GRANTEE PERCEPTION REPORT®
APPLICANT PERCEPTION REPORT®

PREPARED FOR

Moses Taylor Foundation

JANUARY 2018

CEP

THE CENTER FOR
EFFECTIVE PHILANTHROPY

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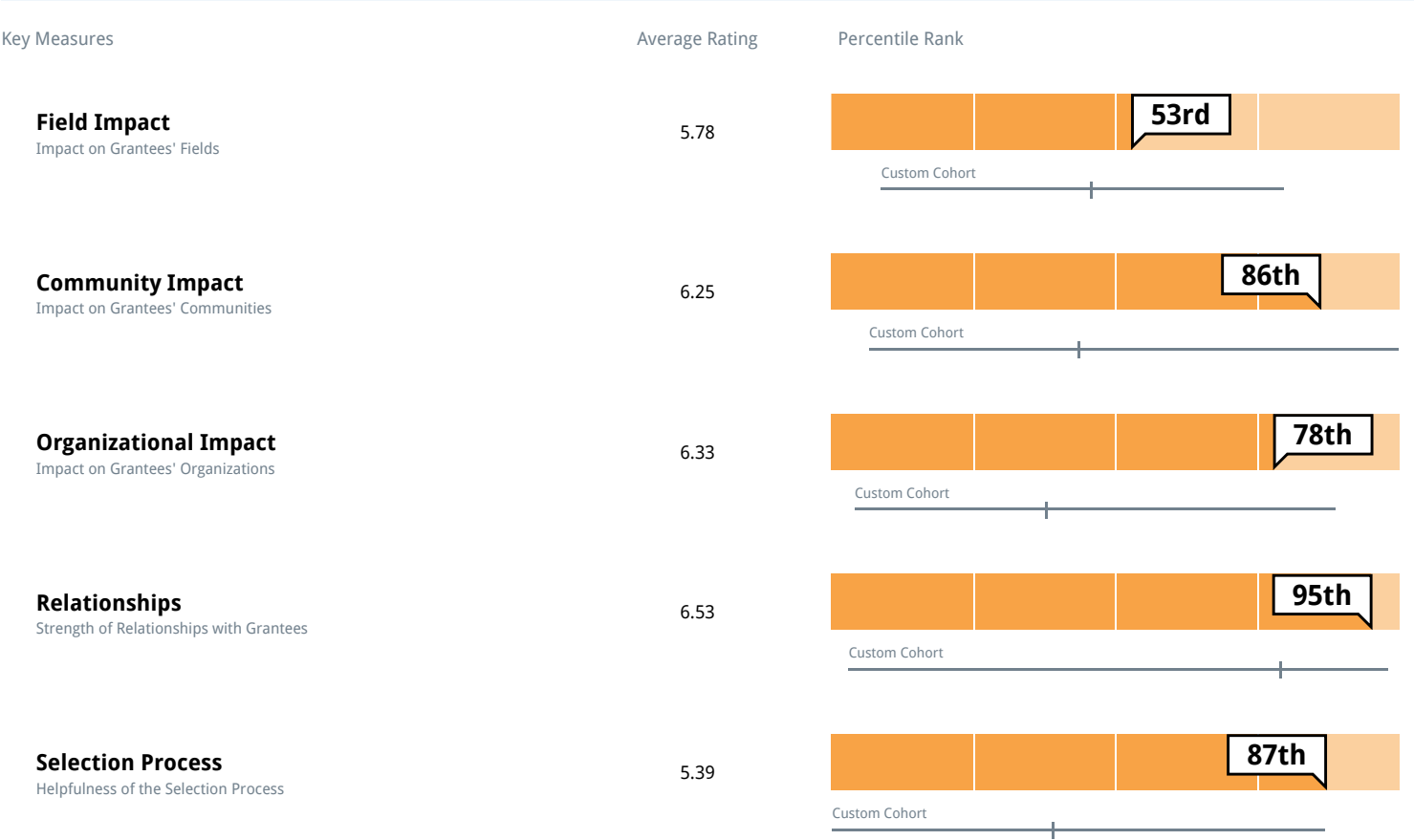
Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.
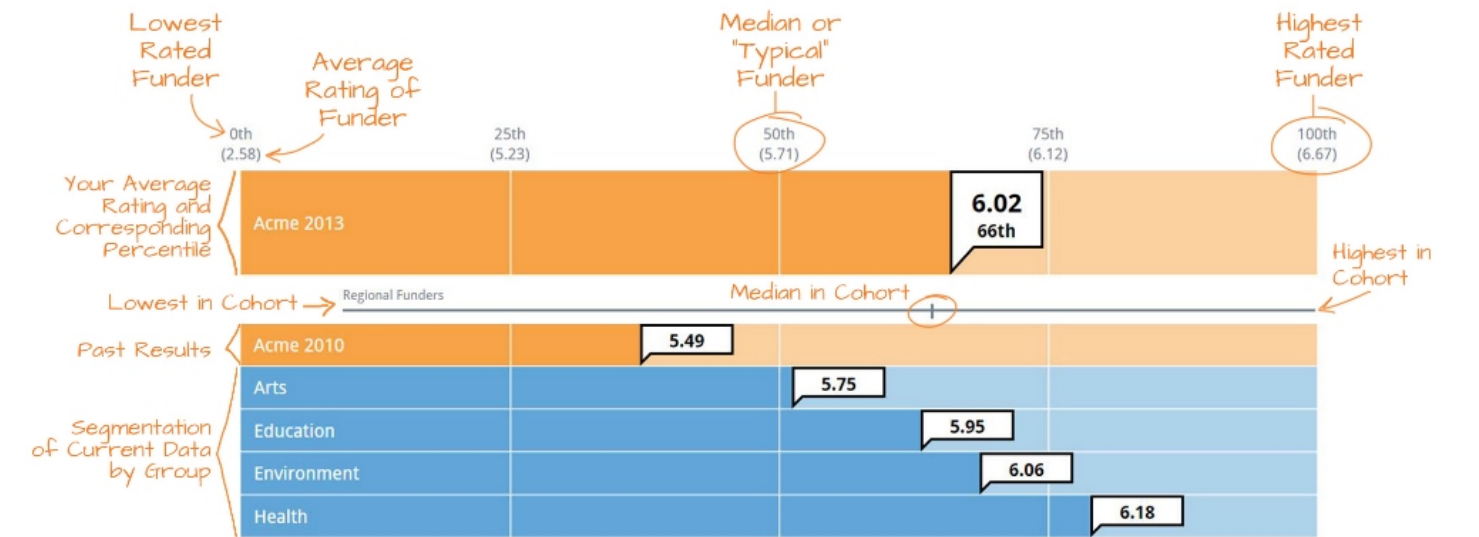
Missing data: Selected grantee and declined applicant ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

Key Grantee Measures

The following chart highlights a selection of your key grantee 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	Average Rating	Percentile Rank
Field Impact Impact on Grantees' Fields	5.78	53rd Custom Cohort
Community Impact Impact on Grantees' Communities	6.25	86th Custom Cohort
Organizational Impact Impact on Grantees' Organizations	6.33	78th Custom Cohort
Relationships Strength of Relationships with Grantees	6.53	95th Custom Cohort
Selection Process Helpfulness of the Selection Process	5.39	87th Custom Cohort

Key Applicant Measures

The following chart highlights a selection of your key applicant 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	Average Rating	Percentile Rank
Field Impact Impact on Applicants' Fields	4.96	93rd
Community Impact Impact on Applicants' Communities	5.14	79th
Proposal Process Helpfulness of the Proposal Process	3.71	83rd

Grantee 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. Five grantees described Moses Taylor as "Supportive," the most commonly used word.

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Applicant Word Cloud

Applicants 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 applicants. The color of each word is stylistic and not indicative its frequency. Three applicants described Moses Taylor as "Responsive," 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

Grantee Survey Methodology

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Moses Taylor 2017	September and October 2017	73	60	82%

Survey Year	Year of Active Grants
Moses Taylor 2017	2016-2017

Throughout this report, Moses Taylor 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.cep.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 Moses Taylor's overall ratings, this report shows ratings segmented by Investment Area.

Investment Area	Number of Responses
Health and Health Care	36
Human Services	24

Applicant Survey Methodology

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Moses Taylor 2017	September and October 2017	67	32	48%

Survey Year	Application Year
Moses Taylor 2017	2016-2017

Throughout this report, Moses Taylor Foundation's applicant survey results are compared to CEP's broader dataset of more than 4,000 declined applicants, from surveys of more than 50 funders.

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 Moses Taylor's overall ratings, this report shows ratings segmented by Investment Area.

Investment Area	Number of Responses
Health and Health Care	19
Human Services	13

Subgroup Methodology & Differences

Based on guidance from the Foundation, CEP tagged grantees and applicants into the following subgroups using data provided by Moses Taylor in its grantee and applicant lists. Descriptions of the composition of each subgroup are below.

Grantee Subgroup

- **Investment Area**: Using the grantee list, and in consultation with the Foundation, CEP tagged all grantees into two groups based on their Investment Area.

Applicant Subgroup

- **Investment Area**: Using the applicant list, and in consultation with the Foundation, CEP tagged all declined applicants into two groups based on their Investment Area.

Summary of Differences by Subgroups

Grantee Subgroups

- **Investment Area:** While there is some variation, no group *consistently* rates higher or lower than others when grantees are segmented by investment area.

Applicant Subgroup Differences

- **Investment Area**: While there is some variation, no group *consistently* rates higher or lower than others when declined applicants are segmented by investment area.

Comparative Cohorts

Customized Cohort

Moses Taylor selected a set of 17 funders to create a smaller comparison group for the grantee data that more closely resembles Moses Taylor in scale and scope.

Custom Cohort

Baptist Healing Trust

Blue Cross Blue Shield of Massachusetts Foundation

Connecticut Health Foundation, Inc.

Endowment for Health

First 5 Santa Barbara County

Kessler Foundation

Maine Health Access Foundation

MetroWest Health Foundation

Moses Taylor Foundation

REACH Healthcare Foundation

Richmond Memorial Health Foundation

The Cameron Foundation

The Fund for New Jersey

The Physicians Foundation

Wachovia Regional Foundation

Williamsburg Health Foundation

Wiregrass Foundation

Standard Cohorts

CEP also included 16 standard GPR 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	37	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 and Application Characteristics

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

Grant Size

Grantee Responses

Median Grant Size

0th ($2K)	25th ($38K)	50th ($85K)	75th ($200K)	100th ($2142K)

Moses Taylor 2017 — **$40K** 27th

Custom Cohort

Health and Health Care — **$75K**

Human Services — **$38K**

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Investment Area ▼
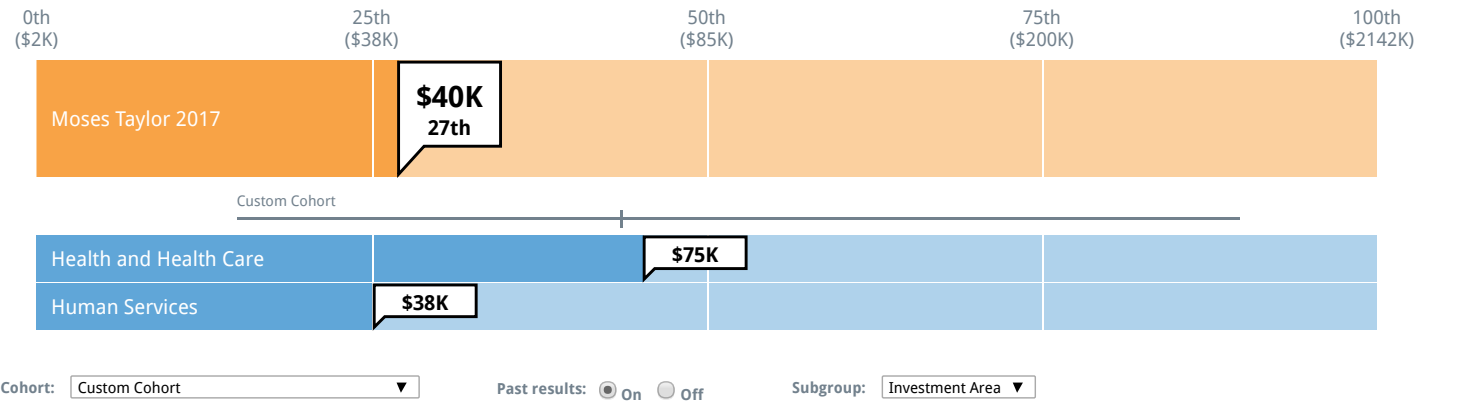
Applicant Responses

Median Grant Request Size

0th ($10K)	25th ($25K)	50th ($50K)	75th ($100K)	100th ($247K)

Moses Taylor 2017 — **$24K** 23rd

Health and Health Care — **$25K**

Human Services — **$20K**

Cohort: None ▼   Past results: ⦿ On ◯ Off   Subgroup: Investment Area ▼
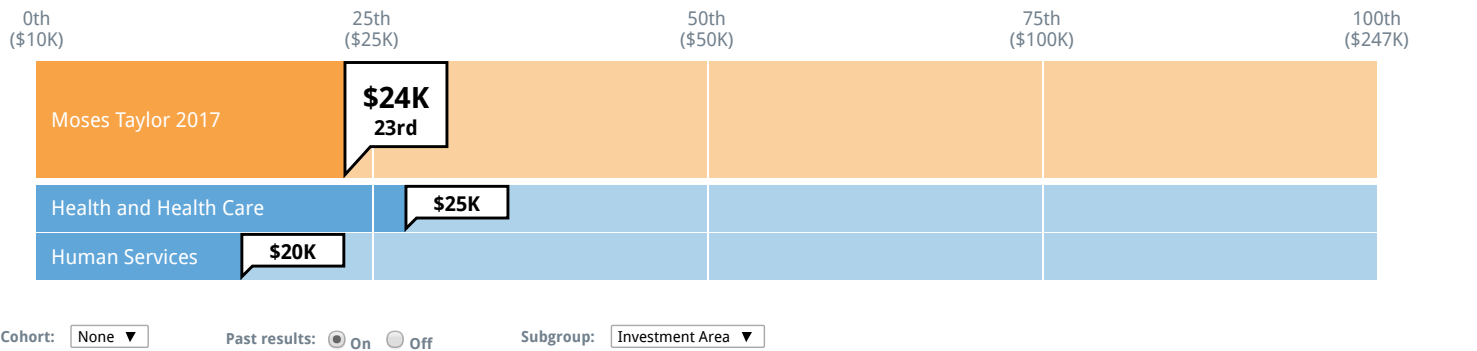
Grantee/Applicant Budget

Grantee Responses

Median Organizational Budget

0th ($0.0M)	25th ($0.8M)	50th ($1.5M)	75th ($2.5M)	100th ($30.0M)

Moses Taylor 2017 — **$3.0M** 80th

Custom Cohort

Health and Health Care — $7.0M

Human Services — $1.6M

Cohort: [Custom Cohort ▼]   Past results: ⦿ On ◯ Off   Subgroup: [Investment Area ▼]

Applicant Responses

Median Organizational Budget

0th ($0.1M)	25th ($0.4M)	50th ($0.7M)	75th ($1.3M)	100th ($4.1M)

Moses Taylor 2017 — **$1.8M** 85th

Health and Health Care — $1.7M

Human Services — $1.8M

Cohort: [None ▼]   Past results: ⦿ On ◯ Off   Subgroup: [Investment Area ▼]
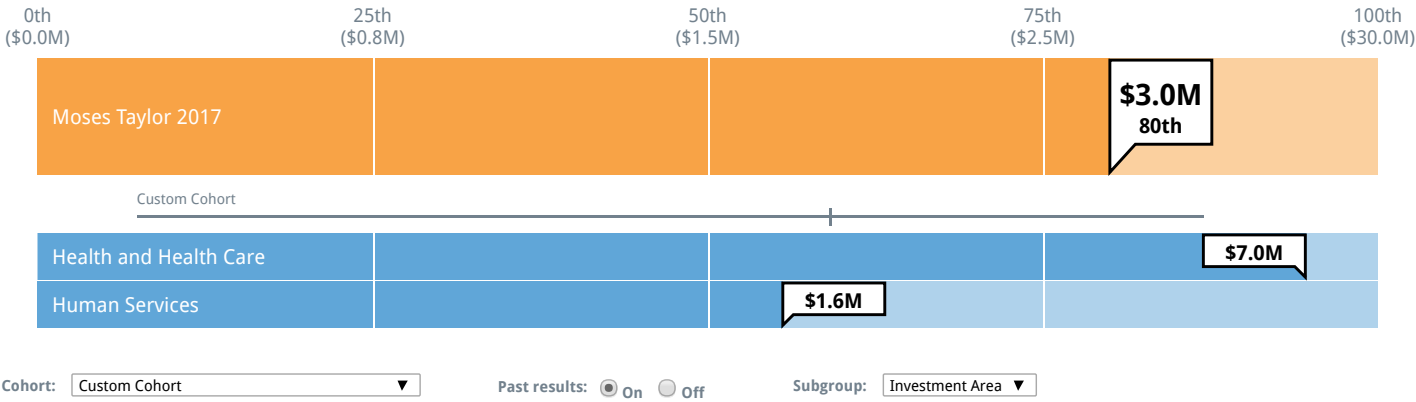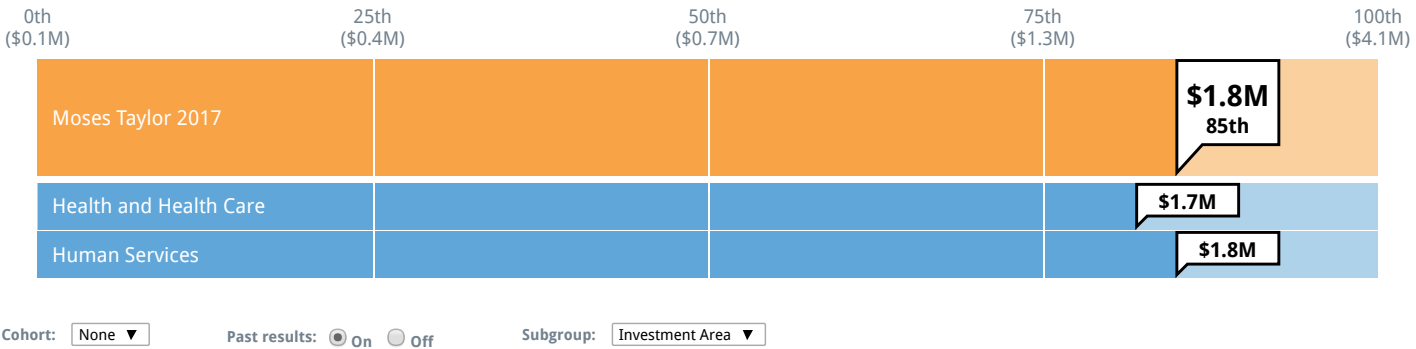
Type of Grant Awarded/Requested

Type of Grant Awarded	Moses Taylor 2017	Average Funder	Custom Cohort
Program / Project Support	73%	65%	73%
General Operating / Core Support	7%	21%	13%
Capital Support: Building / Renovation / Endowment Support / Other	10%	5%	4%
Technical Assistance / Capacity Building	8%	4%	7%
Scholarship / Fellowship	2%	2%	0%
Event / Sponsorship Funding	0%	2%	2%

Type of Grant Requested	Moses Taylor 2017	Average Funder
Program / Project Support	74%	71%
General Operating / Core Support	3%	11%
Capital Support: Building / Renovation / Endowment Support / Other	16%	11%
Technical Assistance / Capacity Building	0%	5%
Scholarship / Fellowship	0%	1%
Event / Sponsorship Funding	6%	1%

Program Staff Load	Moses Taylor 2017	Median Funder	Custom Cohort
Dollars awarded per program staff full-time employee	$2.8M	$2.6M	$1.5M
Applications per program full-time employee	92	29	29
Active grants per program full-time employee	53	33	36

Impact on and Understanding of Fields

Grantee Ratings

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

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

0th (4.21)	25th (5.48)	50th (5.74)	75th (5.95)	100th (6.46)

Moses Taylor 2017 — **5.78** 53rd

Custom Cohort

Health and Health Care — **5.66**

Human Services — **5.96**

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

Applicant Ratings

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

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

0th (2.15)	25th (3.98)	50th (4.39)	75th (4.63)	100th (5.20)

Moses Taylor 2017 — **4.96** 93rd

Health and Health Care — **5.06**

Human Services — **4.75**

Cohort: None ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

Understanding of Fields

Grantee Ratings

"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 |

0th (4.60)	25th (5.44)	50th (5.69)	75th (5.93)	100th (6.39)

Moses Taylor 2017 — **5.48** 28th

Custom Cohort

Health and Health Care — **5.59**

Human Services — **5.32**

Cohort: [Custom Cohort ▼]   Past results: ● On ○ Off   Subgroup: [Investment Area ▼]

Applicant Ratings

"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 |

0th (3.29)	25th (4.00)	50th (4.32)	75th (4.60)	100th (5.53)

Moses Taylor 2017 — **4.71** 81st

Health and Health Care — **4.94**

Human Services — **4.36**

Cohort: [None ▼]   Past results: ● On ○ Off   Subgroup: [Investment Area ▼]

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Advancing Knowledge and Public Policy

Grantee Ratings

"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

0th (3.45)	25th (4.68)	50th (5.11)	75th (5.46)	100th (6.44)

4.34 12th   Moses Taylor 2017

Custom Cohort

4.28 Health and Health Care

Human Services **4.42**

Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼
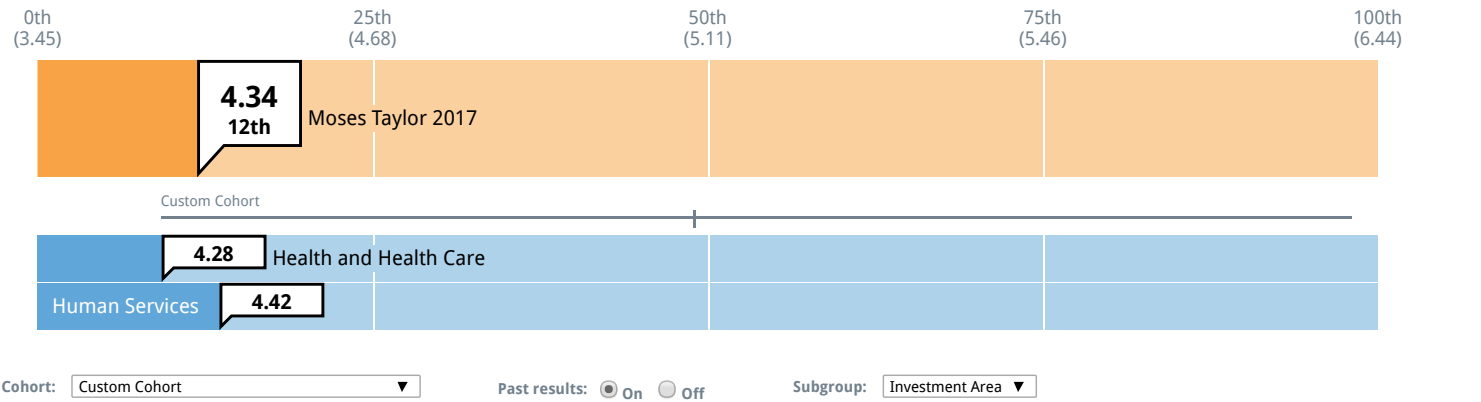
Grantee Ratings

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

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

0th (2.54)	25th (4.19)	50th (4.61)	75th (5.09)	100th (5.99)

3.28 3rd   Moses Taylor 2017

Custom Cohort

3.35 Health and Health Care

3.19 Human Services

Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

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Impact on and Understanding of Local Communities

Grantee Ratings

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

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

0th (2.52)	25th (5.07)	50th (5.69)	75th (6.06)	100th (6.83)

Moses Taylor 2017 — **6.25** / 86th

Custom Cohort

Health and Health Care — **6.11**

Human Services — **6.46**

Cohort: [Custom Cohort ▼]   Past results: ● On ○ Off   Subgroup: [Investment Area ▼]

Applicant Ratings

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

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

0th (2.25)	25th (3.49)	50th (4.37)	75th (5.11)	100th (5.83)

Moses Taylor 2017 — **5.14** / 79th

Health and Health Care — **5.33**

Human Services — **4.80**

Cohort: [None ▼]   Past results: ● On ○ Off   Subgroup: [Investment Area ▼]

Understanding of Local Communities

Grantee Ratings

"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

0th (3.78)	25th (5.15)	50th (5.62)	75th (5.96)	100th (6.83)

Moses Taylor 2017 — **5.86 / 69th**

Custom Cohort

Health and Health Care — **6.03**

Human Services — **5.59**

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

Applicant Ratings

"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

0th (2.74)	25th (3.44)	50th (4.52)	75th (5.10)	100th (6.33)

Moses Taylor 2017 — **5.08 / 73rd**

Health and Health Care — **5.12**

Human Services — **5.00**

Cohort: None ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

19

Impact on and Understanding of Organizations

Grantee Ratings

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

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

0th (4.58)	25th (5.88)	50th (6.13)	75th (6.30)	100th (6.73)

Moses Taylor 2017 — **6.33** 78th

Custom Cohort

Health and Health Care — **6.25**

Human Services — **6.46**

Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼
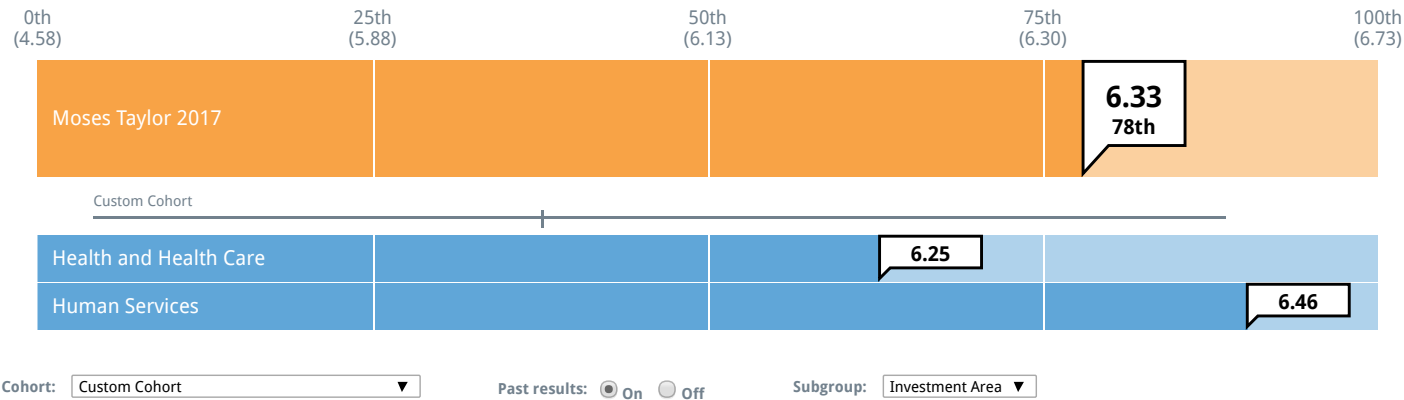
Grantee Ratings

"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
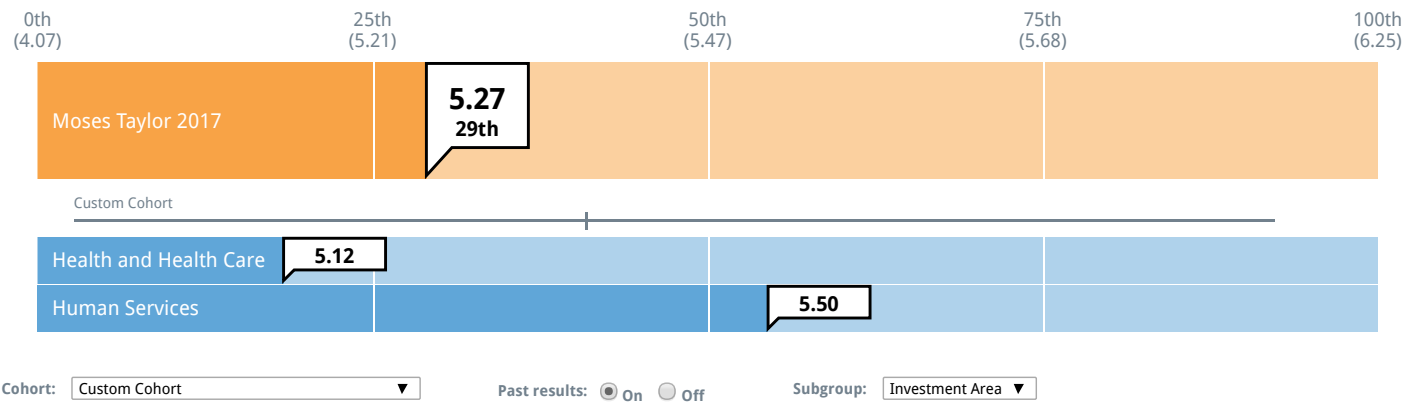
0th (4.07)	25th (5.21)	50th (5.47)	75th (5.68)	100th (6.25)

Moses Taylor 2017 — **5.27** 29th

Custom Cohort

Health and Health Care — **5.12**

Human Services — **5.50**

Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

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Understanding of Organizations

Grantee Ratings

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

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

0th (3.69)	25th (5.57)	50th (5.79)	75th (5.98)	100th (6.60)

Moses Taylor 2017 — **5.80** / **51st**

Custom Cohort

Health and Health Care — **5.74**

Human Services — **5.88**

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Investment Area ▼

Applicant Ratings

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

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

0th (2.50)	25th (3.46)	50th (3.84)	75th (4.34)	100th (5.32)

Moses Taylor 2017 — **4.53** / **83rd**

Health and Health Care — **4.67**

Human Services — **4.33**

Cohort: None ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Investment Area ▼
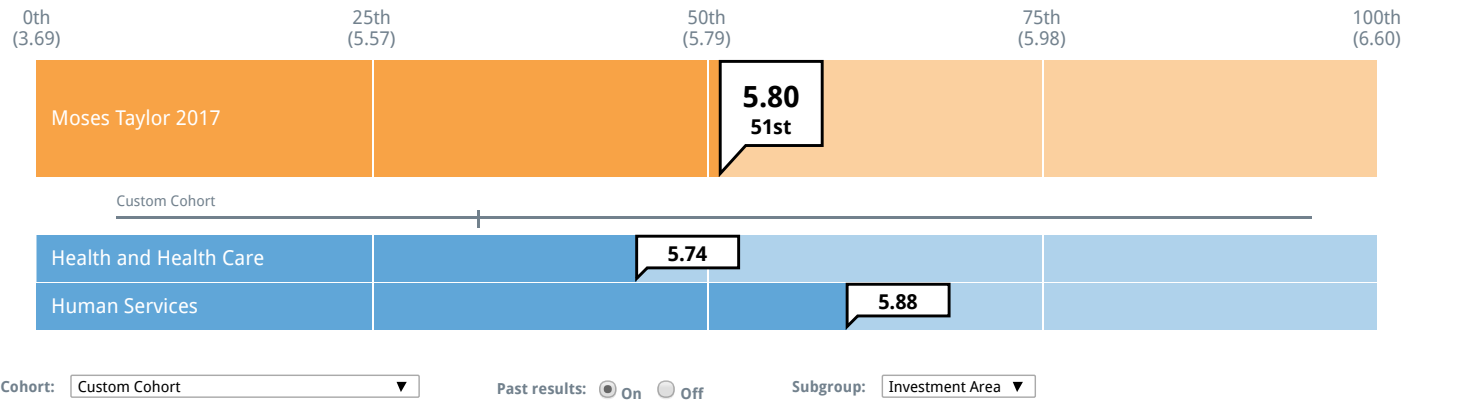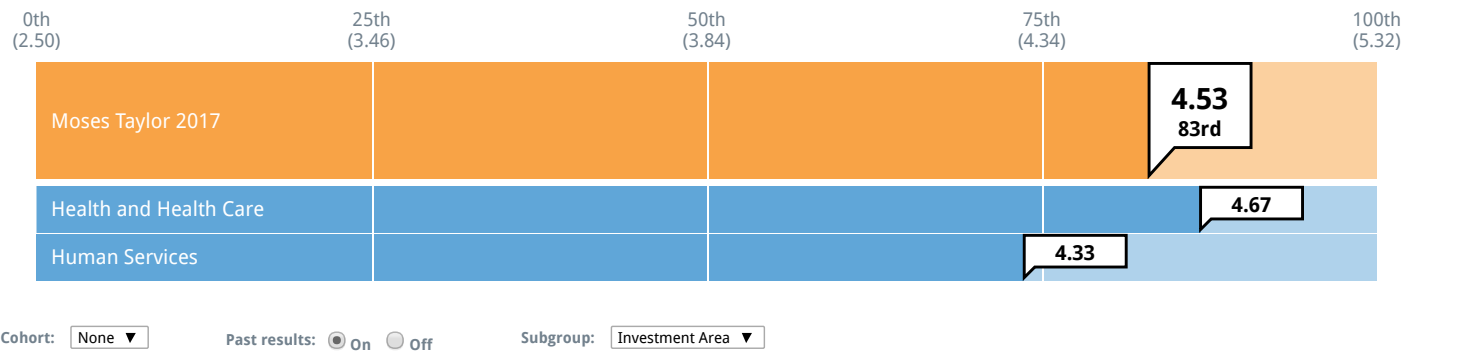
Grantee and Applicant Challenges

Grantee Ratings

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

1 = Not at all aware   7 = Extremely aware

0th (4.00)	25th (5.06)	50th (5.31)	75th (5.53)	100th (6.18)

Moses Taylor 2017 — **5.73** 89th

Custom Cohort

Health and Health Care — **5.67**
Human Services — **5.83**

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

Applicant Ratings

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

1 = Not at all aware   7 = Extremely aware

0th (2.61)	25th (3.08)	50th (3.45)	75th (3.99)	100th (4.67)

Moses Taylor 2017 — **4.13** 85th

Health and Health Care — **4.41**
Human Services — **3.77**

Cohort: None ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

22
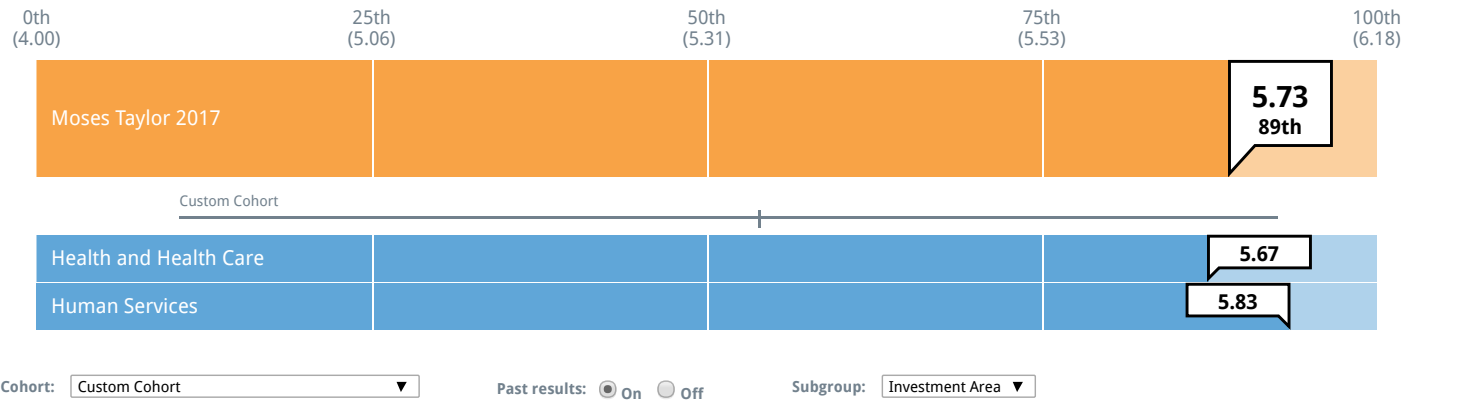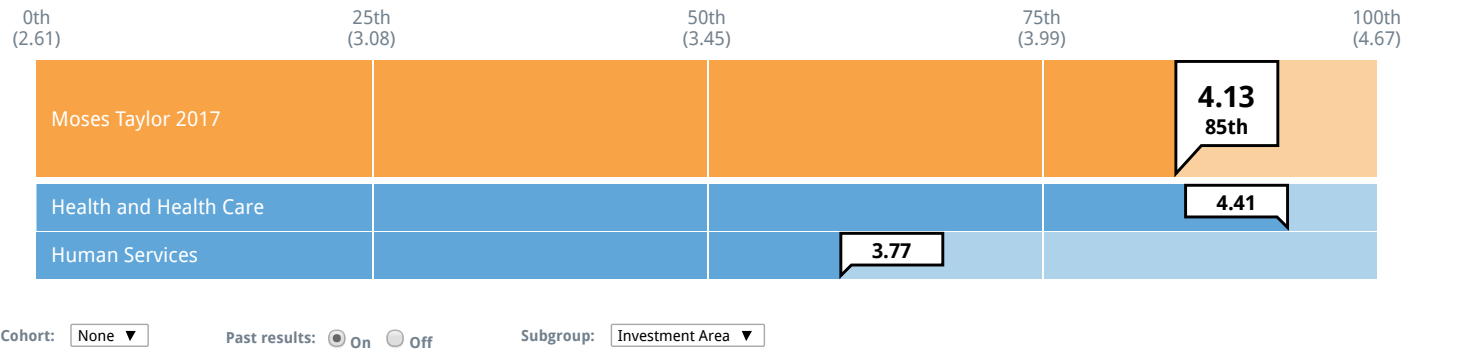
Interactions

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

Grantee Ratings

Funder-Grantee Relationships Summary Measure

1 = Very negative   **7** = Very positive

0th (4.80)	25th (6.00)	50th (6.18)	75th (6.35)	100th (6.72)

Moses Taylor 2017 — **6.53** 95th

Custom Cohort

Health and Health Care — **6.60**

Human Services — **6.42**

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼
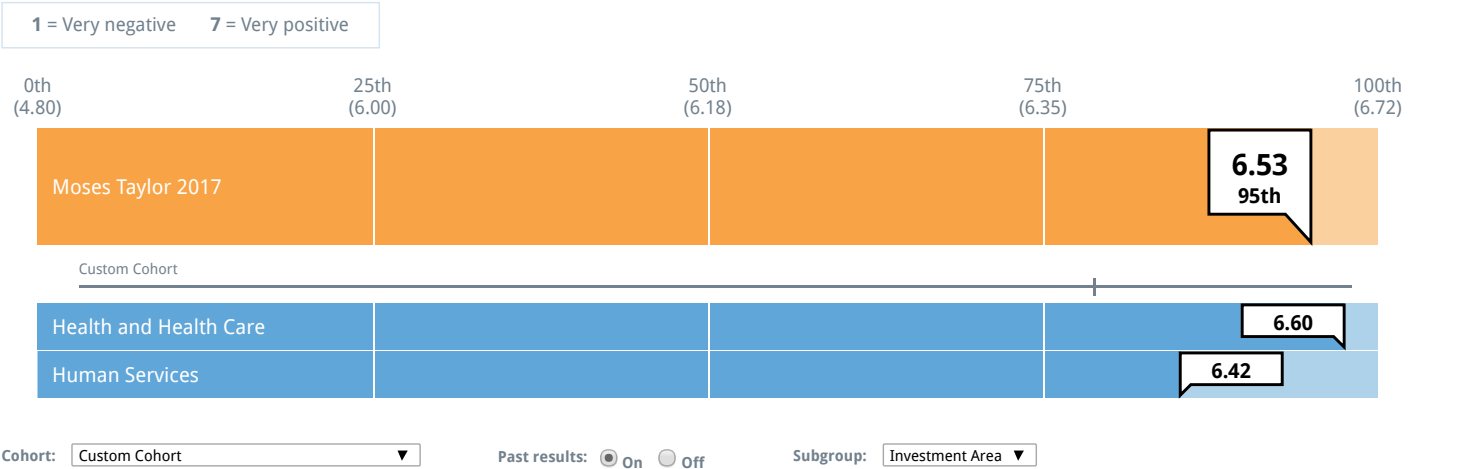
Responsiveness

Grantee Ratings

"Overall, how responsive was the Foundation staff?"

1 = Not at all responsive	7 = Extremely responsive

0th (4.90)	25th (6.10)	50th (6.35)	75th (6.56)	100th (6.89)

Moses Taylor 2017 — **6.59** 80th

Custom Cohort

Health and Health Care — **6.58**

Human Services — **6.61**

Cohort: Custom Cohort ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

Applicant Ratings

"Overall, how responsive was the Foundation staff?"

1 = Not at all responsive	7 = Extremely responsive

0th (3.38)	25th (4.19)	50th (4.76)	75th (5.23)	100th (5.96)

Moses Taylor 2017 — **5.59** 83rd

Health and Health Care — **5.53**

Human Services — **5.69**

Cohort: None ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

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Fairness

Grantee Ratings

"Overall, how fairly did the Foundation treat you?"

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

0th (5.38)	25th (6.35)	50th (6.53)	75th (6.68)	100th (6.90)

Moses Taylor 2017 — **6.68** **75th**

Custom Cohort

Health and Health Care — **6.69**

Human Services — **6.67**

Cohort: Custom Cohort ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Investment Area ▼

Applicant Ratings

"Overall, how fairly did the Foundation treat you?"

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

0th (3.39)	25th (4.28)	50th (4.74)	75th (5.07)	100th (5.96)

Moses Taylor 2017 — **5.52** **89th**

Health and Health Care — **5.94**

Human Services — **4.92**

Cohort: None ▼   **Past results:** ◉ On ○ Off   **Subgroup:** Investment Area ▼
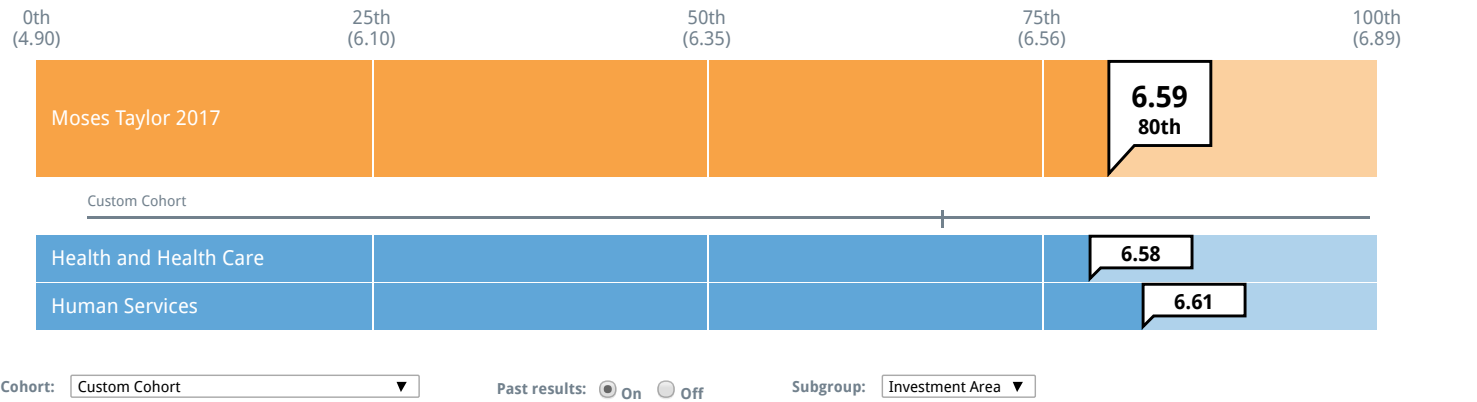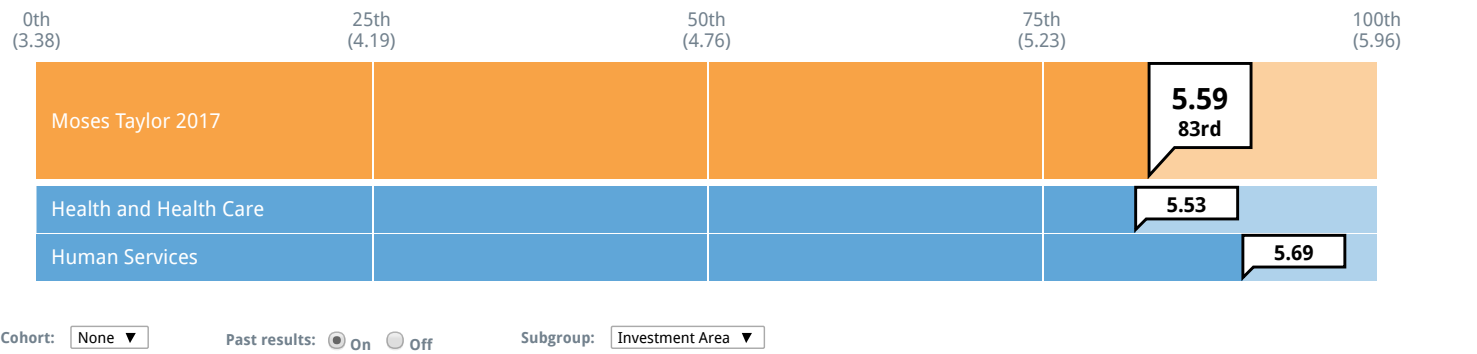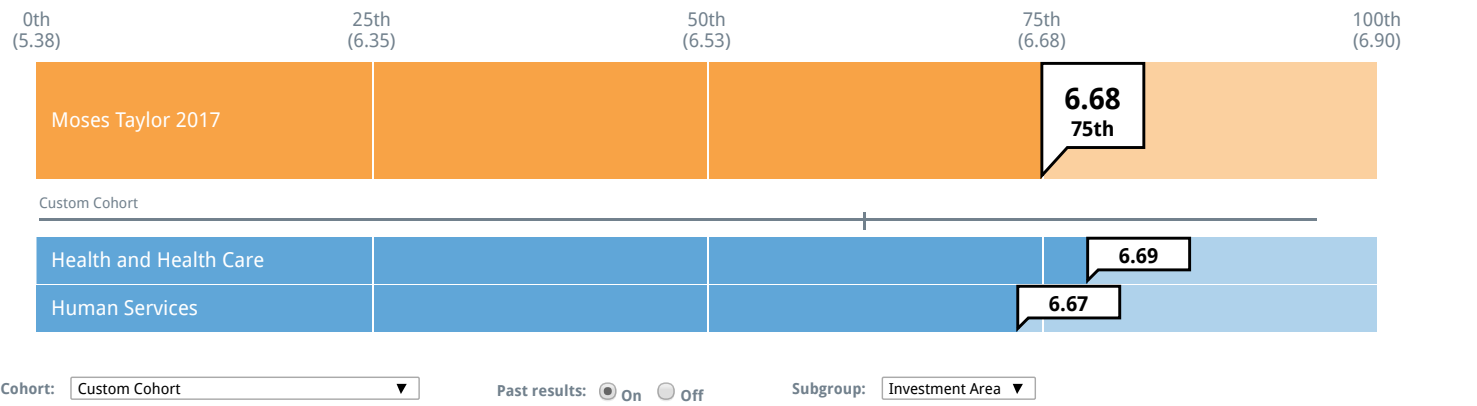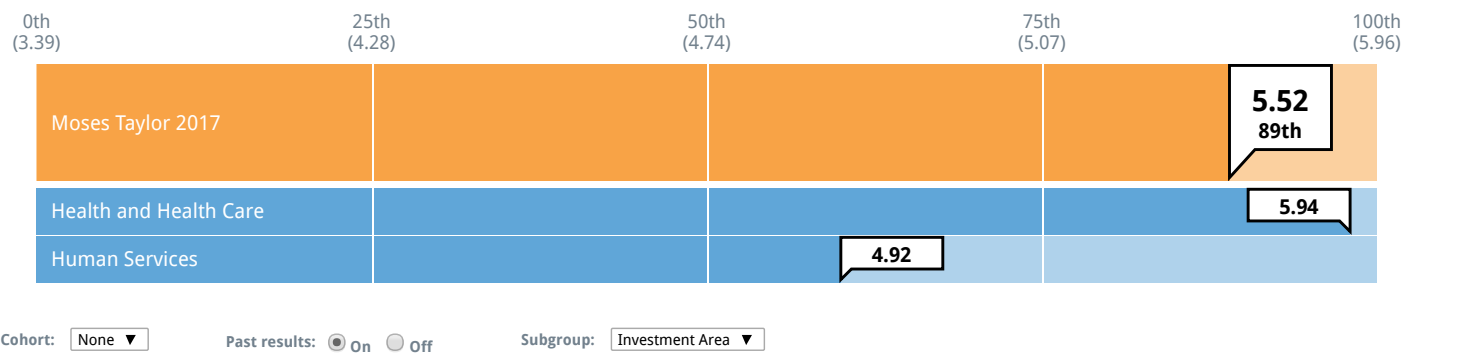
Comfort and Accessibility

Grantee Ratings

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

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

0th (5.29)	25th (6.03)	50th (6.21)	75th (6.35)	100th (6.78)

Moses Taylor 2017 — **6.64** 98th

Custom Cohort

Health and Health Care — **6.68**
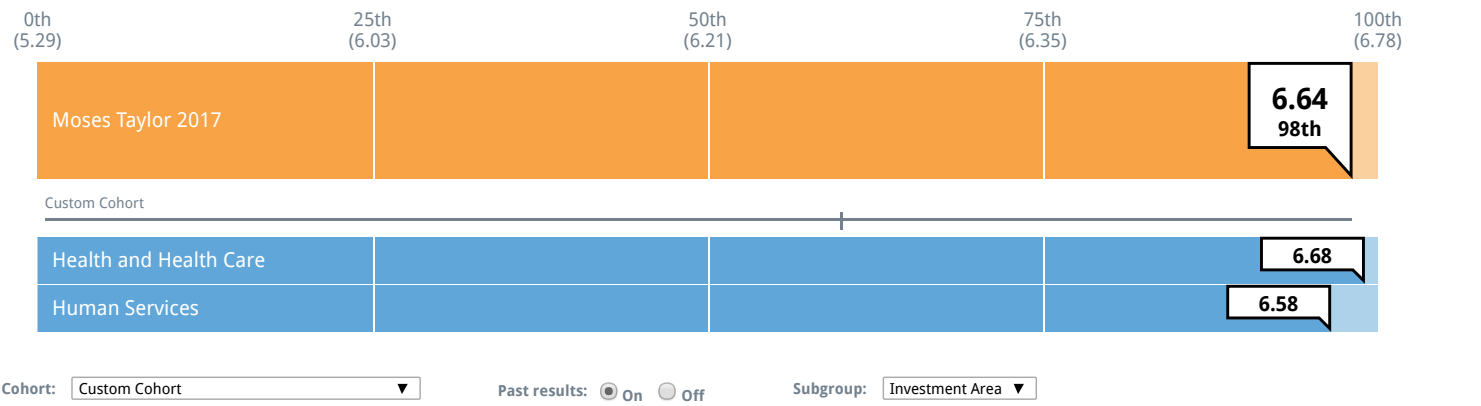
Human Services — **6.58**

| Cohort: | Custom Cohort ▼ | Past results: ⦿ On ○ Off | Subgroup: | Investment Area ▼ |

Applicant Ratings

"How accessible do you believe the Foundation is to applicants?"

1 = Some organizations are favored over others	**7** = Everyone has equal access

0th (2.47)	25th (3.82)	50th (4.25)	75th (4.63)	100th (5.50)

Moses Taylor 2017 — **5.45** 97th

Health and Health Care — **5.26**

Human Services — **5.75**

| Cohort: | None ▼ | Past results: ⦿ On ○ Off | Subgroup: | Investment Area ▼ |

26
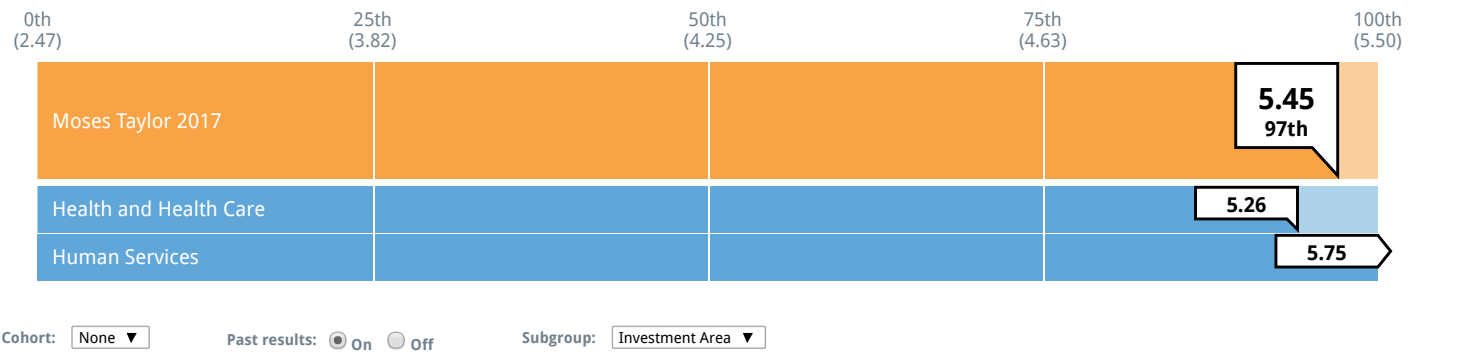
Grantee Interaction Patterns

| **Grantee Responses**

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

Frequency of Contact with Program Officer	Moses Taylor 2017	Average Funder	Custom Cohort
Weekly or more often	5%	3%	2%
A few times a month	7%	11%	12%
Monthly	15%	15%	16%
Once every few months	59%	53%	57%
Yearly or less often	14%	18%	13%

Frequency of Contact with Program Officer (By Subgroup)	Health and Health Care	Human Services
Weekly or more often	8%	0%
A few times a month	3%	13%
Monthly	11%	22%
Once every few months	67%	48%
Yearly or less often	11%	17%

| Grantee Responses

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

Initiation of Contact with Program Officer	Moses Taylor 2017	Average Funder	Custom Cohort
Program Officer	25%	15%	20%
Both of equal frequency	40%	50%	53%
Grantee	35%	35%	27%

Initiation of Contact with Program Officer (By Subgroup)	Health and Health Care	Human Services
Program Officer	25%	26%
Both of equal frequency	38%	43%
Grantee	38%	30%

Contact Change and Site Visits

Grantee Ratings

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

Proportion of grantees responding 'Yes'

0th (0%)	25th (5%)	50th (14%)	75th (25%)	100th (90%)

Moses Taylor 2017 — 4% 18th

Custom Cohort

Health and Health Care — 3%
Human Services — 4%

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼
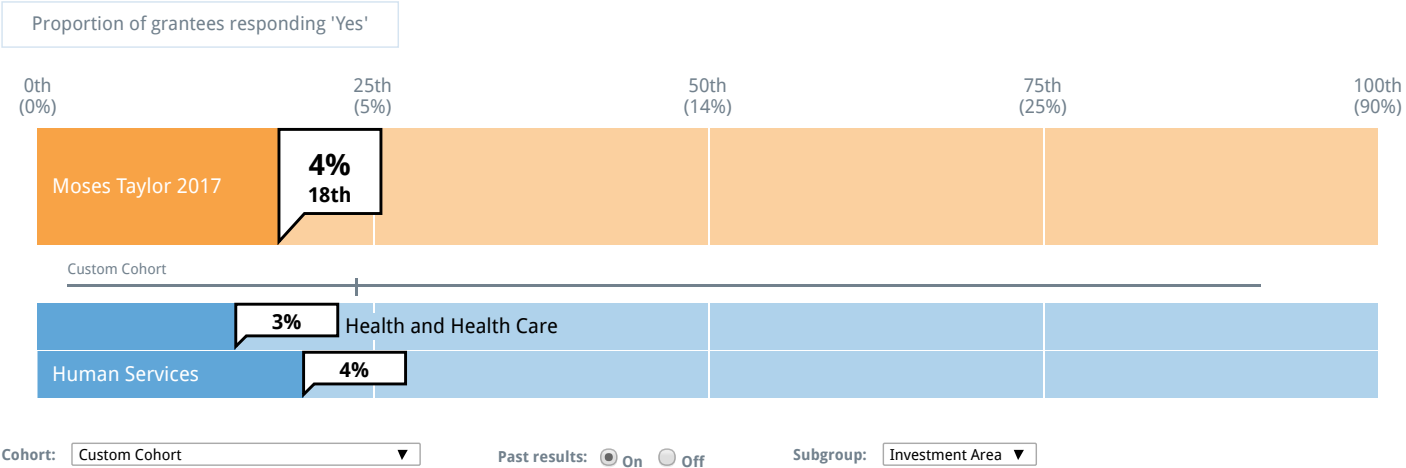
Grantee Ratings

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

Proportion of grantees responding 'Yes'

0th (7%)	25th (36%)	50th (51%)	75th (69%)	100th (100%)

Moses Taylor 2017 — 78% 83rd

Custom Cohort

Health and Health Care — 79%
Human Services — 75%

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

29
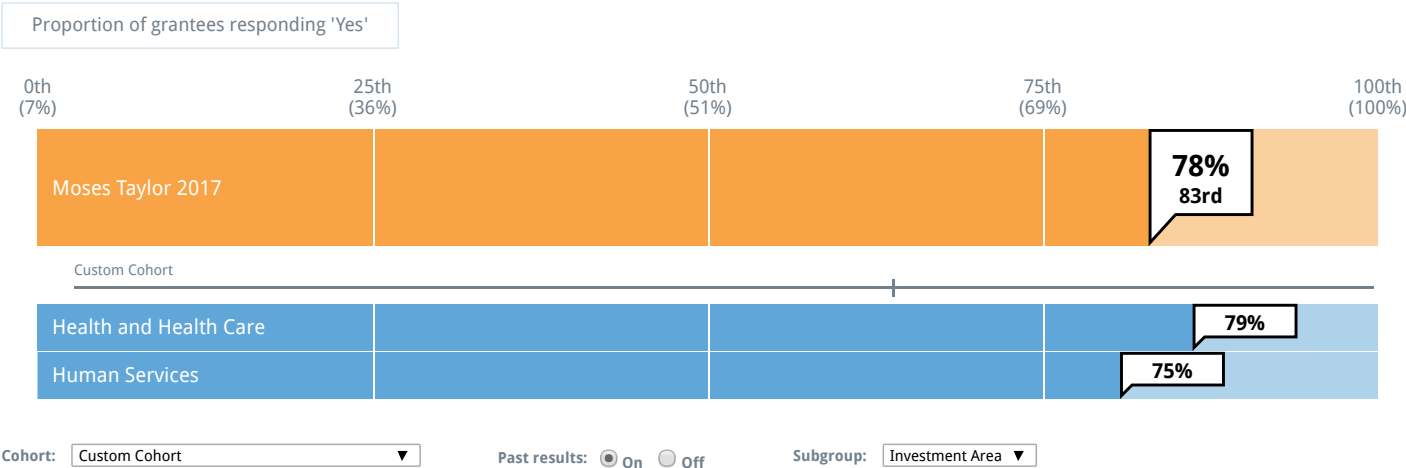
Communication

Grantee Ratings

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

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

0th (3.65)	25th (5.50)	50th (5.73)	75th (6.00)	100th (6.57)

Moses Taylor 2017 — **6.29** 95th

Custom Cohort

Health and Health Care — **6.44**

Human Services — **6.04**

Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Investment Area ▼]
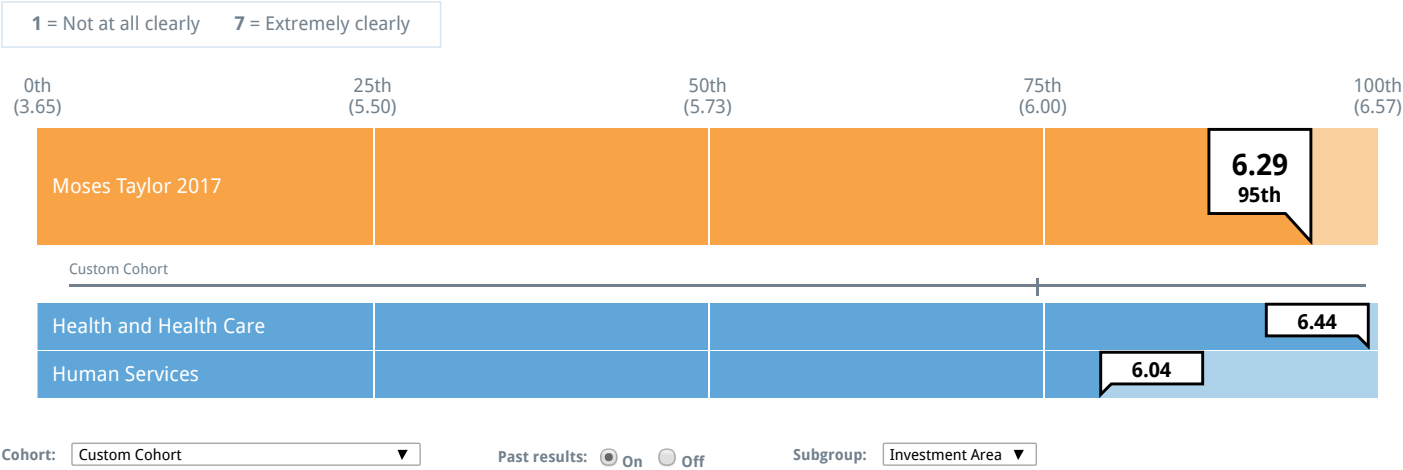
Applicant Ratings

"How clearly has the Foundation communicated its goals and strategy to you?"
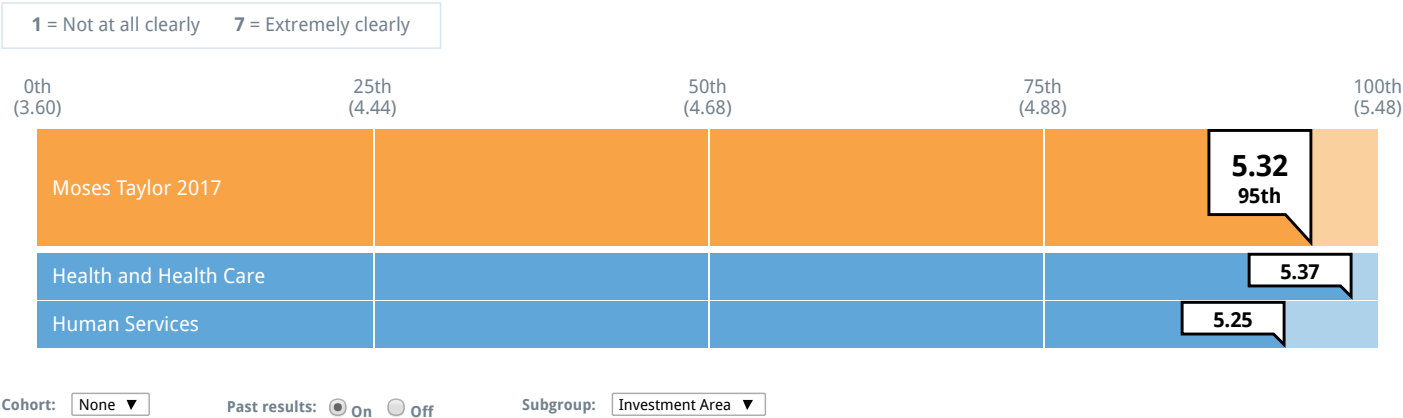
1 = Not at all clearly   **7** = Extremely clearly

0th (3.60)	25th (4.44)	50th (4.68)	75th (4.88)	100th (5.48)

Moses Taylor 2017 — **5.32** 95th

Health and Health Care — **5.37**

Human Services — **5.25**

Cohort: [None ▼]   Past results: ◉ On ○ Off   Subgroup: [Investment Area ▼]
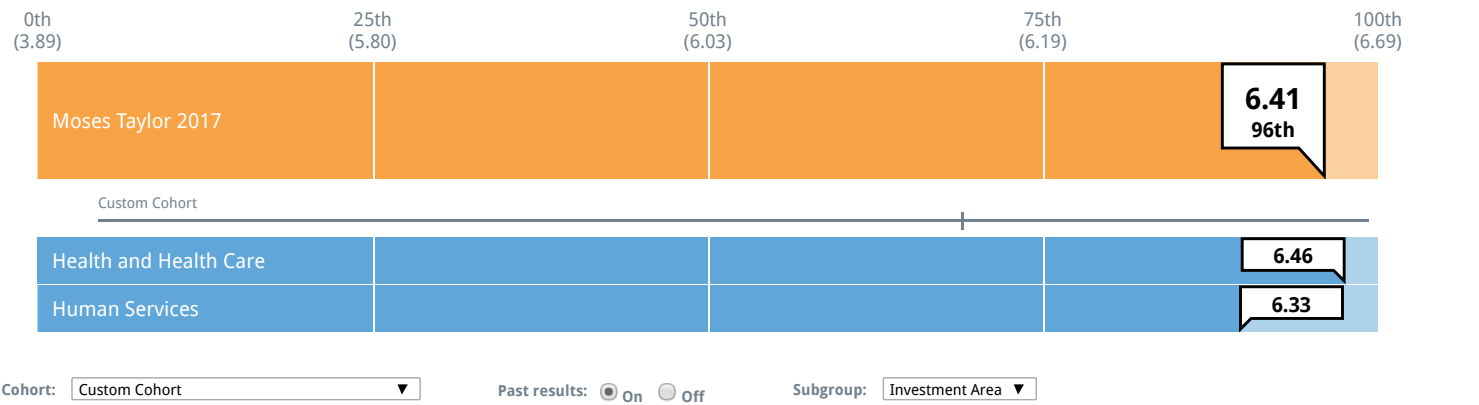
Consistency of Communication

Grantee Ratings

"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

0th (3.89)	25th (5.80)	50th (6.03)	75th (6.19)	100th (6.69)

Moses Taylor 2017 — **6.41** / **96th**

Custom Cohort

Health and Health Care — **6.46**

Human Services — **6.33**

Cohort: Custom Cohort ▼   Past results: ⦿ On   ○ Off   Subgroup: Investment Area ▼

Applicant Ratings

"How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?"
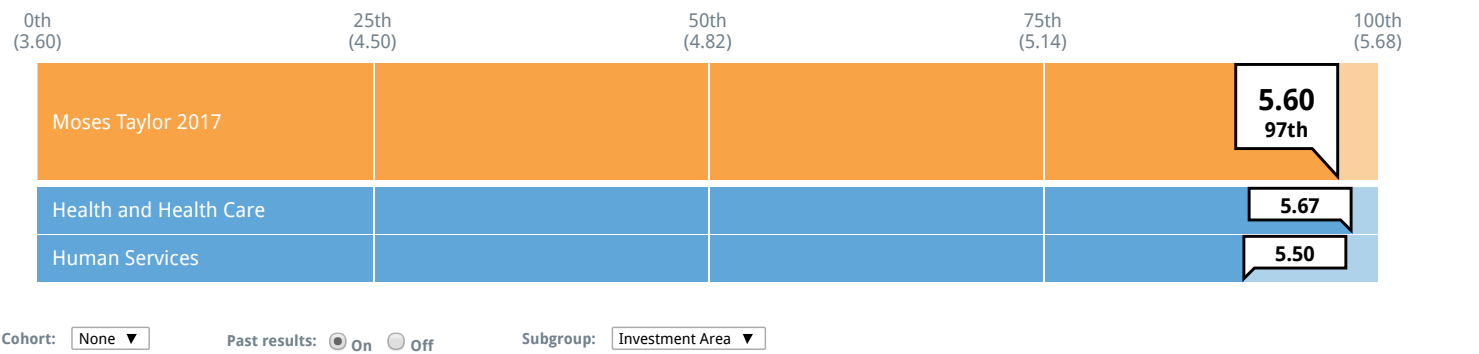
1 = Not at all consistent	**7** = Completely consistent

0th (3.60)	25th (4.50)	50th (4.82)	75th (5.14)	100th (5.68)

Moses Taylor 2017 — **5.60** / **97th**

Health and Health Care — **5.67**

Human Services — **5.50**

Cohort: None ▼   Past results: ⦿ On   ○ Off   Subgroup: Investment Area ▼
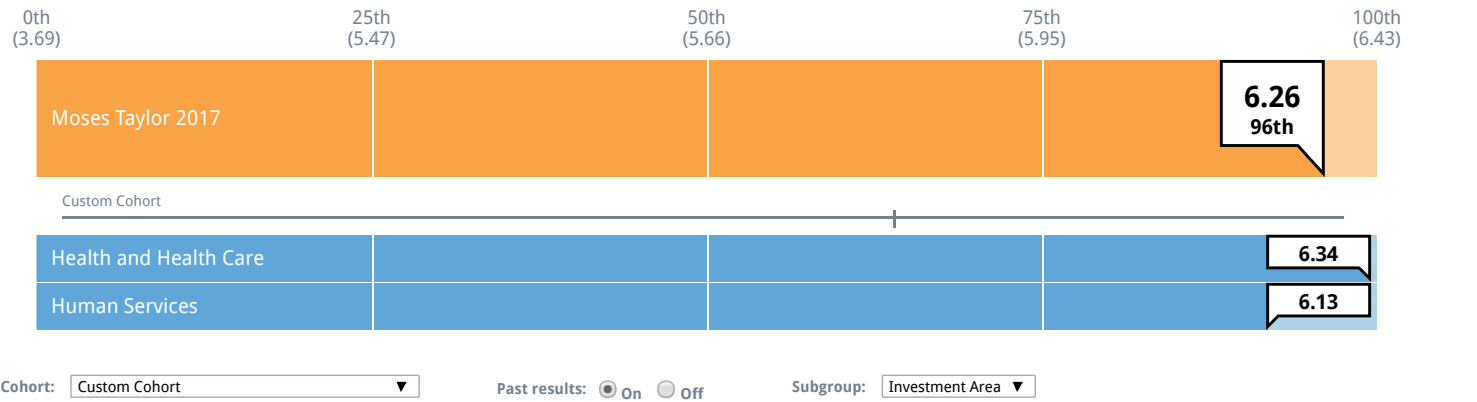
31

Funder Transparency

Grantee Ratings

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

| 1 = Not at all transparent | 7 = Extremely transparent |

| 0th (3.69) | 25th (5.47) | 50th (5.66) | 75th (5.95) | 100th (6.43) |

Moses Taylor 2017 — 6.26 / 96th

Custom Cohort

Health and Health Care — 6.34

Human Services — 6.13

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

Grantee Ratings

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

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

| 0th (4.14) | 25th (5.02) | 50th (5.26) | 75th (5.52) | 100th (6.26) |
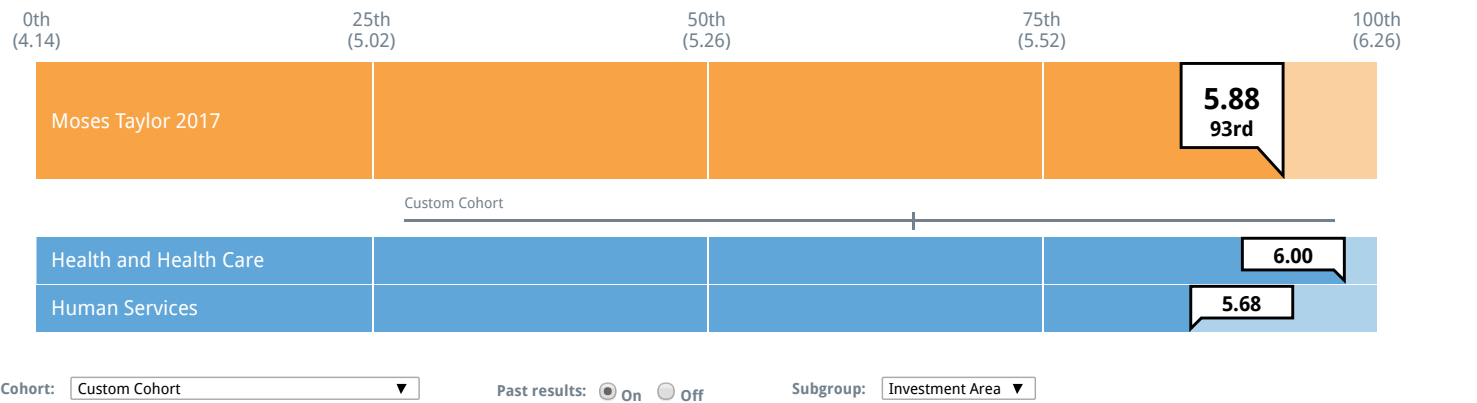
Moses Taylor 2017 — 5.88 / 93rd

Custom Cohort

Health and Health Care — 6.00

Human Services — 5.68

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

Applicant Ratings

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

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

0th (3.46)	25th (3.73)	50th (4.06)	75th (4.58)	100th (5.18)

Moses Taylor 2017 — **4.93** **82nd**

Health and Health Care — **5.00**

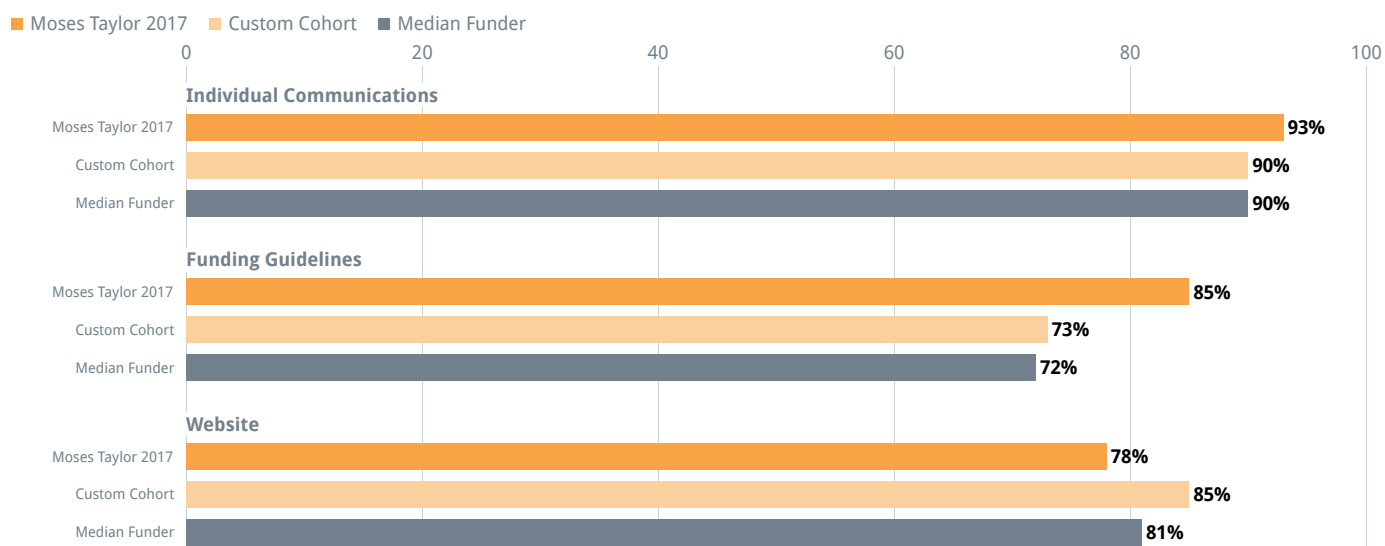Human Services — **4.85**
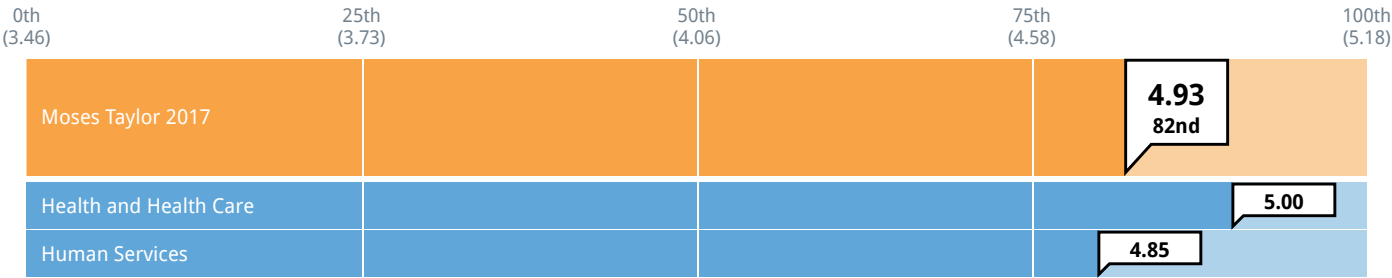
Cohort: None ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼
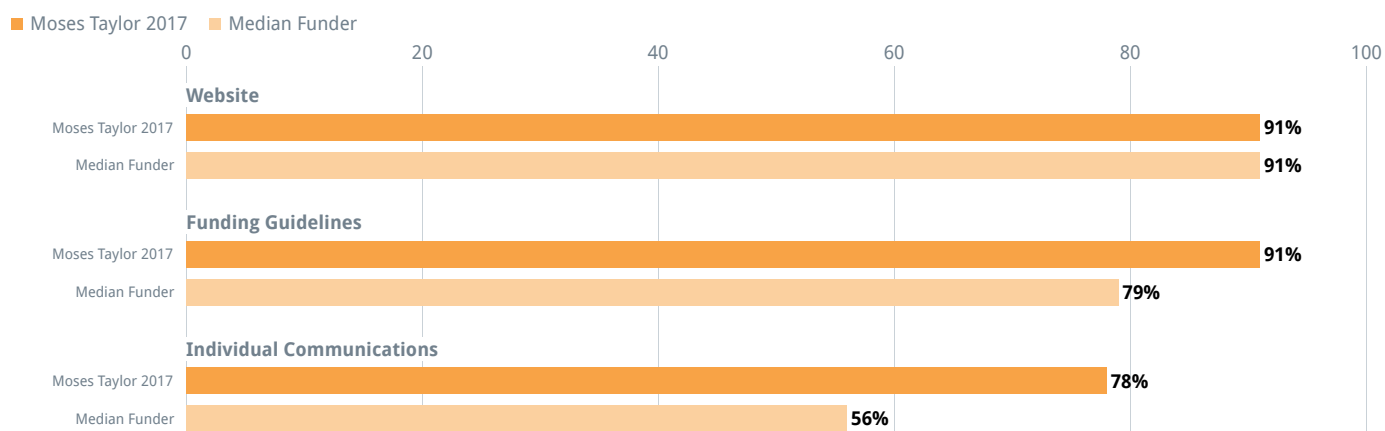
Communication Resources

Grantees and applicants were asked whether they used each of the following communications resources from the Foundation and how helpful they found each resource. The following charts show the proportions of respondents 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 (Grantee Responses)

■ Moses Taylor 2017   ■ Custom Cohort   ■ Median Funder

Individual Communications
- Moses Taylor 2017: 93%
- Custom Cohort: 90%
- Median Funder: 90%

Funding Guidelines
- Moses Taylor 2017: 85%
- Custom Cohort: 73%
- Median Funder: 72%

Website
- Moses Taylor 2017: 78%
- Custom Cohort: 85%
- Median Funder: 81%

Usage of Communication Resources (Applicant Responses)

■ Moses Taylor 2017   ■ Median Funder

Website
- Moses Taylor 2017: 91%
- Median Funder: 91%

Funding Guidelines
- Moses Taylor 2017: 91%
- Median Funder: 79%

Individual Communications
- Moses Taylor 2017: 78%
- Median Funder: 56%

Helpfulness of Communication Resources (Grantee Ratings)

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

■ Moses Taylor 2017   ■ Custom Cohort   ■ Median Funder

Individual Communications

Moses Taylor 2017	6.63
Custom Cohort	6.48
Median Funder	6.54

Funding Guidelines

Moses Taylor 2017	6.18
Custom Cohort	6.07
Median Funder	5.92

Website

Moses Taylor 2017	6.15
Custom Cohort	5.85
Median Funder	5.61
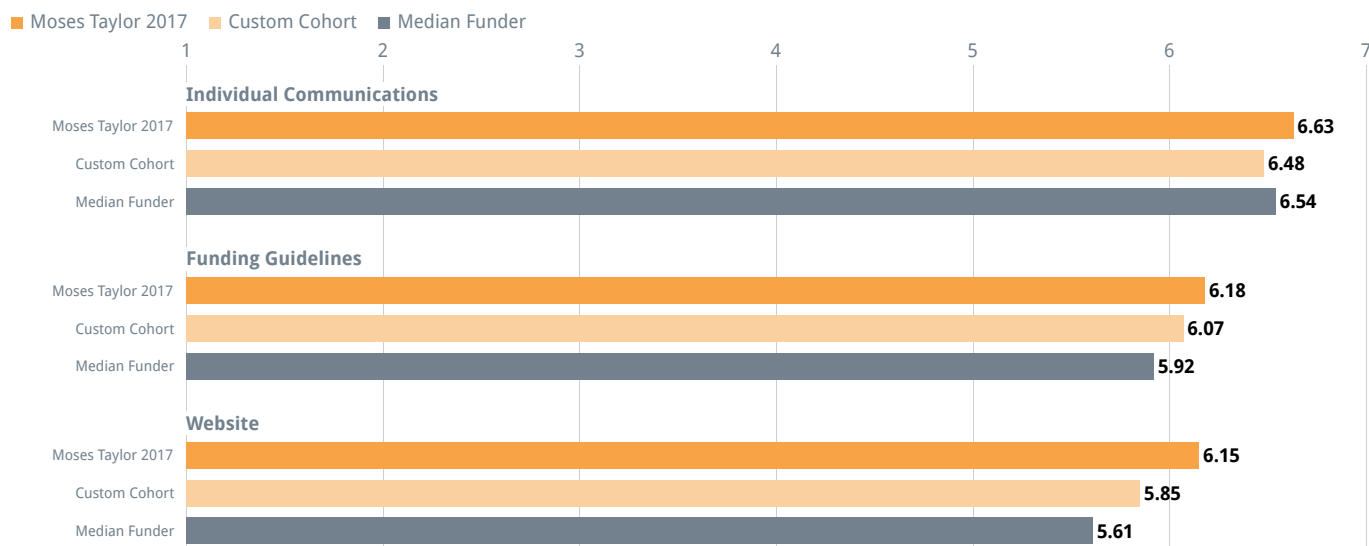
Helpfulness of Communication Resources (Applicant Ratings)

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

■ Moses Taylor 2017   ■ Median Funder

Website

Moses Taylor 2017	5.11
Median Funder	5.07

Funding Guidelines

Moses Taylor 2017	5.25
Median Funder	5.06

Individual Communications

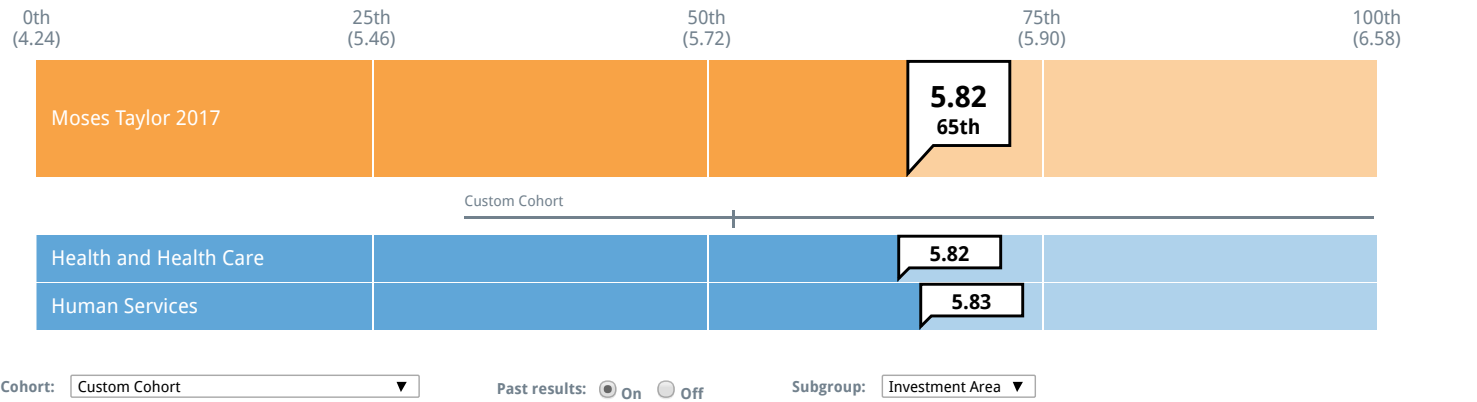|	
Moses Taylor 2017	5.09
Median Funder	5.09
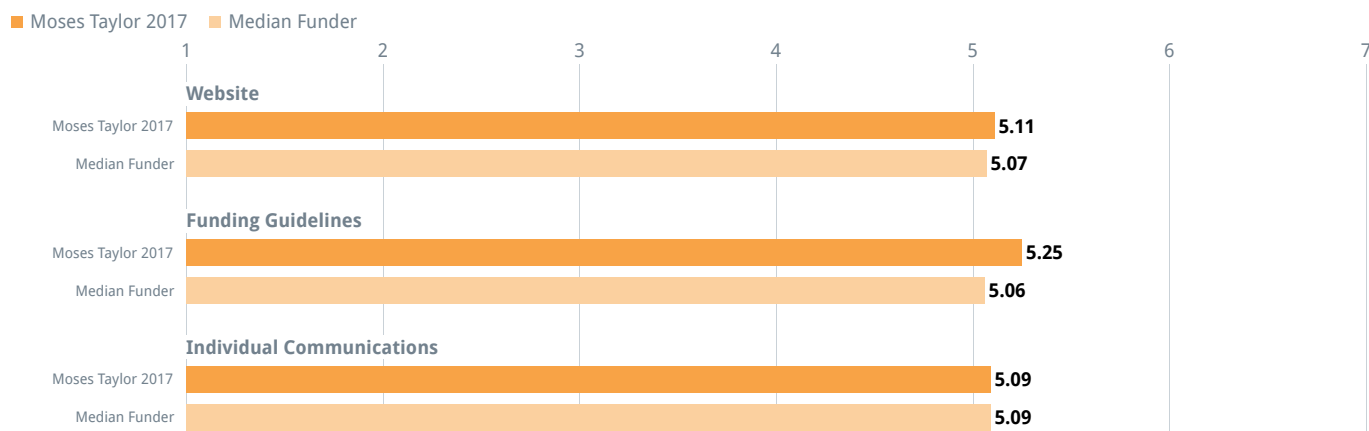
Beneficiary and Contextual Understanding

Grantee Ratings

"How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?"
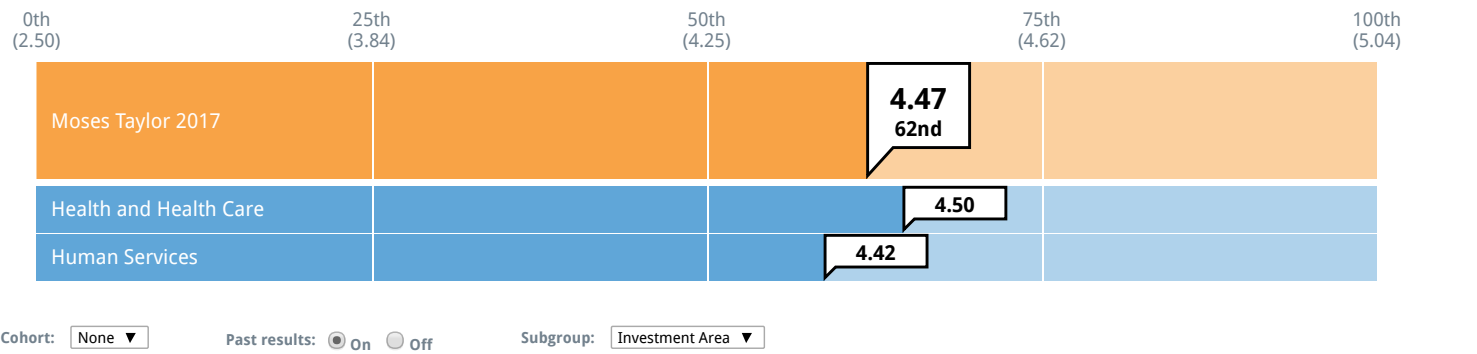
1 = Limited understanding   **7** = Thorough understanding

0th (4.24)	25th (5.46)	50th (5.72)	75th (5.90)	100th (6.58)

Moses Taylor 2017 — **5.82** / 65th

Custom Cohort

Health and Health Care — **5.82**

Human Services — **5.83**

Cohort: Custom Cohort ▼   **Past results:** ◉ On ◯ Off   **Subgroup:** Investment Area ▼

Applicant Ratings

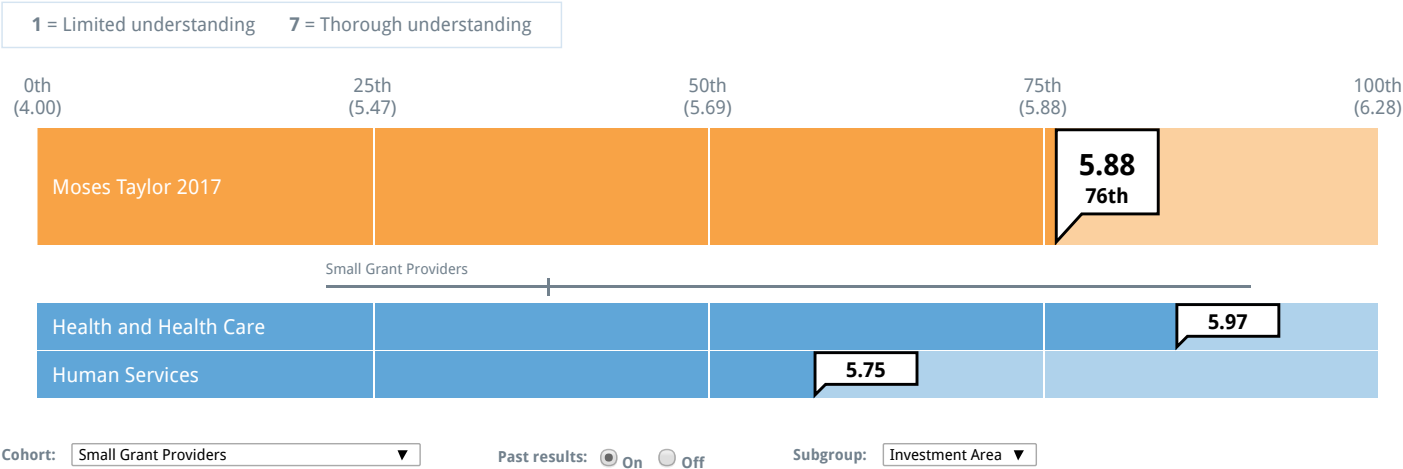### "How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?"

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

0th (2.50)	25th (3.84)	50th (4.25)	75th (4.62)	100th (5.04)

Moses Taylor 2017 — **4.47** / 62nd

Health and Health Care — **4.50**

Human Services — **4.42**

Cohort: None ▼   **Past results:** ◉ On ◯ Off   **Subgroup:** Investment Area ▼

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.
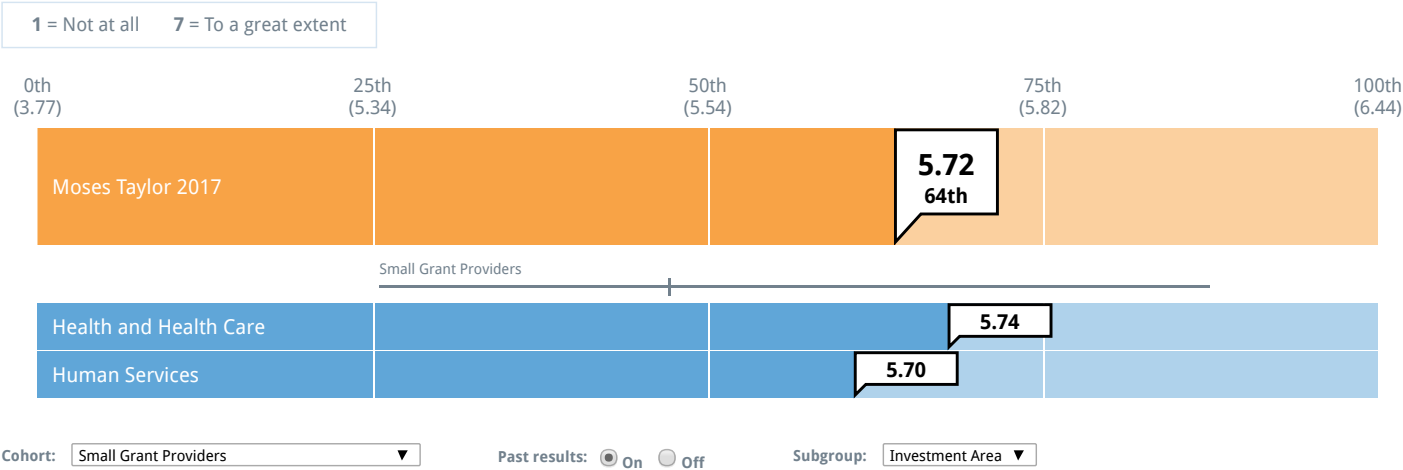
Grantee Ratings

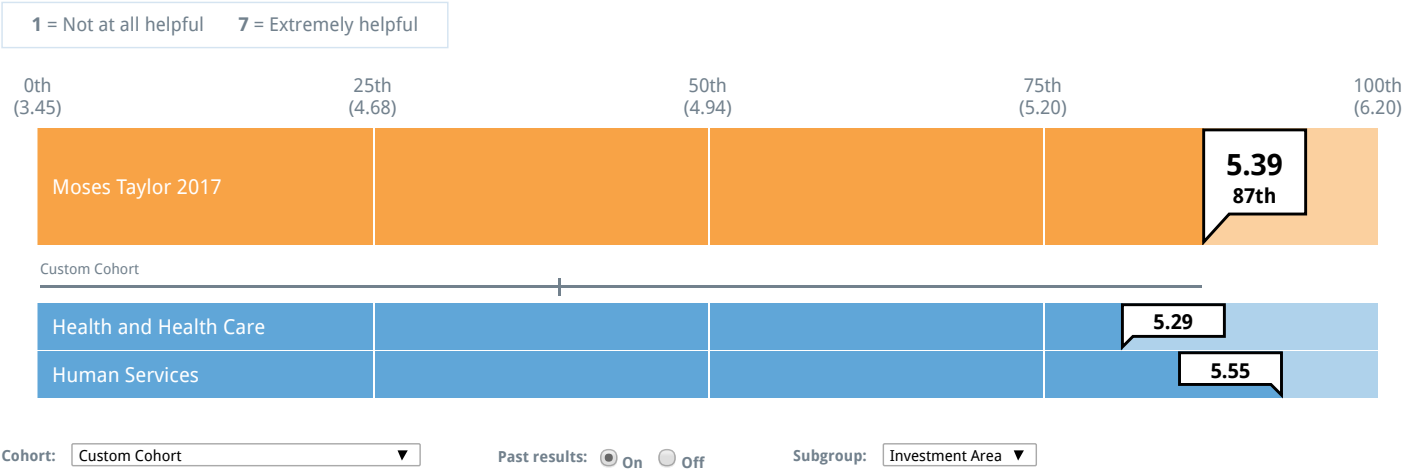### "How well does the Foundation understand your intended beneficiaries' needs?"

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

0th (4.00)	25th (5.47)	50th (5.69)	75th (5.88)	100th (6.28)

Moses Taylor 2017 — **5.88** 76th

Small Grant Providers

Health and Health Care — **5.97**

Human Services — **5.75**

Cohort: Small Grant Providers ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

Grantee Ratings

"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

0th (3.77)	25th (5.34)	50th (5.54)	75th (5.82)	100th (6.44)

Moses Taylor 2017 — **5.72** 64th

Small Grant Providers

Health and Health Care — **5.74**

Human Services — **5.70**

Cohort: Small Grant Providers ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼
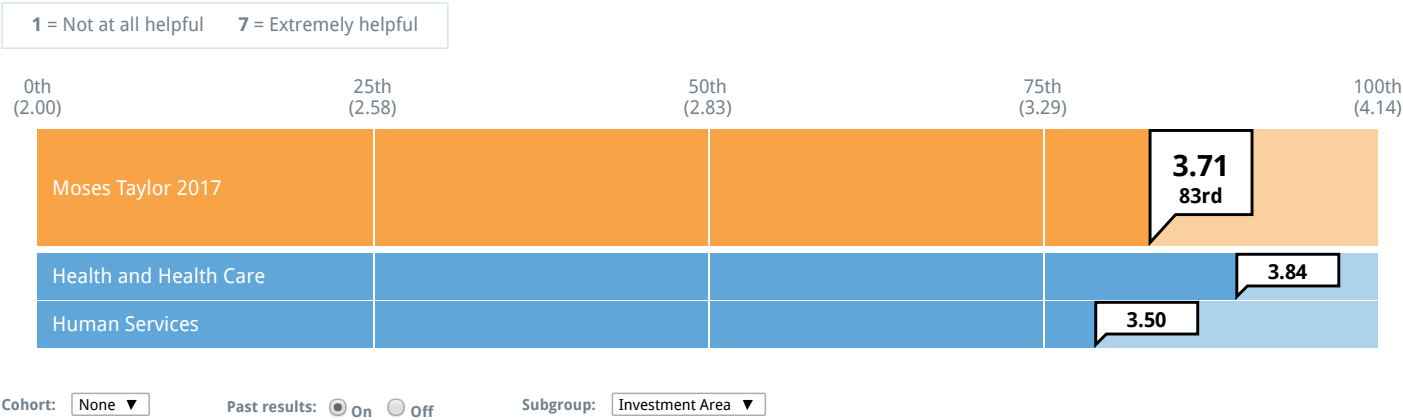
Selection Process

Grantee Ratings

"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

0th (3.45)	25th (4.68)	50th (4.94)	75th (5.20)	100th (6.20)

Moses Taylor 2017 — **5.39** / 87th

Custom Cohort

Health and Health Care — **5.29**

Human Services — **5.55**

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Investment Area ▼
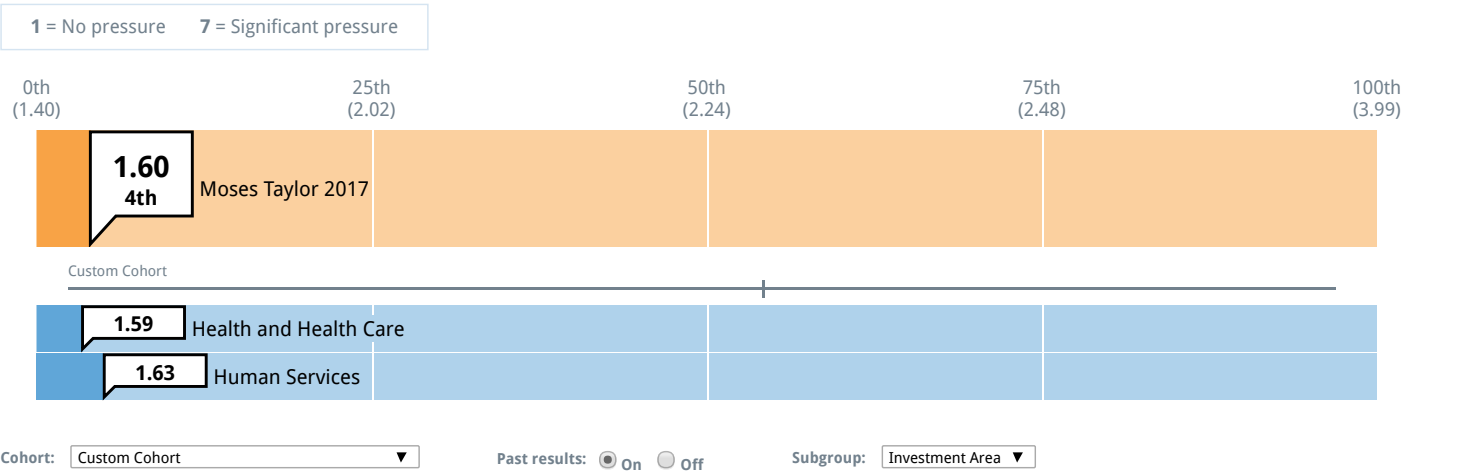
Applicant Ratings

"How helpful was participating in the Foundation's selection process in strengthening the organization/program to which the grant funding would have been directed?"

1 = Not at all helpful   7 = Extremely helpful

0th (2.00)	25th (2.58)	50th (2.83)	75th (3.29)	100th (4.14)

Moses Taylor 2017 — **3.71** / 83rd

Health and Health Care — **3.84**

Human Services — **3.50**

Cohort: None ▼   Past results: ⦿ On ◯ Off   Subgroup: Investment Area ▼
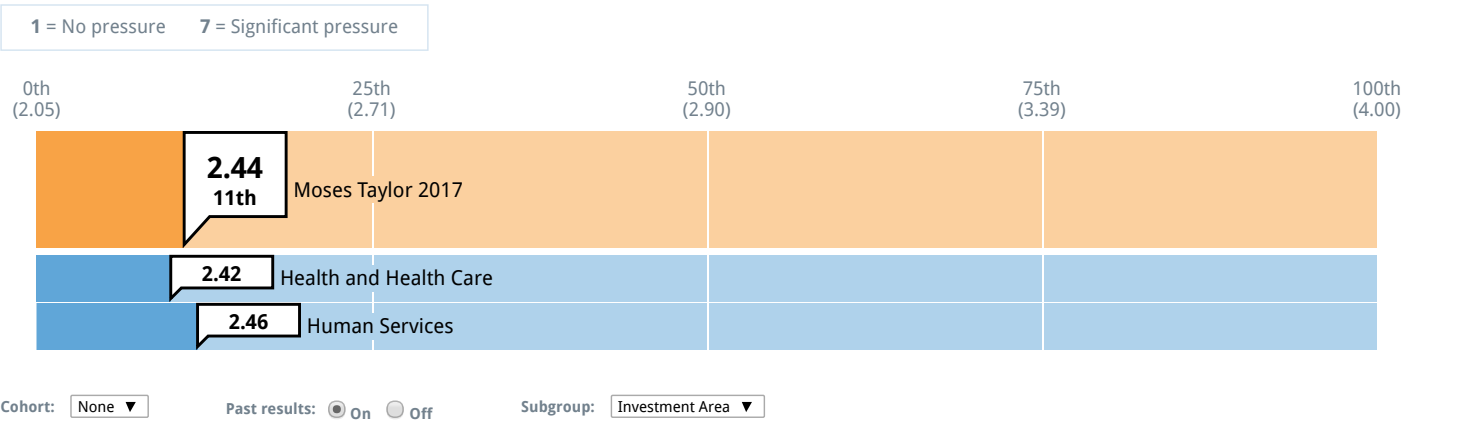
Pressure to Modify Priorities

Grantee Ratings

"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 (1.40)	25th (2.02)	50th (2.24)	75th (2.48)	100th (3.99)

1.60
4th   Moses Taylor 2017

Custom Cohort

1.59   Health and Health Care

1.63   Human Services

Cohort: [Custom Cohort ▼]   Past results: ◉ On ○ Off   Subgroup: [Investment Area ▼]

Applicant Ratings

"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 (2.05)	25th (2.71)	50th (2.90)	75th (3.39)	100th (4.00)

2.44
11th   Moses Taylor 2017

2.42   Health and Health Care

2.46   Human Services

Cohort: [None ▼]   Past results: ◉ On ○ Off   Subgroup: [Investment Area ▼]

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Time Between Submission and Funding Decision

| **Grantee Responses**

| **"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	Moses Taylor 2017	Average Funder	Custom Cohort
Less than 1 month	7%	6%	6%
1 - 3 months	73%	56%	61%
4 - 6 months	14%	29%	27%
7 - 9 months	2%	5%	4%
10 - 12 months	2%	2%	1%
More than 12 months	2%	2%	1%

Time Elapsed from Submission of Proposal to Clear Commitment of Funding (By Subgroup)	Health and Health Care	Human Services
Less than 1 month	0%	18%
1 - 3 months	79%	64%
4 - 6 months	15%	14%
7 - 9 months	3%	0%
10 - 12 months	0%	5%
More than 12 months	3%	0%

| Applicant Responses

| "How much time elapsed from initial submission of your grant proposal to the final decision not to fund your request?"

Time Between Submission and Funding Decision	Moses Taylor 2017	Average Funder
Less than 1 month	21%	14%
1 to 3 months	71%	55%
4 to 6 months	4%	24%
7 to 9 months	4%	4%
10 to 12 months	0%	2%
More than 12 months	0%	1%

Time Between Submission and Funding Decision (By Subgroup)	Health and Health Care	Human Services
Less than 1 month	12%	36%
1 to 3 months	76%	64%
4 to 6 months	6%	0%
7 to 9 months	6%	0%
10 to 12 months	0%	0%
More than 12 months	0%	0%

Involvement in Proposal Development

Grantee Ratings

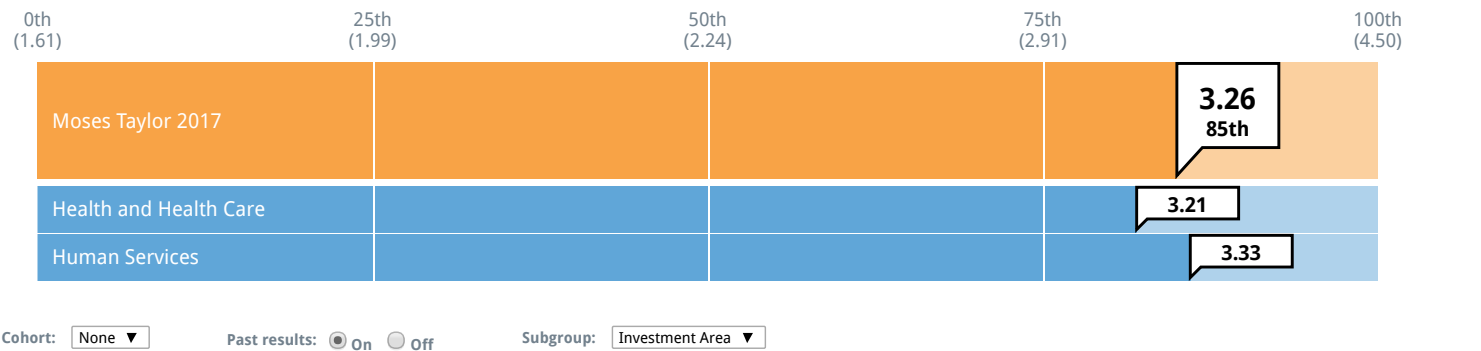### "How involved was the Foundation staff in the development of your proposal?"

1 = No involvement   **7** = Substantial involvement

0th (1.87)	25th (3.19)	50th (3.78)	75th (4.24)	100th (6.41)

Moses Taylor 2017 — **3.82** 52nd

Custom Cohort

Health and Health Care — **3.44**

Human Services — **4.39**

Cohort: [Custom Cohort ▼]   Past results: ⦿ On ◯ Off   Subgroup: [Investment Area ▼]

Applicant Ratings

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

1 = No involvement   **7** = Substantial involvement

0th (1.61)	25th (1.99)	50th (2.24)	75th (2.91)	100th (4.50)

Moses Taylor 2017 — **3.26** 85th

Health and Health Care — **3.21**

Human Services — **3.33**

Cohort: [None ▼]   Past results: ⦿ On ◯ Off   Subgroup: [Investment Area ▼]
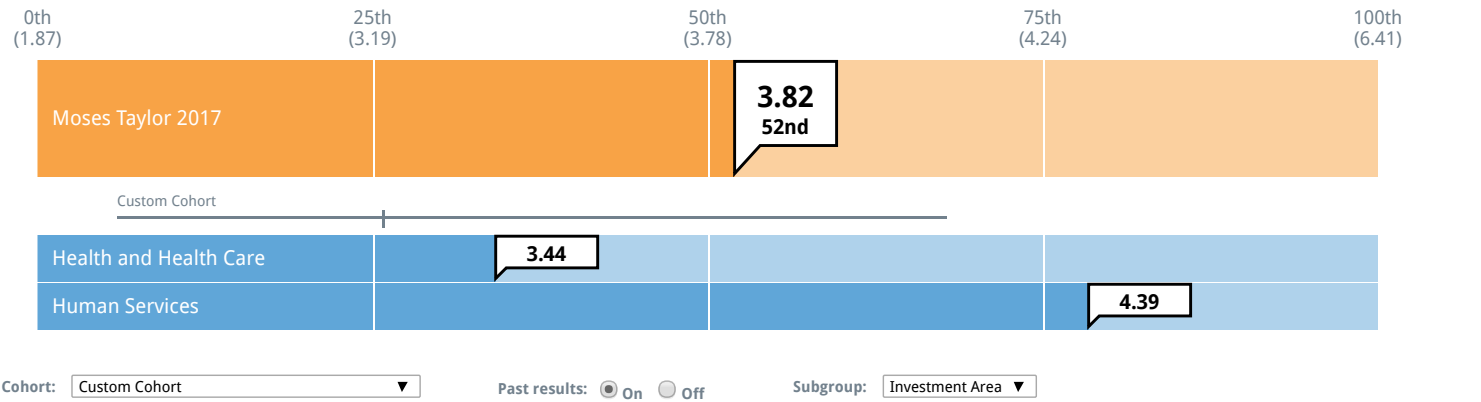
Declined Applications

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

Reasons for Applying for Funding (Applicant Responses)

■ Moses Taylor 2017   ■ Median Funder

Read Guidelines
- Moses Taylor 2017: 66%
- Median Funder: 62%

Major Local Funder
- Moses Taylor 2017: 50%
- Median Funder: 37%

Encouraged By Others
- Moses Taylor 2017: 38%
- Median Funder: 27%

Major Field Funder
- Moses Taylor 2017: 31%
- Median Funder: 27%

Encouraged By Foundation Staff
- Moses Taylor 2017: 34%
- Median Funder: 28%

Call for Proposals
- Moses Taylor 2017: 41%
- Median Funder: 18%

Follow-up to a Previous Grant
- Moses Taylor 2017: 0%
- Median Funder: 16%

Reasons Provided for Declining Proposal

| Applicant Responses

| "Please choose the option that most resembles the reason the Foundation gave when it declined to fund your proposal."
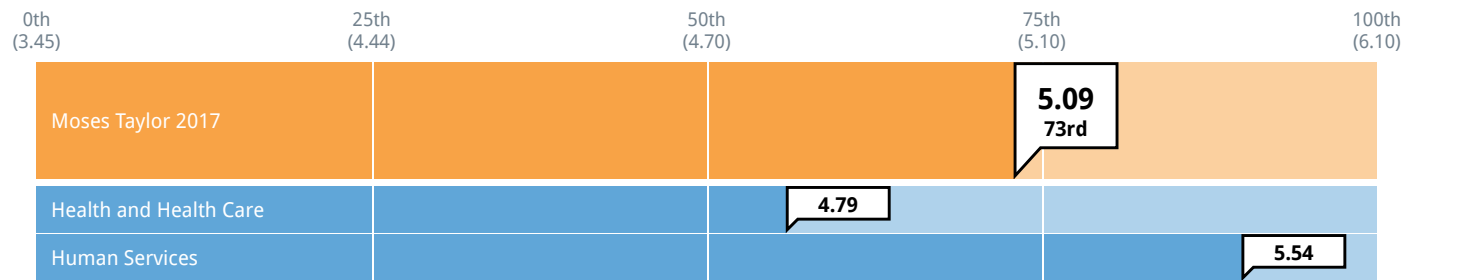
Reasons Provided for Declining Proposal	Moses Taylor 2017	Average Funder
No reason provided	0%	14%
Not enough funds/too many good proposals	34%	29%
Doesn't fit Foundation priorities/guidelines, with no explanation as to why	28%	14%
Doesn't fit Foundation priorities/guidelines, with explanation as to why	25%	16%
Other	13%	27%

Reasons Provided for Declining Proposal (By Subgroup)	Health and Health Care	Human Services
No reason provided	0%	0%
Not enough funds/too many good proposals	58%	0%
Doesn't fit Foundation priorities/guidelines, with no explanation as to why	21%	38%
Doesn't fit Foundation priorities/guidelines, with explanation as to why	21%	31%
Other	0%	31%

| Applicant Ratings

| "How would you rate the honesty of the reason(s) the Foundation gave for declining to fund your proposal?"

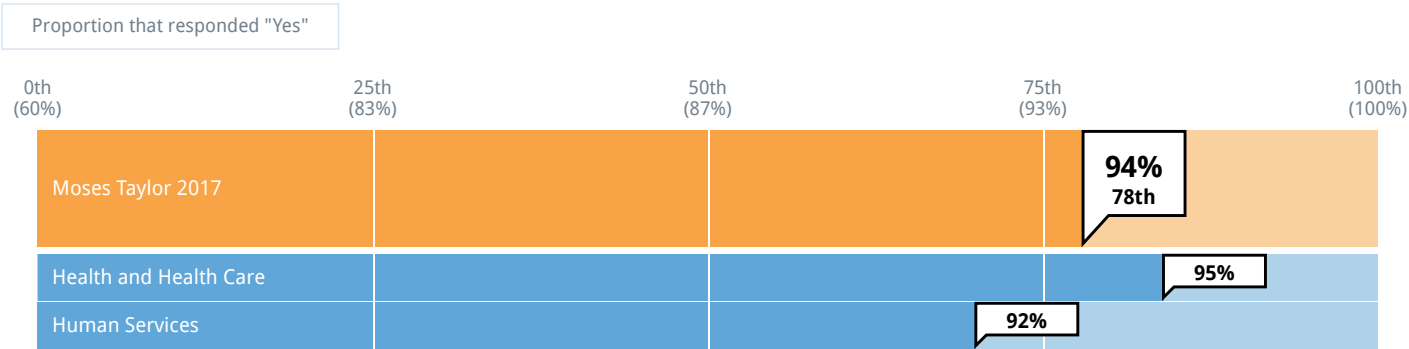1 = Not at all honest   7 = Extremely honest

0th (3.45)	25th (4.44)	50th (4.70)	75th (5.10)	100th (6.10)

Moses Taylor 2017 — 5.09 73rd

Health and Health Care — 4.79

Human Services — 5.54

Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

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Implications for Future Applications

Applicant Ratings

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

Proportion that responded "Yes"

0th (60%)	25th (83%)	50th (87%)	75th (93%)	100th (100%)

Moses Taylor 2017 — **94%** **78th**

Health and Health Care — **95%**

Human Services — **92%**

Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

History with the Foundation of Respondents That Would Consider Reapplying	Moses Taylor 2017	Average Funder
First-time applicant	55%	44%
Previously received funding	21%	41%
Previously declined	24%	15%

History with the Foundation of Respondents That Would Consider Reapplying (By Subgroup)	Health and Health Care	Human Services
First-time applicant	61%	45%
Previously received funding	28%	9%
Previously declined	11%	45%

Feedback on Declined Applications

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

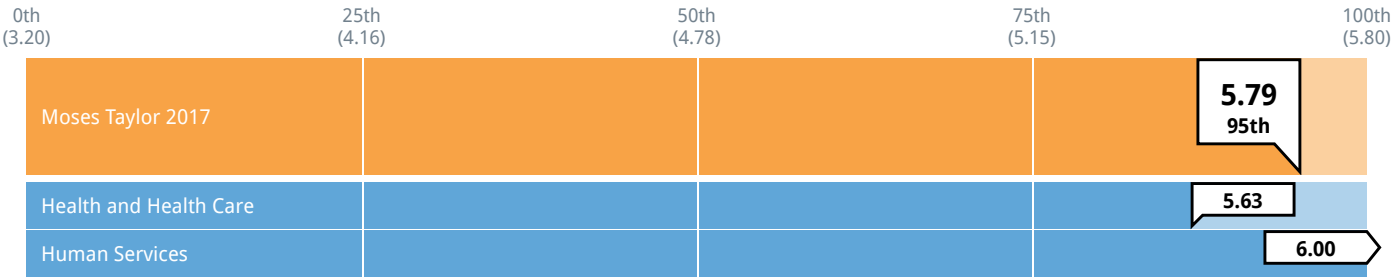### Proportion of Applicants that Requested/Received Feedback (Applicant Responses)

■ Moses Taylor 2017   ■ Median Funder

Received Feedback

Moses Taylor 2017 — **50%**
Median Funder — **43%**

Requested Feedback

Moses Taylor 2017 — **55%**
Median Funder — **51%**
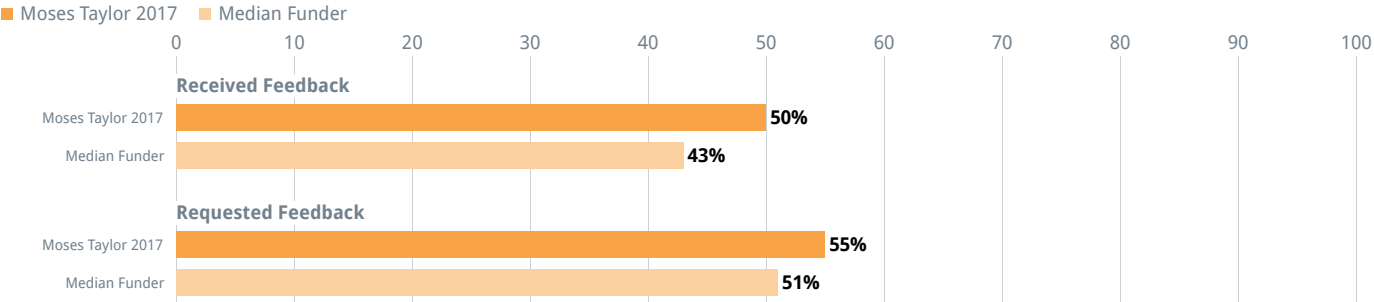
Proportion of Applicants that Requested Feedback, But Did Not Receive It (Applicant Responses)

■ Moses Taylor 2017   ■ Median Funder

Requested Feedback, But Did Not Receive It

Moses Taylor 2017 — **13%**
Median Funder — **12%**

Applicant Ratings

"Please rate the feedback and advice you received in terms of its helpfulness in strengthening future proposals to this funder."

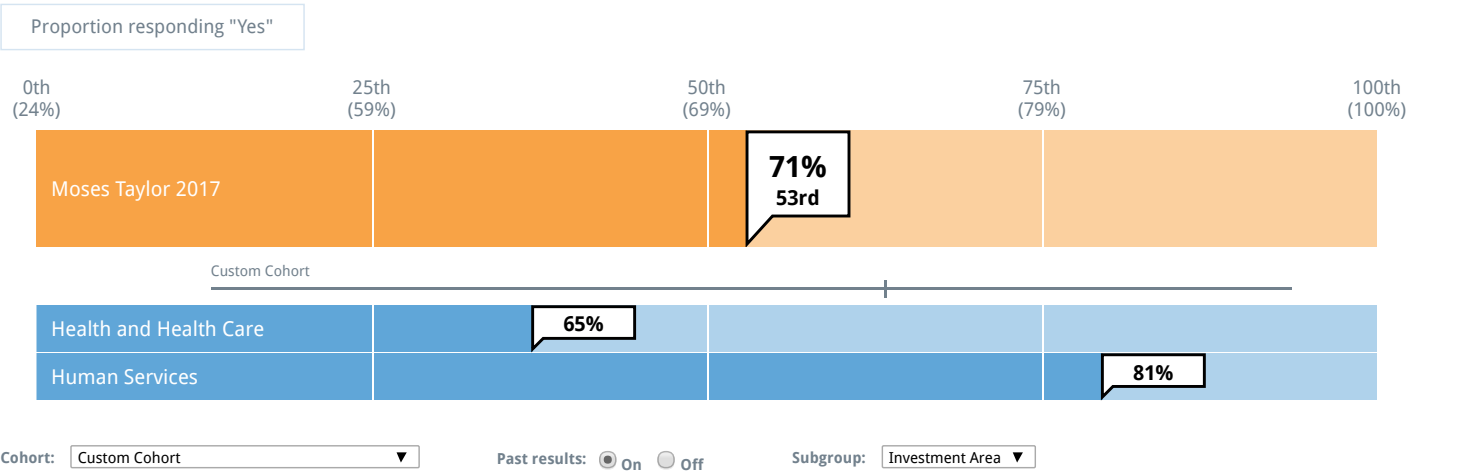**1** = Not at all helpful   **7** = Extremely helpful

0th (3.20)	25th (4.16)	50th (4.78)	75th (5.15)	100th (5.80)

Moses Taylor 2017 — **5.79** 95th

Health and Health Care — **5.63**

Human Services — **6.00**

Cohort: None ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

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Reporting and Evaluation Process

Grantee Ratings

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

Proportion responding "Yes"

0th (24%)	25th (59%)	50th (69%)	75th (79%)	100th (100%)

Moses Taylor 2017 — **71%** **53rd**

Custom Cohort

Health and Health Care — **65%**

Human Services — **81%**

Cohort: Custom Cohort ▼   Past results: ⦿ On ◯ Off   Subgroup: Investment Area ▼

The following questions were recently added to the grantee survey and depict comparative data from fewer than one-third of funders in the dataset.
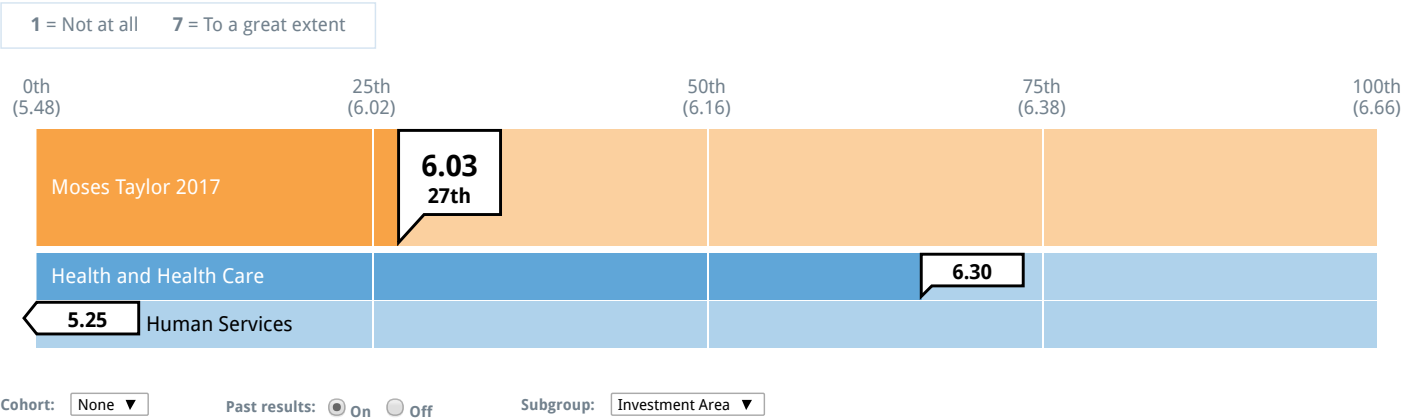
Participation in Reporting and/or Evaluation Processes	Moses Taylor 2017	Average Funder
Participated in a reporting process only	53%	56%
Participated in an evaluation process only	0%	1%
Participated in both a reporting and an evaluation process	12%	31%
Participated in neither a reporting nor an evaluation process	35%	12%

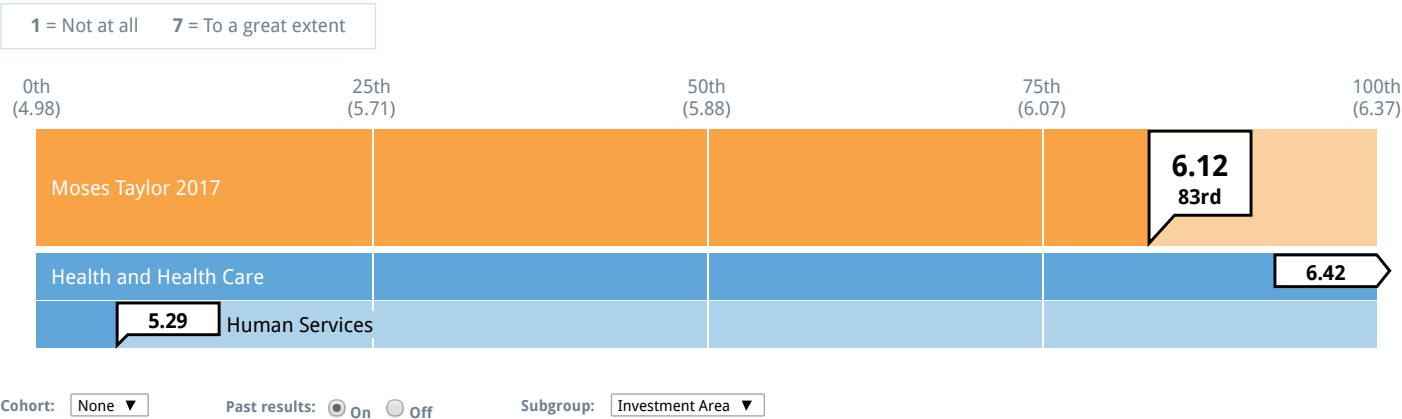| Participation in Reporting and/or Evaluation Processes (By Subgroup)	Health and Health Care	Human Services
Participated in a reporting process only	61%	40%
Participated in an evaluation process only	0%	0%
Participated in both a reporting and an evaluation process	19%	0%
Participated in neither a reporting nor an evaluation process	19%	60%

Reporting Process

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

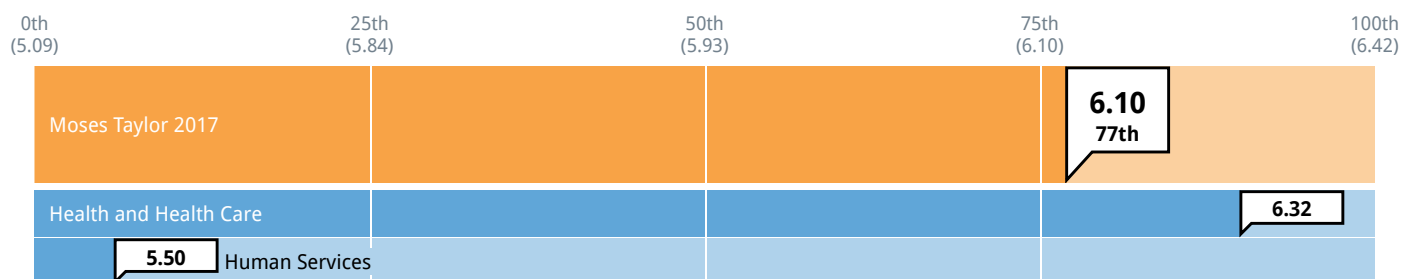## "To what extent was the Foundation's reporting process straightforward?"

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

0th (5.48)	25th (6.02)	50th (6.16)	75th (6.38)	100th (6.66)

Moses Taylor 2017 — **6.03** 27th

Health and Health Care — 6.30

5.25 Human Services

Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

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

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

0th (4.98)	25th (5.71)	50th (5.88)	75th (6.07)	100th (6.37)

Moses Taylor 2017 — **6.12** 83rd

Health and Health Care — 6.42

5.29 Human Services

Cohort: None ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

"To what extent was the Foundation's reporting process aligned appropriately to the timing of your work?"
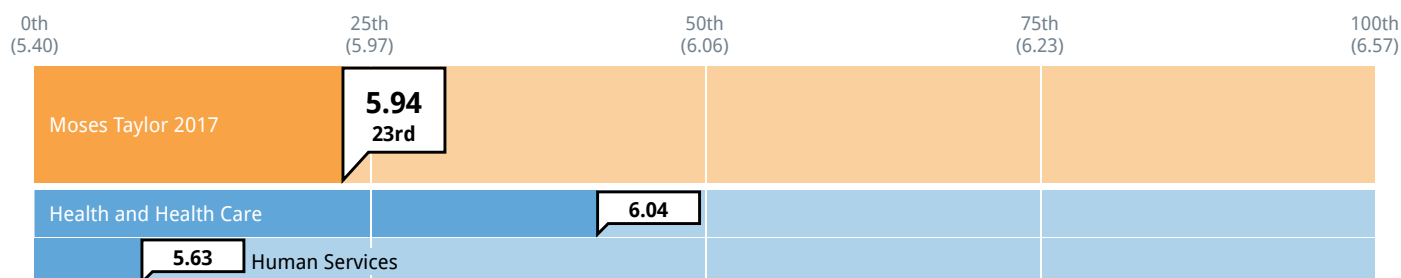
1 = Not at all   7 = To a great extent

0th (5.09)	25th (5.84)	50th (5.93)	75th (6.10)	100th (6.42)

Moses Taylor 2017 — **6.10** 77th

Health and Health Care — 6.32

5.50 Human Services

Cohort: None ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

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

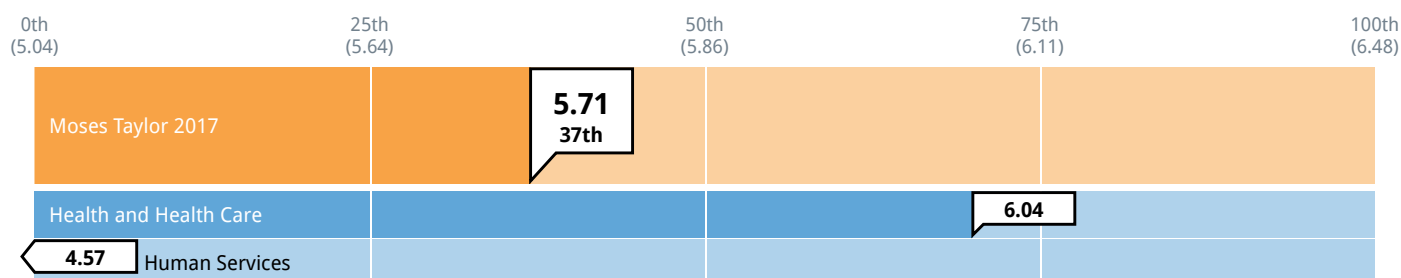1 = Not at all   7 = To a great extent

0th (5.40)	25th (5.97)	50th (6.06)	75th (6.23)	100th (6.57)

Moses Taylor 2017 — **5.94** 23rd

Health and Health Care — 6.04

5.63 Human Services

Cohort: None ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

"To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?"
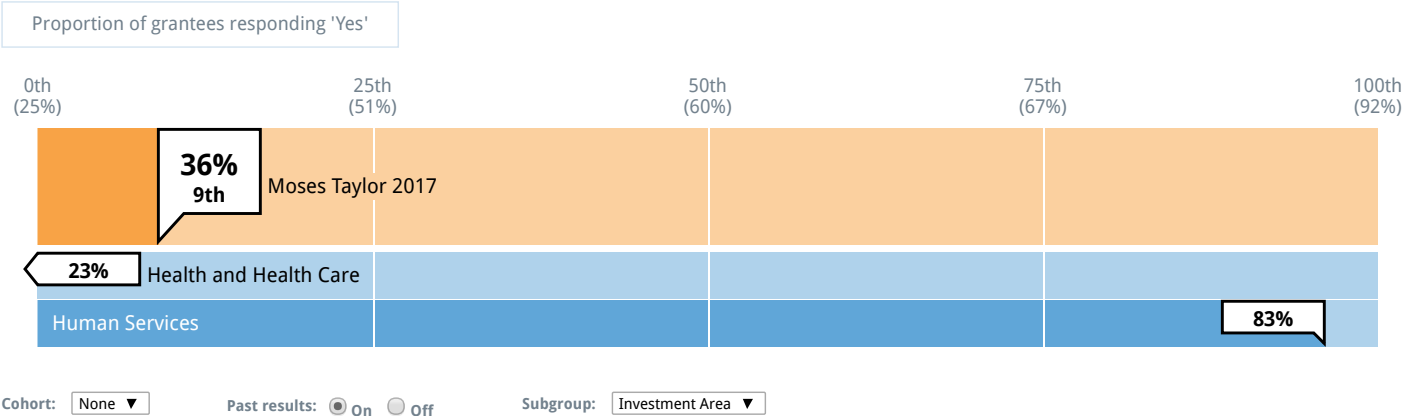
1 = Not at all   7 = To a great extent

0th (5.04)	25th (5.64)	50th (5.86)	75th (6.11)	100th (6.48)

Moses Taylor 2017 — **5.71** 37th

Health and Health Care — 6.04

4.57 Human Services

Cohort: None ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

"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'

0th (25%)	25th (51%)	50th (60%)	75th (67%)	100th (92%)

36%
9th   Moses Taylor 2017

23%   Health and Health Care

Human Services   **83%**

Cohort: None ▼   Past results: ◉ On ○ Off   Subgroup: Investment Area ▼

Evaluation Process

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

Note: a small proportion of total respondents reported participating in the Foundation's evaluation process, and, as such, only a small group of grantees were asked the questions below about their experiences with the Foundation's evaluation process.

"Who was primarily responsible for carrying out the evaluation?"	Moses Taylor 2017	Average Funder
Evaluation staff at the Foundation	0%	19%
Evaluation staff at your organization	83%	51%
External evaluator, chosen by the Foundation	0%	15%
External evaluator, chosen by your organization	17%	15%

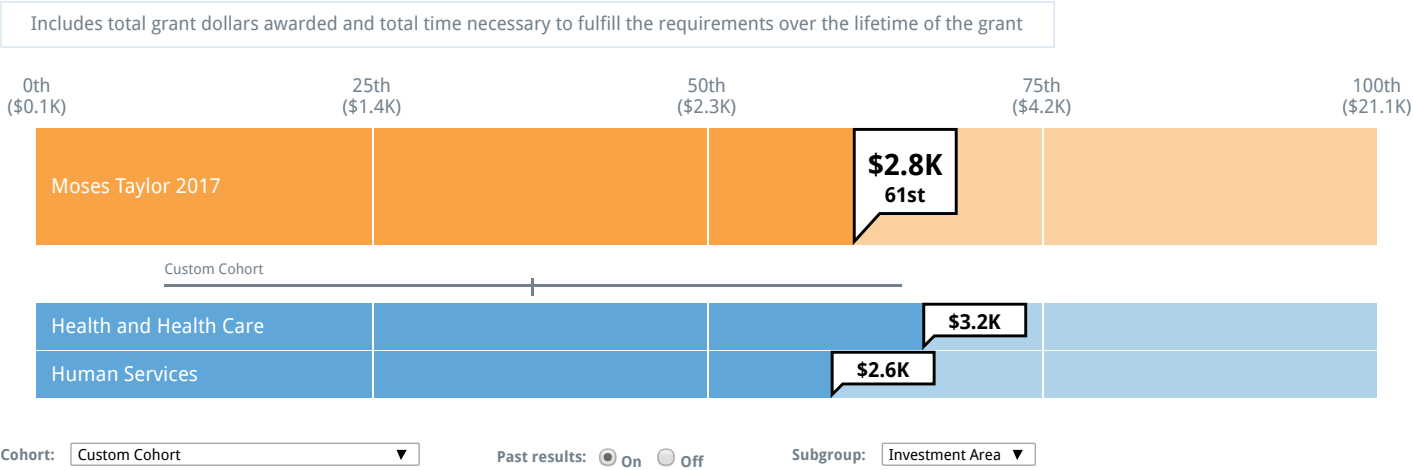| "Who was primarily responsible for carrying out the evaluation?" (By Subgroup)	Health and Health Care	Human Services
Evaluation staff at the Foundation	0%	N/A
Evaluation staff at your organization	83%	N/A
External evaluator, chosen by the Foundation	0%	N/A
External evaluator, chosen by your organization	17%	N/A

Note: For the evaluation questions below, CEP received fewer than five responses to each specific question. For these questions, the Foundation's overall and subgroup results are not shown to protect grantee confidentiality.

- "Did the Foundation provide financial support for the evaluation?"
- "To what extent did the evaluation incorporate input from your organization in the design of the evaluation?"
- "To what extent did the evaluation result in your organization making changes to the work that was evaluated?"
- "To what extent did the evaluation generate information that you believe will be useful for other organizations?"
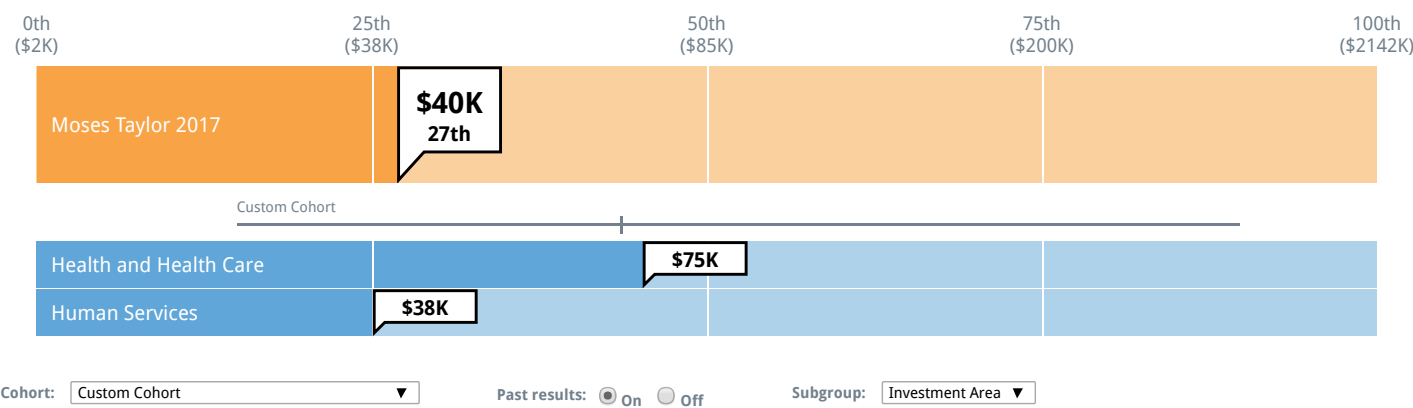
Dollar Return and Time Spent on Processes

Grantee Responses

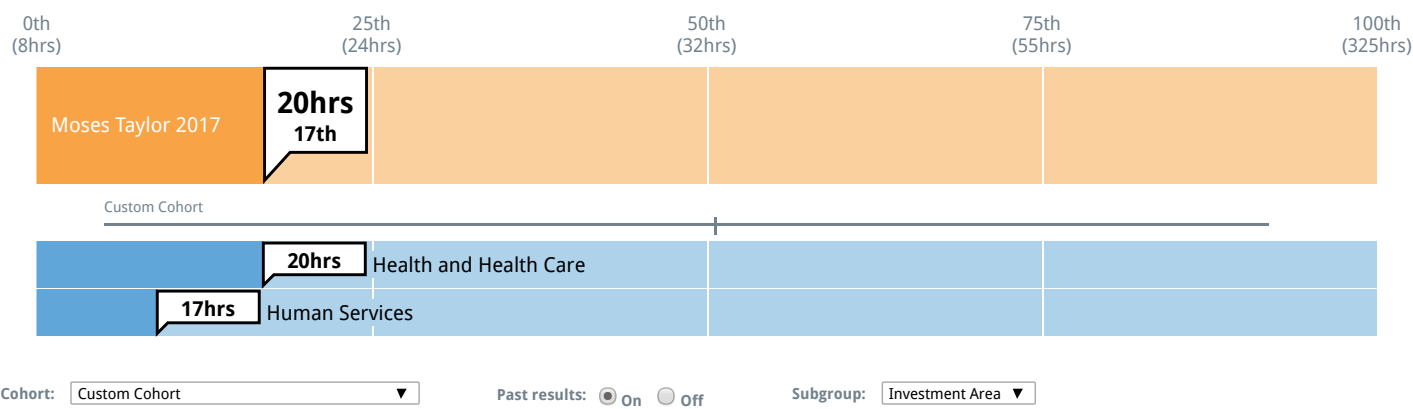### Dollar Return: Median grant dollars awarded per process hour required

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

0th ($0.1K)	25th ($1.4K)	50th ($2.3K)	75th ($4.2K)	100th ($21.1K)

Moses Taylor 2017 — **$2.8K 61st**

Custom Cohort

Health and Health Care — **$3.2K**
Human Services — **$2.6K**

Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

Grantee Responses

Median Grant Size

0th ($2K)	25th ($38K)	50th ($85K)	75th ($200K)	100th ($2142K)

Moses Taylor 2017 — **$40K 27th**

Custom Cohort

Health and Health Care — **$75K**
Human Services — **$38K**

Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

Grantee Responses

Median hours spent by grantees on funder requirements over grant lifetime

0th (8hrs)	25th (24hrs)	50th (32hrs)	75th (55hrs)	100th (325hrs)

Moses Taylor 2017 — **20hrs 17th**

Custom Cohort

20hrs Health and Health Care
17hrs Human Services

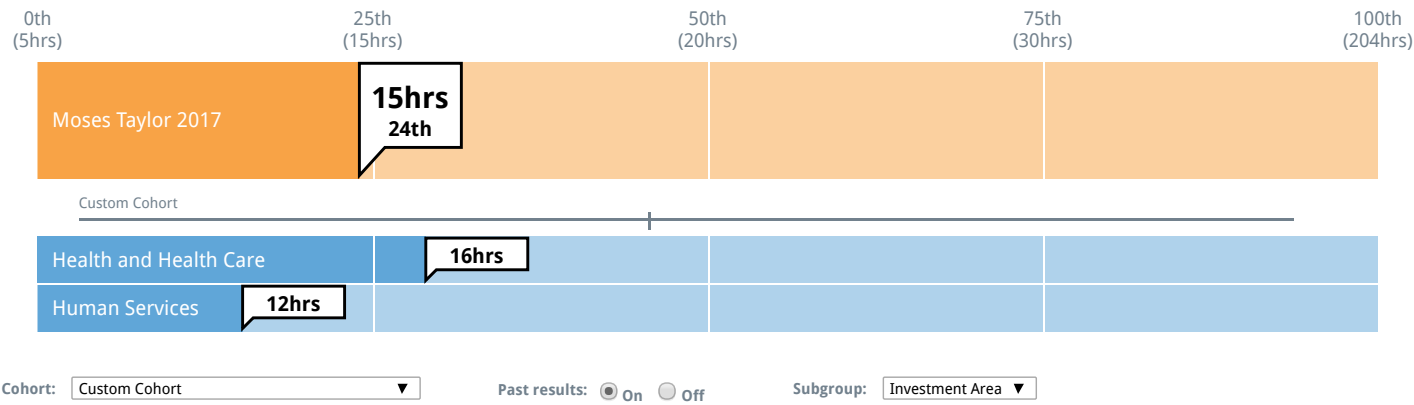Cohort: Custom Cohort ▼   Past results: ⦿ On ○ Off   Subgroup: Investment Area ▼

Time Spent on Selection Process

Grantee Feedback

Grantee Responses
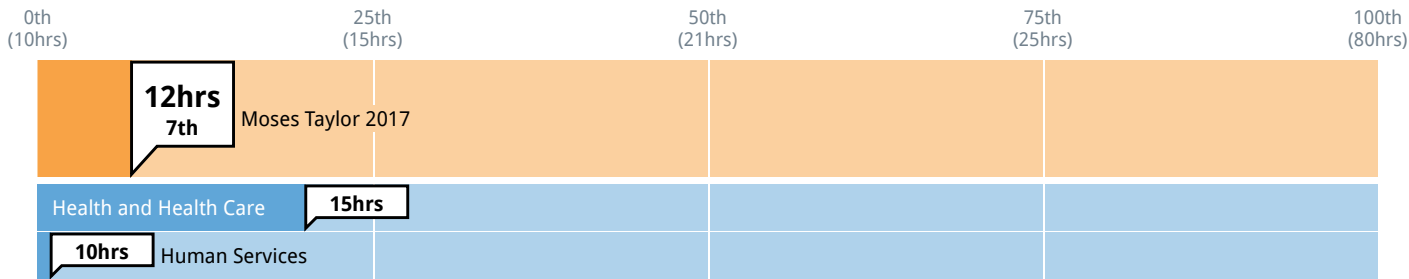
Median Hours Spent on Proposal and Selection Process

| | 0th (5hrs) | 25th (15hrs) | 50th (20hrs) | 75th (30hrs) | 100th (204hrs) |

Moses Taylor 2017 — **15hrs 24th**

Custom Cohort

Health and Health Care — **16hrs**

Human Services — **12hrs**

Cohort: Custom Cohort ▼   Past results: ● On ○ Off   Subgroup: Investment Area ▼

Time Spent On Proposal And Selection Process	Moses Taylor 2017	Average Funder	Custom Cohort
1 to 9 hours	33%	20%	20%
10 to 19 hours	24%	21%	23%
20 to 29 hours	19%	18%	18%
30 to 39 hours	5%	8%	7%
40 to 49 hours	10%	12%	12%
50 to 99 hours	5%	12%	13%
100 to 199 hours	3%	6%	6%
200+ hours	0%	3%	1%

Time Spent On Proposal And Selection Process (By Subgroup)	Health and Health Care	Human Services
1 to 9 hours	35%	29%
10 to 19 hours	21%	29%
20 to 29 hours	21%	17%
30 to 39 hours	6%	4%
40 to 49 hours	6%	17%
50 to 99 hours	9%	0%
100 to 199 hours	3%	4%
200+ hours	0%	0%

Applicant Feedback

Applicant Responses

Median Hours Spent on Proposal Process

0th (10hrs)	25th (15hrs)	50th (21hrs)	75th (25hrs)	100th (80hrs)

12hrs
7th   Moses Taylor 2017

Health and Health Care   **15hrs**

10hrs   Human Services

Cohort: None ▼   **Past results:** ◉ On   ○ Off   **Subgroup:** Investment Area ▼

Times Spent on Selection Process	Moses Taylor 2017	Average Funder
Fewer than 10 hours	34%	17%
10 to 19 hours	38%	22%
20 to 29 hours	9%	19%
30 to 39 hours	9%	10%
40 to 49 hours	3%	10%
50 to 99 hours	3%	13%
100 to 199 hours	0%	6%
200 hours or more	3%	2%

Times Spent on Selection Process (By Subgroup)	Health and Health Care	Human Services
Fewer than 10 hours	26%	46%
10 to 19 hours	37%	38%
20 to 29 hours	11%	8%
30 to 39 hours	11%	8%
40 to 49 hours	5%	0%
50 to 99 hours	5%	0%
100 to 199 hours	0%	0%
200 hours or more	5%	0%

Time Spent on Reporting and Evaluation Process

Grantee Responses

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

0th (2hrs)	25th (5hrs)	50th (8hrs)	75th (12hrs)	100th (90hrs)

Moses Taylor 2017 — **5hrs** 21st

Custom Cohort

Health and Health Care — **5hrs**

3hrs Human Services

Cohort: [Custom Cohort ▼]   Past results: ● On ○ Off   Subgroup: [Investment Area ▼]
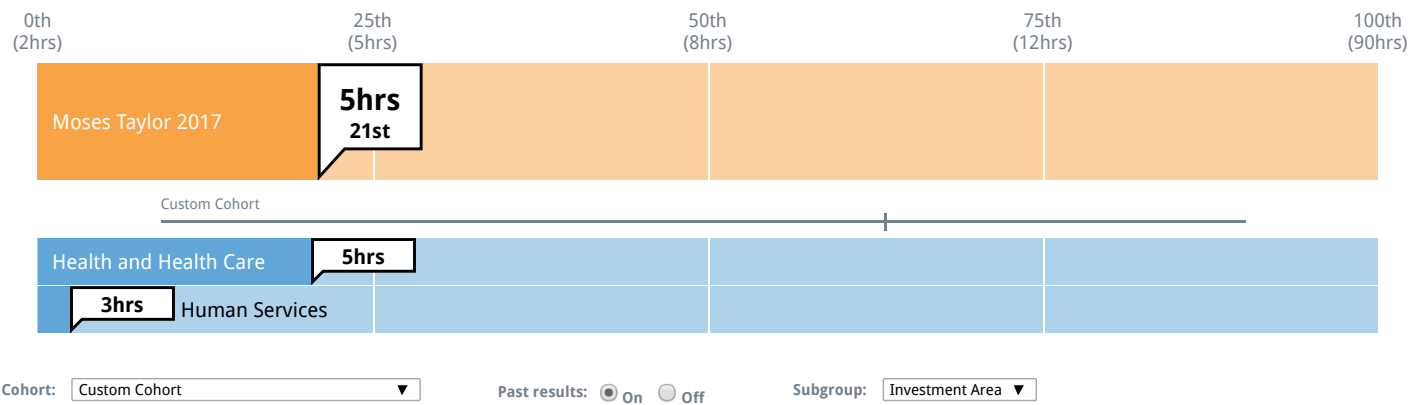
| Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Moses Taylor 2017	Average Funder	Custom Cohort
1 to 9 hours	65%	52%	49%
10 to 19 hours	27%	20%	21%
20 to 29 hours	5%	11%	11%
30 to 39 hours	0%	4%	5%
40 to 49 hours	3%	4%	6%
50 to 99 hours	0%	5%	5%
100+ hours	0%	4%	3%

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Health and Health Care	Human Services
1 to 9 hours	58%	82%
10 to 19 hours	35%	9%
20 to 29 hours	4%	9%
30 to 39 hours	0%	0%
40 to 49 hours	4%	0%
50 to 99 hours	0%	0%
100+ hours	0%	0%

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.
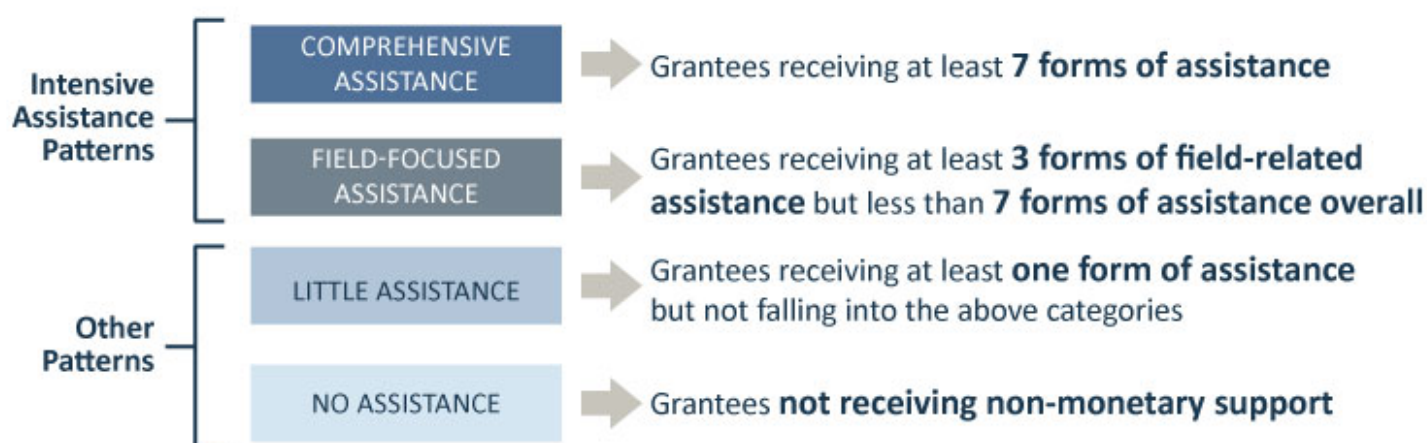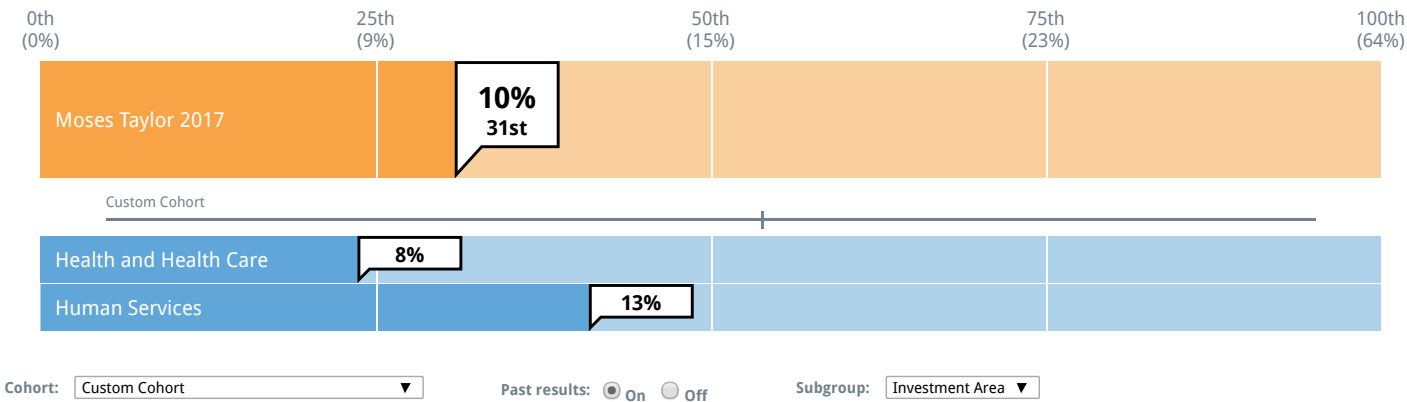

Non-Monetary Assistance Patterns	Moses Taylor 2017	Average Funder	Custom Cohort
Comprehensive	0%	7%	9%
Field-focused	10%	11%	12%
Little	43%	40%	43%
None	47%	43%	36%

Non-Monetary Assistance Patterns (By Subgroup)	Health and Health Care	Human Services
Comprehensive	0%	0%
Field-focused	8%	13%
Little	39%	50%
None	53%	38%

Grantee Responses

Proportion of grantees that received field-focused or comprehensive assistance

0th (0%)	25th (9%)	50th (15%)	75th (23%)	100th (64%)

Moses Taylor 2017

10%
31st

Custom Cohort

Health and Health Care — **8%**

Human Services — **13%**

Cohort: [Custom Cohort ▼]   Past results: ⦿ On   ○ Off   Subgroup: [Investment Area ▼]
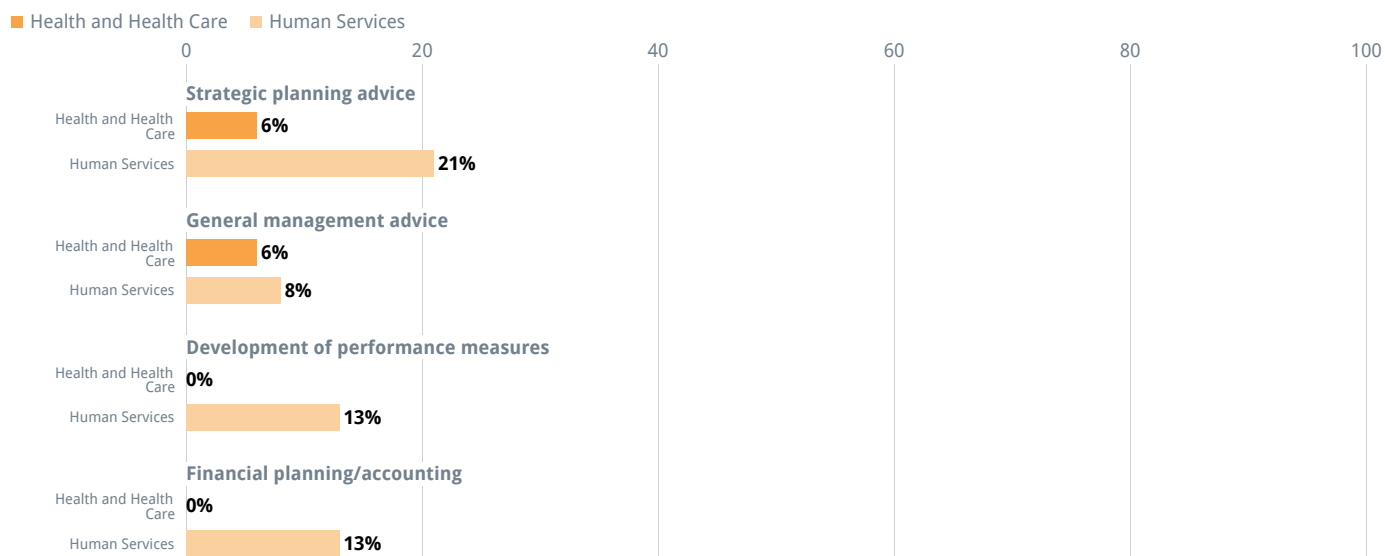
58

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."

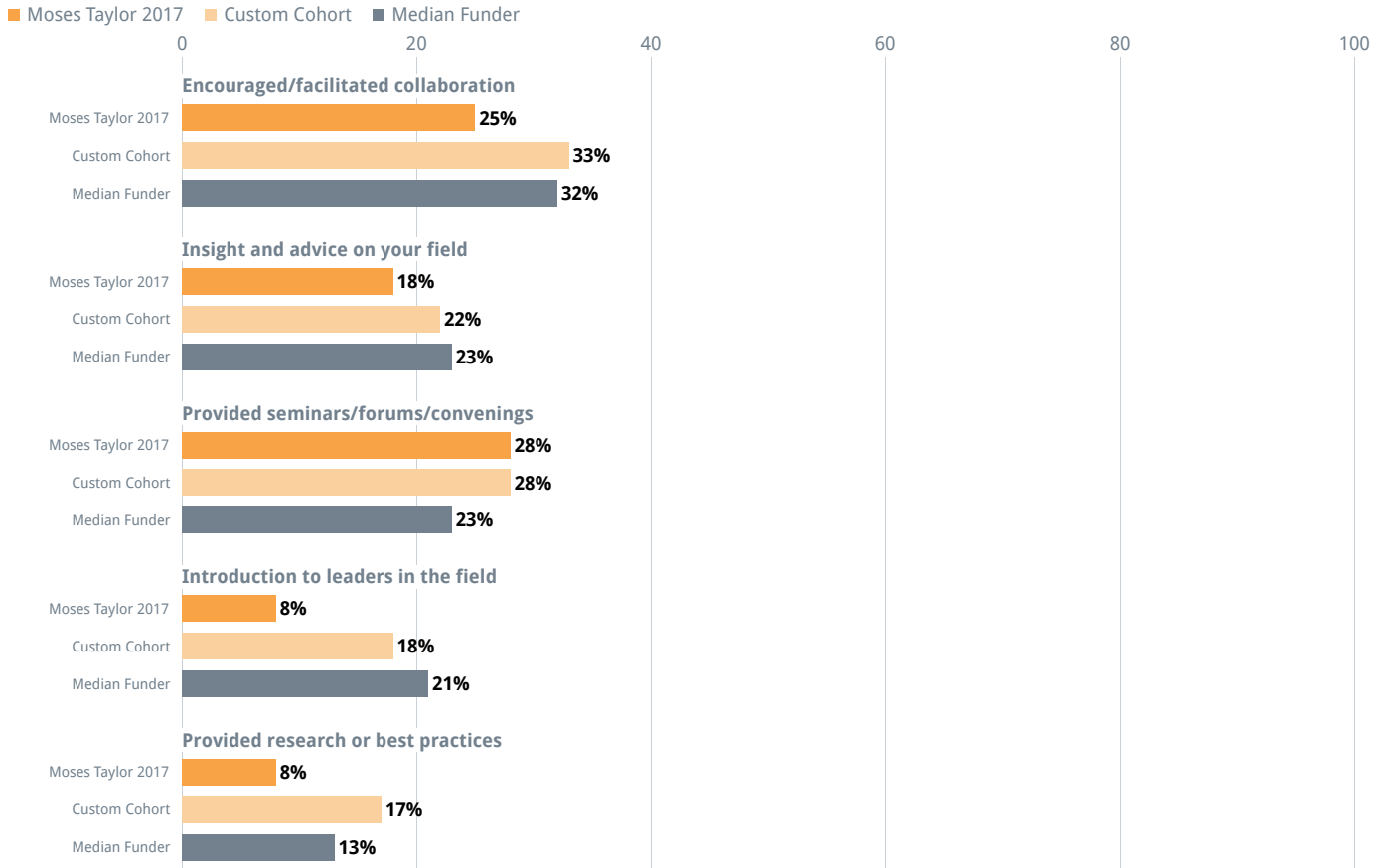## Proportion of Grantees that Received Management Assistance

■ Moses Taylor 2017   ■ Custom Cohort   ■ Median Funder

Strategic planning advice
- Moses Taylor 2017: **12%**
- Custom Cohort: **21%**
- Median Funder: **19%**

General management advice
- Moses Taylor 2017: **7%**
- Custom Cohort: **14%**
- Median Funder: **11%**

Development of performance measures
- Moses Taylor 2017: **5%**
- Custom Cohort: **17%**
- Median Funder: **11%**

Financial planning/accounting
- Moses Taylor 2017: **5%**
- Custom Cohort: **5%**
- Median Funder: **5%**

Proportion of Grantees that Received Management Assistance - By Subgroup

■ Health and Health Care   ■ Human Services

Strategic planning advice
- Health and Health Care: **6%**
- Human Services: **21%**

General management advice
- Health and Health Care: **6%**
- Human Services: **8%**

Development of performance measures
- Health and Health Care: **0%**
- Human Services: **13%**

Financial planning/accounting
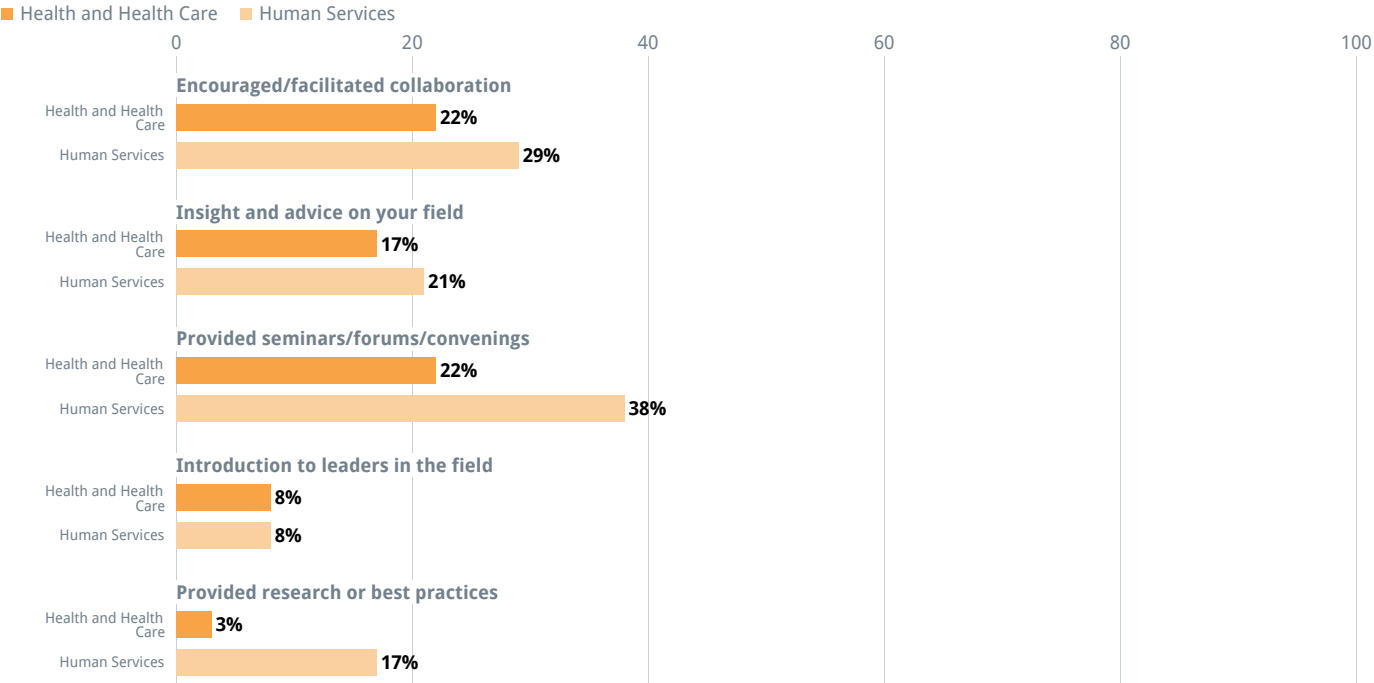- Health and Health Care: **0%**
- Human Services: **13%**

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."

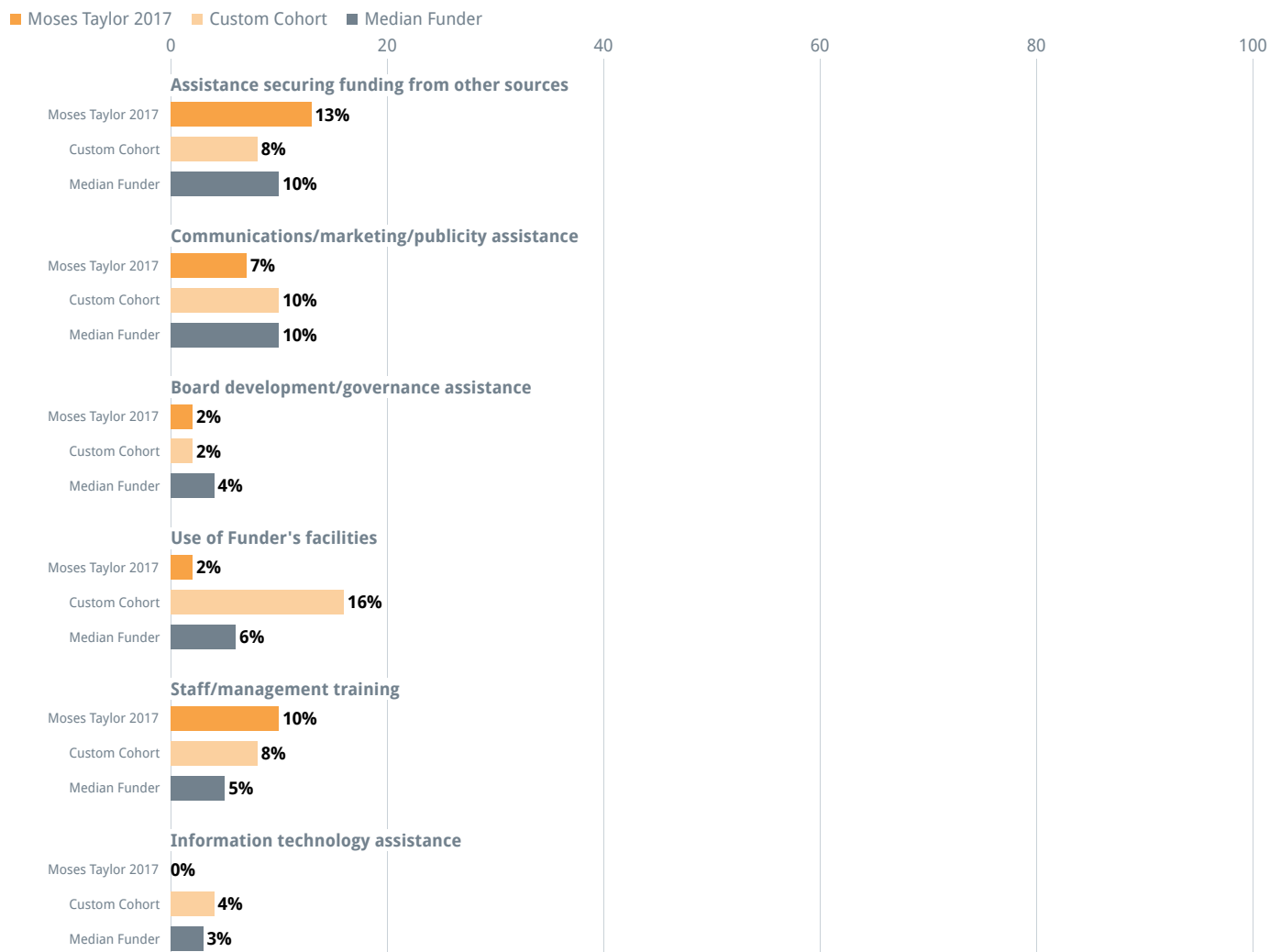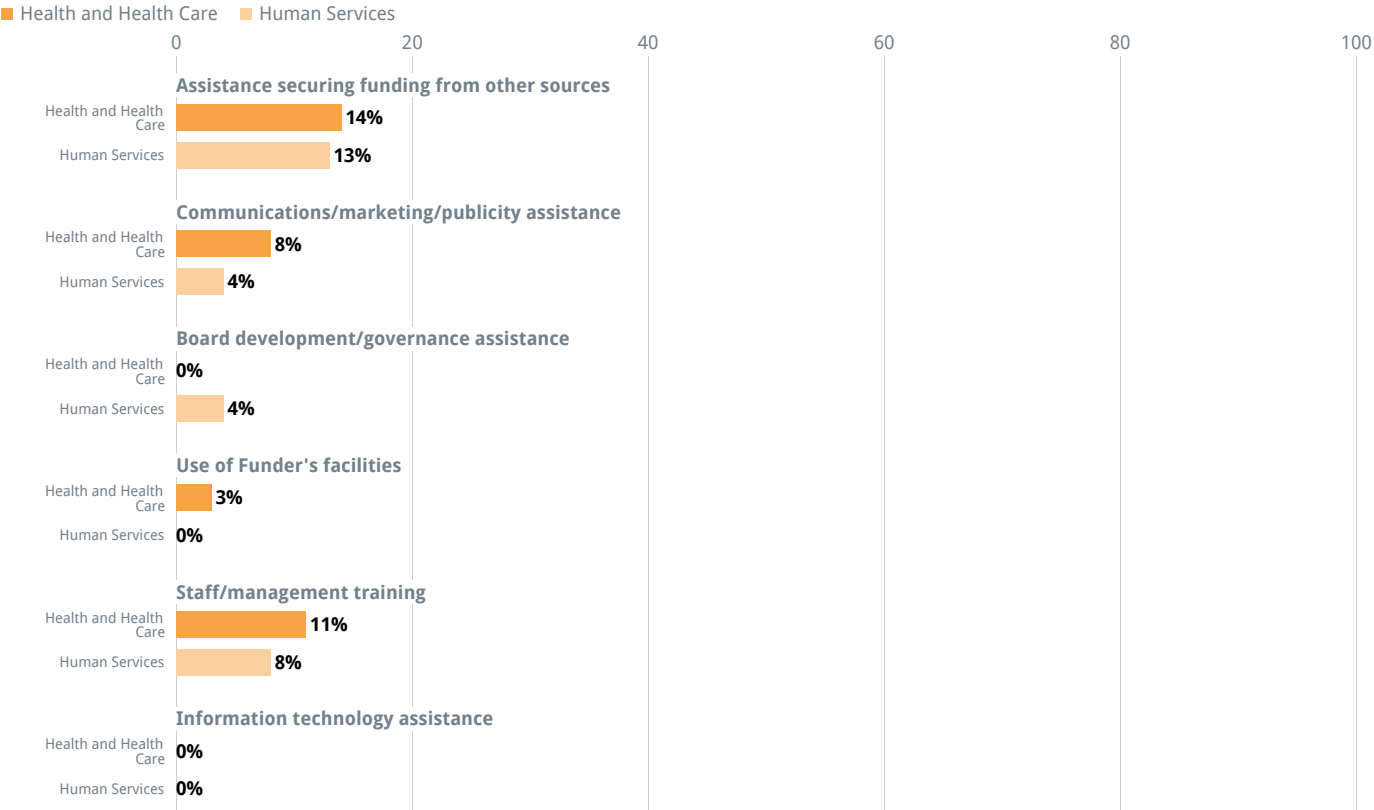## Proportion of Grantees that Received Field-Related Assistance - Overall

■ Moses Taylor 2017 ■ Custom Cohort ■ Median Funder

Encouraged/facilitated collaboration

Moses Taylor 2017	25%
Custom Cohort	33%
Median Funder	32%

Insight and advice on your field

Moses Taylor 2017	18%
Custom Cohort	22%
Median Funder	23%

Provided seminars/forums/convenings

Moses Taylor 2017	28%
Custom Cohort	28%
Median Funder	23%

Introduction to leaders in the field

Moses Taylor 2017	8%
Custom Cohort	18%
Median Funder	21%

Provided research or best practices

Moses Taylor 2017	8%
Custom Cohort	17%
Median Funder	13%

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

■ Health and Health Care ■ Human Services

0   20   40   60   80   100

Encouraged/facilitated collaboration
- Health and Health Care: 22%
- Human Services: 29%

Insight and advice on your field
- Health and Health Care: 17%
- Human Services: 21%

Provided seminars/forums/convenings
- Health and Health Care: 22%
- Human Services: 38%

Introduction to leaders in the field
- Health and Health Care: 8%
- Human Services: 8%

Provided research or best practices
- Health and Health Care: 3%
- Human Services: 17%

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."

Proportion of Grantees that Received Other Assistance - Overall

■ Moses Taylor 2017   ■ Custom Cohort   ■ Median Funder

Assistance securing funding from other sources
- Moses Taylor 2017: **13%**
- Custom Cohort: **8%**
- Median Funder: **10%**

Communications/marketing/publicity assistance
- Moses Taylor 2017: **7%**
- Custom Cohort: **10%**
- Median Funder: **10%**

Board development/governance assistance
- Moses Taylor 2017: **2%**
- Custom Cohort: **2%**
- Median Funder: **4%**

Use of Funder's facilities
- Moses Taylor 2017: **2%**
- Custom Cohort: **16%**
- Median Funder: **6%**

Staff/management training
- Moses Taylor 2017: **10%**
- Custom Cohort: **8%**
- Median Funder: **5%**

Information technology assistance
- Moses Taylor 2017: **0%**
- Custom Cohort: **4%**
- Median Funder: **3%**

Proportion of Grantees that Received Other Assistance - By Subgroup

■ Health and Health Care   ■ Human Services

Assistance securing funding from other sources

Health and Health Care — **14%**
Human Services — **13%**

Communications/marketing/publicity assistance

Health and Health Care — **8%**
Human Services — **4%**

Board development/governance assistance

Health and Health Care — **0%**
Human Services — **4%**

Use of Funder's facilities

Health and Health Care — **3%**
Human Services — **0%**

Staff/management training

Health and Health Care — **11%**
Human Services — **8%**

Information technology assistance

Health and Health Care — **0%**
Human Services — **0%**

Suggestions for the Foundation

Grantees and applicants 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 and applicant 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	Proportion
Grantmaking Characteristics	50%
Impact on and Understanding of Grantees' Fields	20%
Quality and Quantity of Interactions	20%
Other Suggestions	10%

Proportion of Applicant Suggestions by Topic

Topic of Applicant Suggestion	Proportion
Impact on and Understanding of Applicants' Communities, Fields, and Organizations	36%
The Foundation's Selection Process	29%
Quality and Quantity of Interactions	14%
Other Suggestions	21%

Grantee 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.

Grantmaking Processes (N=5, 50%)

- **Increase Grant Length (N=3)**
    - "The availability of multi-year grants would enable agencies more time to implement and evaluate a program over an extended period of time."
    - "The Foundation would be more effective if they made multi-year commitments."
    - "We are always challenged in some way with funding. Foundations that are willing to assist in funding programs for more than one or two years are extremely helpful in maintaining quality, evidence-based programs."

- **Greater Inclusion for Smaller Organizations (N=1)**
    - "Be more willing to discuss funding with small non-profits."

- **Offer Different Types of Grants (N=1)**
    - "We are...extremely grateful when foundations will consider funding general agency operations, because typically this is an area that challenges us."

Impact on and Understanding of Grantees' Fields (N=2, 20%)

- **Deepen Understanding of Grantees' Fields (N=1)**
    - "For [us], it's the Foundation realizing the impact of the arts on the health and well-being in the community. Through educational programs on healthy eating [and] exercise..., we are making a difference in our community."

- **Expand Thought Leadership Role (N=1)**
    - "The Foundation could use its authority to challenge the status quo and influence change."

Quality and Quantity of Interactions (N=2, 20%)

- **Greater Board Involvement During Site Visits (N=1)**
    - "Increased Board presence at site visits to show engagement and interest."

- **More Frequent Interactions with Grantees (N=1)**
    - "Schedule monthly calls with grantees."

Other Suggestion (N=1, 10%)

- "Commitments to innovative programs, coupled with technical assistance."

Applicant Comments

Applicants 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 Applicants' Communities, Fields, and Organizations (N=5, 36%)

- **Expand Field Definition (N=3)**
    - "I recommend they define health care more broadly and not just look at 'sickness-care' for people who are already under care."
    - "I suggest they broaden their views on what 'wellness' includes, beginning with programs that provide hope, compassion, and hands-on physical and social interactions with others."
    - "When an application comes in, ask 'how important is this funding [in order] to create a healthy community?'....Stopping health-related issues before they become medical conditions/issues should be [an] important part of funding, with [inclusion of] prevention projects."

- **Fund Different Type of Organizations (N=1)**
    - "Look at the broader picture of how the Foundation can assist organizations that may fall on the fringes of healthcare."

- **Increase Involvement with Community Organizations (N=1)**
    - "Create a stronger process to interact with community non-profits."

Selection Process (N=4, 29%)

- **Greater Staff Involvement in the Proposal Process (N=2)**
    - "Meet with the proposer at the time the proposal comes, or sometime before decision-time, to develop [an] adequate understanding basis."
    - "I...would have liked more opportunities to dialogue throughout the process."

- **Provide More Feedback After Decision (N=1)**
    - "If the proposal is rejected, discuss [the] reason(s) for rejection in order to clarify any value of a later proposal."

- **Shorten Turnaround Time (N=1)**
    - "When letters of inquiry or information requests are received, get back to the organization in a timely manner. It took several months for staff to respond."

Quality and Quantity of Interactions (N=2, 14%)

- **Improve Quality of Interactions (N=1)**
    - "Sensitivity training for Foundation staff."

- **Provide Site Visits (N=1)**
    - "A visit to clients' conditions and circumstances."

Other Suggestions (N=3, 21%)

- "Improve community outreach."
- "More responsive to unmet needs and less concerned about future enhancements."
- "Perhaps expanding the types of projects considered eligible for funding. Brick-and-mortar projects are not eligible, yet many non-profits have infrastructure needs that would benefit greatly from Foundation support."

Moses Taylor-Specific Questions

Grantee Ratings

"Did you have an initial meeting with the Foundation staff prior to applying to the grant?"

"Did you have an initial meeting with the Foundation staff prior to applying to the grant?"	Moses Taylor 2017
Yes	81%
No	19%

"Did you have an initial meeting with the Foundation staff prior to applying to the grant?" (By Subgroup)	Health and Health Care	Human Services
Yes	71%	96%
No	29%	4%

Applicant Ratings

"Did you have an initial meeting with the Foundation staff prior to applying to the grant?"

"Did you have an initial meeting with the Foundation staff prior to applying to the grant?"	Moses Taylor 2017
Yes	55%
No	45%

"Did you have an initial meeting with the Foundation staff prior to applying to the grant?" (By Subgroup)	Health and Health Care	Human Services
Yes	47%	67%
No	53%	33%

Grantee Ratings

Note: the following question was only asked of grantees who indicated that they had an initial meeting with the Foundation staff prior to applying to the grant in a previous survey question.

"To what extent did your initial meeting with the Foundation staff…" - Overall

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

■ Moses Taylor 2017

Help you begin building a strong relationship with Foundation staff

Moses Taylor 2017 — **6.66**

Help you understand how your organization's work aligns with that of the Foundation

Moses Taylor 2017 — **6.53**

Help you craft a proposal that seemed aligned with the Foundation's funding priorities

Moses Taylor 2017 — **6.43**

Help you build an understanding of the Foundation's goals and strategy

Moses Taylor 2017 — **6.40**

"To what extent did your initial meeting with the Foundation staff…" - By Subgroup

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

■ Health and Health Care   ■ Human Services

Help you begin building a strong relationship with Foundation staff

Health and Health Care — **6.68**
Human Services — **6.64**

Help you understand how your organization's work aligns with that of the Foundation

Health and Health Care — **6.64**
Human Services — **6.41**

Help you craft a proposal that seemed aligned with the Foundation's funding priorities

Health and Health Care — **6.40**
Human Services — **6.48**

Help you build an understanding of the Foundation's goals and strategy

Health and Health Care — **6.48**
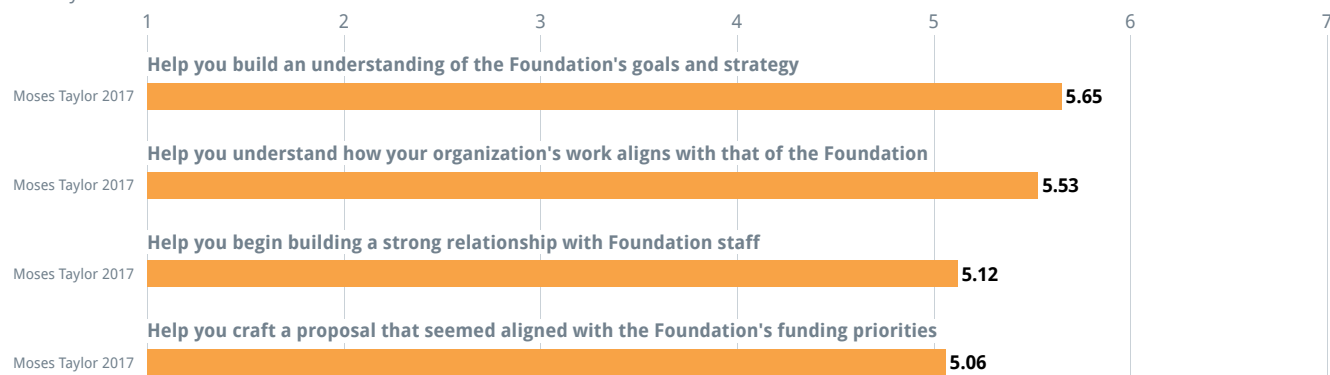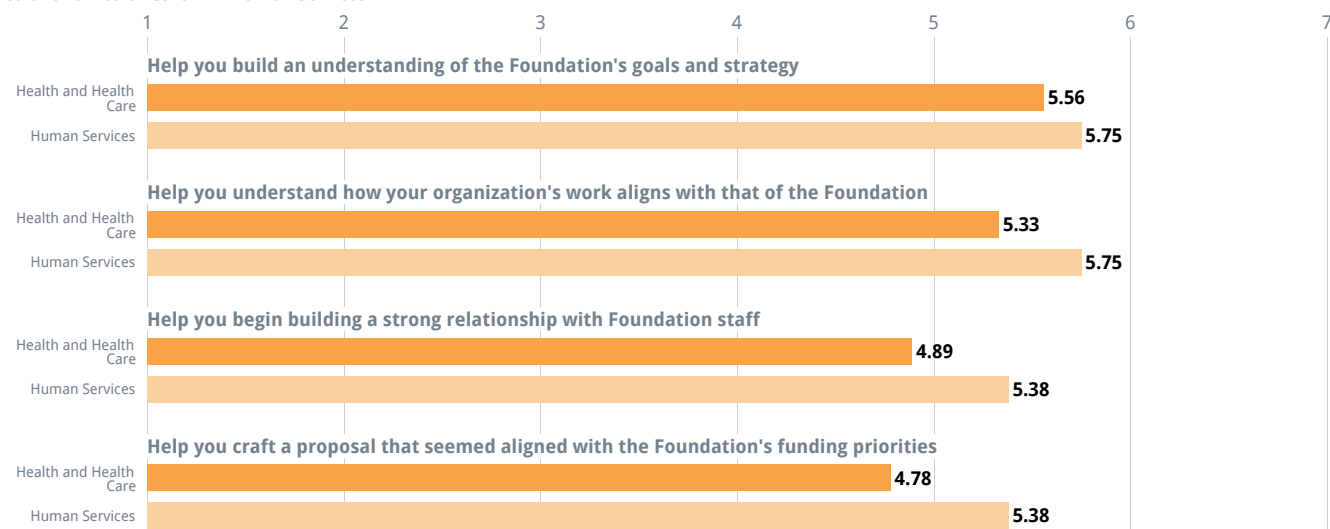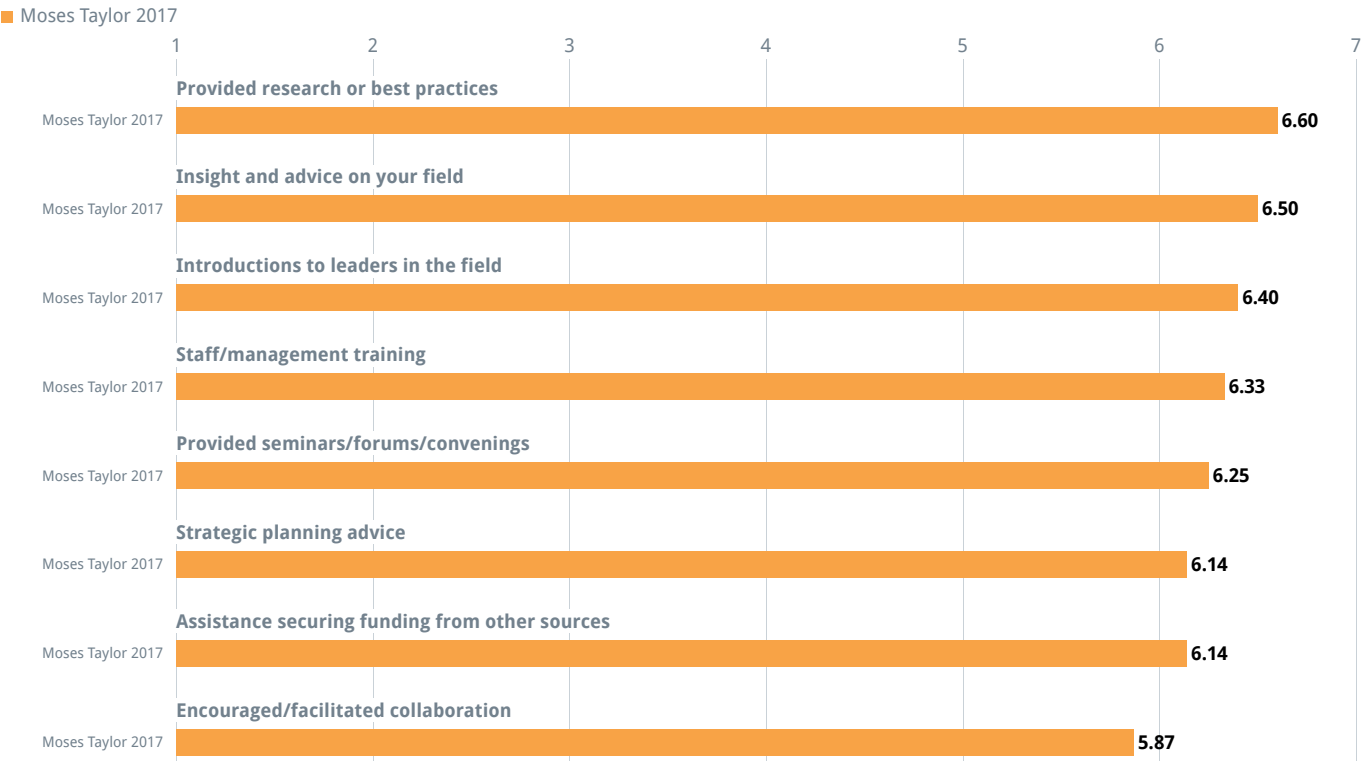Human Services — **6.32**

Applicant Ratings

Note: the following question was only asked of declined applicants who indicated that they had an initial meeting with the Foundation staff prior to applying to the grant in a previous survey question.

"To what extent did your initial meeting with the Foundation staff…" - Overall

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

■ Moses Taylor 2017

Help you build an understanding of the Foundation's goals and strategy

Moses Taylor 2017 — 5.65

Help you understand how your organization's work aligns with that of the Foundation

Moses Taylor 2017 — 5.53

Help you begin building a strong relationship with Foundation staff

Moses Taylor 2017 — 5.12

Help you craft a proposal that seemed aligned with the Foundation's funding priorities

Moses Taylor 2017 — 5.06

"To what extent did your initial meeting with the Foundation staff…" - By Subgroup

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

■ Health and Health Care   ■ Human Services

Help you build an understanding of the Foundation's goals and strategy

Health and Health Care — 5.56
Human Services — 5.75

Help you understand how your organization's work aligns with that of the Foundation

Health and Health Care — 5.33
Human Services — 5.75

Help you begin building a strong relationship with Foundation staff

Health and Health Care — 4.89
Human Services — 5.38

Help you craft a proposal that seemed aligned with the Foundation's funding priorities

Health and Health Care — 4.78
Human Services — 5.38

Assistance Beyond the Grant - Asked Only of Grantees

"Earlier you indicated receiving non-monetary supports from the Foundation. How helpful was each type of non-monetary assistance that you received directly from Moses Taylor Foundation staff?"

Note: the following question was asked only of those grantees indicating receipt of each specific support in a previous survey question. "N/A" is used when there were not enough responses to meet CEP's confidentiality threshold to present results.
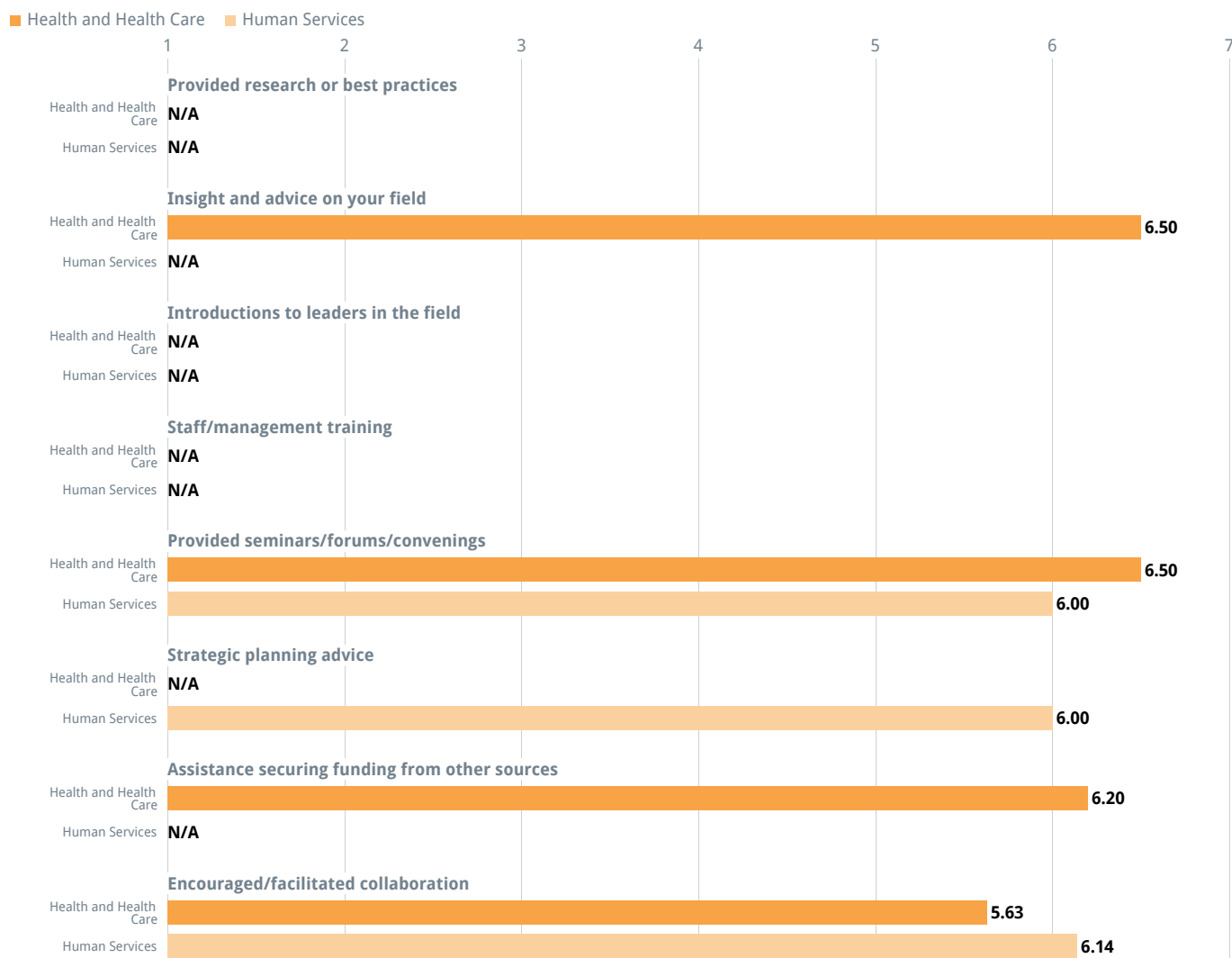
Helpfulness of Non-Monetary Supports - Overall

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

■ Moses Taylor 2017

Provided research or best practices
Moses Taylor 2017 — **6.60**

Insight and advice on your field
Moses Taylor 2017 — **6.50**

Introductions to leaders in the field
Moses Taylor 2017 — **6.40**

Staff/management training
Moses Taylor 2017 — **6.33**

Provided seminars/forums/convenings
Moses Taylor 2017 — **6.25**

Strategic planning advice
Moses Taylor 2017 — **6.14**

Assistance securing funding from other sources
Moses Taylor 2017 — **6.14**

Encouraged/facilitated collaboration
Moses Taylor 2017 — **5.87**

Helpfulness of Non-Monetary Supports - By Subgroup

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

■ Health and Health Care   ■ Human Services

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 |

Provided research or best practices
- Health and Health Care: N/A
- Human Services: N/A

Insight and advice on your field
- Health and Health Care: 6.50
- Human Services: N/A

Introductions to leaders in the field
- Health and Health Care: N/A
- Human Services: N/A

Staff/management training
- Health and Health Care: N/A
- Human Services: N/A

Provided seminars/forums/convenings
- Health and Health Care: 6.50
- Human Services: 6.00

Strategic planning advice
- Health and Health Care: N/A
- Human Services: 6.00

Assistance securing funding from other sources
- Health and Health Care: 6.20
- Human Services: N/A

Encouraged/facilitated collaboration
- Health and Health Care: 5.63
- Human Services: 6.14

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"The Foundation is considering what types of supports it may provide to grantees in the future, and would like to know what types of support grantees would find most valuable. Please rate how much you would value each of the following supports, if they were available in the future."

Value of Potential Future Supports - Overall

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

■ Moses Taylor 2017

Assessment & evaluation
Moses Taylor 2017 — 5.24

Leadership development
Moses Taylor 2017 — 5.10

Strategic planning
Moses Taylor 2017 — 4.92

Board development/governance
Moses Taylor 2017 — 4.55

Organization design/staff structure
Moses Taylor 2017 — 4.31
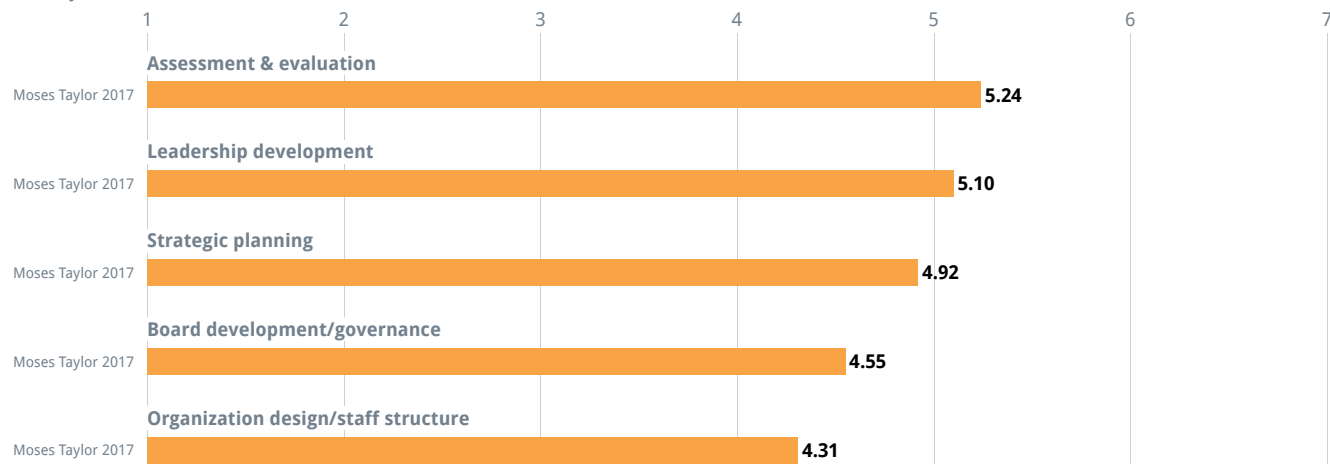
Value of Potential Future Supports - By Subgroup

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

■ Health and Health Care   ■ Human Services

Assessment & evaluation
Health and Health Care — 4.77
Human Services — 5.90

Leadership development
Health and Health Care — 4.77
Human Services — 5.57

Strategic planning
Health and Health Care — 4.57
Human Services — 5.47

Board development/governance
Health and Health Care — 4.14
Human Services — 5.16

Organization design/staff structure
Health and Health Care — 3.97
Human Services — 4.84
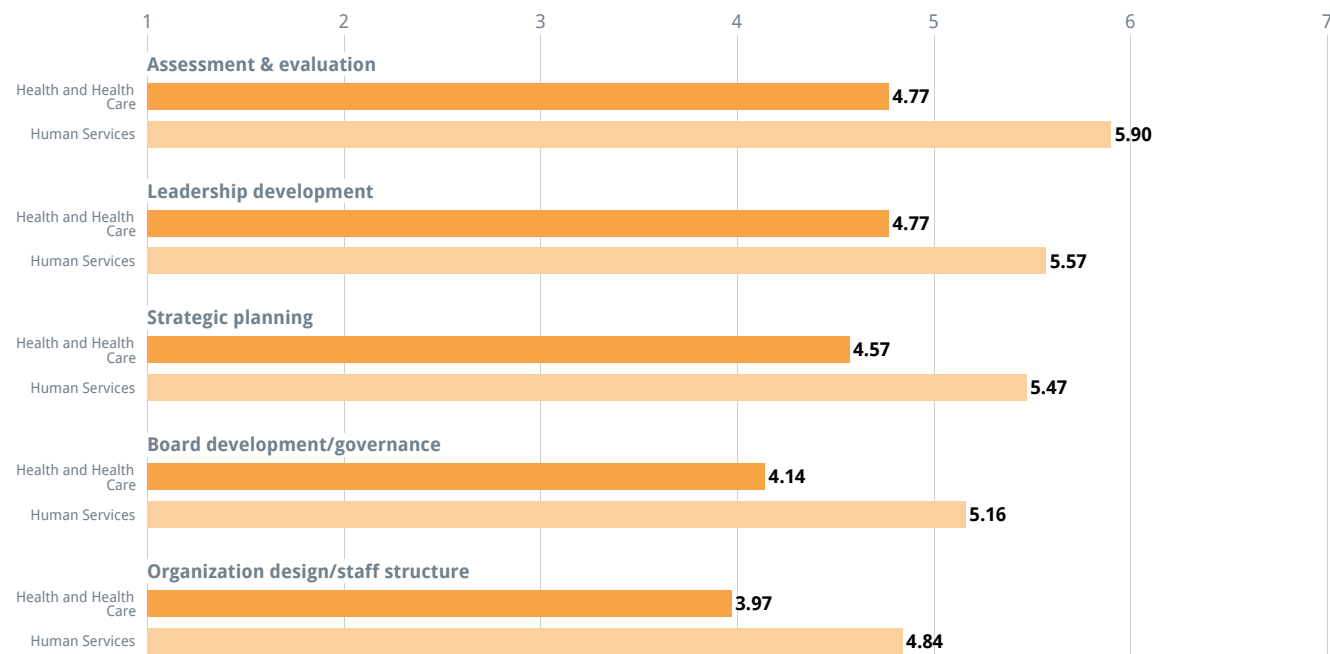
Characteristics Associated with the Foundation - Asked Only of Grantees

"To what extent do you associate the Foundation with the following characteristics..." - Overall

1 = Do not associate with the Foundation   **7** = Strongly associate with the Foundation

■ Moses Taylor 2017

Committed to improving health and wellness in Northeastern Pennsylvania

Moses Taylor 2017 — **6.82**

Treats grantees with compassion, respect, and dignity

Moses Taylor 2017 — **6.75**

Builds partnerships built on trust

Moses Taylor 2017 — **6.63**

Values and advances diversity

Moses Taylor 2017 — **6.61**

Accountable to grantees

Moses Taylor 2017 — **6.58**

Open to ideas about the best approaches to achieve its goals

Moses Taylor 2017 — **6.49**

"To what extent do you associate the Foundation with the following characteristics…" - By Subgroup

1 = Do not associate with the Foundation   7 = Strongly associate with the Foundation

■ Health and Health Care   ■ Human Services

Committed to improving health and wellness in Northeastern Pennsylvania

Subgroup	Value
Health and Health Care	6.82
Human Services	6.82

Treats grantees with compassion, respect, and dignity

Subgroup	Value
Health and Health Care	6.80
Human Services	6.68

Builds partnerships built on trust

Subgroup	Value
Health and Health Care	6.63
Human Services	6.64

Values and advances diversity

Subgroup	Value
Health and Health Care	6.66
Human Services	6.52

Accountable to grantees

Subgroup	Value
Health and Health Care	6.62
Human Services	6.53

Open to ideas about the best approaches to achieve its goals

Subgroup	Value
Health and Health Care	6.55
Human Services	6.40

Response to 2016 Elections

*The following questions were recently added to the grantee survey and depict comparative data from 15 funders in the dataset.

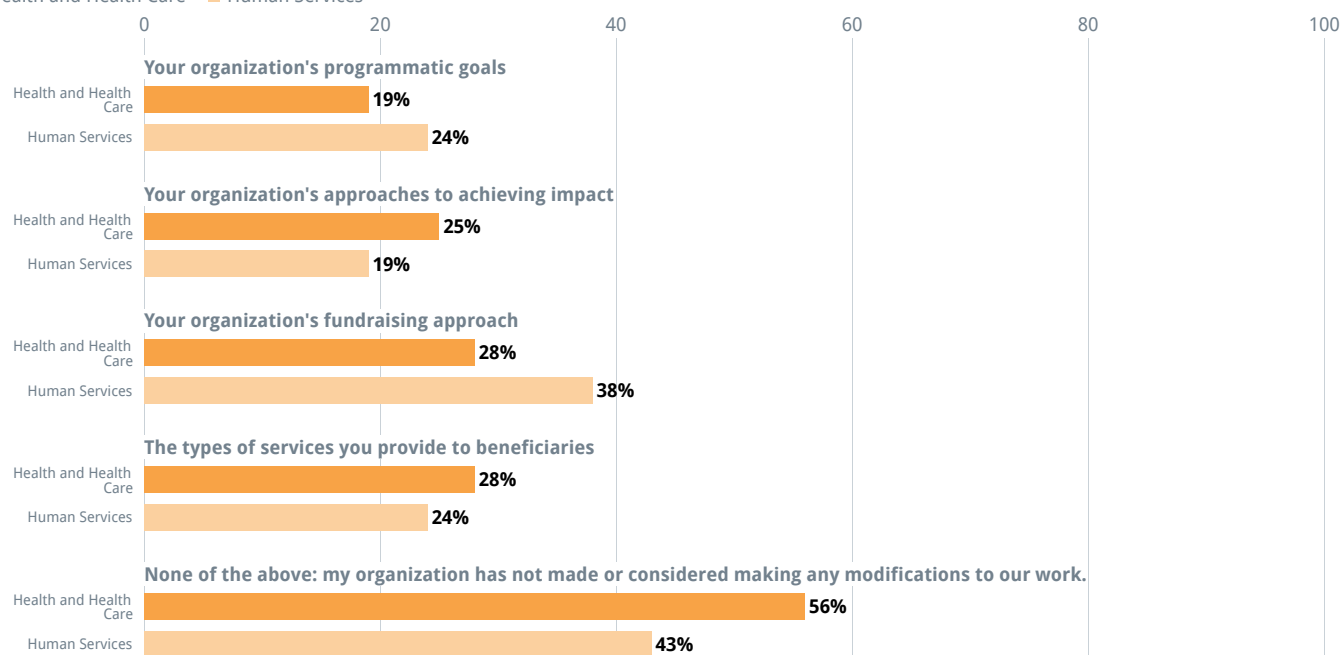| "What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?"	Moses Taylor 2017	Average Funder
Generally positive impact	9%	8%
No impact/Neutral	13%	15%
Generally negative impact	78%	77%

> **"Has your organization modified or made plans to modify your work in any of the following areas as a result of the changing U.S. political landscape?"**

■ Moses Taylor 2017 ■ Median Funder
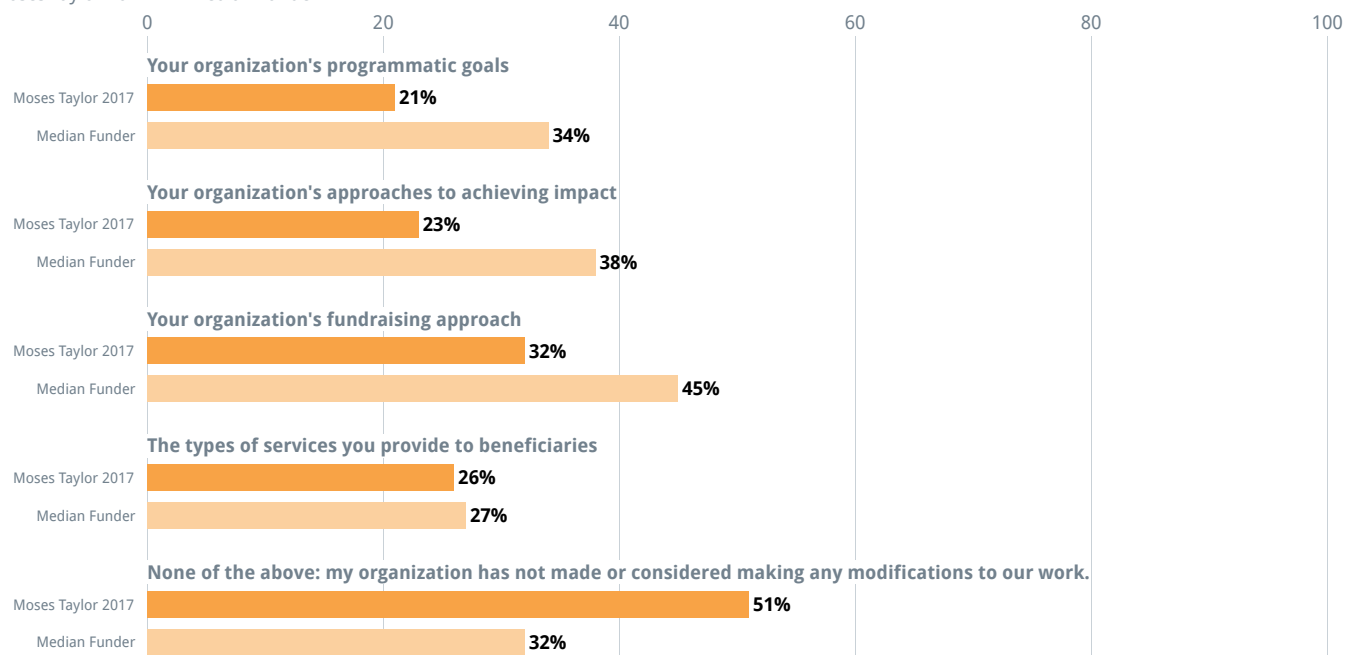
Your organization's programmatic goals
- Moses Taylor 2017: **21%**
- Median Funder: **34%**

Your organization's approaches to achieving impact
- Moses Taylor 2017: **23%**
- Median Funder: **38%**

Your organization's fundraising approach
- Moses Taylor 2017: **32%**
- Median Funder: **45%**

The types of services you provide to beneficiaries
- Moses Taylor 2017: **26%**
- Median Funder: **27%**

None of the above: my organization has not made or considered making any modifications to our work.
- Moses Taylor 2017: **51%**
- Median Funder: **32%**

(If grantees indicated making at least one modification avove)

"In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas:"

Direct service work	Moses Taylor 2017	Average Funder
Increasing emphasis	35%	41%
No change in emphasis	65%	57%
Decreasing emphasis	0%	2%

Policy/advocacy work	Moses Taylor 2017	Average Funder
Increasing emphasis	79%	71%
No change in emphasis	21%	28%
Decreasing emphasis	0%	1%

Collaboration with other nonprofit organizations	Moses Taylor 2017	Average Funder
Increasing emphasis	75%	74%
No change in emphasis	25%	26%
Decreasing emphasis	0%	0%

Collaboration with other sectors	Moses Taylor 2017	Average Funder
Increasing emphasis	82%	70%
No change in emphasis	18%	30%
Decreasing emphasis	0%	0%

Local community engagement efforts	Moses Taylor 2017	Average Funder
Increasing emphasis	81%	75%
No change in emphasis	19%	24%
Decreasing emphasis	0%	1%

Collecting input from your beneficiaries	Moses Taylor 2017	Average Funder
Increasing emphasis	77%	60%
No change in emphasis	23%	39%
Decreasing emphasis	0%	0%

"Has the changing U.S. political landscape had any impact on your organization's ability to raise funds in support of your work?"

Ability to raise funds from foundations	Moses Taylor 2017	Average Funder
Generally positive impact	11%	18%
No impact/Neutral	82%	63%
Generally negative impact	8%	19%

Ability to raise funds from other sources (e.g., public funders, individual donors)	Moses Taylor 2017	Average Funder
Generally positive impact	13%	22%
No impact/Neutral	64%	47%
Generally negative impact	22%	31%

"Have you received any of the following communications from the Foundation related to the changing U.S. political landscape?"

Public communication from the Foundation (e.g., blog post, mass email, newsletter)	Moses Taylor 2017	Average Funder
Yes	38%	36%
No, and I would like to receive this communication	24%	46%
No, and I don't think this communication would be helpful	38%	18%

Communication with your program officer about your organization's work	Moses Taylor 2017	Average Funder
Yes	24%	32%
No, and I would like to receive this communication	34%	49%
No, and I don't think this communication would be helpful	42%	19%

Communication with your program officer about the Foundation's work	Moses Taylor 2017	Average Funder
Yes	36%	31%
No, and I would like to receive this communication	33%	56%
No, and I don't think this communication would be helpful	31%	13%

Response to 2016 Elections - By Subgroup

*The following questions were recently added to the grantee survey and depict comparative data from 15 funders in the dataset.

"What impact do you anticipate the changing U.S. political landscape will have on your organization's ability to carry out its mission?" (By Subgroup)	Health and Health Care	Human Services
Generally positive impact	12%	5%
No impact/Neutral	19%	5%
Generally negative impact	69%	89%

"Has your organization modified or made plans to modify your work in any of the following areas as a result of the changing U.S. political landscape?" - By Subgroup

■ Health and Health Care   ■ Human Services

Your organization's programmatic goals
Health and Health Care: 19%
Human Services: 24%

Your organization's approaches to achieving impact
Health and Health Care: 25%
Human Services: 19%

Your organization's fundraising approach
Health and Health Care: 28%
Human Services: 38%

The types of services you provide to beneficiaries
Health and Health Care: 28%
Human Services: 24%

None of the above: my organization has not made or considered making any modifications to our work.
Health and Health Care: 56%
Human Services: 43%

(If grantees indicated making at least one modification above)

"In response to the changing U.S. political landscape, is your organization changing or planning to change the emphasis of its work in the following areas:"

Direct service work (By Subgroup)	Health and Health Care	Human Services
Increasing emphasis	47%	18%
No change in emphasis	53%	82%
Decreasing emphasis	0%	0%

Policy/advocacy work (By Subgroup)	Health and Health Care	Human Services
Increasing emphasis	92%	67%
No change in emphasis	8%	33%
Decreasing emphasis	0%	0%

Collaboration with other nonprofit organizations (By Subgroup)	Health and Health Care	Human Services
Increasing emphasis	75%	75%
No change in emphasis	25%	25%
Decreasing emphasis	0%	0%

Collaboration with other sectors (By Subgroup)	Health and Health Care	Human Services
Increasing emphasis	81%	83%
No change in emphasis	19%	17%
Decreasing emphasis	0%	0%

Local community engagement efforts (By Subgroup)	Health and Health Care	Human Services
Increasing emphasis	73%	92%
No change in emphasis	27%	8%
Decreasing emphasis	0%	0%

Collecting input from your beneficiaries (By Subgroup)	Health and Health Care	Human Services
Increasing emphasis	79%	75%
No change in emphasis	21%	25%
Decreasing emphasis	0%	0%

"Has the changing U.S. political landscape had any impact on your organization's ability to raise funds in support of your work?"

Ability to raise funds from foundations (By Subgroup)	Health and Health Care	Human Services
Generally positive impact	13%	7%
No impact/Neutral	78%	87%
Generally negative impact	9%	7%

Ability to raise funds from other sources (e.g., public funders, individual donors) (By Subgroup)	Health and Health Care	Human Services
Generally positive impact	15%	11%
No impact/Neutral	67%	61%
Generally negative impact	19%	28%

"Have you received any of the following communications from the Foundation related to the changing U.S. political landscape?"

Public communication from the Foundation (e.g., blog post, mass email, newsletter) (By Subgroup)	Health and Health Care	Human Services
Yes	37%	39%
No, and I would like to receive this communication	22%	28%
No, and I don't think this communication would be helpful	41%	33%

Communication with your program officer about your organization's work (By Subgroup)	Health and Health Care	Human Services
Yes	24%	23%
No, and I would like to receive this communication	32%	38%
No, and I don't think this communication would be helpful	44%	38%

Communication with your program officer about the Foundation's work (By Subgroup)	Health and Health Care	Human Services
Yes	31%	44%
No, and I would like to receive this communication	35%	31%
No, and I don't think this communication would be helpful	35%	25%

Contextual Data

Grantee Responses

Grantmaking Characteristics

Length of Grant Awarded	Moses Taylor 2017	Median Funder	Custom Cohort
Average grant length	1.2 years	2.1 years	1.9 years

Length of Grant Awarded	Moses Taylor 2017	Average Funder	Custom Cohort
1 year	78%	46%	51%
2 years	19%	24%	18%
3 years	3%	18%	18%
4 years	0%	4%	4%
5 or more years	0%	8%	9%

Type of Grant Awarded	Moses Taylor 2017	Average Funder	Custom Cohort
Program / Project Support	73%	65%	73%
General Operating / Core Support	7%	21%	13%
Capital Support: Building / Renovation / Endowment Support / Other	10%	5%	4%
Technical Assistance / Capacity Building	8%	4%	7%
Scholarship / Fellowship	2%	2%	0%
Event / Sponsorship Funding	0%	2%	2%

Grantmaking Characteristics - By Subgroup

Length of Grant Awarded (By Subgroup)	Health and Health Care	Human Services
Average grant length	1.2 years	1.2 years

Length of Grant Awarded (By Subgroup)	Health and Health Care	Human Services
1 year	80%	75%
2 years	14%	25%
3 years	6%	0%
4 years	0%	0%
5 or more years	0%	0%

Type of Grant Awarded (By Subgroup)	Health and Health Care	Human Services
Program / Project Support	81%	63%
General Operating / Core Support	3%	13%
Capital Support: Building / Renovation / Endowment Support / Other	8%	13%
Technical Assistance / Capacity Building	8%	8%
Scholarship / Fellowship	0%	4%
Event / Sponsorship Funding	0%	0%

Grant Size

Grant Amount Awarded	Moses Taylor 2017	Median Funder	Custom Cohort
Median grant size	$40K	$84.6K	$65K

Grant Amount Awarded	Moses Taylor 2017	Average Funder	Custom Cohort
Less than $10K	19%	10%	12%
$10K - $24K	22%	13%	12%
$25K - $49K	12%	13%	15%
$50K - $99K	17%	16%	24%
$100K - $149K	14%	9%	13%
$150K - $299K	15%	16%	8%
$300K - $499K	0%	8%	6%
$500K - $999K	0%	7%	7%
$1MM and above	2%	8%	3%

Median Percent of Budget Funded by Grant (Annualized)	Moses Taylor 2017	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	1%	4%	3%

Grant Size - By Subgroup

Grant Amount Awarded (By Subgroup)	Health and Health Care	Human Services
Median grant size	$75K	$38.3K

Grant Amount Awarded (By Subgroup)	Health and Health Care	Human Services
Less than $10K	23%	13%
$10K - $24K	14%	33%
$25K - $49K	9%	17%
$50K - $99K	11%	25%
$100K - $149K	17%	8%
$150K - $299K	23%	4%
$300K - $499K	0%	0%
$500K - $999K	0%	0%
$1MM and above	3%	0%

Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Health and Health Care	Human Services
Size of grant relative to size of grantee budget	1%	3%

Application Characteristics

Applicant Responses

Type of Grant Requested	Moses Taylor 2017	Average Funder
Program / Project Support	74%	71%
General Operating / Core Support	3%	11%
Capital Support: Building / Renovation / Endowment Support / Other	16%	11%
Technical Assistance / Capacity Building	0%	5%
Scholarship / Fellowship	0%	1%
Event / Sponsorship Funding	6%	1%

Grant Amount Requested	Moses Taylor 2017	Median Funder
Median Grant Amount	$24K	$50K

Grant Amount Requested	Moses Taylor 2017	Average Funder
Less than $10K	16%	10%
$10K - $24K	36%	20%
$25K - $49K	24%	18%
$50K - $99K	20%	20%
$100K - $149K	4%	10%
$150K - $299K	0%	12%
$300K - $499K	0%	5%
$500K - $999K	0%	3%
$1MM and above	0%	2%

Application Characteristics - By Subgroup

Type of Grant Requested (By Subgroup)	Health and Health Care	Human Services
Program / Project Support	79%	67%
General Operating / Core Support	5%	0%
Capital Support: Building / Renovation / Endowment Support / Other	16%	17%
Technical Assistance / Capacity Building	0%	0%
Scholarship / Fellowship	0%	0%
Event / Sponsorship Funding	0%	17%

Grant Amount Requested (By Subgroup)	Health and Health Care	Human Services
Median Grant Amount	$25K	$20K

Grant Amount Requested (By Subgroup)	Health and Health Care	Human Services
Less than $10K	21%	9%
$10K - $24K	21%	55%
$25K - $49K	36%	9%
$50K - $99K	14%	27%
$100K - $149K	7%	0%
$150K - $299K	0%	0%
$300K - $499K	0%	0%
$500K - $999K	0%	0%
$1MM and above	0%	0%

Grantee/Applicant Characteristics

Operating Budget of Grantee Organizations

Operating Budget of Grantee Organization	Moses Taylor 2017	Median Funder	Custom Cohort
Median Budget	$3M	$1.5M	$1.8M

Operating Budget of Grantee Organization	Moses Taylor 2017	Average Funder	Custom Cohort
<$100K	8%	8%	6%
$100K - $499K	19%	19%	23%
$500K - $999K	6%	14%	13%
$1MM - $4.9MM	25%	30%	28%
$5MM - $24MM	21%	18%	19%
>=$25MM	21%	11%	10%

Operating Budget of Grantee Organization (By Subgroup)	Health and Health Care	Human Services
Median Budget	$7M	$1.6M

Operating Budget of Grantee Organization (By Subgroup)	Health and Health Care	Human Services
<$100K	3%	13%
$100K - $499K	21%	17%
$500K - $999K	3%	9%
$1MM - $4.9MM	17%	35%
$5MM - $24MM	28%	13%
>=$25MM	28%	13%

Operating Budget of Applicant Organizations

Operating Budget of Applicant Organization	Moses Taylor 2017	Median Funder
Median Budget	$1.8M	$0.7M

Operating Budget of Applicant Organization	Moses Taylor 2017	Average Funder
Less than $100K	7%	15%
$100K-$499K	13%	28%
$500K-$999K	10%	12%
$1MM-$4.9MM	37%	24%
$5MM-$25MM	17%	11%
$25MM and above	17%	9%

Operating Budget of Applicant Organization (By Subgroup)	Health and Health Care	Human Services
Median Budget	$1.7M	$1.8M

Operating Budget of Applicant Organization (By Subgroup)	Health and Health Care	Human Services
Less than $100K	6%	8%
$100K-$499K	11%	17%
$500K-$999K	11%	8%
$1MM-$4.9MM	39%	33%
$5MM-$25MM	11%	25%
$25MM and above	22%	8%

Additional Grantee Characteristics

Pattern of Grantees' Funding Relationship with the Foundation	Moses Taylor 2017	Average Funder	Custom Cohort
First grant received from the Foundation	71%	29%	23%
Consistent funding in the past	22%	53%	56%
Inconsistent funding in the past	7%	19%	21%

Funding Status and Grantees Previously Declined Funding	Moses Taylor 2017	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	63%	80%	74%
Percent of grantees previously declined funding by the Foundation	30%	31%	42%

Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Health and Health Care	Human Services
First grant received from the Foundation	66%	79%
Consistent funding in the past	23%	21%
Inconsistent funding in the past	11%	0%

Funding Status and Grantees Previously Declined Funding (By Subgroup)	Health and Health Care	Human Services
Percent of grantees currently receiving funding from the Foundation	57%	71%
Percent of grantees previously declined funding by the Foundation	29%	32%

Grantee Demographics

Job Title of Respondents	Moses Taylor 2017	Average Funder	Custom Cohort
Executive Director	46%	47%	48%
Other Senior Management	21%	15%	17%
Project Director	4%	12%	15%
Development Director	12%	8%	6%
Other Development Staff	11%	7%	4%
Volunteer	2%	1%	1%
Other	5%	9%	9%

Gender of Respondents	Moses Taylor 2017	Average Funder	Custom Cohort
Female	74%	64%	71%
Male	26%	36%	29%

Race/Ethnicity of Respondents	Moses Taylor 2017	Average Funder	Custom Cohort
African-American/Black	0%	7%	7%
American Indian/Alaskan Native	0%	1%	0%
Asian (incl. Indian subcontinent)	0%	4%	2%
Caucasian/White	98%	80%	87%
Hispanic/Latino	0%	5%	2%
Multi-racial	0%	3%	1%
Pacific Islander	0%	0%	0%
Other	2%	1%	1%

Applicant Demographics

Job Title of Respondents	Moses Taylor 2017	Average Funder
Executive Director/CEO	63%	46%
Other Senior Management	16%	13%
Project Director	3%	10%
Development Director	6%	10%
Other Development Staff	9%	7%
Volunteer	3%	2%
Other	0%	11%

Gender of Respondents	Moses Taylor 2017	Average Funder
Female	56%	62%
Male	44%	35%

Race/Ethnicity of Respondents	Moses Taylor 2017	Average Funder
African-American/Black	0%	10%
American Indian/Alaskan Native	0%	1%
Asian (incl. Indian subcontinent)	0%	2%
Caucasian/White	97%	78%
Hispanic/Latino	0%	5%
Multi-racial	3%	2%
Pacific Islander	0%	0%
Other	0%	2%

Funder Characteristics

Financial Information	Moses Taylor 2017	Median Funder	Custom Cohort
Total assets	$87.1M	$213M	$111.7M
Total giving	$2.8M	$15.3M	$3.5M

Funder Staffing	Moses Taylor 2017	Median Funder	Custom Cohort
Total staff (FTEs)	4	15	8
Percent of staff who are program staff	25%	40%	43%

Grantmaking Processes	Moses Taylor 2017	Median Funder	Custom Cohort
Proportion of grants that are proactive	N/A	46%	21%
Proportion of grantmaking dollars that are proactive	N/A	65%	19%

Additional Survey Information

On many questions in the grantee and applicant surveys, respondents 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 or applicants 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 Moses Taylor's grantee and applicant surveys were 60 and 32, respectively.

Question Text	Count of Responses
Overall, how would you rate the Foundation's impact on your field?	59
How well does the Foundation understand the field in which you work?	56
To what extent has the Foundation advanced the state of knowledge in your field?	44
To what extent has the Foundation affected public policy in your field?	39
Overall, how would you rate the Foundation's impact on your local community?	60
How well does the Foundation understand the local community in which you work?	58
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	57
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?	59
Who most frequently initiated the contact you had with your program officer during this grant?	59
Did the Foundation conduct a site visit during the selection process or during the course of this grant?	58
Has your main contact at the Foundation changed in the past six months?	57
Did you submit a proposal to the Foundation for this grant?	60
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?	58
How involved was Foundation staff in the development of your grant proposal?	57
How much time elapsed from the submission of the grant proposal to clear commitment of funding?	56
Have you ever been declined funding from the Foundation?	56
Are you currently receiving funding from the Foundation?	59
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?	57
To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?	57
Have you participated in a reporting or evaluation process?	51
To what extent was the Foundation's reporting process...Adaptable, if necessary, to fit your circumstances?	26
To what extent was the Foundation's reporting process...A helpful opportunity for you to reflect and learn?	31
To what extent was the Foundation's reporting process...Relevant, with questions and measures pertinent to the work funded by this grant?	32
To what extent was the Foundation's reporting process...Straightforward?	31
To what extent was the Foundation's reporting process...Aligned appropriately to the timing of your work?	30
Did the Foundation provide financial support for the evaluation?	4
To what extent did the evaluation...Result in you making changes to the work that was evaluated?	3
To what extent did the evaluation...Incorporate your input in the design of the evaluation?	3
To what extent did the evaluation...Generate information that you believe will be useful for other organizations?	4
Did you have an initial meeting with the Foundation staff prior to applying to the grant?	59
To what extent did your initial meeting with the Foundation staff...Help you build an understanding of the Foundation's goals and strategy?	47
To what extent did your initial meeting with the Foundation staff...Help you understand how your organization's work aligns with that of the Foundation?	47
To what extent did your initial meeting with the Foundation staff...Help you craft a proposal that seemed aligned with the Foundation's funding priorities?	46

To what extent did your initial meeting with the Foundation staff...Help you begin building a strong relationship with Foundation staff?	47
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: General management advice?	4
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Strategic planning advice?	7
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Financial planning/accounting?	2
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Development of performance measures?	2
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Encouraged/facilitated collaboration?	15
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Insight and advice on your field?	10
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Introductions to leaders in the field?	5
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Provided research or best practices?	5
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Provided seminars/forums/convenings?	16
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Board development/governance assistance?	1
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Communications/marketing/publicity assistance?	4
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Use of the Foundation's facilities?	1
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Staff/management training?	6
How helpful was each type of non-monetary assistance you received directly from Moses Taylor staff: Assistance securing funding from other sources?	7
Please rate how much you would value each of the following supports if they were available in the future: Strategic planning?	49
Please rate how much you would value each of the following supports if they were available in the future: Board development/governance?	47
Please rate how much you would value each of the following supports if they were available in the future: Assessment and evaluation?	51
Please rate how much you would value each of the following supports if they were available in the future: Organization design/staff structure?	49
Please rate how much you would value each of the following supports if they were available in the future: Leadership development?	51
To what extent do you associate the Foundation with the following characteristics...Treats grantees with compassion, respect, and dignity?	57
To what extent do you associate the Foundation with the following characteristics...Builds partnerships built on trust?	57
To what extent do you associate the Foundation with the following characteristics...Accountable to grantees?	53
To what extent do you associate the Foundation with the following characteristics...Open to ideas about the best approaches to achieve its goals?	53
To what extent do you associate the Foundation with the following characteristics...Values and advances diversity?	56
To what extent do you associate the Foundation with the following characteristics...Committed to improving health and wellness in Northeastern Pennsylvania?	55

Question Text	Count of Responses
Overall, how would you rate the Foundation's impact on your field?	26
How well does the Foundation understand the field in which you work?	28
Overall, how would you rate the Foundation's impact on your local community?	28
How well does the Foundation understand the local community in which you work?	26
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	30
How well does the Foundation understand your organization's strategy and goals?	30
What was the dollar amount of your grant request to the Foundation?	25
How consistent was the information provided by different communications resources, both personal and written, that you used to learn about the Foundation?	30
How much time elapsed from initial submission of your grant proposal to the final decision not to fund your request?	28
After your request was declined did you request any feedback or advice from the Foundation?	29
After your request was declined did you receive any feedback or advice from the Foundation?	28
Did you have an initial meeting with the Foundation staff prior to applying to the grant?	31
To what extent did your initial meeting with the Foundation staff...Help you build an understanding of the Foundation's goals and strategy?	17
To what extent did your initial meeting with the Foundation staff...Help you understand how your organization's work aligns with that of the Foundation?	17
To what extent did your initial meeting with the Foundation staff...Help you craft a proposal that seemed aligned with the Foundation's funding priorities?	17
To what extent did your initial meeting with the Foundation staff...Help you begin building a strong relationship with Foundation staff?	17

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 and APR

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.

CEP developed the Applicant Perception Report (APR) as a complement to the Grantee Perception Report. Based on a separate, shorter survey, the APR allows philanthropic funders to understand the candid perspectives of declined applicants on a number of important dimensions. The APR shows an individual funder the perceptions of its applicants relative to a set of perceptions of 40 funders whose declined applicants were surveyed by CEP.

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