



## University of Washington Philanthropy Project

Thank you for participating in our national survey of the philanthropic community that seeks to understand the landscape of foundation governance and stakeholder engagement. Additionally, given the extraordinary times we are in, we have integrated questions about how COVID-19 is affecting foundation operations.

We expect the survey to take approximately 20 minutes. The survey is completely confidential, and all results will be presented only in aggregate form.

**We suggest using a desktop or laptop to complete the survey.**

If you have any comments or questions about the survey, please feel free to contact the principal investigator, David Suarez, at [suarezdf@uw.edu](mailto:suarezdf@uw.edu).

We greatly appreciate your time in completing this survey. Thank you.

This study has been approved by the University of Washington's Institutional Review Board. (IRB ID: STUDY00008845)

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## Part 1

### Question 1

How would you characterize your foundation?

- Independent/Family
- Corporate
- Community
- Operating

If you selected **Independent/Family or Operating**, move on to [Question 2](#)  
If you selected **Corporate**, move to [Question 5](#)  
If you selected **Community**, move on to Question [Question 6](#)

### Question 2

Which of the following best describes the founding donor's current level of activity in the foundation?

- The founding donor is involved in foundation governance or operations. (1)
- The founding donor is not involved in the foundation's governance or operations. (5)
- The founding donor is no longer living. (3)

If you indicated that the founding donor **is no longer living**, please skip to [Question 6](#).

### Question 3

On a scale from 0 to 10 (0 = not very involved, 10 = extremely involved), select the founding donors' level of involvement in establishing and revising the foundation's programmatic priorities.

Select one option from dropdown menu

### Question 4

On a scale from 0 to 10 (0 = not very involved, 10 = extremely involved), select the founding donors' level of involvement in decision-making about grants.

Select one option from dropdown menu



### Question 5

For **Corporate** foundations only. How many board members are current employees of the parent company of the foundation?

- All
- Most
- Some
- None

### Question 6

How many individuals serve on the Board of Directors of your foundation?

### Question 7

How many full-time equivalent staff (FTE) does your foundation employ?

- Our foundation does not employ paid staff.
- Fewer than 1
- 1-5
- 6-10
- 11-20
- 21-30
- 31-40
- 41 or more

### Question 8

Does your foundation hire consultants for any of the following services?

*Please select all that apply.*

- Organizational strategy and management
- Evaluation
- Stakeholder engagement
- None of the above

### Question 9

Does your foundation collaborate with other private or community foundations?

- Yes
- No



### Question 10

If your foundation is an **Operating** foundation: Does your foundation make grants to charitable nonprofit organizations?

- Yes
- No

### Question 11

Has your foundation used a Letter of Intent or Request for Proposals process in the past two years?

- Yes
- No

### Question 12

If your foundation is a **Community** foundation: Does your foundation host giving circles?

- Yes
- No

### Question 13

Does your foundation have an interest in influencing public policy?

- Yes
- No

If you selected **Yes**, proceed to [Question 14](#).  
If you selected **No**, proceed to [Question 15](#).

### Question 14

Indicate how your foundation has attempted to influence public policy in the past two years.

*Please select all that apply.*

- Public education about policy issues
- Policy research
- Media advocacy
- Coalition building
- Expert testimony
- Judicial advocacy
- Public events
- Funding advocacy efforts of other organizations
- Encouraging citizen participation in the policy process
- Other
- None of the above

If **Other**, please describe how your foundation has attempted to influence public policy in the past two years.

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## Part II

In light of global events surrounding COVID-19, we would like to know how your foundation's work may have been affected.

### Question 15

What, if any, changes to strategy or giving has your foundation made (or is currently making) in response to COVID-19?

*Please select all that apply.*

- Changed funding priorities
- Increased payout percentage
- Increased length of grant cycle
- Established a specific fund for COVID-19 issues
- Engaged in advocacy around COVID-19 issues
- Solicited community feedback in forming our COVID-19 response
- Other
- None of the above

If Other, please describe the changes your foundation has made (or is currently making) to strategy or giving in response to COVID-19.



### Question 16

What, if any, changes to agreements or relationships with current grantees has your foundation made (or is currently making) in response to COVID-19?

*Please select all that apply*

- Increased communication with grantees
- Loosened or eliminated restrictions on current grants
- Made new grants unrestricted
- Changed payment schedules
- Reduced reporting requirements
- Changed how funding can be used
- Provided additional funding
- Supported advocacy efforts of grantees
- Other
- None of the above

If Other, please describe the changes your foundation made (or is currently making) to grantee relations in response to COVID-19.

### Question 17

Which, if any, of the following groups has your foundation prioritized in its COVID-19 response?

*Please select all that apply.*

- Older adults
- Children
- Black/African American communities
- Latinx communities
- Native American communities
- Immigrant communities
- People experiencing homelessness
- People experiencing job insecurity
- Low-income people
- Female-identified individuals
- Other
- No specific group targeted

If Other, what groups has your foundation prioritized in its COVID-19 response?

### Question 18

Has your foundation collaborated with any of the following entities in response to COVID-19?

- State and local governments
- Federal government
- Tribal governments
- International agencies
- Other foundations
- Philanthropic associations/affinity groups
- Charitable/nonprofit organizations
- Companies
- Other
- None of the above





If Other, please describe the entities with which your foundation has collaborated in response to COVID-19.

**Question 19**

If there is anything else that you would like to share about your foundation's response to COVID-19, please do so in the space below.



## Part III

This section is for **operating foundations that do not make grants**. If your foundation is not an operating foundation that does not make grants, please skip to [Question 25](#).

The following series of questions relates to the involvement of various stakeholders in your foundation's governance and operations at any point in the past two years. In each of these questions, you will see the following terms:

- Solicited feedback
- Incorporated feedback
- Made decisions

The table below provides some examples of the types of activities that constitute each of these terms.

Action	What this might look like
Solicited stakeholder feedback	surveys, focus groups, meetings, opportunities for comment
Incorporated feedback from stakeholder to influence	stakeholders serving on foundation working groups or advisory committees
Stakeholder made decisions	the foundation confers decision-making authority upon the stakeholder

### Question 20

Which, if any, of the following stakeholders has your foundation solicited feedback from about your foundation's priorities.

*Please select all that apply.*

- Foundation staff
- Peer foundations
- Nonprofits/Community-based organizations
- Community members directly affected by our foundation's work
- Members of the general public
- None of the above



### Question 21

Which, if any, of the following stakeholders has your foundation **incorporated feedback from to influence** your foundation's priorities.

*Please select all that apply.*

- Foundation staff
- Peer foundations
- Nonprofits/Community-based organizations
- Community members directly affected by our foundation's work
- Members of the general public
- None of the above

### Question 22

Which, if any, of the following stakeholders have **made decisions** about your foundation's priorities.

*Please select all that apply.*

- Foundation staff
- Peer foundations
- Nonprofits/Community-based organizations
- Community members directly affected by our foundation's work
- Members of the general public
- None of the above

### Question 23

Have you collaborated with consultants to conduct any of the activities (e.g., soliciting feedback from stakeholders, incorporating stakeholder feedback to influence decision-making) that you have indicated above?

We use the term consultants to indicate any management organization, philanthropic advisory group, or an independent consultant with which your foundation collaborates.

- Yes
- No



### Question 24

Which of the following best describes the general relationship between your foundation and the consultant(s) with which it worked in the past two years?

- Our foundation staff/board collaborated with the consultant(s) in both decision-making and implementation.
- Our foundation staff/board made decisions and relied on the consultant(s) to implement them.
- Our foundation staff/board collaborated with the consultant(s) to make decisions, but the consultant(s) implemented them.
- Our foundation delegated decision-making and implementation to the consultant(s).

If you indicated that your foundation engages any of the following entities in [Question 21](#) or [Question 22](#), please continue to [Question 30](#):

- **Nonprofits/community-based organizations**
- **Community members directly affected by our foundation's work**
- **Members of the public**

If you indicated that your foundation does not engage any of the above entities, please continue to [Question 50](#).



## Part IV

This section is for **all** foundations, **except** operating foundation that do not make grants.

The following series of questions relates to the involvement of various stakeholders in your foundation's governance and operations at any point in the past two years. In each of these questions, you will see the following terms:

- Solicited feedback
- Incorporated feedback
- Made decisions

The table below provides some examples of the types of activities that constitute each of these terms.

Action	What this might look like
Solicited stakeholder feedback	surveys, focus groups, meetings, opportunities for comment
Incorporated feedback from stakeholder to influence	stakeholders serving on foundation working groups or advisory committees
Stakeholder made decisions	the foundation confers decision-making authority upon the stakeholder

If your foundation does not utilize a specific activity to engage the highlighted stakeholder, please select **Not applicable** at the end of each row in order to be able to proceed to the next section of the survey.

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**Question 25**

Indicate all of the ways in which your foundation **solicited feedback from** stakeholders about various aspects of the foundation's governance or grant-making.

*Please select all that apply.*

	our organizational priorities	our grant- making processes	which grantees we fund	our post-grant evaluation	Not applicable
Our foundation solicited feedback from <b>staff</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation solicited feedback from <b>peer foundations</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation solicited feedback from <b>donors/members</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation solicited feedback from <b>current/former grantees</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation solicited feedback from <b>non-grantee nonprofits/community-based organizations</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation solicited feedback from <b>community members directly affected by the foundation's funding</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation solicited feedback from <b>members of the public</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Question 26**

Indicate all of the ways in which your foundation **incorporated feedback from stakeholders to influence** various aspects of the foundation's governance or grant-making.

*Please select all that apply.*

	our organizational priorities	our grant-making processes	which grantees we fund	our post-grant evaluation	Not applicable
Our foundation incorporated feedback from <b>staff</b> to influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation incorporated feedback from <b>peer foundations</b> to influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation incorporated feedback from <b>donors/members</b> to influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation incorporated feedback from <b>current/former grantees</b> to influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation incorporated feedback from <b>non-grantee nonprofits/community-based organizations</b> to influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation incorporated feedback from <b>community members directly affected by the foundation's funding</b> to influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation incorporated feedback from <b>members of the public</b> to influence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Question 27**

Indicate all of the ways in which **stakeholders made decisions** about various aspects of the foundation's governance or grant-making.

*Please select all that apply.*

	our organizational priorities	our grant-making processes	which grantees we fund	our post-grant evaluation	Not applicable
<b>Staff</b> made decisions about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Peer foundations</b> made decisions about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Donors/members</b> made decisions about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Current/former grantees</b> made decisions about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Non-grantee nonprofits/community-based organizations</b> made decisions about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Community members directly affected by the foundation's funding</b> made decisions about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Members of the public</b> made decisions about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>





### Question 28

Have you collaborated with consultants to conduct any of the activities (e.g., soliciting feedback from stakeholders, incorporating stakeholder feedback to influence decision-making) that you have indicated in the previous section?

We use the term consultants to indicate any management organization, philanthropic advisory group, or an independent consultant with which your foundation collaborates.

- Yes
- No

### Question 29

Which of the following best describes the relationship between your foundation and the consultant(s) with which it worked to engage stakeholders in the past two years?

- Our foundation staff/board collaborated with the consultant(s) in both decision-making and implementation.
- Our foundation staff/board made decisions and relied on the consultant(s) to implement them.
- Our foundation staff/board collaborated with the consultant(s) to make decisions, but the consultant(s) implemented them.
- Our foundation delegated decision-making and implementation to the consultant(s).

If you indicated that your foundation engages the following stakeholders in [Question 27](#) or [Question 28](#), please continue on to [Question 30](#) in the next section:

- **Current or former grantees**
- **Non-grantee nonprofits/community based organizations**
- **Community members directly affected by the foundation's funding**
- **Members of the public**

If you indicated **Not applicable** for the above entities, please move on to [Part VI](#).

## Part V

You have indicated that your foundation engaged external stakeholders at some point in the past two years. We are interested in understanding **how** your foundation identified and engaged external stakeholders.

### Question 30

Who identified external stakeholders to participate? *Please select all that apply.*

- Foundation board members
- Foundation staff
- Consultants
- Grantees
- Contacts in our foundation network
- Other

If **Other**, please indicate who identified external stakeholders to participate.

### Question 31

What processes were used to identify external stakeholders to participate? *Please select all that apply.*

- Our foundation sent invitations to external stakeholders.
- Our foundation requested nominations from another entity.
- External stakeholders self-selected.
- Our foundation used other methods to engage external stakeholders.

If your foundation has used **other** processes to identify external stakeholders to participate, please describe those methods here.



### Question 32

Indicate the attributes that were important in selecting external stakeholders to participate.

*Please select all that apply.*

- The external stakeholder's knowledge of the challenge our foundation seeks to address.
- The external stakeholder's willingness to share information or best practices.
- The experience that the external stakeholder had with our foundation's target beneficiaries.
- The diversity of perspectives that the external stakeholder brought to the process.
- Our foundation had existing relationships with the external stakeholder(s).
- Other

If other attributes were important in selecting external stakeholders, please describe those attributes here.

### Question 33

Indicate how your foundation facilitated external stakeholder participation.

*Please select all that apply.*

- Provided multiple forums for participation (e.g. in-person, online)
- Scheduled meetings outside of business hours
- Provided childcare
- Compensated external stakeholders for time
- Held meetings in accessible locations
- Other

If your foundation facilitated stakeholder participation in other ways, please describe them here.



## Part VI

The following section is intended for foundations that **make grants**.

If your foundation does not make grants, please continue to [Part VIII](#).

### Question 34

In the last two years, has your foundation funded grantees to make grants to other organizations?

- Yes
- No

The following series of questions reflect whether and how your foundation funded grantees to engage various stakeholders at any point in the past two years. In each of these questions, you will see the following terms:

- Solicited feedback
- Incorporated feedback
- Made decisions

The table below provides some examples of the types of activities that constitute each of these terms.

Action	What this might look like
Solicited stakeholder feedback	surveys, focus groups, meetings, opportunities for comment
Incorporated feedback from stakeholder to influence	stakeholders serving on foundation working groups or advisory committees
Stakeholder made decisions	the foundation confers decision-making authority upon the stakeholder

If your foundation does not utilize a specific activity to engage the highlighted stakeholder, please select **Not applicable** at the end of each row in order to be able to proceed to the next section of the survey.

**Question 35**

Indicate all of the activities for which your foundation funded grantees to **solicit feedback** from stakeholders.

*Please select all that apply.*

	the grantee's organizational priorities	the grantee's grant-making processes	what the grantee funds	the grantee's evaluation of programs	Not applicable
Our foundation funded grantees to solicit feedback from <b>peer nonprofits/CBOs</b> about	=	=	=	=	=
Our foundation funded grantees to solicit feedback from <b>community members directly affected by the foundation's funding</b> about	=	=	=	=	=
Our foundation funded grantees to solicit feedback from <b>members of the public</b> about	=	=	=	=	=



Question 36

Indicate all of the activities for which your foundation funded grantees to **incorporate feedback** from stakeholders to influence organizational governance/operations.

Please select all that apply.

	the grantee's organizational priorities	the grantee's grant-making processes	what the grantee funds	the grantee's evaluation of programs	Not applicable
Our foundation funded grantees to incorporate feedback from <b>peer nonprofits/CBOs</b> to influence	=	=	=	=	=
Our foundation funded grantees to incorporate feedback from <b>community members directly affected by the foundation's funding</b> to influence	=	=	=	=	=
Our foundation funded grantees to incorporate feedback from <b>members of the public</b> to influence	=	=	=	=	=



**Question 37**

Indicate all of the activities for which your foundation funded grantees to **confer decision-making authority upon** stakeholders.

*Please select all that apply.*

	the grantee's organizational priorities	the grantee's grant-making processes	what the grantee funds	the grantee's evaluation of programs	Not applicable
Our foundation funded grantees to confer decision-making authority upon <b>peer nonprofits/CBOs</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation funded grantees to confer decision-making authority upon <b>community members directly affected by the foundation's funding</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our foundation funded grantees to confer decision-making authority upon <b>members of the public</b> about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Question 38**

Has your foundation collaborated with consultants to assist your grantees with any of the activities (e.g., soliciting feedback from stakeholders) that you have indicated in the previous section?

*Just a reminder: we use the term consultants to indicate any management organization, philanthropic advisory group, or an independent consultant with which your foundation collaborates.*

- Yes
- No

If you responded **Yes**, please continue to [Question 39](#).  
If you responded **No**, please continue to [Part VII](#).

**Question 39**

Which of the following best characterizes the roles of your foundation's staff/board, your grantee's staff/board, and the consultant(s) in these activities?

	Decision-making processes	Implementation processes	Not applicable
Foundation <b>staff/board</b> was involved in	=	=	=
Our <b>grantee nonprofit</b> was involved in	=	=	=
Our <b>consultant</b> was involved in	=	=	=



## Part VII

This set of questions is only relevant for foundations that make grants. If your foundation does not make grants, please continue to [Question 50](#).

In the next set of questions, we ask about the characteristics that your foundation looks for in potential grantees. Imagine that your foundation is considering a new potential grantee located in the geographic area that you fund, whose work is well-aligned with your foundation's priorities.

Each of the questions that follow presents three characteristics. Please choose which one of the three characteristics is the **most attractive** in your foundation's decision to fund. Then, choose which one of the three characteristics is **least attractive** in your foundation's decision to fund.

Here is an example of what a completed question might look like:

Please indicate which one of the listed characteristics is **most attractive** and which is **least attractive** in terms of your foundation's decision to fund the grantee.

**Most attractive**



Characteristic 1

Characteristic 2

Characteristic 3

**Least attractive**





Question 40

Please indicate which one of the listed characteristics is **most attractive** and which is **least attractive** in terms of your foundation's decision to fund.

Most attractive (1)		Least attractive (2)
=	The grantee surveys beneficiaries to obtain feedback regarding the organization's programs.	=
=	Many of the grantee's staff have advanced degrees relevant to their work.	=
=	The grantee uses logic modeling to design and evaluate its programs.	=

Question 41

Please indicate which one of the listed characteristics is **most attractive** and which is **least attractive** in terms of your foundation's decision to fund.

Most attractive (1)		Least attractive (2)
=	The grantee is predominantly staffed by volunteers from the community.	=
=	The grantee informally evaluates their programs in a qualitative way.	=
=	The grantee surveys beneficiaries to obtain feedback regarding the organization's programs.	=



Question 42

Please indicate which one of the listed characteristics is **most attractive** and which is **least attractive** in terms of your foundation's decision to fund.

Most attractive (1)		Least attractive (2)
=	Many of the grantee's staff have advanced degrees relevant to their work.	=
=	The grantee surveys beneficiaries to obtain feedback regarding the organization's programs.	=
=	The grantee informally evaluates their programs in a qualitative way.	=

Question 43

Please indicate which one of the listed characteristics is **most attractive** and which is **least attractive** in terms of your foundation's decision to fund.

Most attractive (1)		Least attractive (2)
=	The grantee surveys beneficiaries to obtain feedback regarding the organization's programs.	=
=	The grantee uses logic modeling to design and evaluate its programs.	=
=	The grantee is predominantly staffed by volunteers from the community.	=



## Part VIII

The following questions are intended for foundations that indicated they engaged **current/former grantees, nonprofits or community-based organizations, community members directly affected by the foundation's work, or members of the public** in:

- [Question 21](#) and/or [Question 22](#) (for operating foundations that do not make grants)
- [Question 27](#) and/or [Question 28](#) (for grant-making foundations)

If you **did not** indicate that your foundation engages these stakeholders in Question 21/22 or Question 27/28, please continue on to [Question 50](#).

The next series of question seeks to understand how your foundation perceives the benefits and challenges of engaging external stakeholders (e.g. current/former grantees, nonprofit and community-based organizations, communities directly affected by your foundation's funding, members of the public).

### Question 44

What motivates your foundation to engage external stakeholders?

*Please select all that apply.*

- Leads to more effective grant-making
- Shifts power to those most affected by the foundation's funding
- Promotes social justice and equity
- Promotes innovative solutions to challenges the foundation seeks to address
- Increases transparency of the foundation's work
- Encourages collaboration
- Builds trust between the foundation and the communities it seeks to help
- Builds leadership capacity of participants
- Demonstrates foundation's commitment to an inclusive funding process
- Diversifies who makes decisions about resource allocation
- Other
- None of the above



If Other, please describe what motivates your foundation to engage external stakeholders.

If you **did not** select any motivations or indicated **None of the Above**, please continue on to [Question 46](#).

### Question 45

For the motivations that you selected in Question 44, please rank the motivations them in order of importance to your foundation (i.e. "1" indicates greatest importance, "2" indicates second greatest importance)

- Leads to more effective grant-making
- Shifts power to those most affected by the foundation's funding
- Promotes social justice and equity
- Promotes innovative solutions to challenges the foundation seeks to address
- Increases transparency of the foundation's work
- Encourages collaboration
- Builds trust between the foundation and the communities it seeks to help
- Builds leadership capacity of participants
- Demonstrates foundation's commitment to an inclusive funding process
- Diversifies who makes decisions about resource allocation
- Other

### Question 46

Which of the following has facilitated your foundation's efforts to engage external stakeholders?

*Please select all that apply.*

- Motivated board members
- Motivated senior leadership
- Motivated staff/program officers
- Existing capacity in communities affected by foundation funding
- Relationships with partner organizations
- Other
- None of the above

If Other, please describe what has facilitated your foundation's efforts to engage external stakeholders.



### Question 47

Which type(s) of partner organizations have facilitated your foundation's efforts to engage external stakeholders?

*Please select all that apply.*

- Peer foundations
- Nonprofit organizations
- Consultants
- Associations/affinity groups
- None of the above

### Question 48

Which, if any, of the following does your foundation view as a challenge to engaging external stakeholders?

*Please select all that apply.*

- Not aligned with the organization's core strategy
- Foundation's fiscal and legal responsibility over decisions
- Lack of existing knowledge about stakeholder engagement
- Lack of capacity to implement (e.g. time, personnel)
- Lack of existing connections with communities
- Difficult to build trust with participants
- Other
- None of the above

If Other, please describe what your foundation has viewed as challenges to engaging external stakeholders.

### Question 49

Which of following statements best describes how your foundation intends to engage external stakeholders in the next two years?

- Decrease substantially
- Decrease somewhat
- Maintain current level
- Increase somewhat
- Increase substantially



## Part IX

The following questions are intended for foundations that indicated **Not applicable** for all of the following entities in [Question 27](#) or [Question 28](#):

- Current or former grantees
- Non-grantee nonprofits/community based organizations
- Community members directly affected by the foundation's funding
- Members of the public

If you indicated that your foundation engages one or more of the above entities in either Question 27 or Question 28, please continue on to Question

### Question 50

Has your foundation considered adopting any strategies to engage external stakeholders?

- Yes
- No

If you selected **Yes**, please continue on to [Question 51](#).  
If you selected **No**, please continue on to [Question 54](#).





### Question 51

What motivates your foundation's interest in engaging external stakeholders?

*Please select all answer choices that apply.*

- Improving the effectiveness of grant-making
- Shifting power to those most affected by the foundation's funding
- Promoting social justice and equity
- Promoting innovative solutions to challenges the foundation seeks to address
- Increasing transparency of the foundation's work
- Encouraging collaboration
- Building trust between the foundation and the communities it seeks to help
- Building leadership capacity of participants (20)
- Demonstrating foundation's commitment to an inclusive funding process
- Diversifying who makes decisions about resource allocation
- Other
- None of the above

If Other, please describe what motivates your foundation's interest in engaging external stakeholders.

### Question 52

Which, if any, of the following does your foundation view as challenges to engaging external stakeholders?

*Please select all answer choices that apply.*

- Not aligned with the foundations's core strategy
- Foundation's fiscal and legal responsibility over decisions
- Lack of existing knowledge about stakeholder participation
- Lack of interest from board/staff
- Lack of capacity to implement (e.g. time, personnel)
- Lack of existing connections with communities
- Difficult to build trust with participants
- Other
- None of the above

If Other, please describe what your foundations views as challenges to engaging external stakeholders.

### Question 53

Which of the following best describes your foundation's plans to engage external stakeholders in the next two years?

- Our foundation plans to engage stakeholders in developing our organizational priorities
- Our foundation plans to engage stakeholders in our grant-making processes
- Our foundation plans to engage stakeholders in our funding decisions.
- Our foundation does not plan to engage stakeholders post-grant evaluations.
- Our foundation does not plan to engage stakeholders.

Please continue on to [Question 55](#).

### Question 54

Which, if any, of the following best describes why your foundation does not engage external stakeholders?

*Please select all answer choices that apply.*

- Not aligned with the foundation's core strategy
- Foundation's fiscal and legal responsibility over decisions
- Lack of existing knowledge about stakeholder participation
- Lack of interest from board/staff
- Lack of capacity to implement
- Lack of existing connections with communities
- Difficult to build trust with participants
- Other
- None of the above

If Other, please describe why your foundation does not engage external stakeholders.



## Part X

The following questions are intended for foundations that indicated that they fund organizations to engage **peer nonprofits/community-based organizations, community members affected by the grantee's work, and/or members of the public** in [Question 36](#) or [Question 37](#).

If you indicated **Not applicable** for each of the stakeholders in these questions, please continue on to [Question 60](#).

### Question 55

Which of the following motivates your foundation's interest **in funding organizations** that engage external stakeholders?

*Please select all that apply.*

- Leads to more effective grant-making
- Shifts power to those most affected by the foundation's funding
- Promotes social justice and equity
- Promotes innovative solutions to challenges the foundation seeks to address
- Increases transparency of the foundation's work
- Encourages collaboration
- Builds trust between the foundation and the communities it seeks to help
- Builds leadership capacity of participants
- Demonstrates foundation's commitment to an inclusive funding process
- Other
- None of the above

If Other, please describe what motivates your foundation's interest in funding organizations that engage external stakeholders.

If you **did not select** any motivations from Question 55, or indicated **None of the Above**, please continue on to [Question 57](#).



### Question 56

For the motivations that you selected in Question 44, please rank the motivations them in order of importance to your foundation (i.e. “1” indicates greatest importance, “2” indicates second greatest importance)

- Leads to more effective grant-making
- Shifts power to those most affected by the foundation's funding
- Promotes social justice and equity
- Promotes innovative solutions to challenges the foundation seeks to address
- Increases transparency of the foundation's work
- Encourages collaboration
- Builds trust between the foundation and the communities it seeks to help
- Builds leadership capacity of participant
- Demonstrates foundation's commitment to an inclusive funding process
- Other

### Question 57

Which, if any, of the following does your foundation see as a challenge to funding organizations that engage external stakeholders?

*Please select all that apply.*

- Not aligned with foundation's strategy
- Lack of interest from board/staff
- Lack of existing knowledge about stakeholder participation
- Resource intensive for grantees to implement
- Difficult to evaluate
- Other

If Other, please describe what you foundation sees as a challenge to funding organizations that engage external stakeholders.



Question 58

Which of the following best describes your foundation's plans in the next two years for funding organizations that engage external stakeholders?

- Decrease substantially
- Decrease somewhat
- Maintain current level
- Increase somewhat
- Increase substantially



## Part XI

The following questions are intended for foundations that indicated they engaged **current/former grantees, nonprofits or community-based organizations, community members directly affected by the foundation's work, or members of the public** in:

- [Question 21](#) and/or [Question 22](#) (for operating foundations that do not make grants)
- [Question 27](#) and/or [Question 28](#) (for grant-making foundations)

If you **did not** indicate that your foundation engages these stakeholders in Question 21/22 or Question 27/28, please continue on to Question

You have indicated that your foundation engages external stakeholders in some aspect of governance or operations.

### Question 59

Does your organization evaluate the results associated with stakeholder engagement?

Yes

No

If you responded **Yes** to this question, please continue to Question 62  
If you responded **No** to this question, please continue to [Question 60](#).



### Question 60

Is your foundation interested in evaluating the results associated with stakeholder engagement?

- Yes
- No

### Question 61

Which of the following describes why your foundation does not evaluate the results associated with stakeholder engagement?

*Please select all that apply.*

- Lack of capacity (e.g. time, personnel)
- Lack of knowledge/skill
- Lack of agreement about what to evaluate
- Not aligned with our foundation's strategy
- Other

If Other, please describe why your foundation does not evaluate the results associated with stakeholder engagement.

Please continue to [Question 66](#).





### Question 62

Which, if any, of the following dimensions does your foundation evaluate in relation to stakeholder engagement?

*Please select all that apply.*

- The extent to which our stakeholder engagement practices help increase our foundation's impact
- The extent to which our stakeholder engagement practices make our processes more resource efficient
- The extent to which our stakeholder engagement practices improve equity
- We do not evaluate any of these dimensions

If you responded that your foundation evaluates the extent to which stakeholder engagement practices **improve equity**, please continue on to [Question 63](#).

If you did not indicate that your foundation evaluates the extent to which stakeholder engagement practices improve equity, please continue to [Question 65](#).



### Question 63

In relation to stakeholder engagement, our foundation evaluates equity in terms of:

*Please select all that apply.*

- Gender
- Race/ethnicity
- Sexual orientation/LGBTQ issues
- Ability/disability
- Socioeconomic status/class
- Other

If Other, please describe other aspects of equity your foundation evaluates.

### Question 64

Please describe how your foundation evaluates **equity** in relation to stakeholder engagement.

Question 65

Please describe how your foundation evaluates the results associated with stakeholder engagement.



## Part XII

### Question 66

What is the name of your foundation? (Optional)

### Question 67

What is your name? (Optional)

### Question 68

What is your job title? (Optional)

### Question 69

Would you be willing to allow our research team to follow up with you for a brief phone interview?

- Yes
- No

### Question 70

Finally, if there is anyone else at your foundation who can provide insights into your foundation's stakeholder engagement efforts, please feel free to leave their name and email address in the space below. We will send them a link to the survey.

### Question 71

If you would like to receive a copy of the report from our survey findings, please leave your email address here. If not, please leave this space blank.

***Thank you very much for your time in taking this survey.***

***We greatly appreciate your participation.***