extent was the Foundation's reporting process..." - By Subgroup

1 = Not at all 7 = To a great extent



"At any point have you had a substantive discussion with the Foundation about the report(s) you or your colleagues submitted as part of the reporting process?"

Proportion of grantees responding 'Yes'



Cohort: **None** ▼

Past results: On Off

Subgroup: **Grant Type** ▼

Evaluation Process

*The following questions were recently added to the grantee survey and depict comparative data from 18 funders in the dataset.

| "Who was primarily responsible for carrying out the evaluation?" | Macy 2017 | Average Funder |
|------------------------------------------------------------------|-----------|----------------|
| Evaluation staff at the Foundation | 23% | 19% |
| Evaluation staff at your organization | 73% | 58% |
| External evaluator, chosen by the Foundation | 0% | 13% |
| External evaluator, chosen by your organization | 5% | 10% |

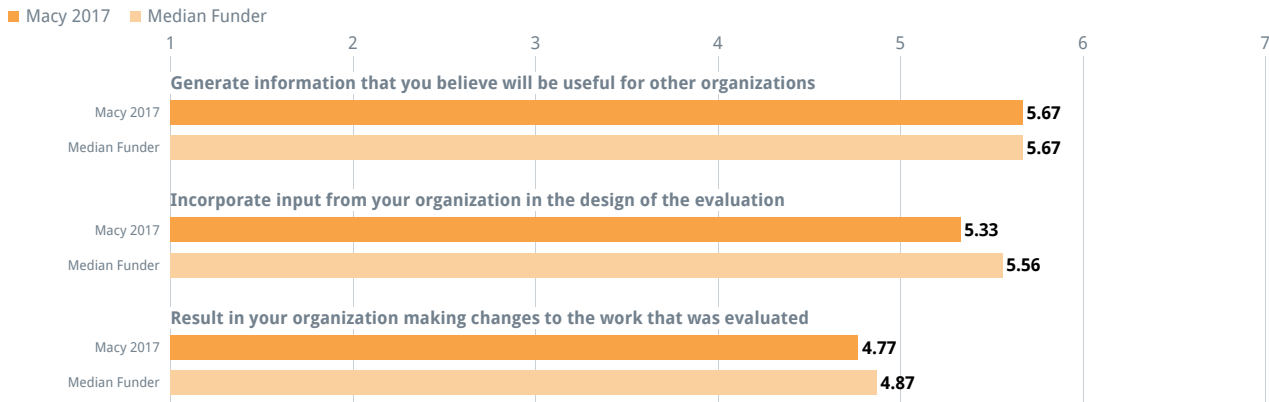
| "Who was primarily responsible for carrying out the evaluation?" (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|--------------------------------------------------------------------------------|------------------|-----------------------|
| Evaluation staff at the Foundation | 7% | 50% |
| Evaluation staff at your organization | 86% | 50% |
| External evaluator, chosen by the Foundation | 0% | 0% |
| External evaluator, chosen by your organization | 7% | 0% |

| "Did the Foundation provide financial support for the evaluation?" | Macy 2017 | Average Funder |
|---------------------------------------------------------------------|-----------|----------------|
| Yes, the evaluation's costs were fully funded by the Foundation | 14% | 27% |
| Yes, the evaluation's costs were partially funded by the Foundation | 38% | 17% |
| No, the evaluation's costs were not funded by the Foundation | 48% | 55% |

| "Did the Foundation provide financial support for the evaluation?" (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|----------------------------------------------------------------------------------|------------------|-----------------------|
| Yes, the evaluation's costs were fully funded by the Foundation | 15% | 13% |
| Yes, the evaluation's costs were partially funded by the Foundation | 46% | 25% |
| No, the evaluation's costs were not funded by the Foundation | 38% | 63% |

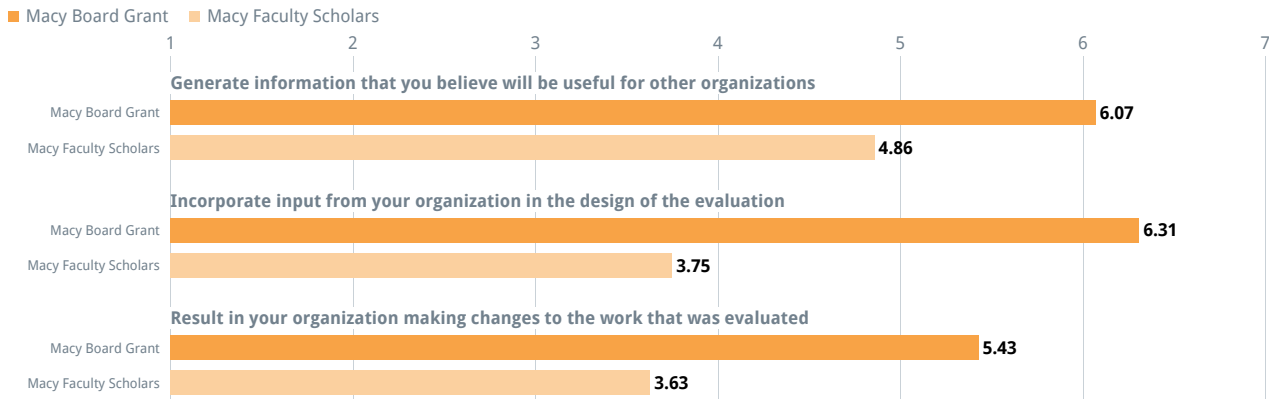
"To what extent did the evaluation..." - Overall

1 = Not at all 7 = To a great extent



"To what extent did the evaluation..." - By Subgroup

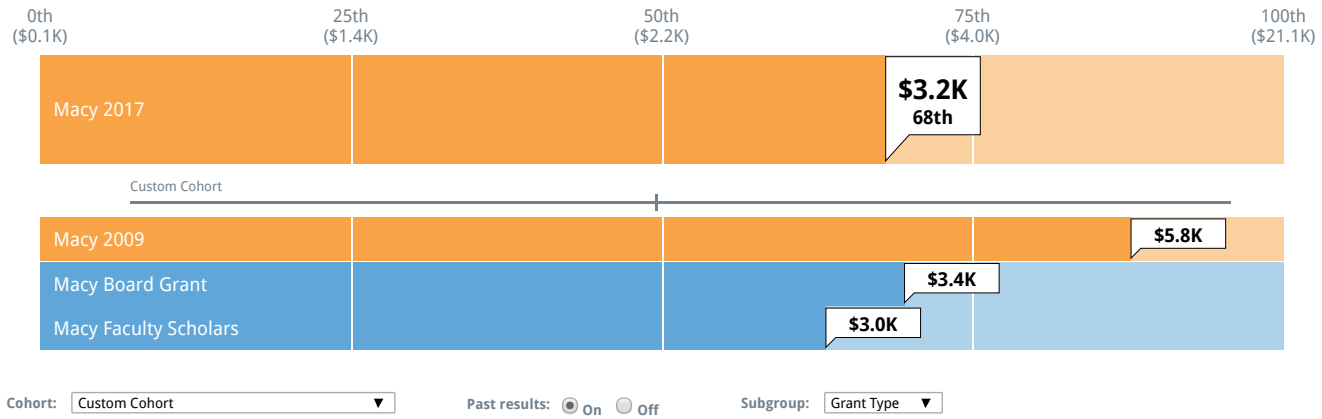
1 = Not at all 7 = To a great extent



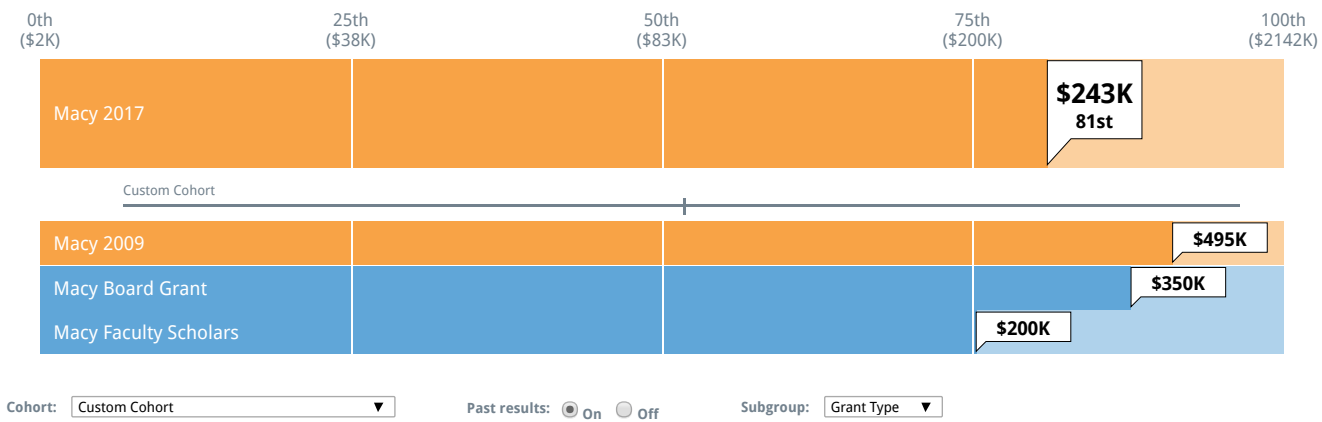
Dollar Return and Time Spent on Processes

Dollar Return: Median grant dollars awarded per process hour required

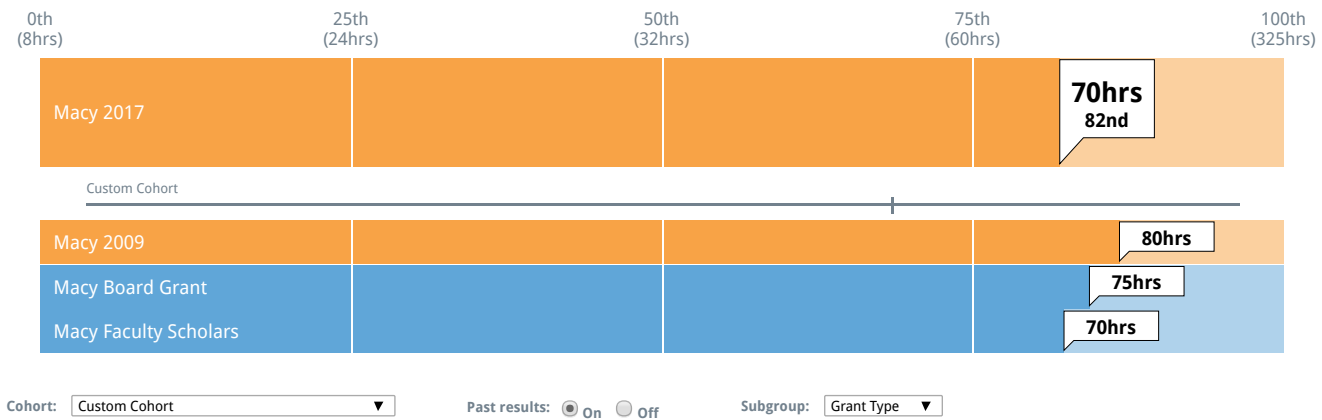
Includes total grant dollars awarded and total time necessary to fulfill the requirements over the lifetime of the grant



Median Grant Size

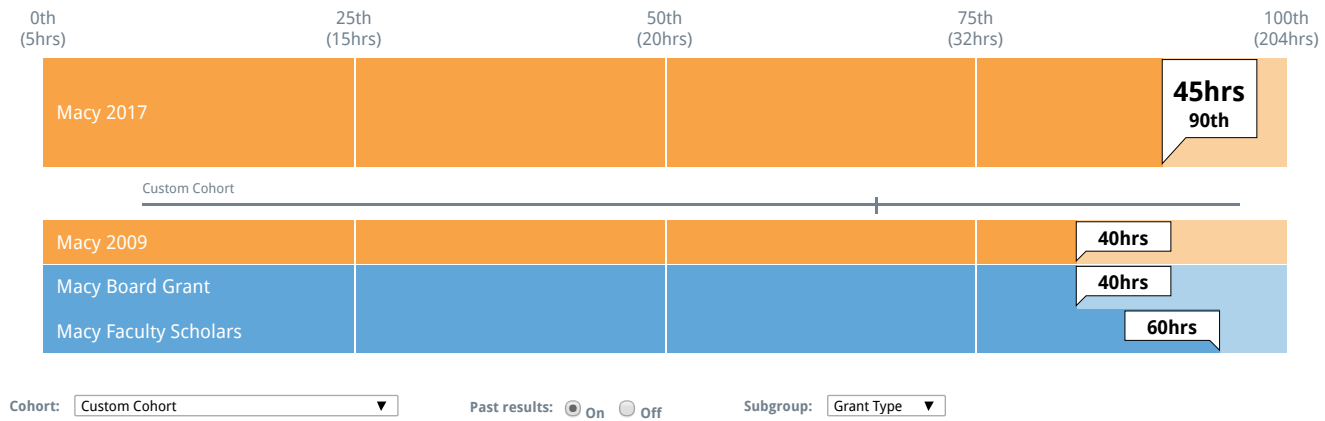


Median hours spent by grantees on funder requirements over grant lifetime



Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process

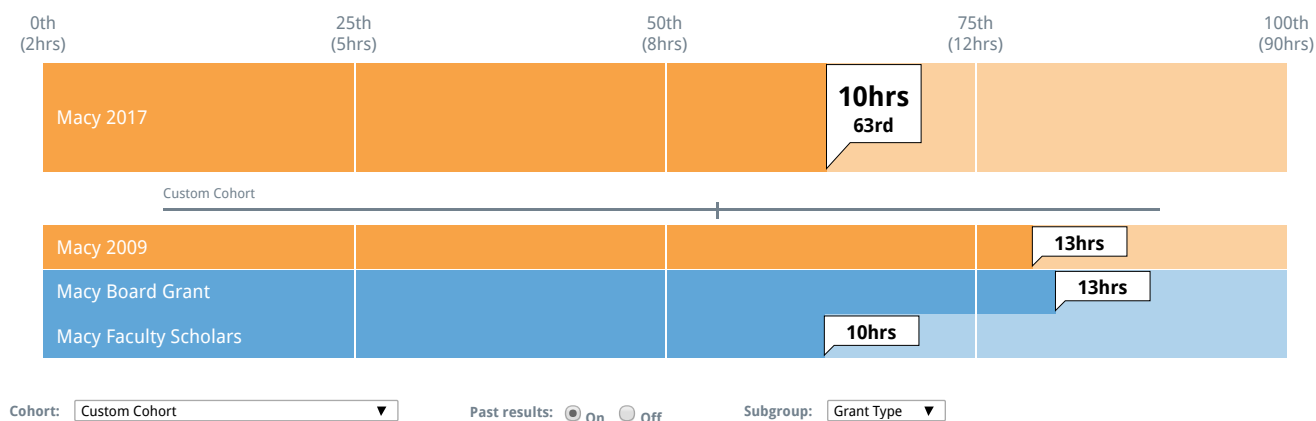


| Time Spent On Proposal And Selection Process | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|----------------------------------------------|-----------|-----------|----------------|---------------|
| 1 to 9 hours | 3% | 0% | 20% | 17% |
| 10 to 19 hours | 15% | 13% | 21% | 20% |
| 20 to 29 hours | 15% | 10% | 18% | 16% |
| 30 to 39 hours | 8% | 10% | 8% | 7% |
| 40 to 49 hours | 10% | 23% | 12% | 11% |
| 50 to 99 hours | 26% | 15% | 12% | 16% |
| 100 to 199 hours | 16% | 21% | 6% | 10% |
| 200+ hours | 8% | 8% | 4% | 3% |

| Time Spent On Proposal And Selection Process (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|------------------------------------------------------------|------------------|-----------------------|
| 1 to 9 hours | 6% | 0% |
| 10 to 19 hours | 19% | 8% |
| 20 to 29 hours | 14% | 15% |
| 30 to 39 hours | 8% | 8% |
| 40 to 49 hours | 11% | 8% |
| 50 to 99 hours | 14% | 42% |
| 100 to 199 hours | 14% | 19% |
| 200+ hours | 14% | 0% |

Time Spent on Reporting and Evaluation Process

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



| Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|--------------------------------------------------------------------------|-----------|-----------|----------------|---------------|
| 1 to 9 hours | 36% | 38% | 52% | 51% |
| 10 to 19 hours | 38% | 32% | 20% | 23% |
| 20 to 29 hours | 10% | 6% | 11% | 10% |
| 30 to 39 hours | 2% | 3% | 4% | 4% |
| 40 to 49 hours | 3% | 3% | 4% | 4% |
| 50 to 99 hours | 10% | 9% | 5% | 4% |
| 100+ hours | 2% | 9% | 5% | 5% |

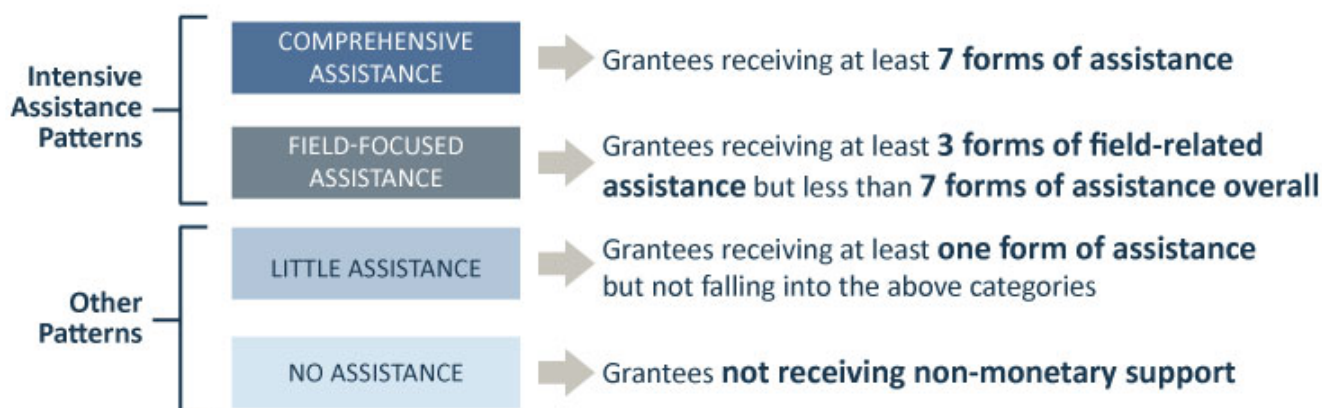
| Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|----------------------------------------------------------------------------------------|------------------|-----------------------|
| 1 to 9 hours | 31% | 42% |
| 10 to 19 hours | 34% | 42% |
| 20 to 29 hours | 14% | 4% |
| 30 to 39 hours | 3% | 0% |
| 40 to 49 hours | 3% | 4% |
| 50 to 99 hours | 14% | 4% |
| 100+ hours | 0% | 4% |

Non-Monetary Assistance

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

| Management Assistance | Field-Related Assistance | Other Assistance |
|-------------------------------------|--------------------------------------|-----------------------------------------------|
| General management advice | Encouraged/facilitated collaboration | Board development/governance assistance |
| Strategic planning advice | Insight and advice on your field | Information technology assistance |
| Financial planning/accounting | Introductions to leaders in field | Communications/marketing/publicity assistance |
| Development of performance measures | Provided research or best practices | Use of Foundation facilities |
| | Provided seminars/forums/convenings | Staff/management training |

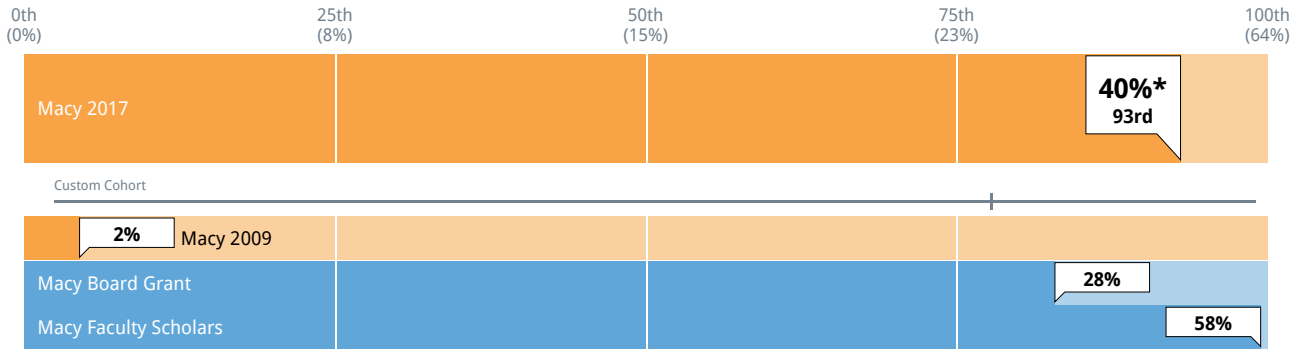
Based on their responses, CEP categorized grantees by the pattern of assistance they received. CEP's analysis shows that providing three or fewer assistance activities is often ineffective; it is only when grantees receive one of the two intensive patterns of assistance described below that they have a substantially more positive experience compared to grantees receiving no assistance.



| Non-Monetary Assistance Patterns | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|----------------------------------|-----------|-----------|----------------|---------------|
| Comprehensive | 13% | 0% | 7% | 10% |
| Field-focused | 27% | 2% | 11% | 12% |
| Little | 39% | 29% | 39% | 35% |
| None | 21% | 69% | 43% | 43% |

| Non-Monetary Assistance Patterns (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|------------------------------------------------|------------------|-----------------------|
| Comprehensive | 6% | 23% |
| Field-focused | 22% | 35% |
| Little | 42% | 35% |
| None | 31% | 8% |

Proportion of grantees that received field-focused or comprehensive assistance



Cohort:

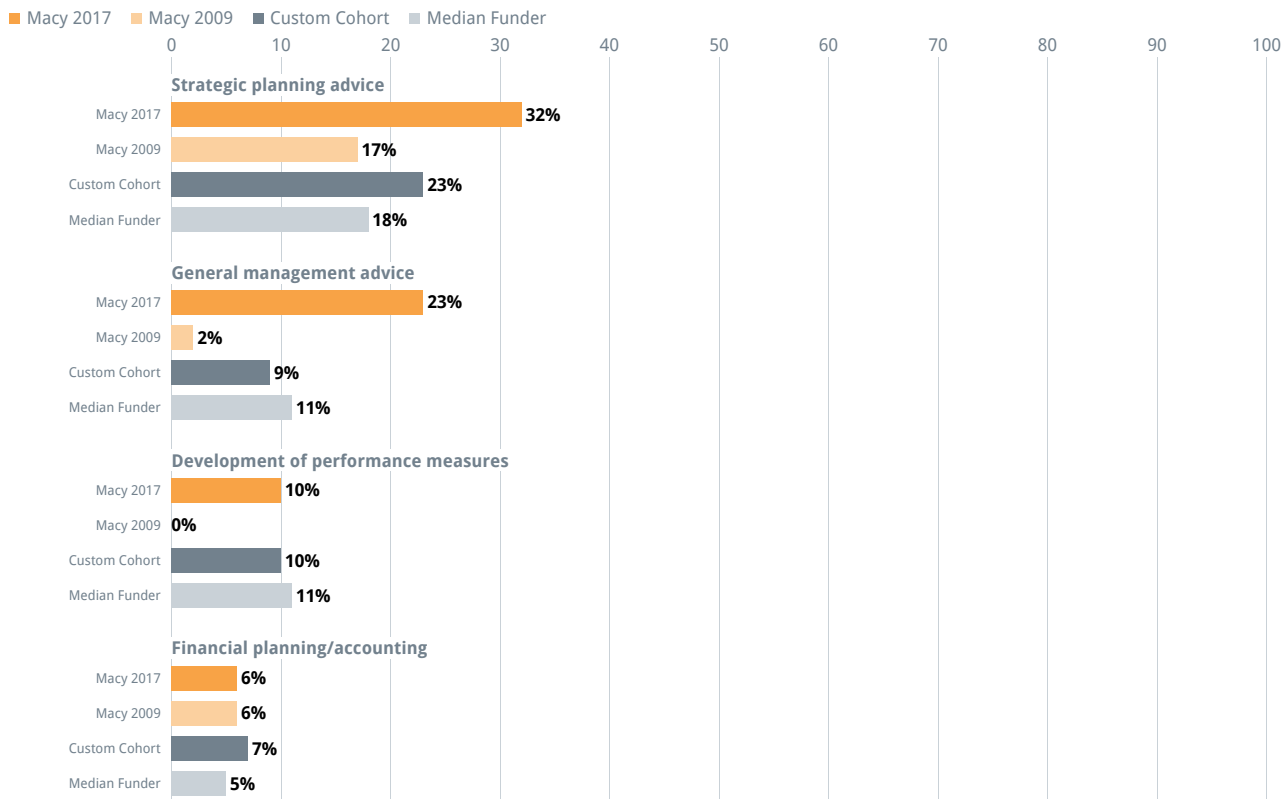
Past results: On Off

Subgroup:

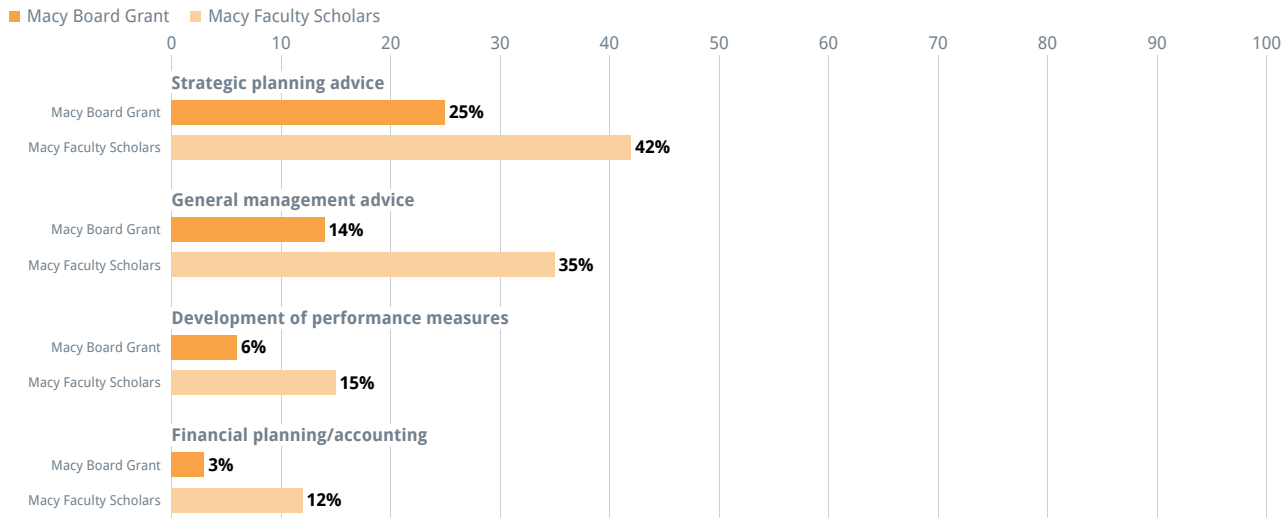
Management Assistance Activities

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

Percentage of Grantees that Received Management Assistance



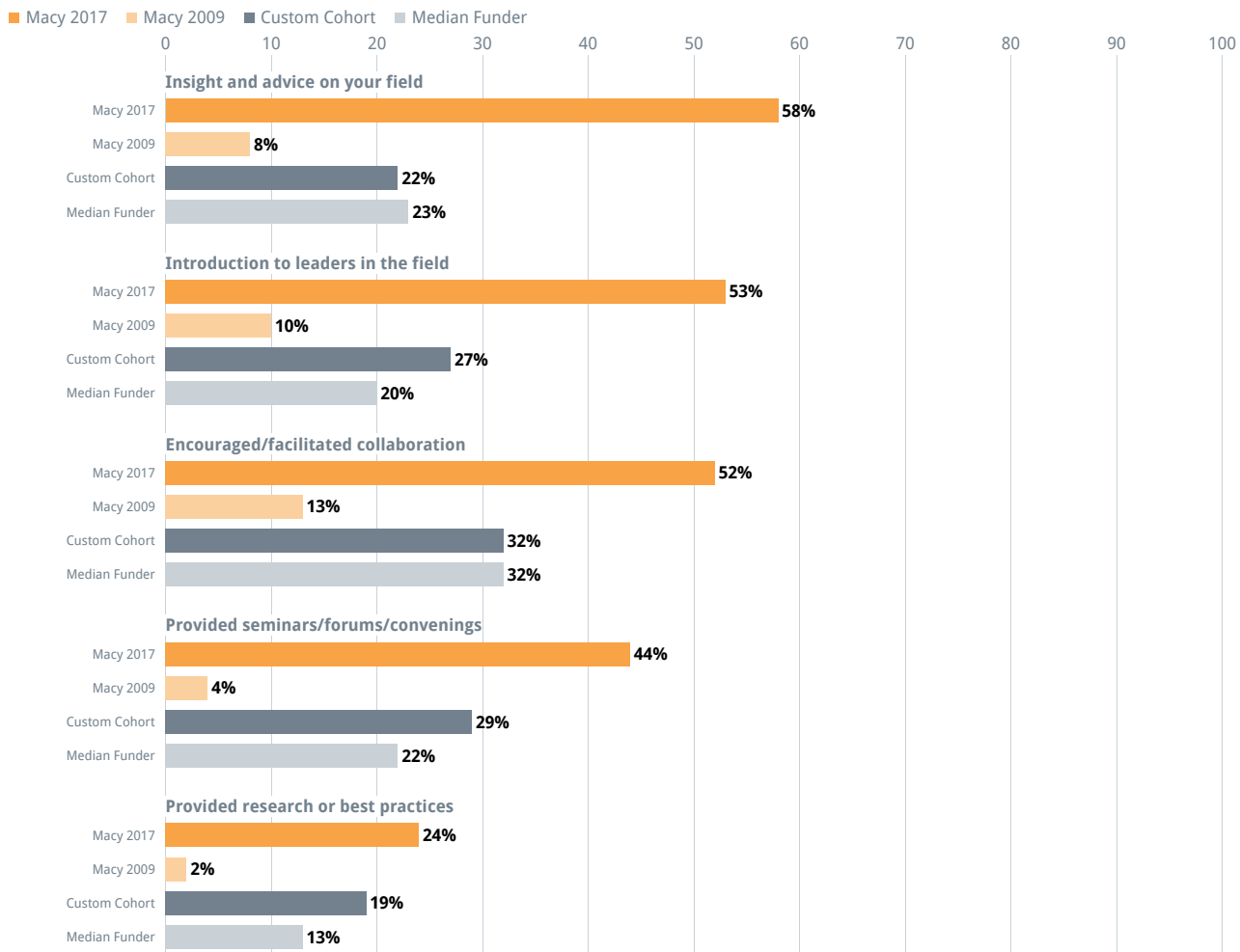
Percentage of Grantees that Received Management Assistance - By Subgroup



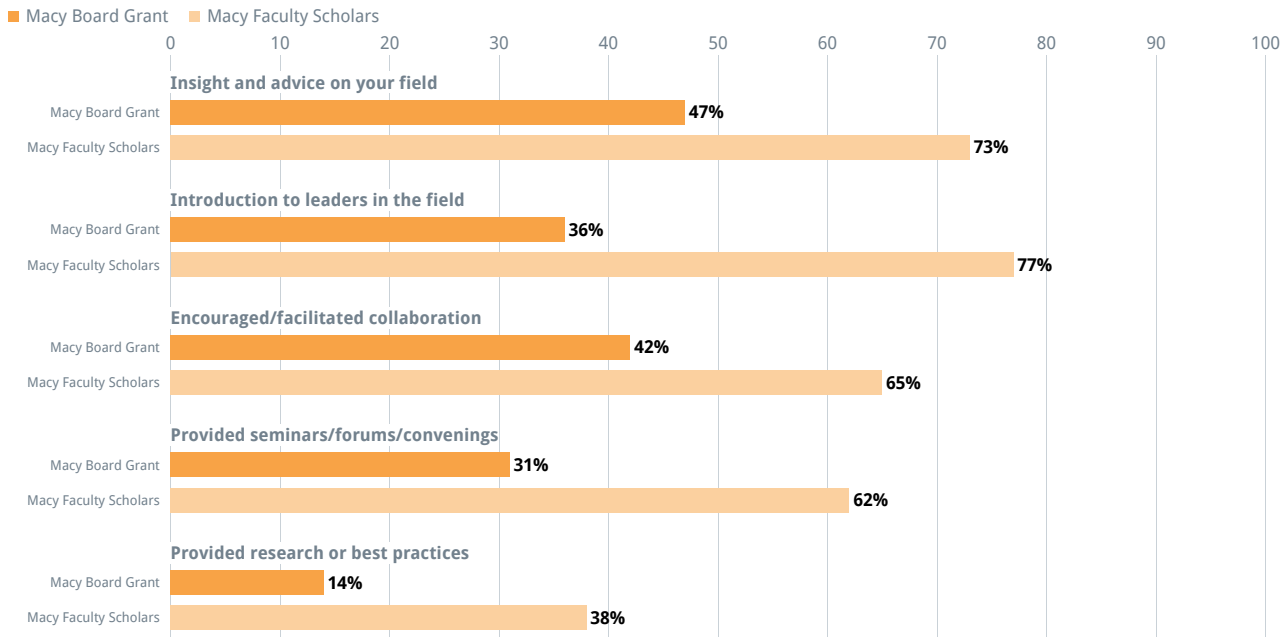
Field-Related Assistance Activities

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

Percentage of Grantees that Received Field-Related Assistance



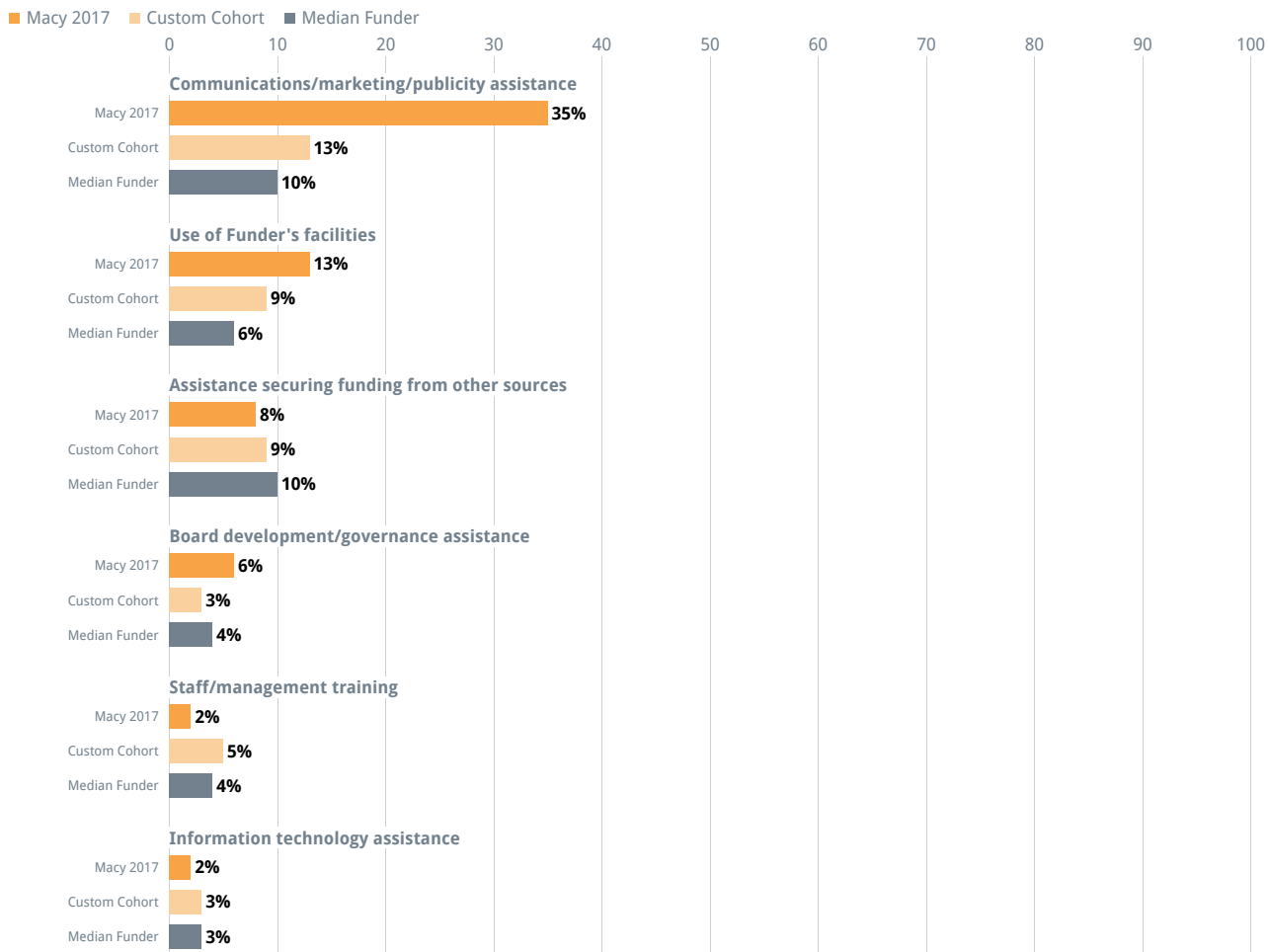
Percentage of Grantees that Received Field-Related Assistance - By Subgroup



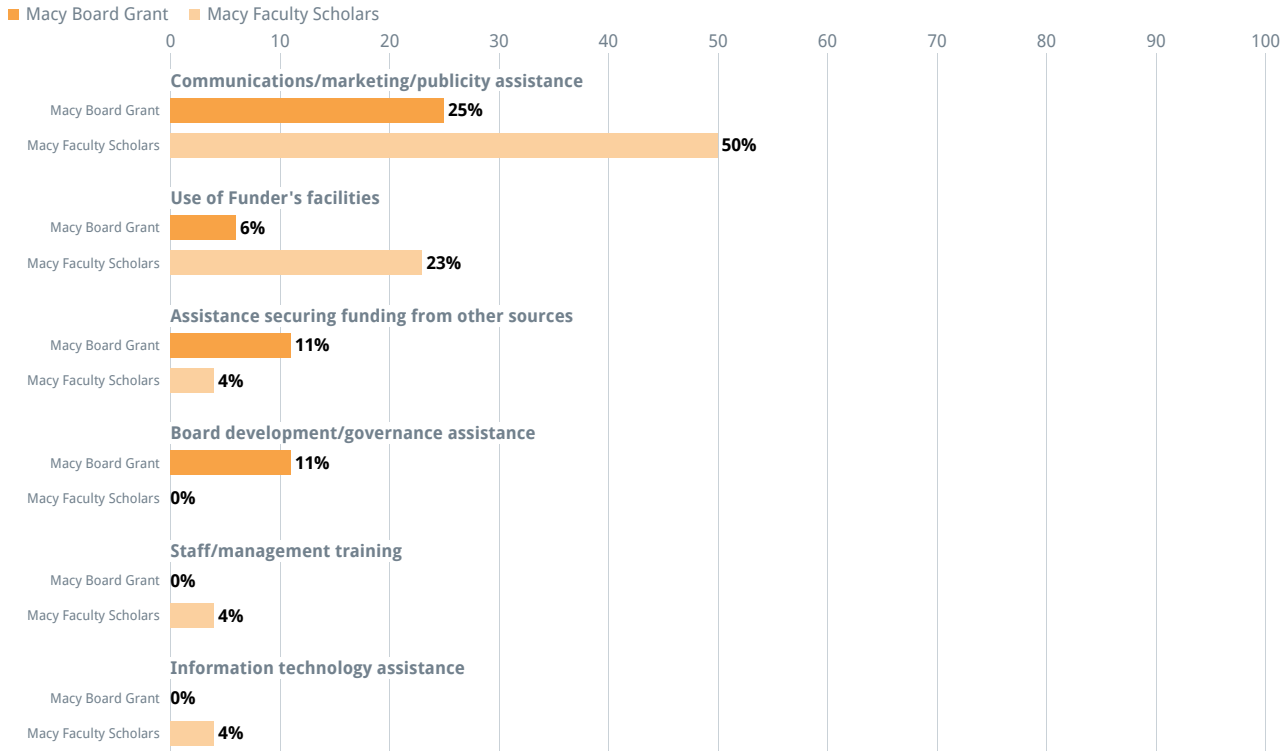
Other Assistance Activities

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

Percentage of Grantees that Received Other Assistance



Percentage of Grantees that Received Other Assistance - By Subgroup

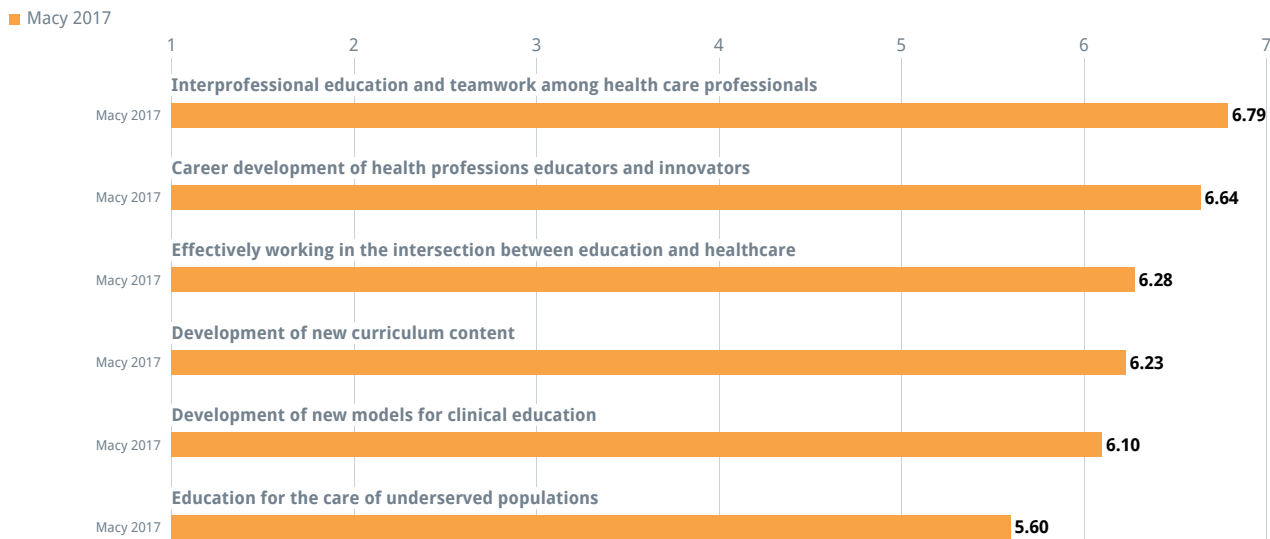


Macy-Specific Questions

"How strongly do you agree or disagree that the Josiah Macy Jr. Foundation has created impact in the following areas?"

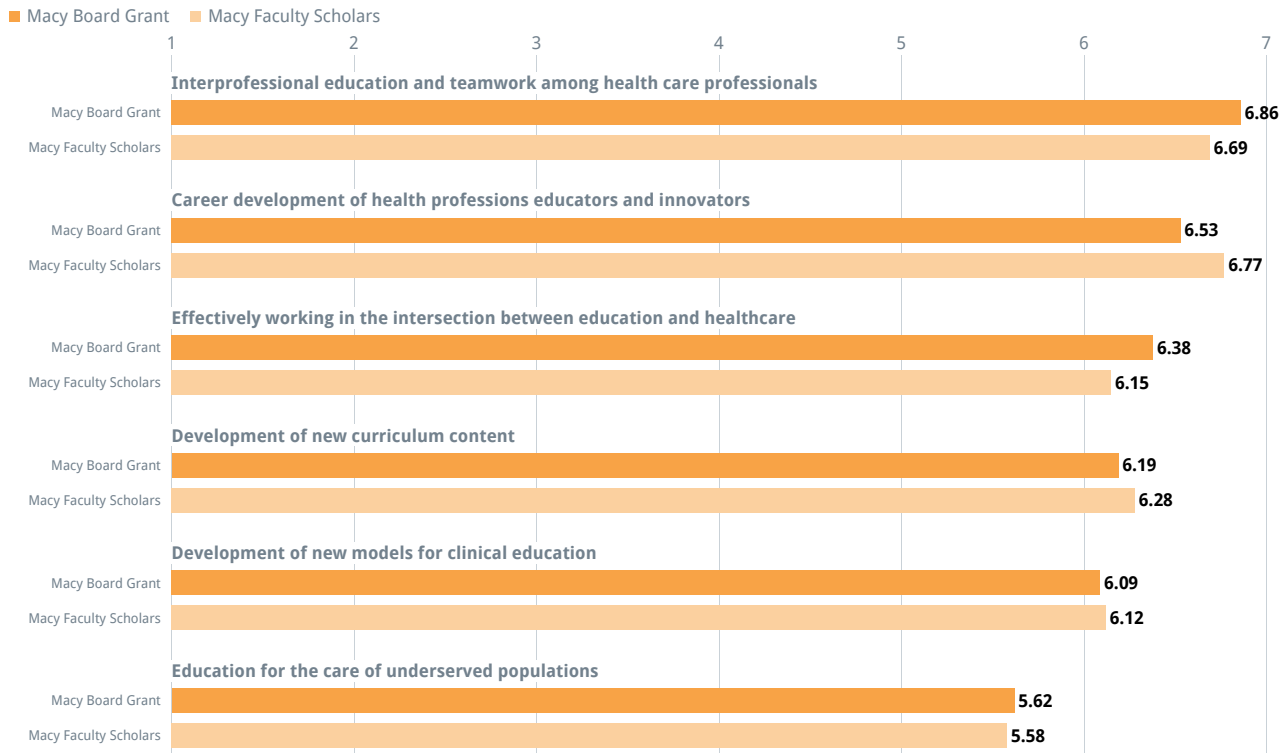
Agreement with the Extent of the Foundation's Impact in the Following Areas - Overall

1 = Strongly disagree 7 = Strongly agree



Agreement with the Extent of the Foundation's Impact in the Following Areas - By Subgroup

1 = Strongly disagree 7 = Strongly agree



"Overall, please rate the impact of being a grantee or a Macy Faculty Scholar on your career development."

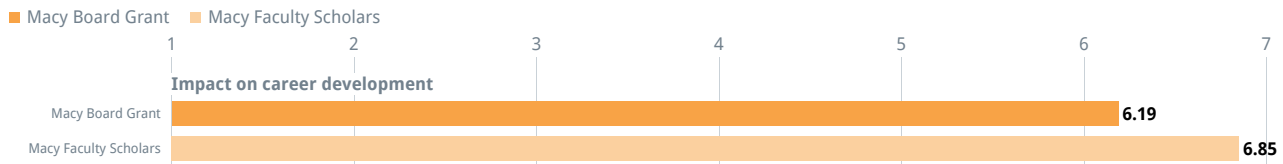
Impact on Career Development - Overall

1 = No impact 7 = Significant positive impact



Impact on Career Development - By Subgroup

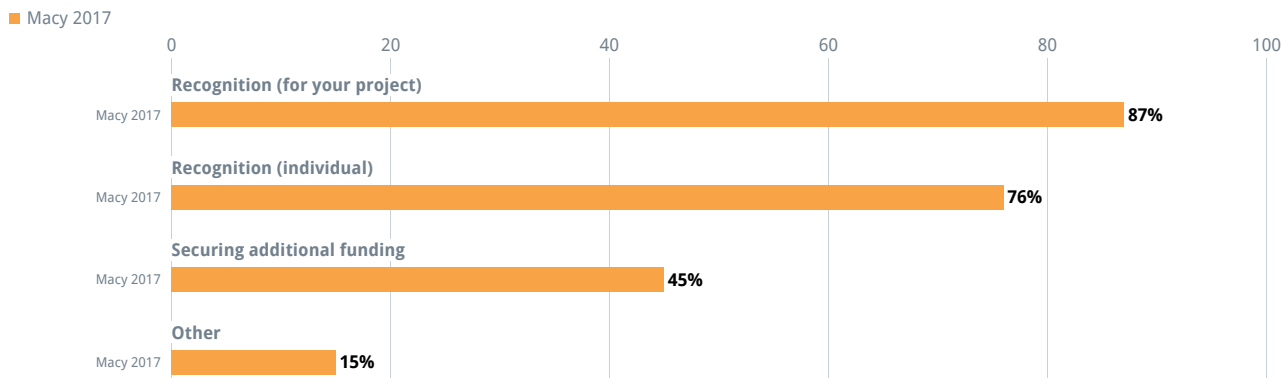
1 = No impact 7 = Significant positive impact



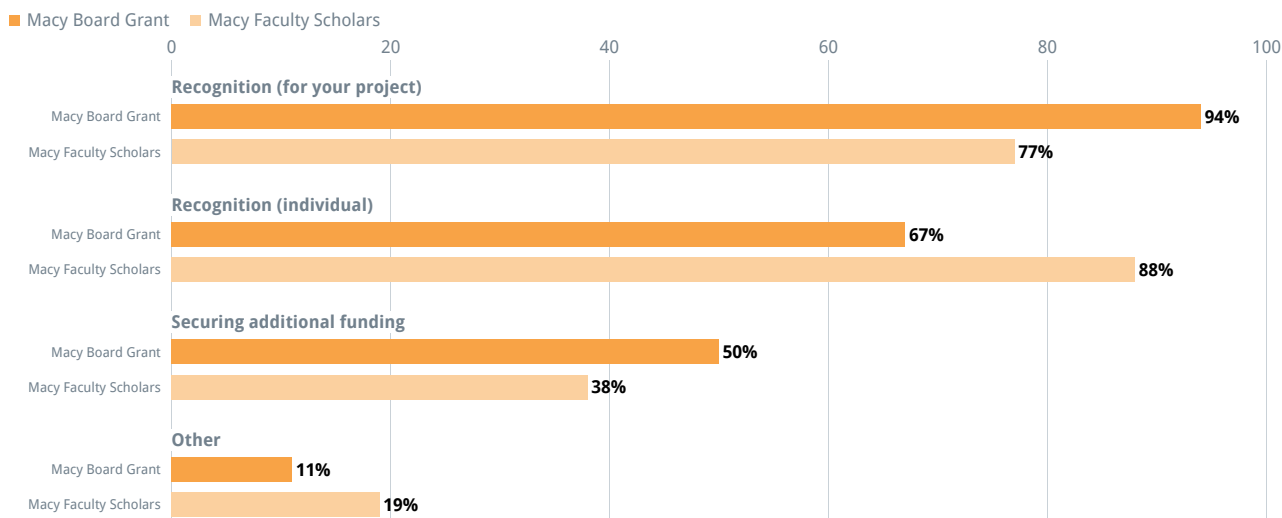
Please note: the following question was asked only of past grantees.

"Has being a Macy grantee resulted in any of the following?"

Result of Macy Grant - Past Grantees - Overall



Result of Macy Grant - Past Grantees - By Subgroup



Note: Nine grantees designated "Other" and wrote in a custom choice: "promotion" (x2); "promotion and tenure"; "improved care in the community"; "Connections with key stakeholders we want to work with e.g. clinical organizations"; "additional leadership opportunities within and outside of my organization, expansion of my national network"; "a stronger purpose and drive to promote a better educational environment that cultivates empathetic, knowledgeable provider."; "school recognition"; "we are trying to continue the work, but without additional funding it may be hard."

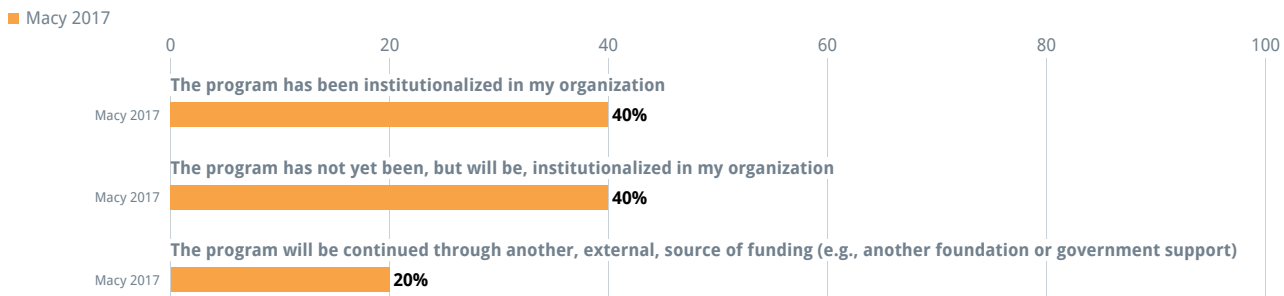
Program Continuation - Current Grantees

Please note: the following questions were asked only of current grantees.

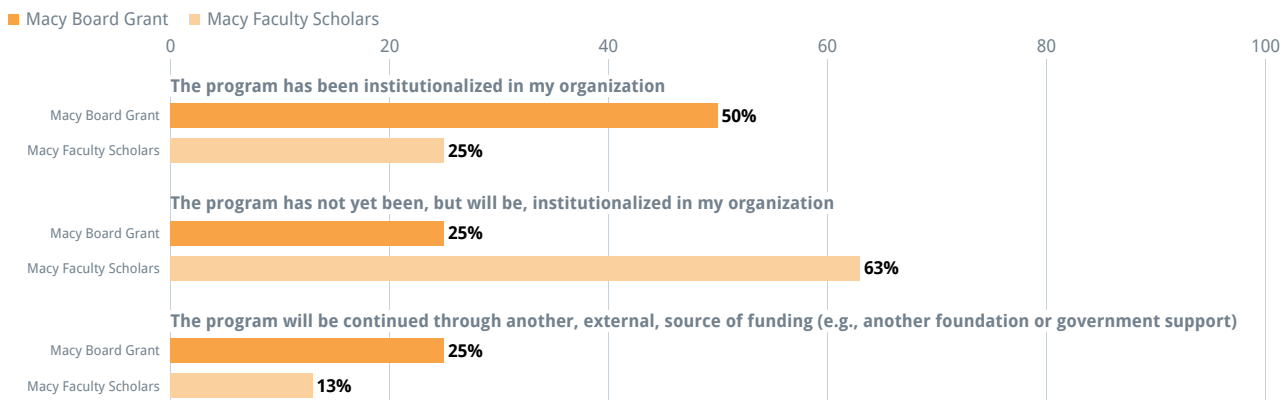
| "Do you intend to continue the program funded by the Foundation after the duration of the grant has ended?" | | Macy 2017 |
|-------------------------------------------------------------------------------------------------------------|--|-----------|
| Yes | | 100% |
| No | | 0% |

"Please select the option(s) that best describe your organization's approach for continuing this program:"

Approach for Continuing the Program - Overall



Approach for Continuing the Program - By Subgroup



Program Continuation - Past Grantees

Please note: the following questions were asked only of past grantees.

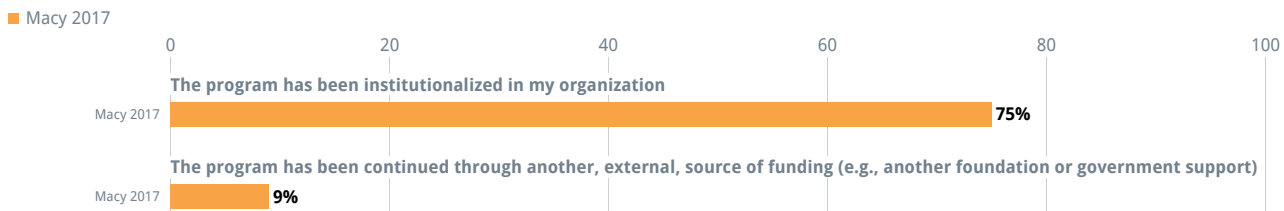
| "Has the program funded by the Foundation continued after the duration of the grant?" | Macy 2017 |
|---------------------------------------------------------------------------------------|-----------|
| Yes | 85% |
| No | 15% |

| "Has the program funded by the Foundation continued after the duration of the grant?" (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|-----------------------------------------------------------------------------------------------------|------------------|-----------------------|
| Yes | 76% | 94% |
| No | 24% | 6% |

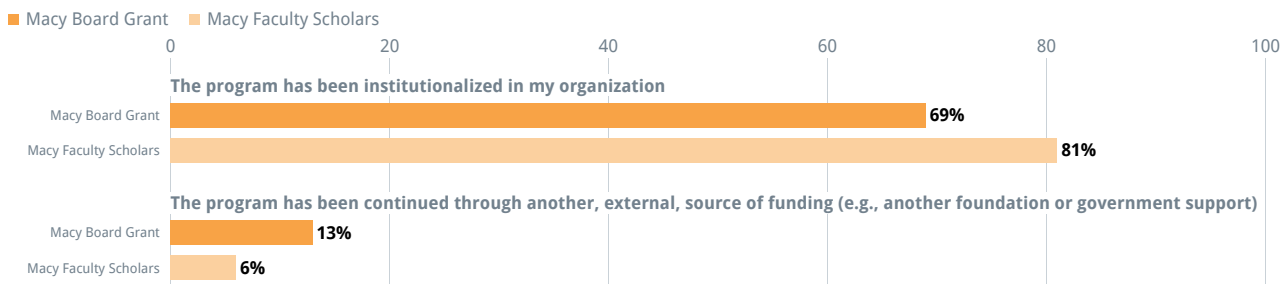
Please note: this question was only asked of grantees who indicated that the funded program has continued after the duration of the grant.

"Please select the option(s) that best describe your organization's approach for continuing this program:"

Approach for Continuing the Program - Overall



Approach for Continuing the Program - By Subgroup



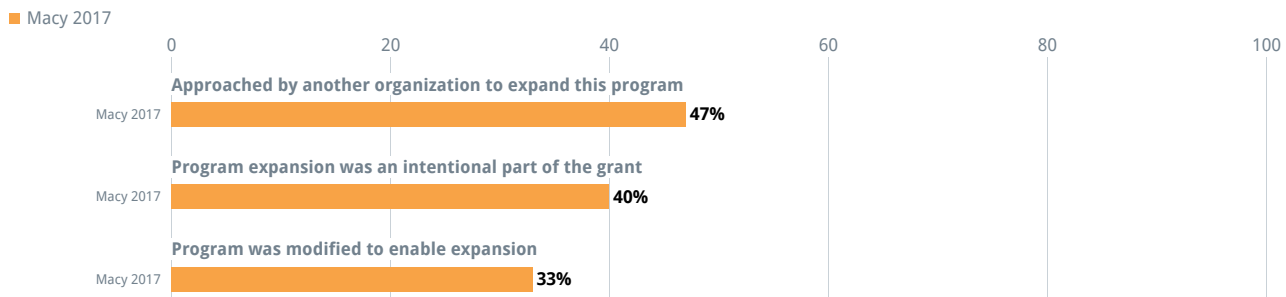
| "Has the program spread to another organization(s)?" | | Macy 2017 |
|------------------------------------------------------|--|-----------|
| Yes | | 56% |
| No | | 44% |

| "Has the program spread to another organization(s)?" (By Subgroup) | | Macy Board Grant | Macy Faculty Scholars |
|--------------------------------------------------------------------|--|------------------|-----------------------|
| Yes | | 59% | 50% |
| No | | 41% | 50% |

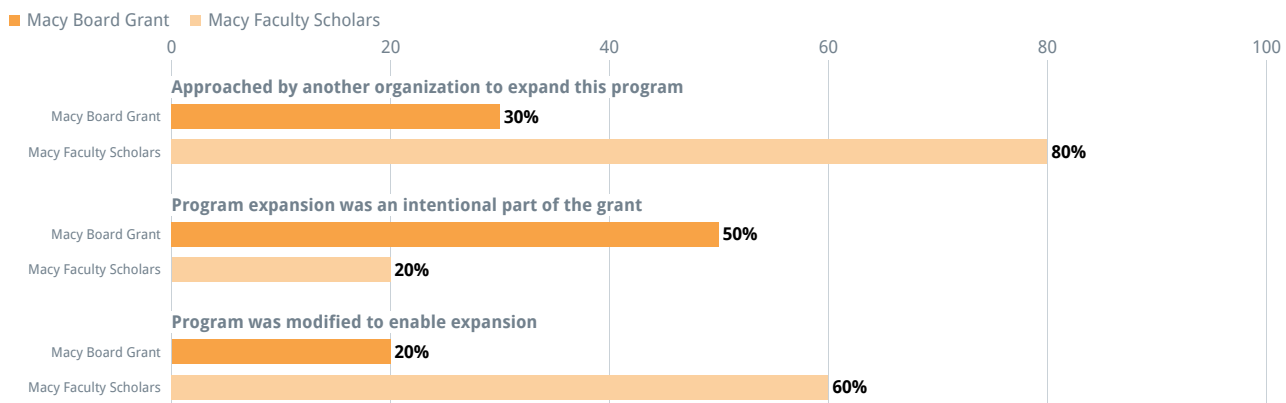
Please note: this question was only asked of grantees who indicated that their program has spread to another organization after the duration of the grant.

"Please select the option(s) that best describe the basis upon which this program has spread:"

The Basis Upon Which the Program has Spread - Overall



The Basis Upon Which the Program has Spread - By Subgroup



Grantee Suggestions for the Foundation

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

To download the full set of grantee comments and suggestions, please refer to the "Downloads" dropdown menu at the top right of your report. Please note that comments have been edited or deleted to protect the confidentiality of respondents.

Proportion of Grantee Suggestions by Topic

| Topic of Grantee Suggestion | Number of Responses | Percent of Responses |
|--------------------------------------------------------|---------------------|----------------------|
| Impact on and Understanding of Grantees' Fields | 10 | 33% |
| Impact on and Understanding of Grantees' Organizations | 6 | 20% |
| Proposal and Selection Process | 7 | 17% |
| Reporting and Evaluation Process | 3 | 10% |
| Quality and Quantity of Interactions | 2 | 7% |
| Non-Monetary Assistance | 2 | 7% |
| Other Suggestions | 2 | 7% |

Selected Comments

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

Impact on and Understanding of Grantees' Fields (33%)

- **Strategic Orientation (N=10)**
 - "Advocate for other health-related organizations, oversight and accreditation organizations and the federal government to dedicate significant resources to advancing medical education research."
 - "Broaden their priorities beyond interprofessional education towards support for primary care education."
 - "Conduct [a] retrospective review looking at the impact of various projects funded by the Foundation in order to enhance process for targeting funding."
 - "Consider expanding the Macy Faculty Scholars beyond just schools of medicine and nursing."
 - "Consider identifying important areas of needed research and issuing RFPs."
 - "Consider some smaller scale funding in educational research which is extremely difficult to find funds for."
 - "I would like to see a strategic plan that 1) shows the connections and impact of their funded projects, and 2) balances funding to the National Center with projects required to advance the field and develop innovative models and evaluation."
 - "In addition to inter professional partnership and collaboration, consider enhancing focus on collaboration with community leaders and policymakers to address social determinants of health."
 - "More funding for educational research and policy endeavors."
 - "Put resources into change management at local level to actually move organizations forward."

Impact on and Understanding of Grantees' Organizations (20%)

- **Project Continuation (N=4)**
 - "Allow for extended grants beyond two cycles of funding."
 - "Connect with scholars to explore future development plans and see how the mentors and Macy leadership can continue to guide and support the scholars."
 - "More continuous funding for institutions that have demonstrated an ability to move the science of collaboration forward."
 - "Sequential rounds of follow up funding for successful projects."
- **General Operating Support (N=1)**
 - "Give a small percentage of indirect funds, for example, even 2% would make a difference for the awardee at their individual institution."
- **Grantee Input (N=1)**
 - "Seek our input regarding potential awardees, when they may be colleagues at our institutions."

Proposal and Selection Process (17%)

- **Clarify Guidelines (N=3)**
 - "Be explicit about whether or not previous grantees are eligible to submit proposals for new projects. Word on the street is that the Foundation will not fund previous grantees, yet staff encourage submissions."
 - "More clear communication with applicants and their institutions that the funding is provided to support the scholar's development in inter-professional education rather than to the proposed project as such."
 - "Provide more information to applicants about what is expected of faculty scholars after the award has been completed."
- **Other (N=2)**
 - "Given growing technological abilities, allowing demos as a supplement to the application. Demos often provide more information than words alone."
 - "There are some opportunities for funding that go to what appear to be 'hand-selected' grantees. Once you are in the circle you have access, but if you are not in the circle it is sometimes difficult to get your foot in the door."

Reporting and Evaluation Process (10%)

- **Communications and Feedback (N=2)**
 - "Perhaps a more thorough mid-course dialog to permit an understanding of barriers being experienced in the grant's execution so as to facilitate any needed mid-course corrections."
 - "Provide guidance in advance about what will be required in annual reports and final reports--and perhaps feedback on drafts since this would be helpful from a professional development standpoint."
- **Timeline (N=1)**
 - "It would be helpful to have at least 3 months notice of the annual progress report so that we have time to prepare. We have several grants and all require progress reports. 60 days is too short."

Quality and Quantity of Interactions (7%)

- "Introduce an accountability measure for national mentors - if a mentor is not meeting with a mentee don't expect the mentee to bring this to your attention. There is a power differential. When I was a scholar my mentors spent very little time with me but this was not the appearance given during the annual meeting."
- "There was a lot of initial contact and pressure, but by the end the pace was good."

Non-Monetary Assistance (7%)

- "Help connect additional sources to support such ideas that require significant funding and support."
- "It might be nice a some point, to host a (rather large) conference for all recent grantees, so that we can all be informed about what other schools and sponsoring institutions are doing."

Other Suggestions (7%)

- "I would like Macy to require IPE funded grantees to affiliate with [our program] to help with our sustainability."
- "Have a more diverse (including different roles) advisory panel...Recognize the value of more diverse roles in health professions education. There seems to be an expectation that scholars will assume administrative roles."

Contextual Data

Grantmaking Characteristics

| Length of Grant Awarded | Macy 2017 | Macy 2009 | Median Funder | Custom Cohort |
|-------------------------|-----------|-----------|---------------|---------------|
| Average grant length | 2.4 years | 2.7 years | 2.1 years | 2.3 years |

| Length of Grant Awarded | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|-------------------------|-----------|-----------|----------------|---------------|
| 1 year | 13% | 17% | 46% | 41% |
| 2 years | 52% | 23% | 24% | 29% |
| 3 years | 26% | 36% | 18% | 17% |
| 4 years | 6% | 15% | 4% | 4% |
| 5 or more years | 3% | 9% | 8% | 10% |

| Type of Grant Awarded | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|--------------------------------------------------------------------|-----------|-----------|----------------|---------------|
| Program / Project Support | 55% | 91% | 65% | 66% |
| General Operating / Core Support | 2% | 0% | 21% | 17% |
| Capital Support: Building / Renovation / Endowment Support / Other | 2% | 0% | 6% | 3% |
| Technical Assistance / Capacity Building | 0% | 0% | 4% | 4% |
| Scholarship / Fellowship | 32% | 9% | 2% | 4% |
| Event / Sponsorship Funding | 10% | 0% | 2% | 3% |

Grantmaking Characteristics - By Subgroup

| Length of Grant Awarded (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|---------------------------------------|------------------|-----------------------|
| Average grant length | 2.6 years | 2.1 years |

| Length of Grant Awarded (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|---------------------------------------|------------------|-----------------------|
| 1 year | 22% | 0% |
| 2 years | 25% | 88% |
| 3 years | 36% | 12% |
| 4 years | 11% | 0% |
| 5 or more years | 6% | 0% |

| Type of Grant Awarded (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|--------------------------------------------------------------------|------------------|-----------------------|
| Program / Project Support | 81% | 19% |
| General Operating / Core Support | 3% | 0% |
| Capital Support: Building / Renovation / Endowment Support / Other | 0% | 4% |
| Technical Assistance / Capacity Building | 0% | 0% |
| Scholarship / Fellowship | 0% | 77% |
| Event / Sponsorship Funding | 17% | 0% |

Grant Size

| Grant Amount Awarded | Macy 2017 | Macy 2009 | Median Funder | Custom Cohort |
|----------------------|-----------|-----------|---------------|---------------|
| Median grant size | \$243.4K | \$495K | \$82.5K | \$87.5K |

| Grant Amount Awarded | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|----------------------|-----------|-----------|----------------|---------------|
| Less than \$10K | 0% | 2% | 10% | 6% |
| \$10K - \$24K | 3% | 0% | 13% | 14% |
| \$25K - \$49K | 3% | 2% | 13% | 13% |
| \$50K - \$99K | 8% | 7% | 16% | 15% |
| \$100K - \$149K | 2% | 0% | 9% | 8% |
| \$150K - \$299K | 45% | 14% | 16% | 17% |
| \$300K - \$499K | 15% | 25% | 8% | 8% |
| \$500K - \$999K | 22% | 36% | 7% | 8% |
| \$1MM and above | 2% | 14% | 8% | 11% |

| Median Percent of Budget Funded by Grant (Annualized) | Macy 2017 | Macy 2009 | Median Funder | Custom Cohort |
|-------------------------------------------------------|-----------|-----------|---------------|---------------|
| Size of grant relative to size of grantee budget | 1% | 1% | 4% | 2% |

Grant Size - By Subgroup

| Grant Amount Awarded (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|------------------------------------|------------------|-----------------------|
| Median grant size | \$350K | \$200K |

| Grant Amount Awarded (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|------------------------------------|------------------|-----------------------|
| Less than \$10K | 0% | 0% |
| \$10K - \$24K | 6% | 0% |
| \$25K - \$49K | 6% | 0% |
| \$50K - \$99K | 14% | 0% |
| \$100K - \$149K | 0% | 4% |
| \$150K - \$299K | 11% | 96% |
| \$300K - \$499K | 25% | 0% |
| \$500K - \$999K | 36% | 0% |
| \$1MM and above | 3% | 0% |

| Median Percent of Budget Funded by Grant (Annualized) (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|---------------------------------------------------------------------|------------------|-----------------------|
| Size of grant relative to size of grantee budget | 1% | 0% |

Grantee Characteristics

| Operating Budget of Grantee Organization | Macy 2017 | Macy 2009 | Median Funder | Custom Cohort |
|------------------------------------------|-----------|-----------|---------------|---------------|
| Median Budget | \$30M | \$36.5M | \$1.5M | \$3M |

| Operating Budget of Grantee Organization | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|------------------------------------------|-----------|-----------|----------------|---------------|
| <\$100K | 0% | 0% | 9% | 4% |
| \$100K - \$499K | 2% | 0% | 20% | 17% |
| \$500K - \$999K | 5% | 3% | 13% | 12% |
| \$1MM - \$4.9MM | 24% | 17% | 30% | 26% |
| \$5MM - \$24MM | 15% | 17% | 18% | 22% |
| >=\$25MM | 54% | 63% | 11% | 18% |

Grantee Characteristics - By Subgroup

| Operating Budget of Grantee Organization (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|--------------------------------------------------------|------------------|-----------------------|
| Median Budget | \$13M | \$300M |

| Operating Budget of Grantee Organization (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|--------------------------------------------------------|------------------|-----------------------|
| <\$100K | 0% | 0% |
| \$100K - \$499K | 3% | 0% |
| \$500K - \$999K | 7% | 0% |
| \$1MM - \$4.9MM | 31% | 8% |
| \$5MM - \$24MM | 17% | 8% |
| >=\$25MM | 41% | 83% |

Funding Relationship

| Pattern of Grantees' Funding Relationship with the Foundation | Macy 2017 | Average Funder | Custom Cohort |
|---------------------------------------------------------------|-----------|----------------|---------------|
| First grant received from the Foundation | 41% | 29% | 30% |
| Consistent funding in the past | 22% | 52% | 51% |
| Inconsistent funding in the past | 37% | 19% | 19% |

| Funding Status and Grantees Previously Declined Funding | Macy 2017 | Macy 2009 | Median Funder | Custom Cohort |
|---------------------------------------------------------------------|-----------|-----------|---------------|---------------|
| Percent of grantees currently receiving funding from the Foundation | 44% | 43% | 80% | 76% |
| Percent of grantees previously declined funding by the Foundation | 22% | 21% | 31% | 22% |

Funding Relationship - By Subgroup

| Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|-----------------------------------------------------------------------------|------------------|-----------------------|
| First grant received from the Foundation | 32% | 52% |
| Consistent funding in the past | 29% | 12% |
| Inconsistent funding in the past | 38% | 36% |

| Funding Status and Grantees Previously Declined Funding (By Subgroup) | Macy Board Grant | Macy Faculty Scholars |
|-----------------------------------------------------------------------|------------------|-----------------------|
| Percent of grantees currently receiving funding from the Foundation | 39% | 50% |
| Percent of grantees previously declined funding by the Foundation | 29% | 12% |

Grantee Demographics

| Job Title of Respondents | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|--------------------------|-----------|-----------|----------------|---------------|
| Executive Director | 16% | 11% | 47% | 37% |
| Other Senior Management | 36% | 24% | 15% | 18% |
| Project Director | 28% | 43% | 12% | 19% |
| Development Director | 0% | 0% | 9% | 9% |
| Other Development Staff | 0% | 0% | 7% | 7% |
| Volunteer | 0% | 0% | 1% | 0% |
| Other | 20% | 22% | 9% | 10% |

| Gender of Respondents | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|-----------------------|-----------|-----------|----------------|---------------|
| Female | 68% | 50% | 64% | 66% |
| Male | 32% | 50% | 36% | 34% |

| Race/Ethnicity of Respondents | Macy 2017 | Macy 2009 | Average Funder | Custom Cohort |
|-----------------------------------|-----------|-----------|----------------|---------------|
| Multi-racial | 0% | 2% | 3% | 3% |
| African-American/Black | 5% | 10% | 7% | 6% |
| Asian (incl. Indian subcontinent) | 5% | 2% | 3% | 4% |
| Hispanic/Latino | 5% | 5% | 5% | 4% |
| American Indian/Alaskan Native | 0% | 0% | 1% | 0% |
| Pacific Islander | 2% | 0% | 0% | 0% |
| Caucasian/White | 82% | 80% | 80% | 82% |
| Other | 0% | 0% | 1% | 1% |

Funder Characteristics

| Financial Information | Macy 2017 | Macy 2009 | Median Funder | Custom Cohort |
|-----------------------|-----------|-----------|---------------|---------------|
| Total assets | \$128M | \$152.1M | \$227.6M | \$241.9M |
| Total giving | \$5M | \$5.5M | \$15.7M | \$8.4M |

| Funder Staffing | Macy 2017 | Median Funder | Custom Cohort |
|----------------------------------------|-----------|---------------|---------------|
| Total staff (FTEs) | 6 | 15 | 10 |
| Percent of staff who are program staff | 39% | 40% | 46% |

| Grantmaking Processes | Macy 2017 | Median Funder | Custom Cohort |
|------------------------------------------------------|-----------|---------------|---------------|
| Proportion of grants that are proactive | 10% | 44% | 41% |
| Proportion of grantmaking dollars that are proactive | 5% | 60% | 69% |

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 Macy’s grantee survey was 62.

| Question Text | Count of Responses |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| Overall, how would you rate the Foundation's impact on your field? | 61 |
| How well does the Foundation understand the field in which you work? | 62 |
| To what extent has the Foundation advanced the state of knowledge in your field? | 62 |
| To what extent has the Foundation affected public policy in your field? | 56 |
| Overall, how would you rate the Foundation's impact on your local community? | 55 |
| How well does the Foundation understand the local community in which you work? | 54 |
| How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work? | 62 |
| How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future? | 55 |
| How well does the Foundation understand your organization's strategy and goals? | 59 |
| How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation? | 62 |
| Who most frequently initiated the contact you had with your program officer during this grant? | 62 |
| Did the Foundation conduct a site visit during the selection process or during the course of this grant? | 60 |
| Has your main contact at the Foundation changed in the past six months? | 53 |
| Did you submit [a proposal] to the Foundation for this grant? | 62 |
| 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? | 61 |
| How involved was Foundation staff in the development of your grant proposal? | 61 |
| How much time elapsed from the submission of the grant proposal to clear commitment of funding? | 55 |
| Have you ever been declined funding from the Foundation? | 60 |
| Are you currently receiving funding from the Foundation? | 62 |
| Which of the following best describes the pattern of your organization's funding relationship with the Foundation? | 59 |
| How well does the Foundation understand your intended beneficiaries' needs? | 61 |
| To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs? | 61 |
| Have you participated in a reporting or evaluation process? | 59 |
| To what extent was the Foundation's reporting process...Adaptable, if necessary, to fit your circumstances | 52 |
| To what extent was the Foundation's reporting process...A helpful opportunity for you to reflect and learn | 54 |
| To what extent was the Foundation's reporting process...Relevant, with questions and measures pertinent to the work funded by this grant | 53 |
| To what extent was the Foundation's reporting process...Straightforward | 55 |
| To what extent was the Foundation's reporting process...Aligned appropriately to the timing of your work | 55 |
| Did the Foundation provide financial support for the evaluation | 21 |
| To what extent did the evaluation...Result in you making changes to the work that was evaluated | 22 |
| To what extent did the evaluation...Incorporate your input in the design of the evaluation | 21 |
| To what extent did the evaluation...Generate information that you believe will be useful for other organizations | 21 |

About CEP and Contact Information

Mission:

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

Vision:

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

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

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

About the GPR

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

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

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