
Oak Foundation 2022 Grantee Perception Report

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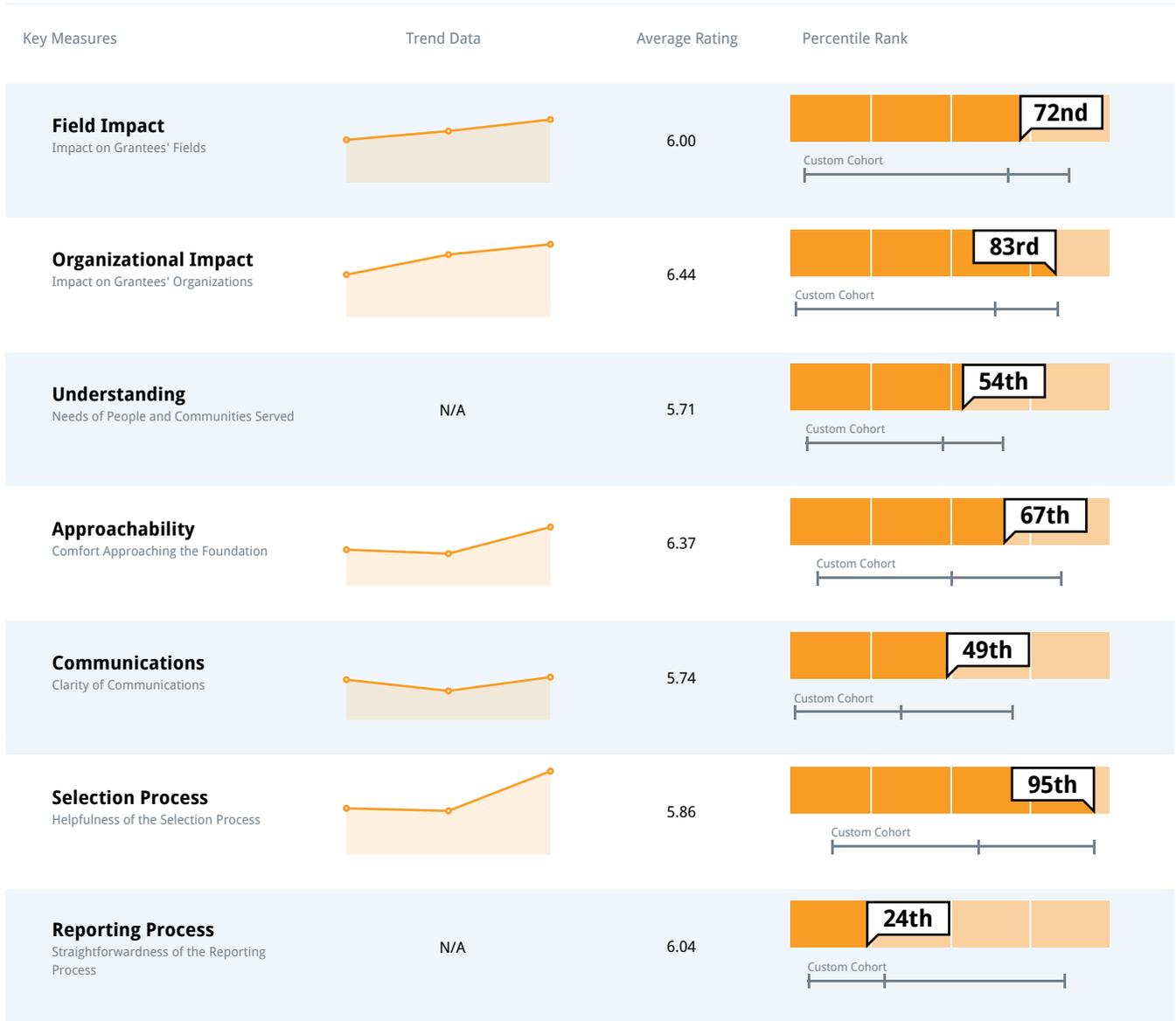
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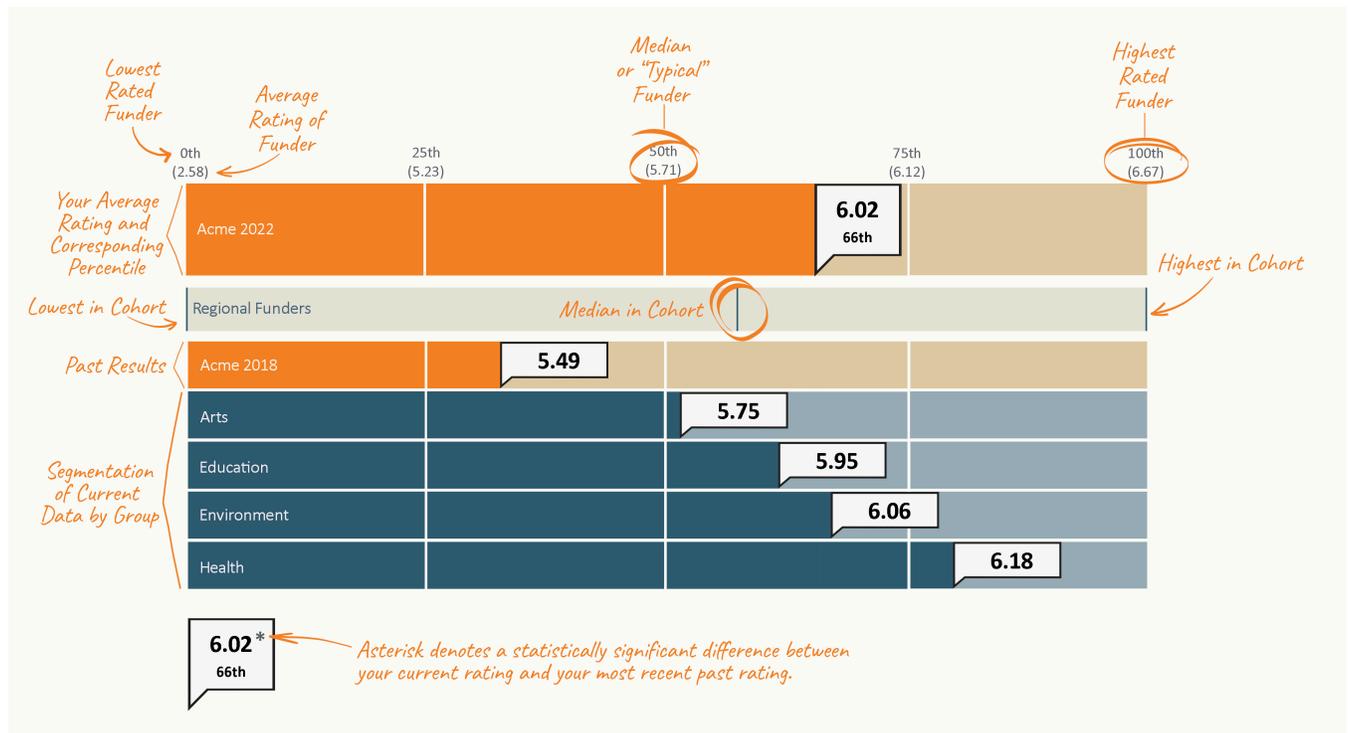
Key Ratings Summary

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



Interpreting Your Charts

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



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

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Oak 2022	February and March 2022	1058	801	76%
Oak 2015	September and October 2015	586	454	77%
Oak 2011	May and June 2011	390	302	77%

Survey Year	Year of Active Grants
Oak 2022	2021
Oak 2015	2013 to Q1 2015
Oak 2011	2010

Throughout this report, Oak 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 350 funders. The full list of participating funders can be found at <https://cep.org/gpr-participants/>.

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

Subgroups

In addition to showing Oak's overall ratings, this report shows ratings segmented by Geography. The online version of this report also shows ratings segmented by Grant Size, Grant Type, Capacity Building Support, Respondent Gender Identity, Respondent Person of Color Identity (for U.S.-based grantees), and Respondent Intersectional Identities (for U.S.-based grantees).

Geography	Number of Responses
Africa	40
Asia	37
Europe	145
Latin America	35
North America	15
Switzerland	48
United Kingdom	184
United States	288

Grant Size	Number of Responses
Small	61
Regular	114
Large	220
Major	345
Multiple Sizes	61

Grant Type	Number of Responses
Restricted Funding	480

Grant Type	Number of Responses
Unrestricted Funding	308

Capacity Building Support	Number of Responses
Received 1 support	192
Received 2-4 supports	194
Received 5 or more supports	108
Did not receive support	277

Respondent Gender	Number of Responses
Identifies as a Man	224
Identifies as a Woman	505
Prefer not to say	21

Respondent Person of Color Identity (US Only)	Number of Responses
Does not identify as a Person of Color	213
Identifies as a Person of Color	57
Prefer not to say	11

Respondent Intersectional Identities (US Only)	Number of Responses
Identifies as a Woman and Person of Color	47
Identifies as Man and Not a Person of Color	66
Identifies as Woman and Not a Person of Color	141
Prefer not to say	24

There are not enough U.S.-based grantees who identify as a man and a person of color to show responses (N<10).

Subgroup Methodology and Differences

Subgroup Methodology

Geography: Using the grantee list provided by the Foundation, CEP tagged grantees based on their countries. CEP grouped countries by continent and separated out countries with substantial numbers of responses, except where those countries were essentially equivalent to programmes (e.g., Denmark).

Grant Size: Using the grantee list provided by the Foundation, CEP tagged grantees based on the size of their grant according to Oak's grant size thresholds.

Grant Type: Using data grantees provided in the survey, CEP tagged grantees based on whether the grant was restricted or unrestricted.

Capacity Building Support: Using data grantees provided in the survey, CEP tagged and grouped grantees based on how many capacity building supports they indicated receiving.

Respondent Gender: Using data grantees provided in the survey, CEP tagged grantees based on their gender identity. Those segmented as "Identifies as a Man" selected "Man" only, and those segmented as "Identifies as a Woman" selected "Woman" only.

Respondent Person of Color Identity (US Only): Using data grantees provided in the survey, CEP tagged grantees based on their Person of Color identity.

Respondents' Intersectional Identities (US Only): Using data grantees provided in the survey, CEP tagged grantees based on their gender and Person of Color identity. There are not enough responses to show U.S.-based grantees who identify as a man and a person of color (N<10).

Subgroup Differences

Geography:

- Grantees based in Latin America rate significantly *higher* for perceptions of the Foundation's impact.
- Grantees based in Switzerland rate significantly *lower* for aspects of Oak's grantmaking processes.

Grant Size: There is not a simple relationship between size of grants and positivity of grantee perceptions and experiences with Oak.

- Regular grant recipients rate significantly *lower* than all other grant sizes for perceptions of impact on grantees' fields, communities, and organizations, understanding of grantees' fields, awareness of challenges facing grantee organizations, and how successful Oak was in supporting grantee organizations in a few areas.
- Large grant recipients rate significantly *lower* than all other grant sizes for perceptions of the Foundation's consistency of communications, openness to grantee ideas, trust in grantee staff, compassion for those affected by grantees' work, and the extent to which strategic planning (including strategic restructuring) helped strengthen organizations' work.
- Grantees who received major grants rate significantly *higher* than all other grant sizes for perceptions of the Foundation's impact on grantees' organizations, understanding of grantees' fields, role in effecting public policy, consistency of information provided by communications resources, clarity of the selection process and timelines, and Oak's success in supporting grantee organizations by raising resources and attracting new donors.

Grant Type: Respondents who receive unrestricted support rate significantly *higher* on many measures across the report, including for perceptions of the Foundation's impact, understanding, communications, processes, and several ways in which the Foundation was successful in supporting their organization.

Capacity Building Support:

- Grantees who received no capacity building support rate significantly *lower* on most measures in the survey, including for aspects of impact, understanding, relationships, processes, diversity, equity, and inclusion, and how successful Oak Foundation was in supporting grantee organizations in several ways.
- Grantees who received two or more supports rate significantly *higher* on most measures in the survey, including for aspects of impact, understanding, relationships, processes, diversity, equity, and inclusion, and how successful Oak Foundation was in supporting grantee organizations in several ways.

Respondent Gender: There are no consistent, significant patterns of differences between respondents who identify as "woman" only and respondents who identify as "man" only. There are not enough respondents who identify as "gender non-conforming", "non-binary" or any combination of genders to run statistical tests (N<10). For more information, please see the "Respondent Demographics" section [here](#).

Respondent Person of Color Identity (US Only): Respondents who identify as a person of color rate significantly *lower* on many measures across the report, including for aspects of impact, understanding, relationships, processes, and diversity, equity, and inclusion. For more information, please see the "Respondent Demographics" section [here](#).

Respondents' Intersectional Identities (US Only): There are no consistent, significant differences by respondents intersectional gender and person of color identity. For more information, please see the "Respondent Demographics" section [here](#).

Comparative Cohorts

Customized Cohort

Oak selected a set of 13 funders to create a smaller comparison group that more closely resembles Oak in scale and scope.

Custom Cohort

Bill & Melinda Gates Foundation
Carnegie Corporation of New York
Ford Foundation
Gordon and Betty Moore Foundation
IKEA Foundation
John D. and Catherine T. MacArthur Foundation
Oak Foundation
Porticus
The Children's Investment Fund Foundation
The David and Lucile Packard Foundation
The Rockefeller Foundation
The William and Flora Hewlett Foundation
W.K. Kellogg Foundation

Standard Cohorts

CEP also included 19 standard cohorts to allow for comparisons to a variety of different types of funders.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	37	Funders with median grant size of \$20K or less
Large Grant Providers	99	Funders with median grant size of \$200K or more
High Touch Funders	38	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Intensive Non-Monetary Assistance Providers	36	Funders that provide at least 30% of grantees with comprehensive or field-focused assistance as defined by CEP
Proactive Grantmakers	103	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	99	Funders that make at most 10% of grants by invitation only
Intermediary Funders	36	Funders that primarily regrant philanthropic dollars
International Funders	62	Funders that fund outside of their own country
European Funders	28	Funders that are headquartered in Europe

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	61	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	83	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	163	All private foundations in the GPR dataset
Family Foundations	78	All family foundations in the GPR dataset
Community Foundations	41	All community foundations in the GPR dataset
Health Conversion Foundations	31	All health conversation foundations in the GPR dataset
Corporate Foundations	23	All corporate foundations in the GPR dataset

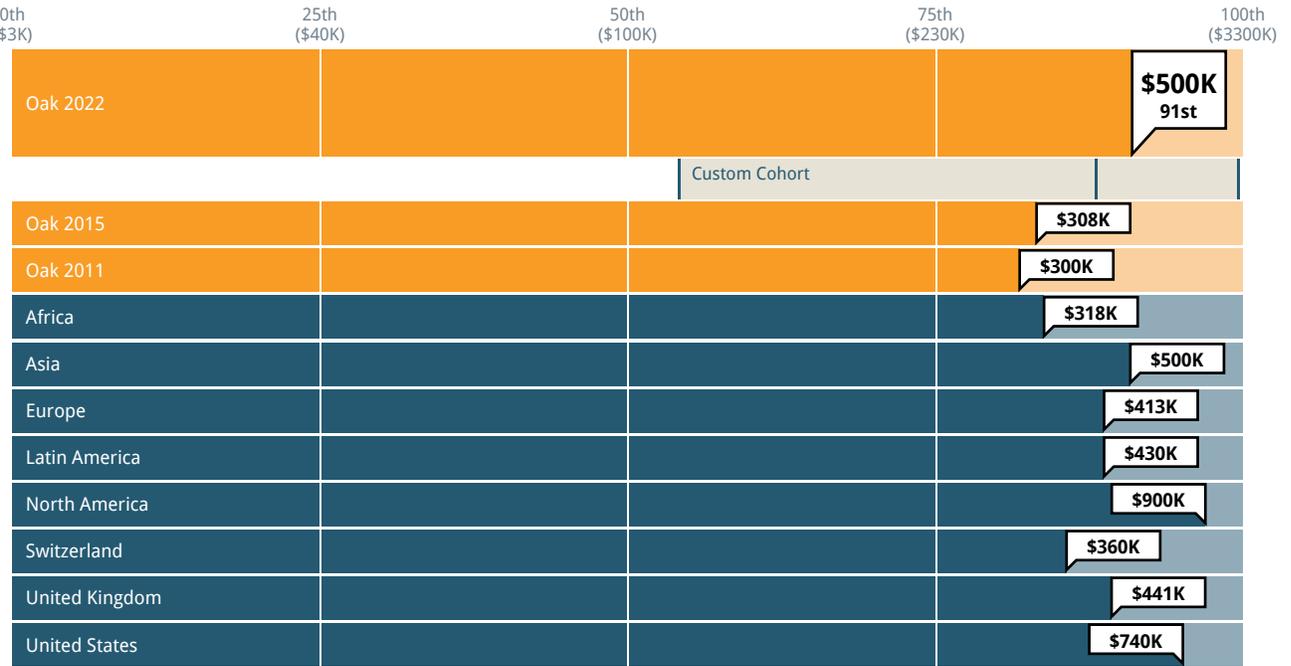
Other Cohorts

Cohort Name	Count	Description
Funders Outside the United States	45	Funders that are primarily based outside the United States
Recently Established Foundations	24	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	98	Funders who surveyed grantees during COVID-19 (GPR only)

Grantmaking Characteristics

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

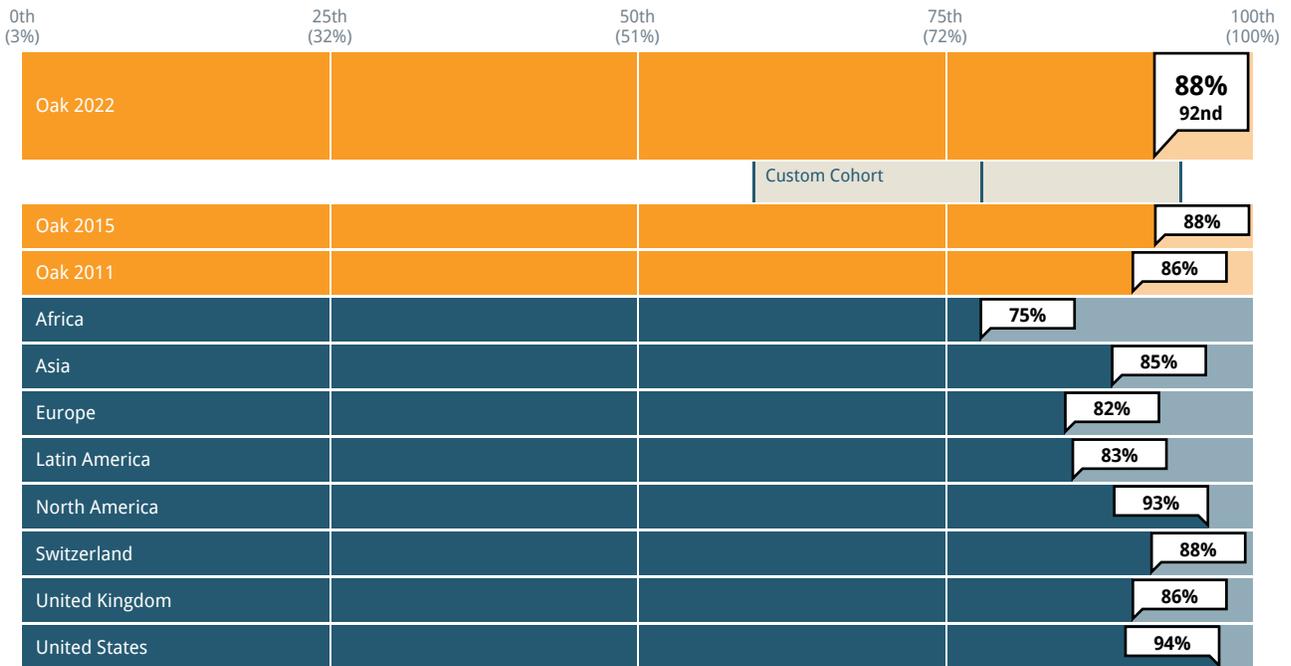
Median Grant Size



Cohort: Custom Cohort Past results: on Subgroup: Geography

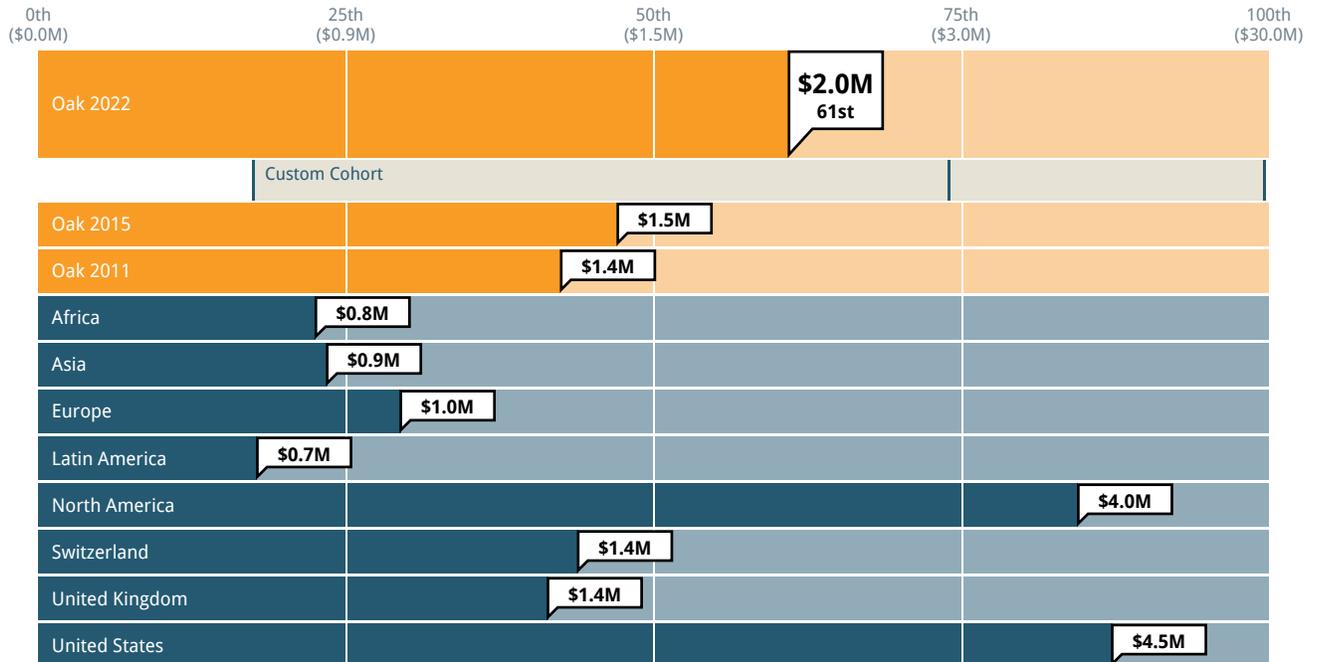
Proportion of Multi-year Grants

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



Cohort: Custom Cohort Past results: on Subgroup: Geography

Median Organisational Budget



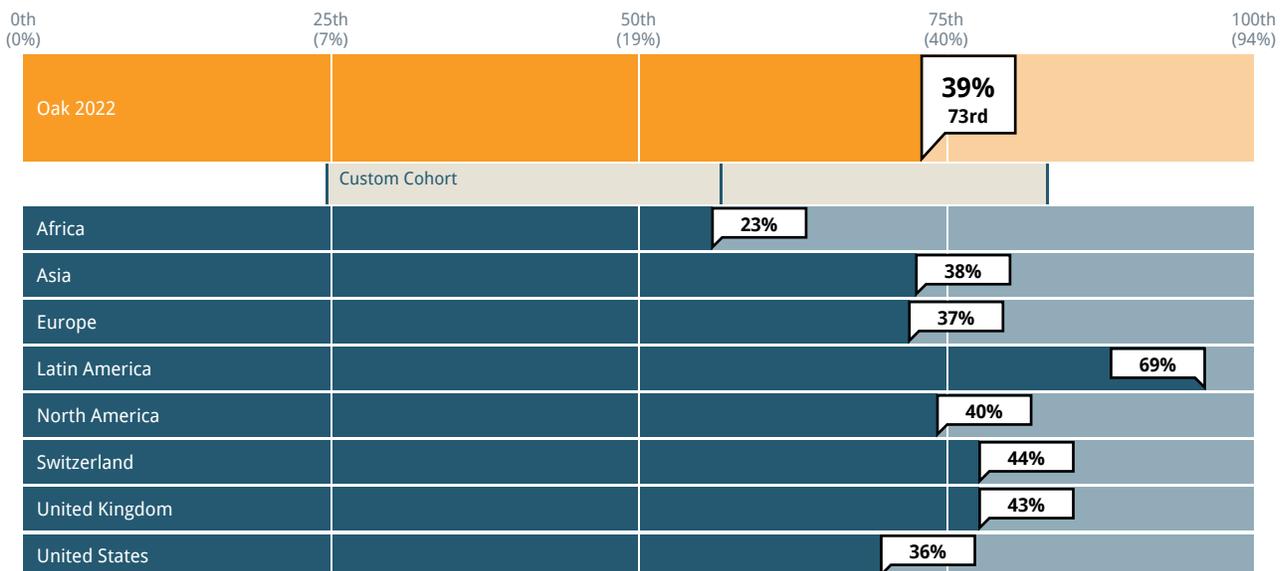
Cohort: Custom Cohort Past results: on Subgroup: Geography

Selected Cohort: Custom Cohort					
Grant History	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
Percentage of first-time grants	29%	42%	43%	29%	32%

Selected Cohort: Custom Cohort					
Program Staff Load	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Dollars awarded per program full-time employee	\$5.4M	\$5.6M	\$3.3M	\$2.7M	\$5.1M
Applications per program full-time employee	8	7	10	26	8
Active grants per program full-time employee	29	24	22	32	25

Proportion of Unrestricted Funding

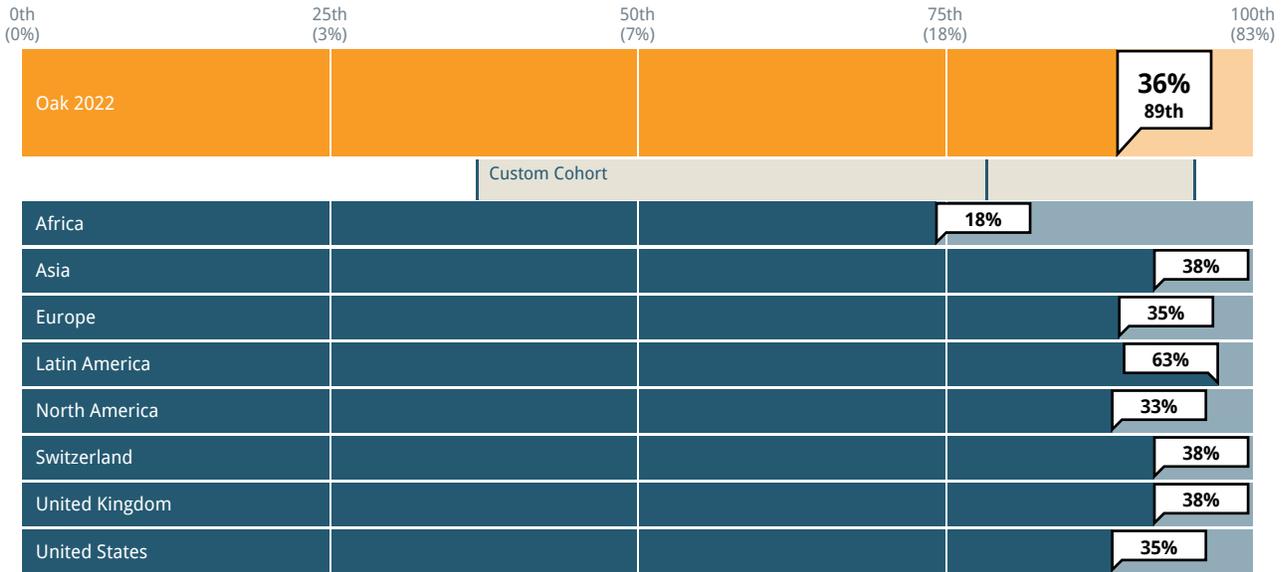
Proportion of grantees responding 'No, this funding was not restricted to a specific use (e.g. general operating, core support)'



Cohort: Custom Cohort Past results: on Subgroup: Geography

Proportion of grantees receiving multi-year unrestricted grants

Proportion of grantees that report receiving grants for two years or longer and who report receiving general operating support funding that was not restricted to a specific use.

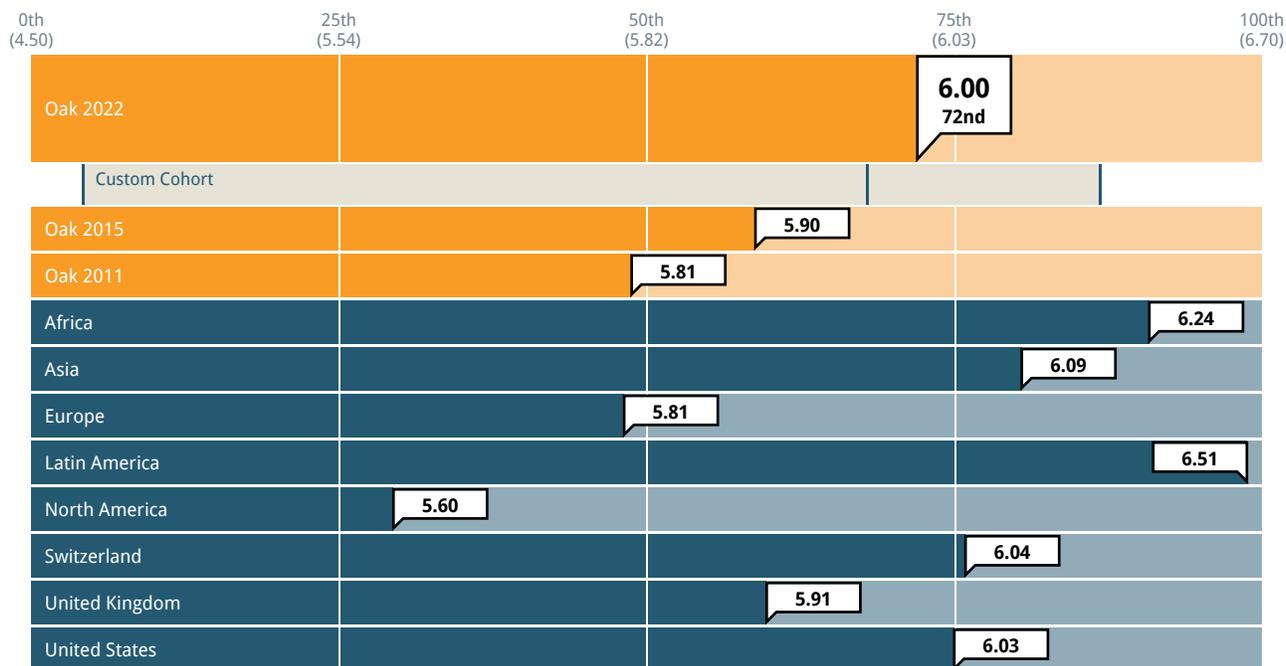


Cohort: Custom Cohort Past results: on Subgroup: Geography

Impact on and Understanding of Grantees' Fields

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

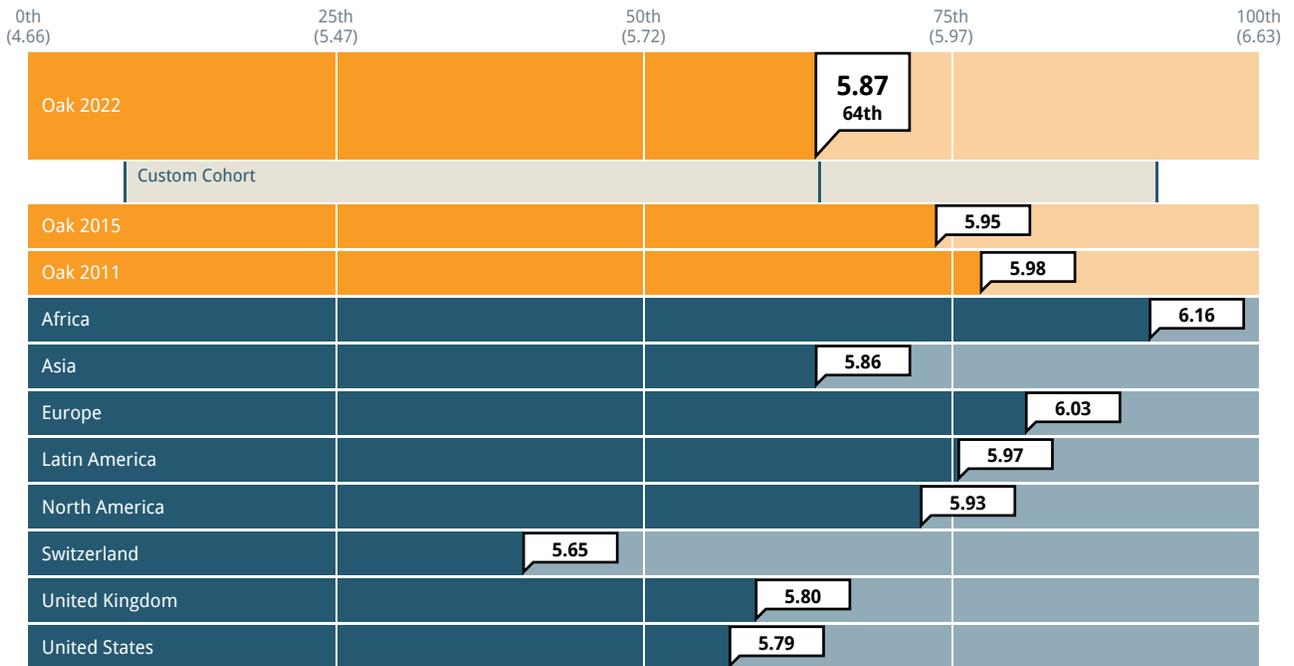
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

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

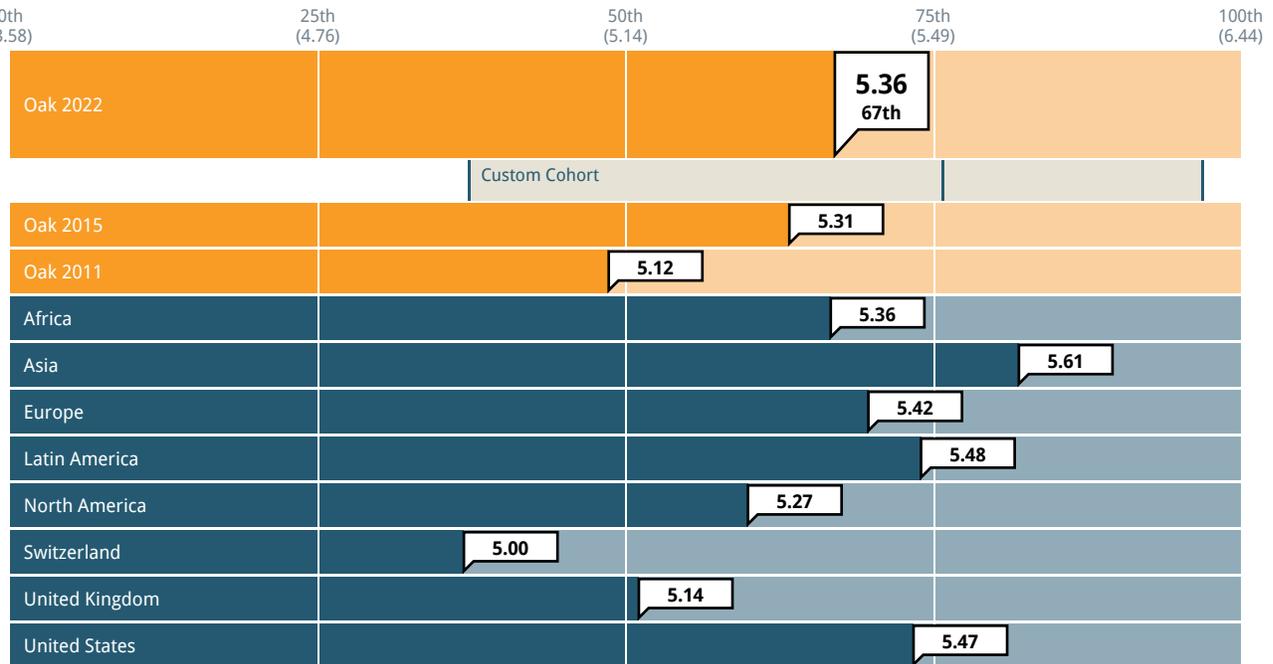


Cohort: Custom Cohort Past results: on Subgroup: Geography

Advancing Knowledge and Public Policy

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

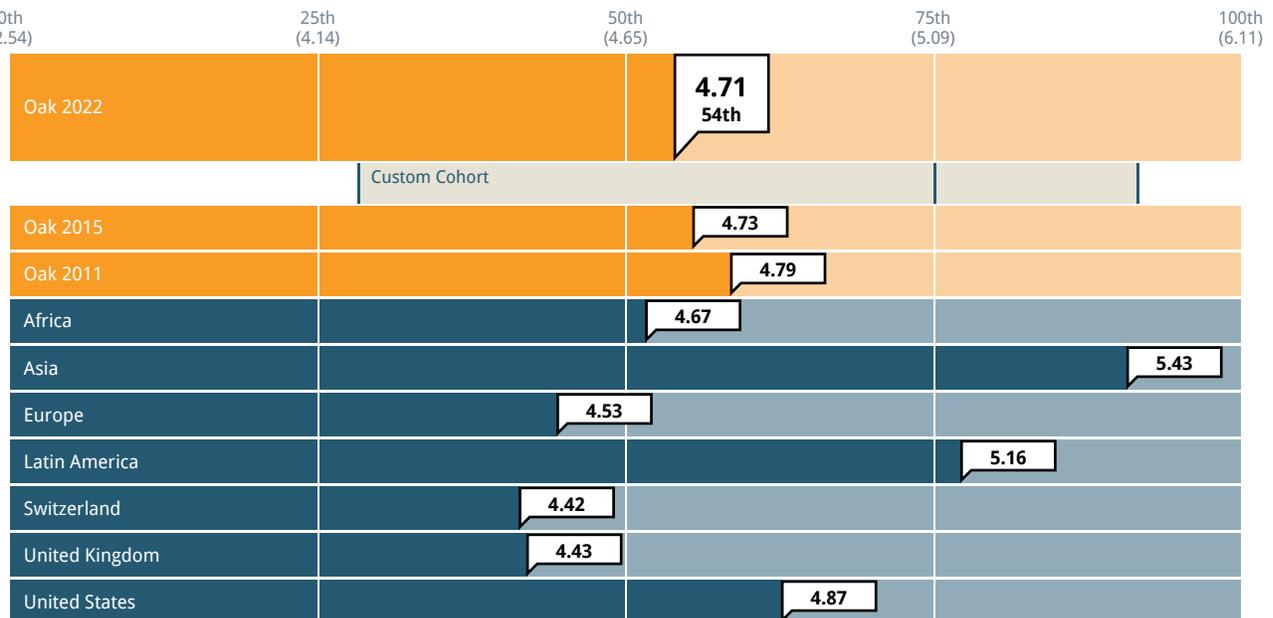
1 = Not at all 7 = Leads the field to new thinking and practice



Cohort: Custom Cohort Past results: on Subgroup: Geography

To what extent has Oak affected public policy in your field?

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

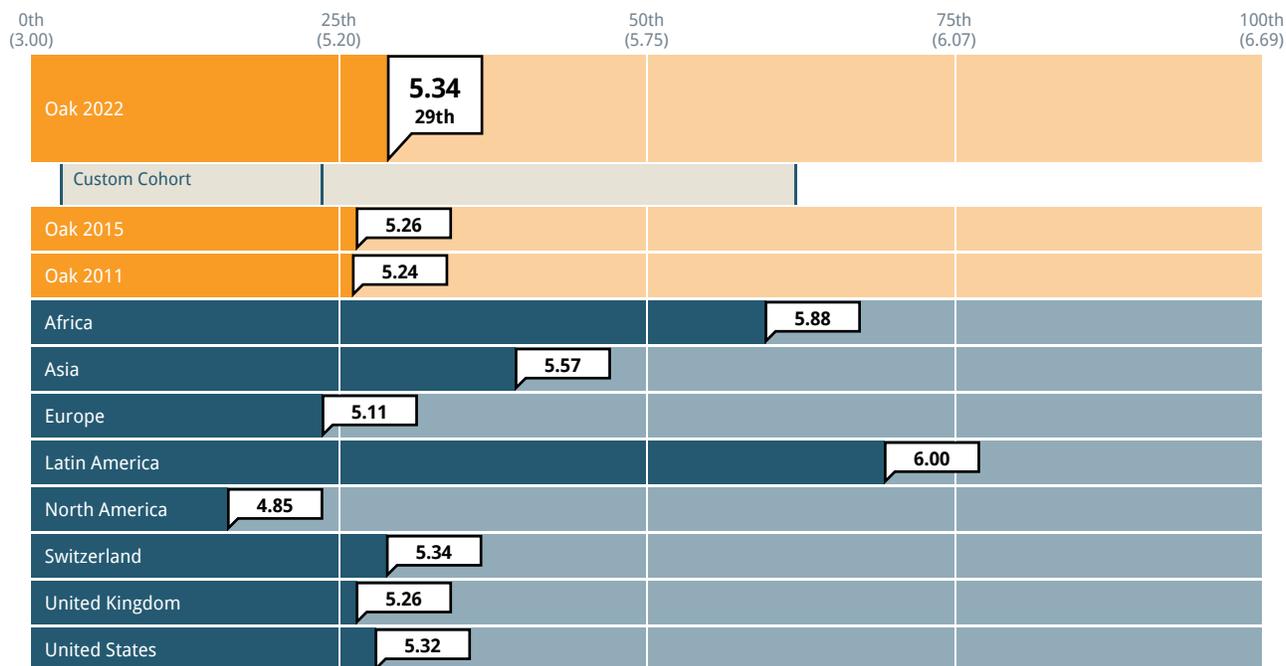


Cohort: Custom Cohort Past results: on Subgroup: Geography

Impact on and Understanding of Grantees' Local Communities

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

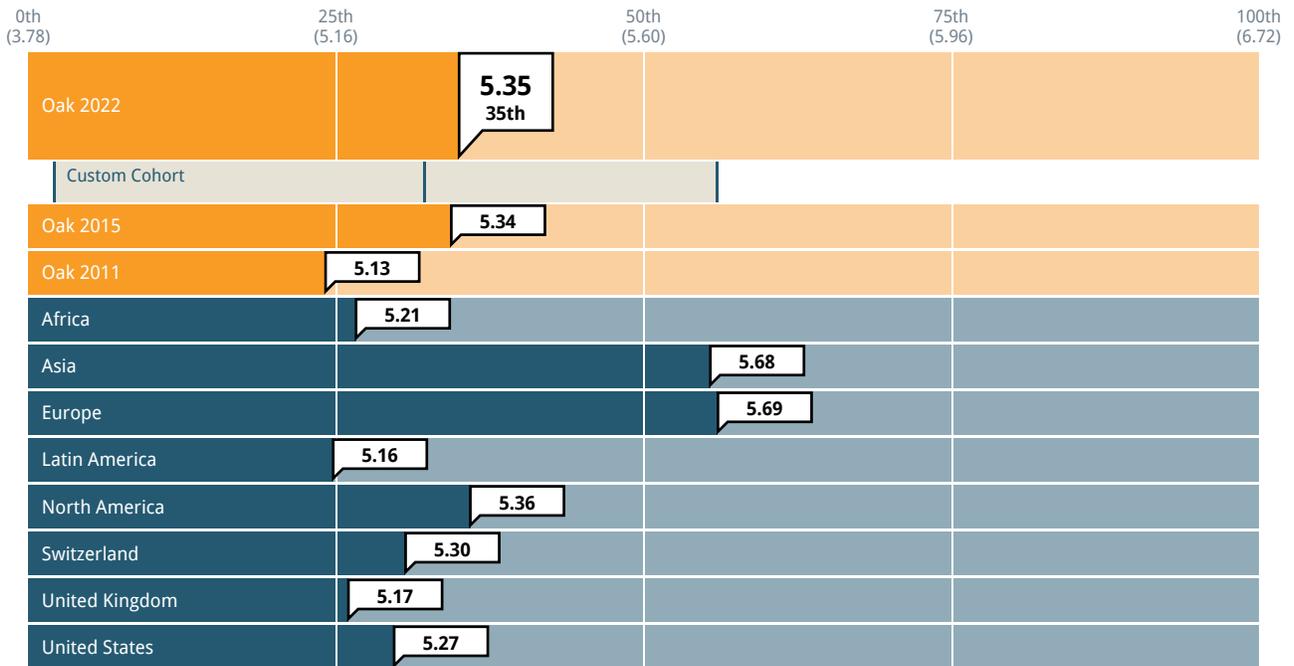
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

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

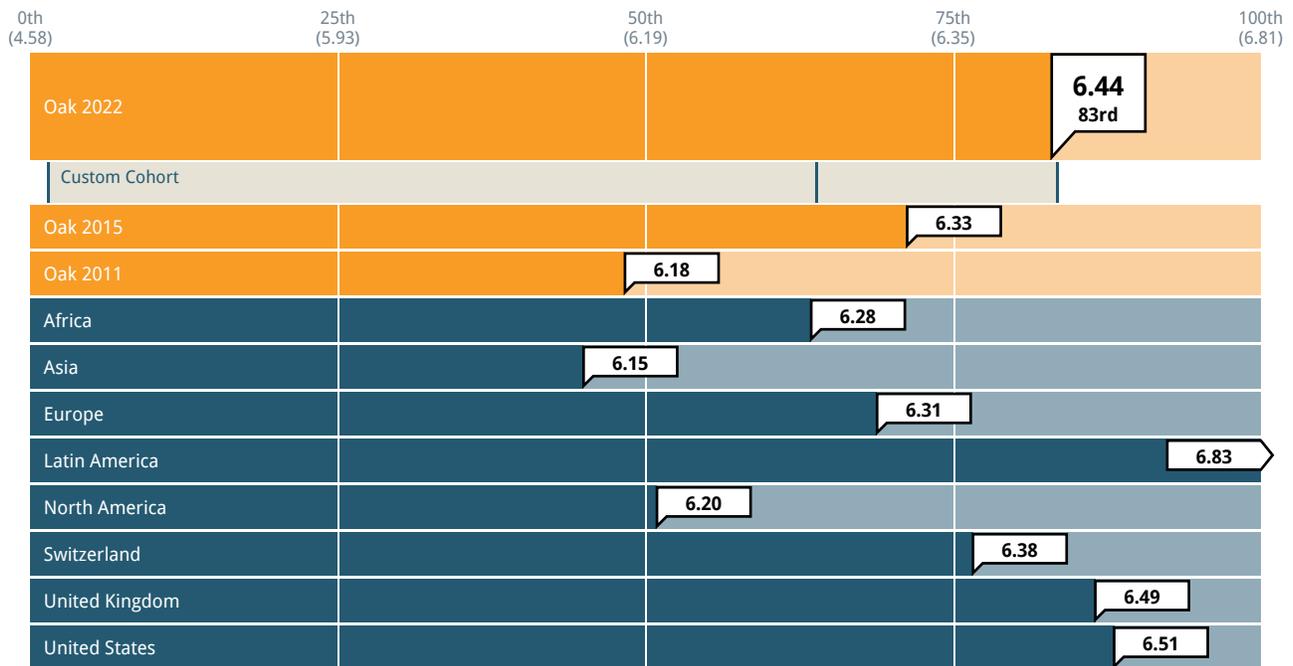


Cohort: Custom Cohort Past results: on Subgroup: Geography

Impact on and Understanding of Grantees' Organizations

Overall, how would you rate Oak's impact on your organisation?

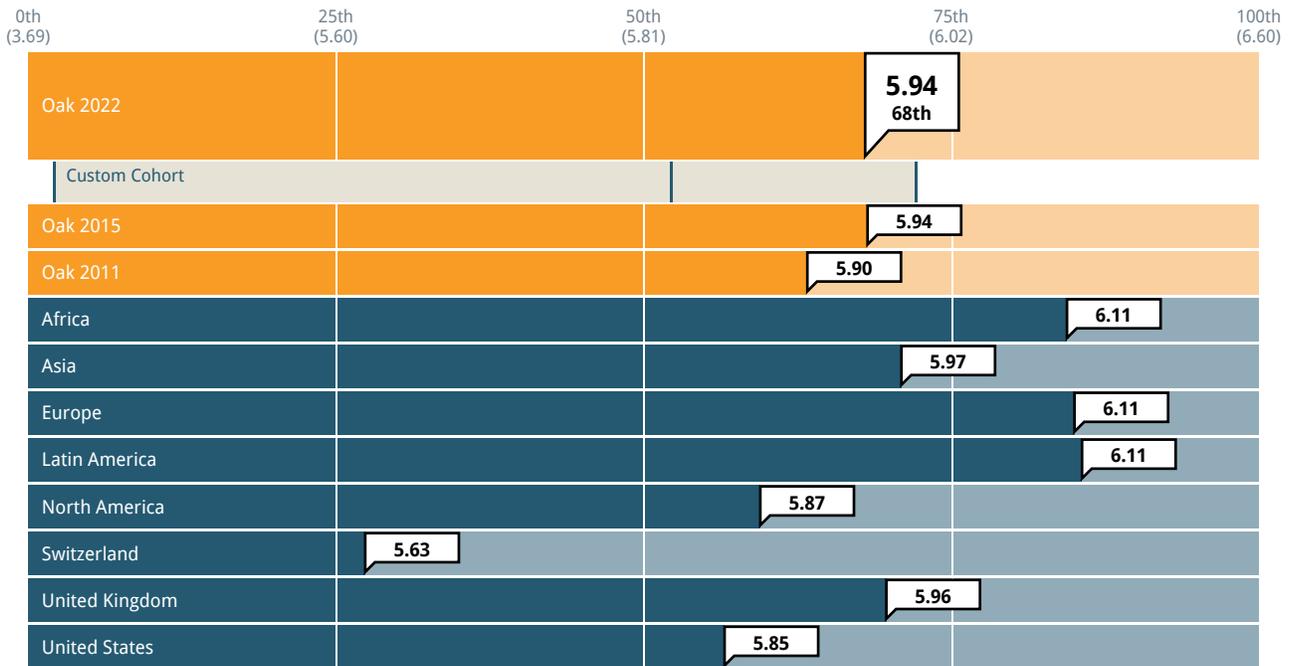
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: on Subgroup: Geography

How well does Oak understand your organisation's strategy and goals?

1 = Limited understanding 7 = Thorough understanding

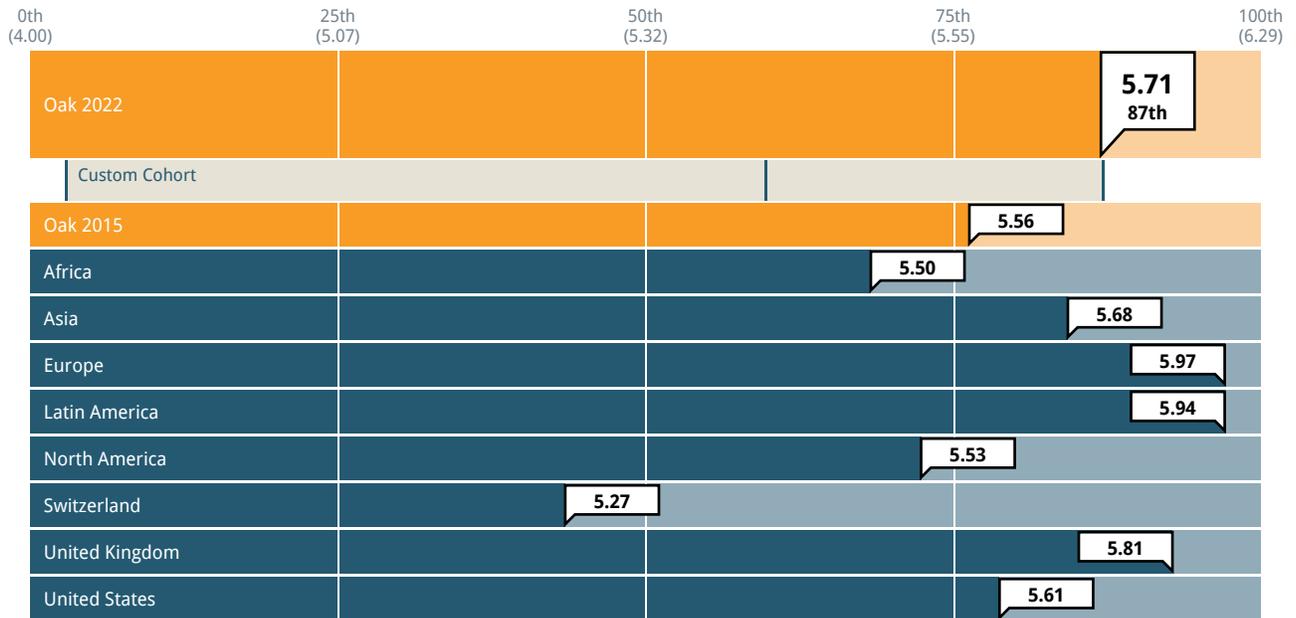


Cohort: Custom Cohort Past results: on Subgroup: Geography

Grantee Challenges

How aware is Oak of the challenges that your organisation is facing?

1 = Not at all aware 7 = Extremely aware



Cohort: Custom Cohort Past results: on Subgroup: Geography

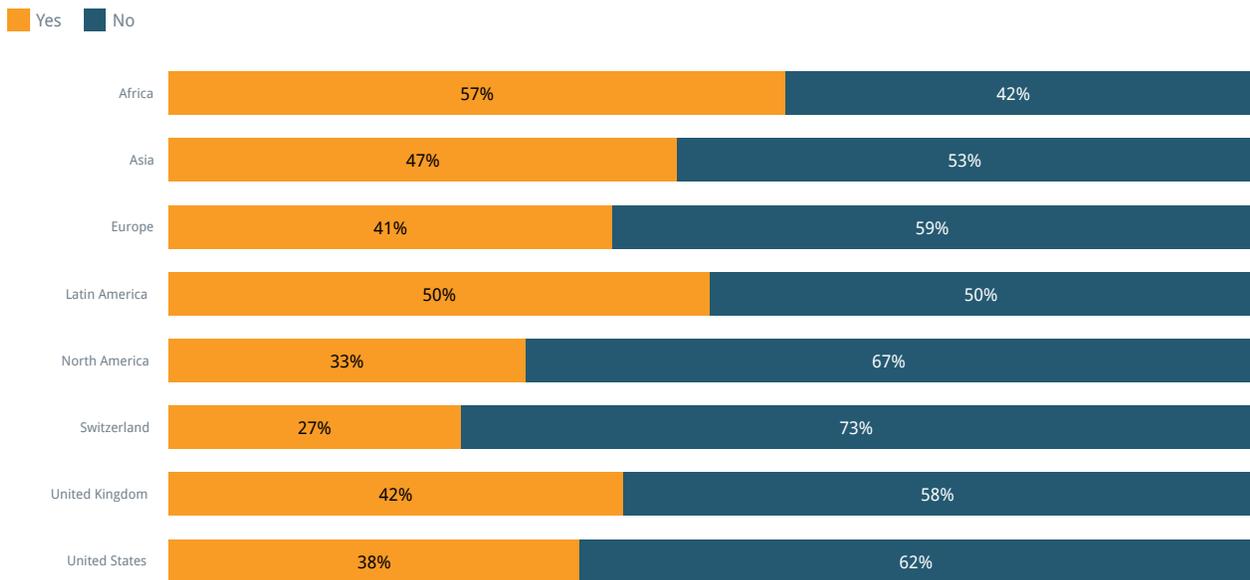
Non-Monetary Assistance

Did you receive any non-monetary support from Oak during this grant period?



Cohort: None Past results: on

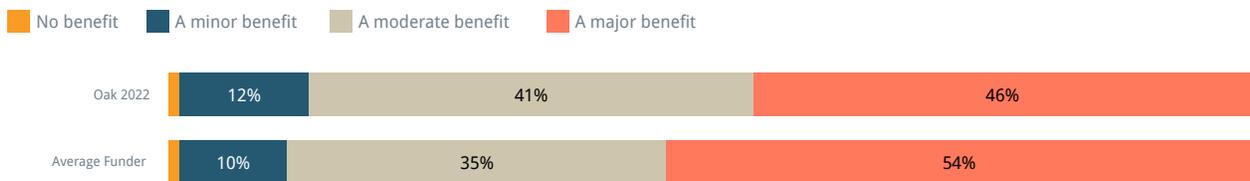
Did you receive any non-monetary support from Oak during this grant period? - By Subgroup



Subgroup: Geography

Please note that the following question was only asked of respondents who indicated "yes" to receiving non-monetary support in the previous question.

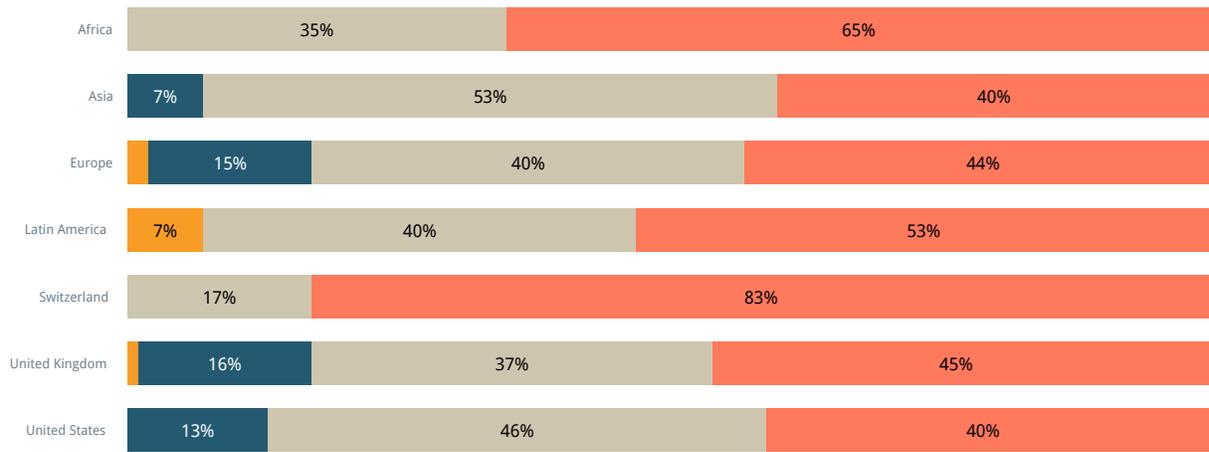
How would you describe the benefit - to your organisation or work - of any non-monetary support that you received?



Cohort: None Past results: on

How would you describe the benefit - to your organisation or work - of any non-monetary support that you received? - By Subgroup

■ No benefit
 ■ A minor benefit
 ■ A moderate benefit
 ■ A major benefit

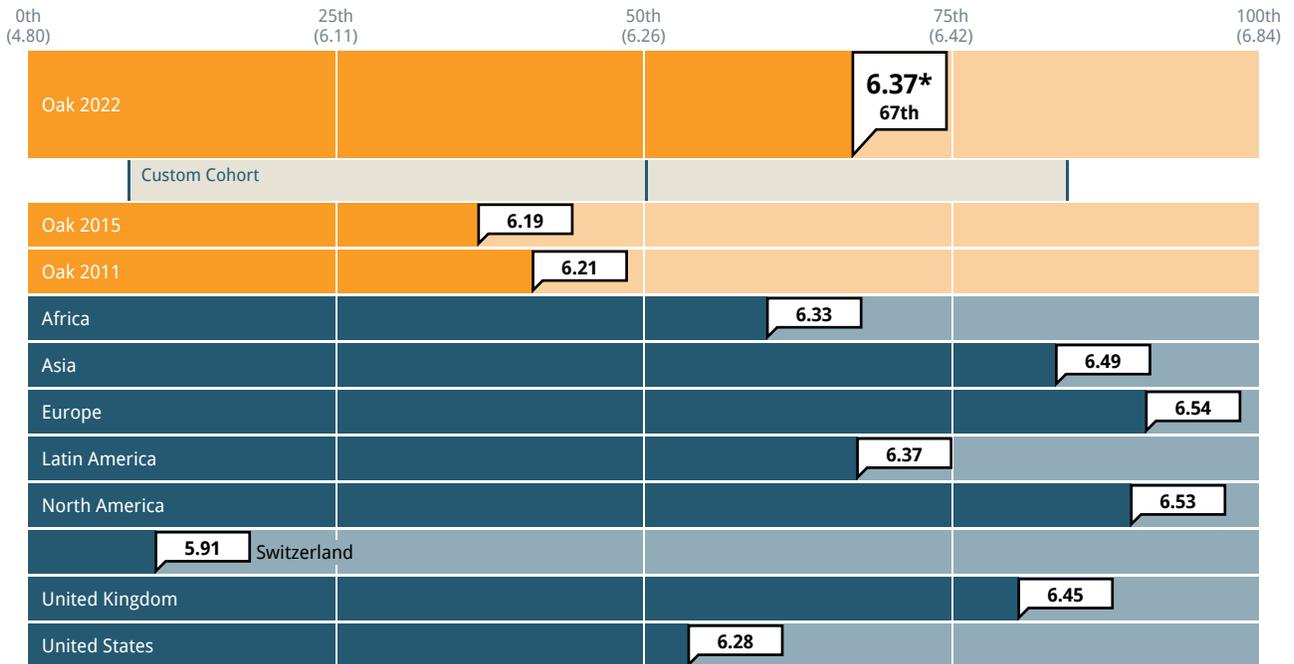


Subgroup: Geography

Funder-Grantee Relationships

How comfortable do you feel approaching Oak if a problem arises?

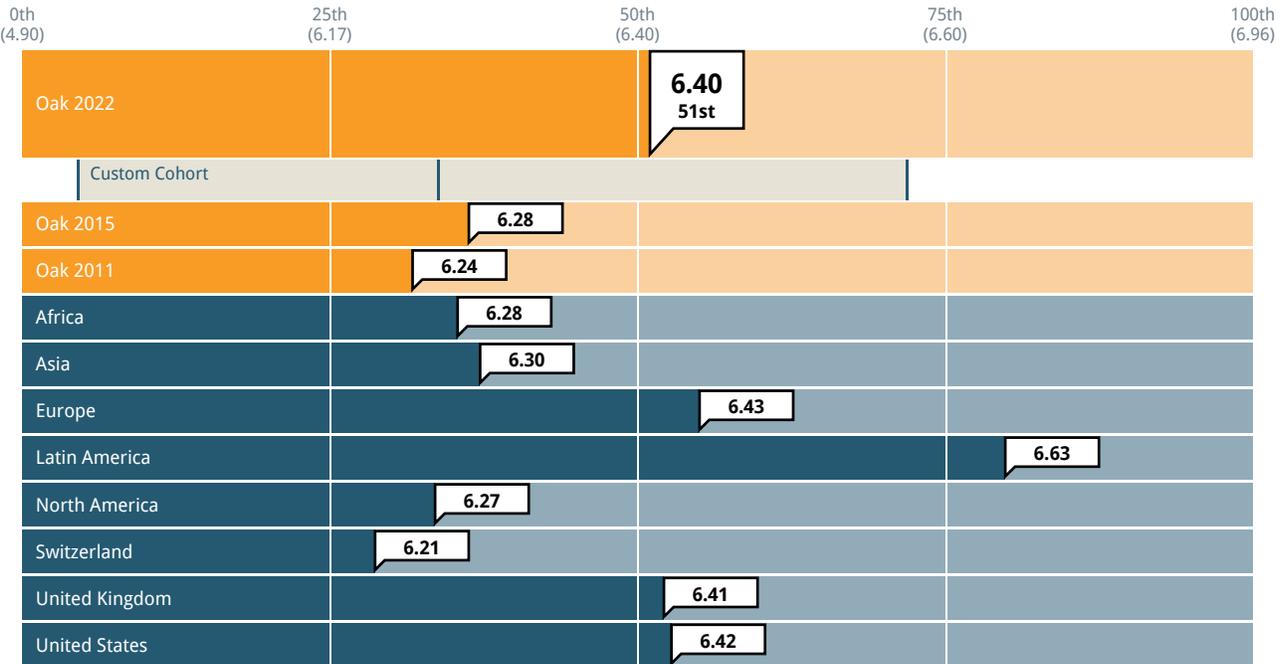
1 = Not at all comfortable 7 = Extremely comfortable



Cohort: Custom Cohort Past results: on Subgroup: Geography

Overall, how responsive was Foundation staff?

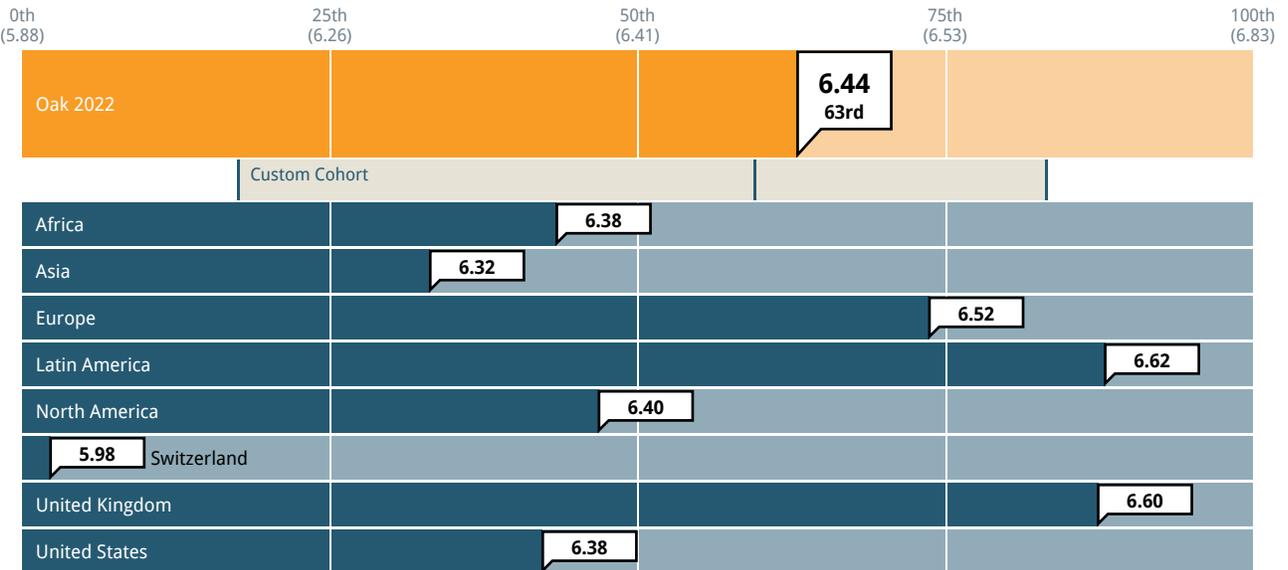
1 = Not at all responsive 7 = Extremely responsive



Cohort: Custom Cohort Past results: on Subgroup: Geography

To what extent did Oak exhibit trust in your organisation's staff during this grant?

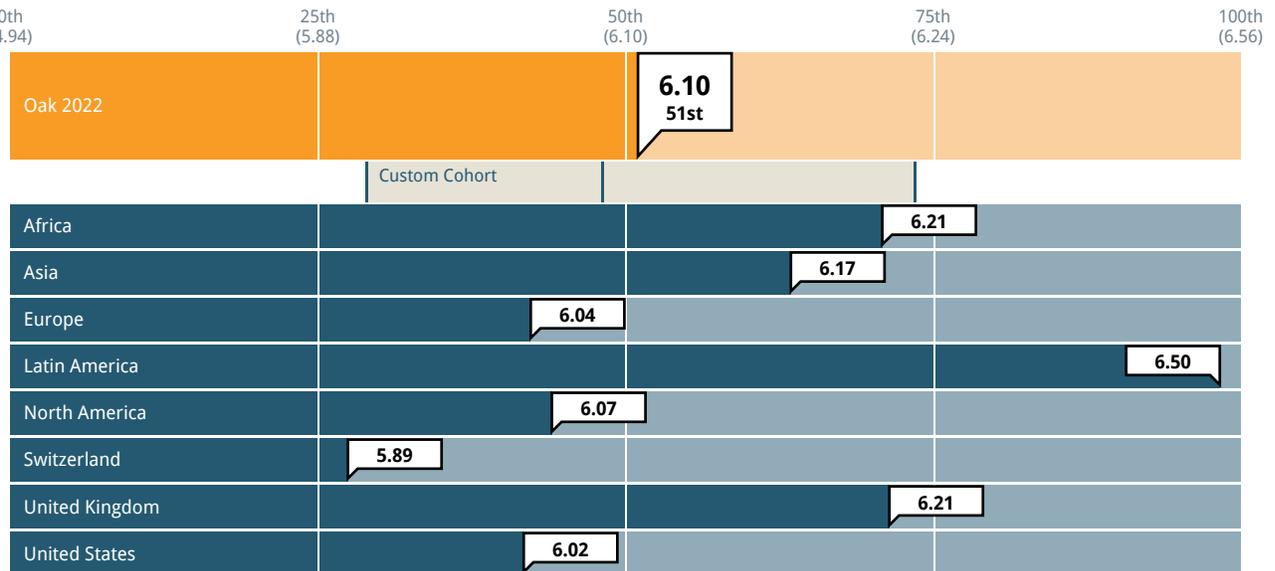
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

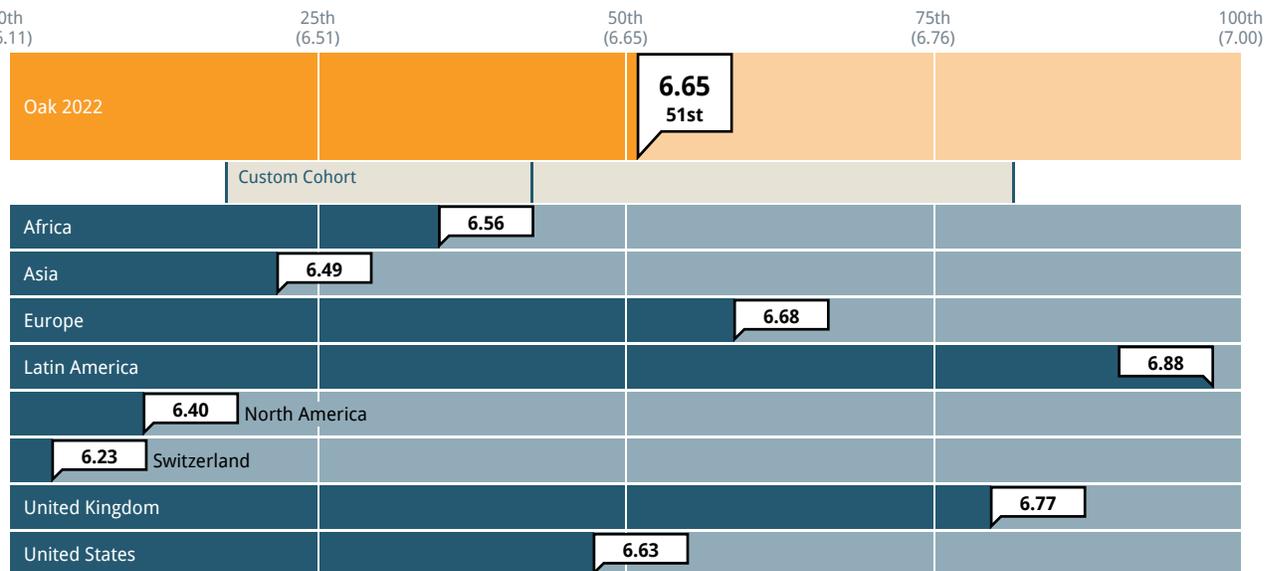
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

To what extent did Oak exhibit respectful interaction during this grant?

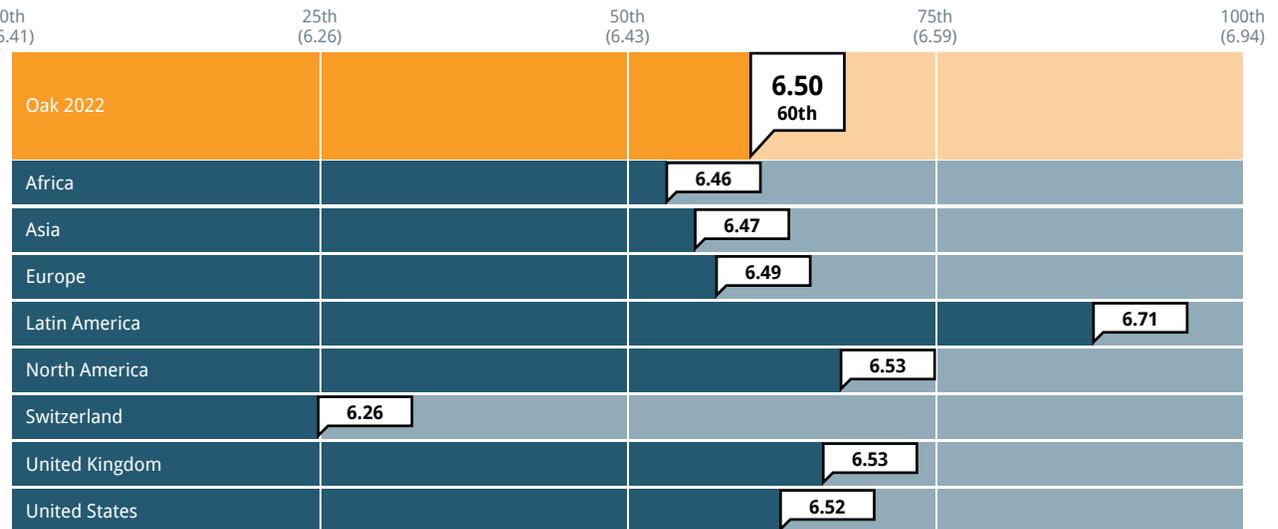
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

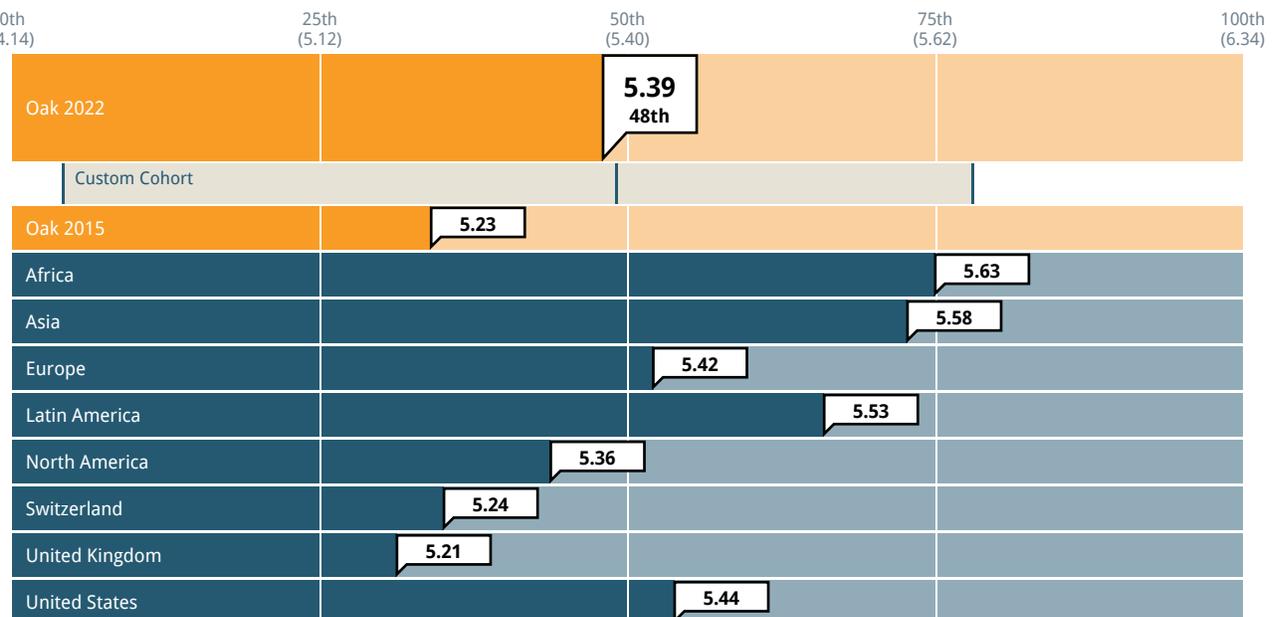
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: None Past results: on Subgroup: Geography

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

1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

Interaction Patterns

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

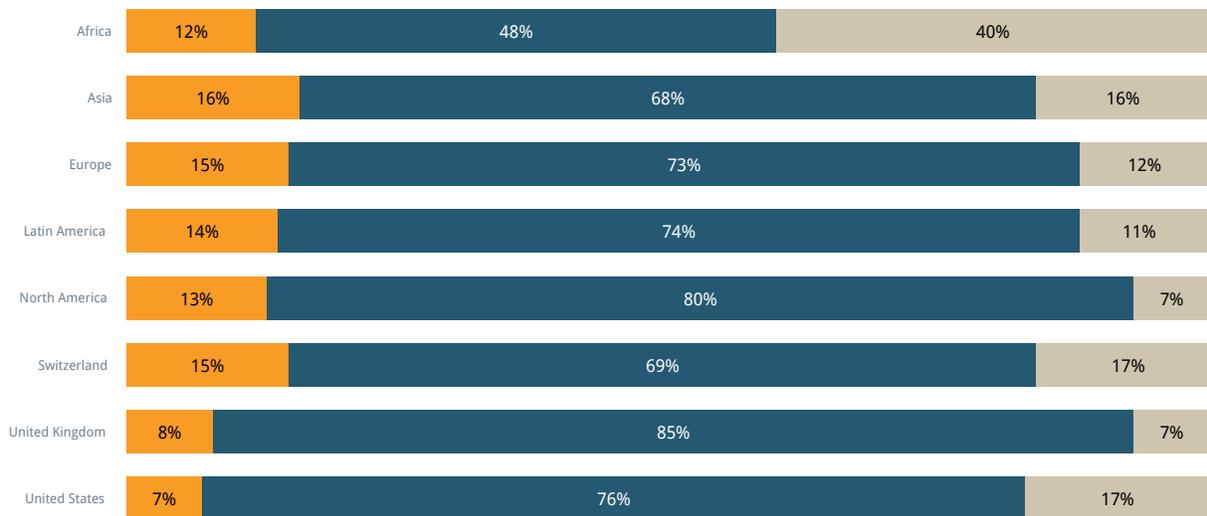
Yearly or less often Once every few months Monthly or more often



Cohort: Custom Cohort Past results: on

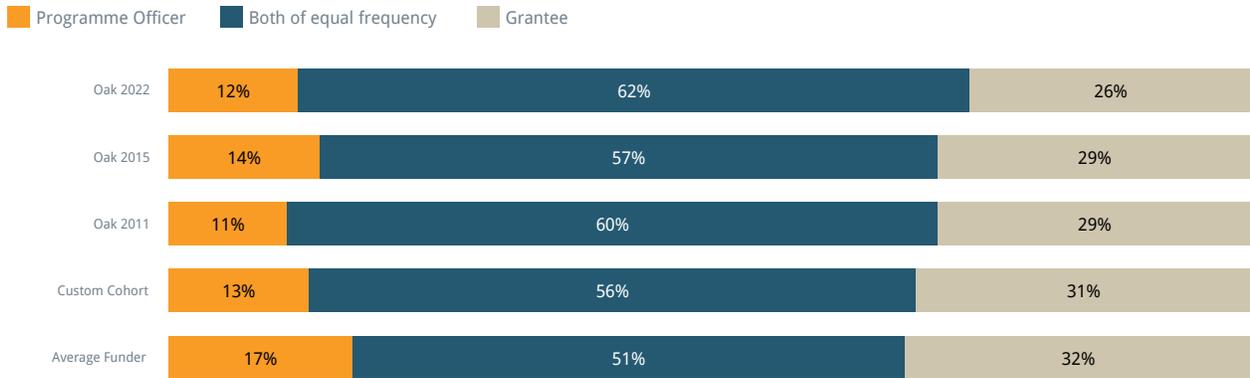
How often do/did you have contact with your programme officer during this grant? - By Subgroup

Yearly or less often Once every few months Monthly or more often



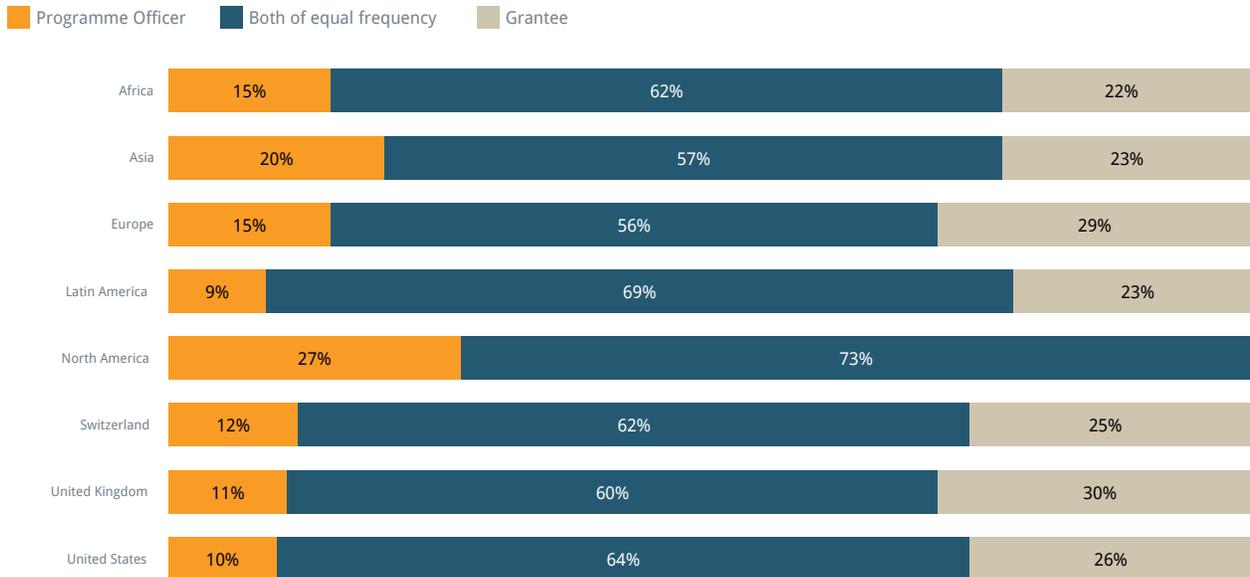
Subgroup: Geography

Who most frequently initiated the contact you had with your programme officer during this grant?



Cohort: Custom Cohort Past results: on

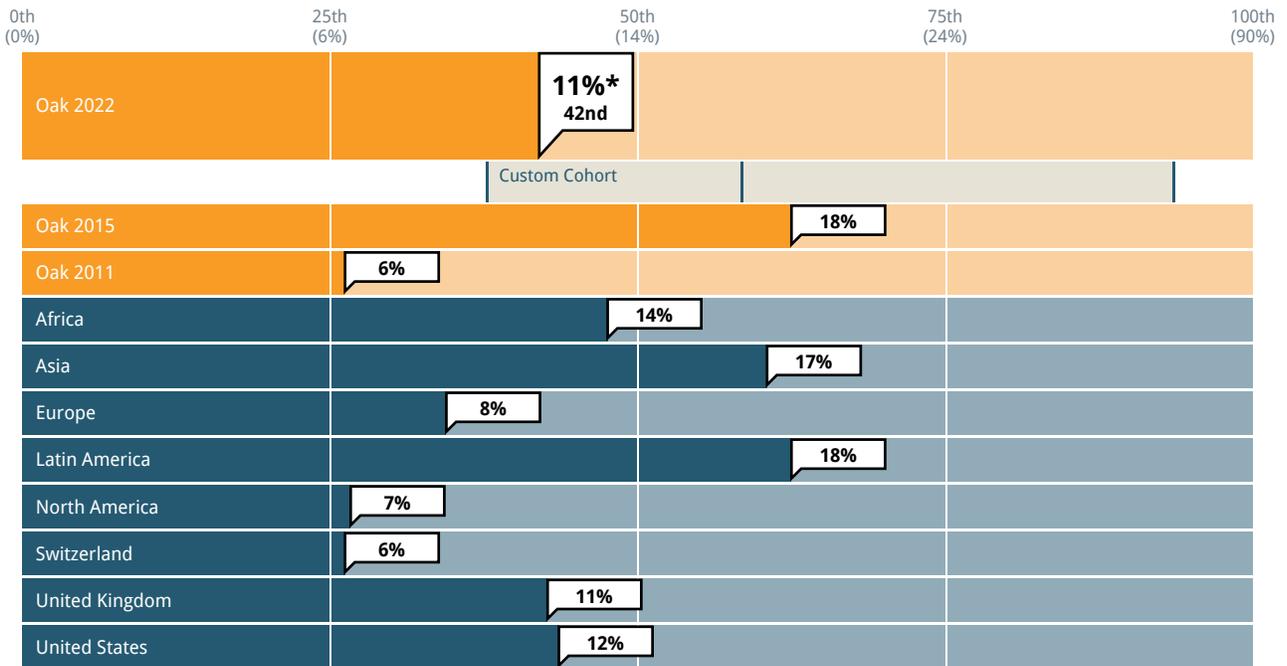
Who most frequently initiated the contact you had with your programme officer during this grant? - By Subgroup



Subgroup: Geography

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

Proportion of grantees responding 'Yes'

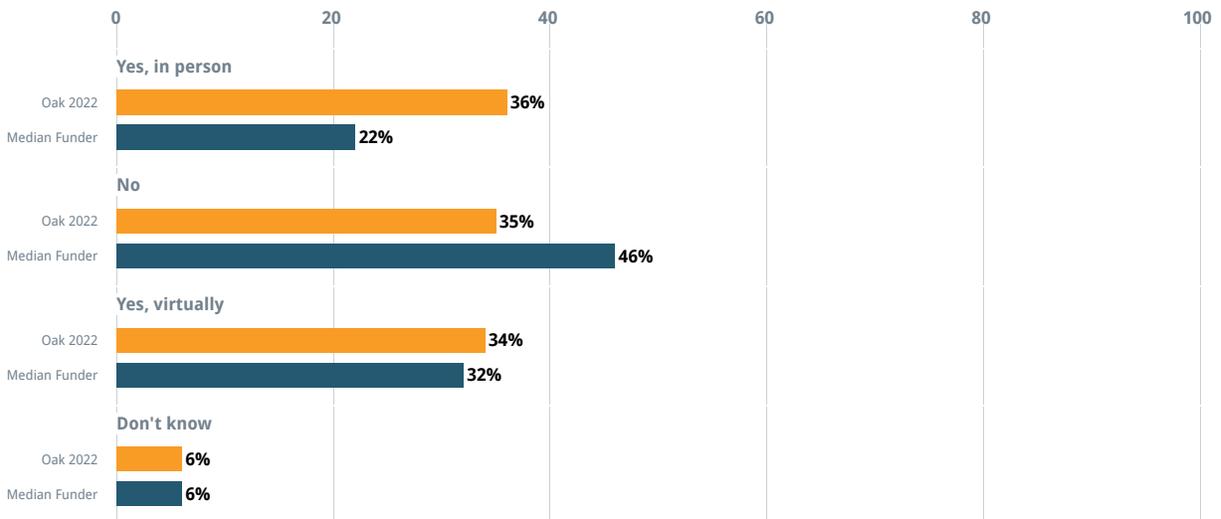


Cohort: Custom Cohort Past results: on Subgroup: Geography

The following questions were recently added to the grantee survey and only represent comparative data from 25 funders.

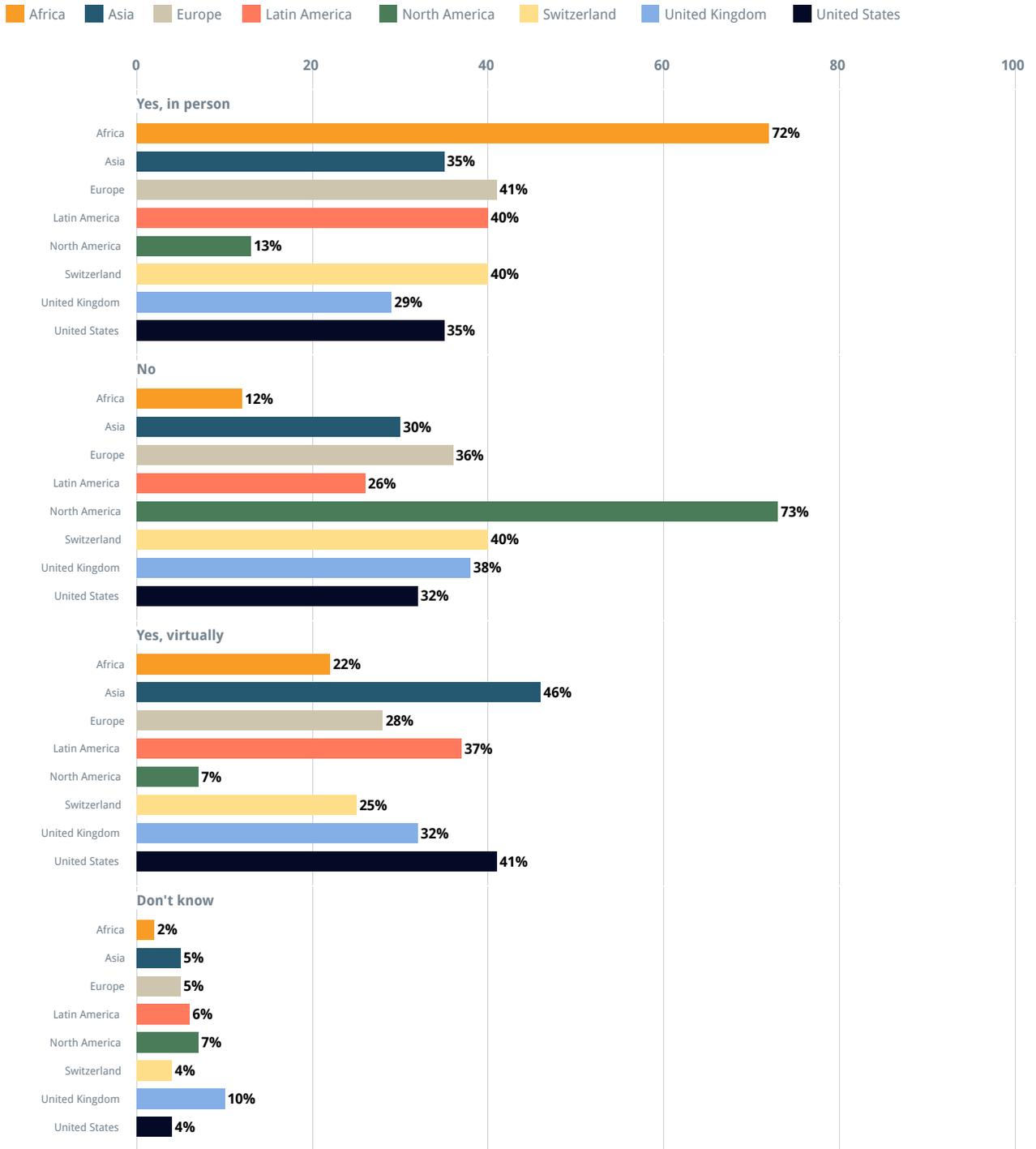
At any point during this grant, including the selection process, did Oak staff visit your offices or programs?

Oak 2022 Median Funder



Cohort: None Past results: on

At any point during this grant, including the selection process, did Oak staff visit your offices or programs? - By Subgroup

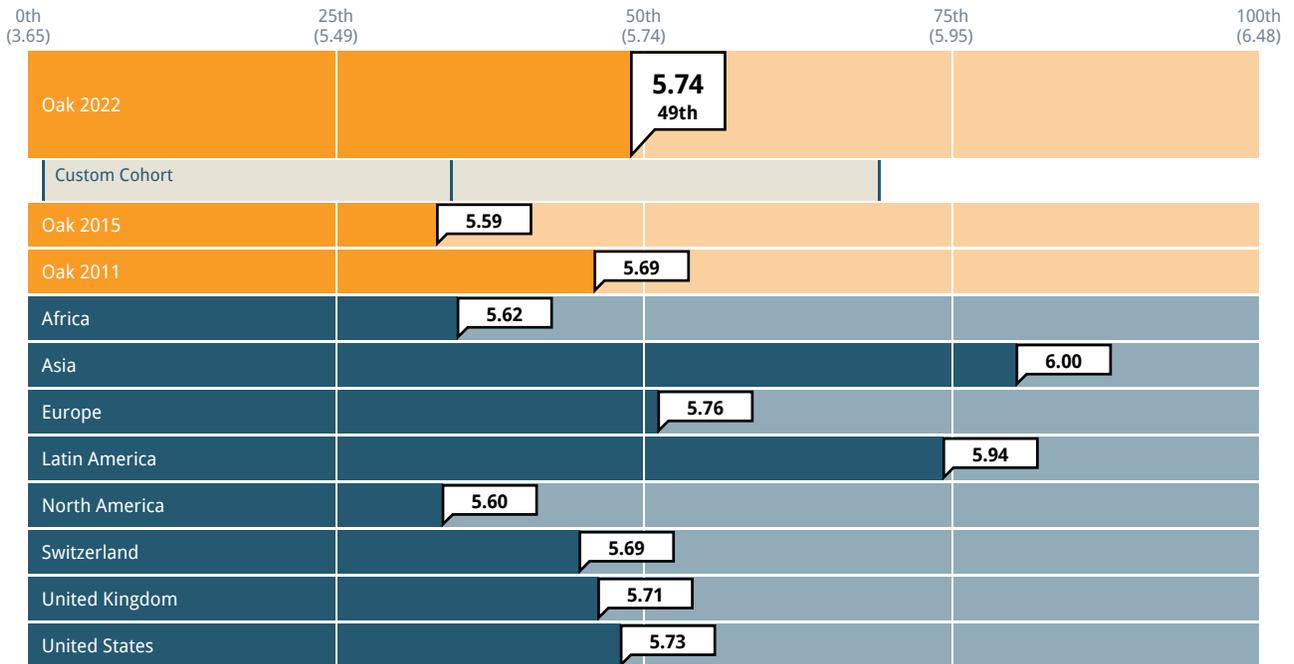


Subgroup: Geography

Communication

How clearly has Oak communicated its goals and strategy to you?

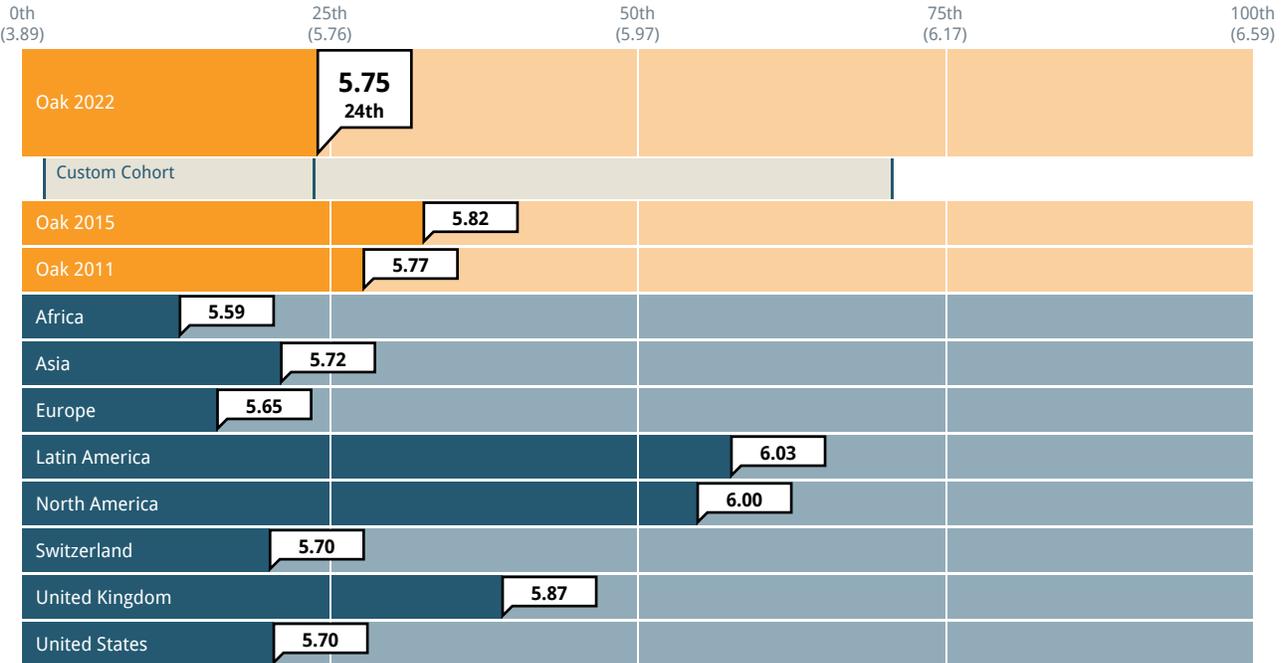
1 = Not at all clearly 7 = Extremely clearly



Cohort: Custom Cohort Past results: on Subgroup: Geography

How consistent was the information provided by different communication resources, both personal and written, that you used to learn about Oak?

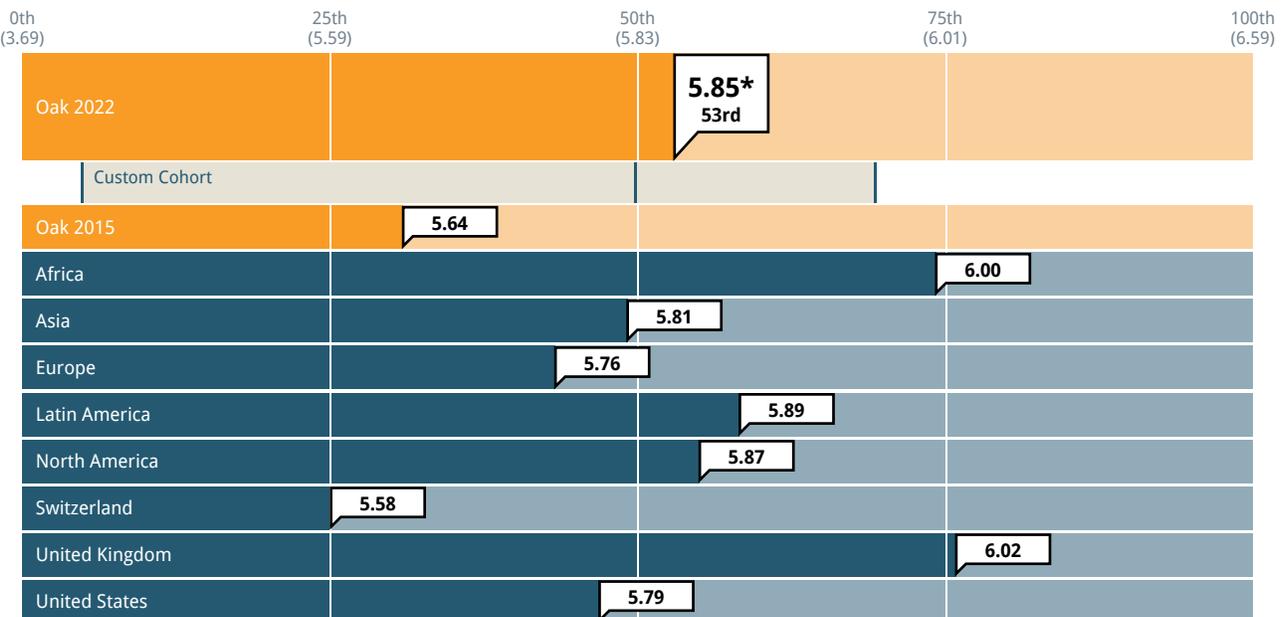
1 = Not at all consistent 7 = Completely consistent



Cohort: Custom Cohort Past results: on Subgroup: Geography

Overall, how transparent is Oak with your organisation?

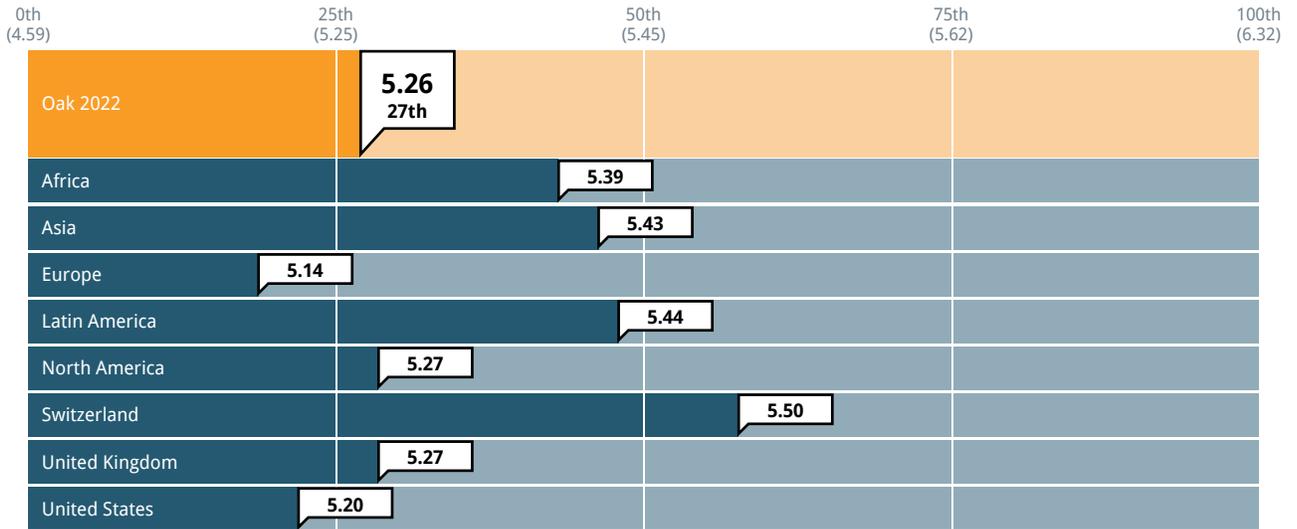
1 = Not at all transparent 7 = Extremely transparent



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

1 = Limited understanding 7 = Thorough understanding

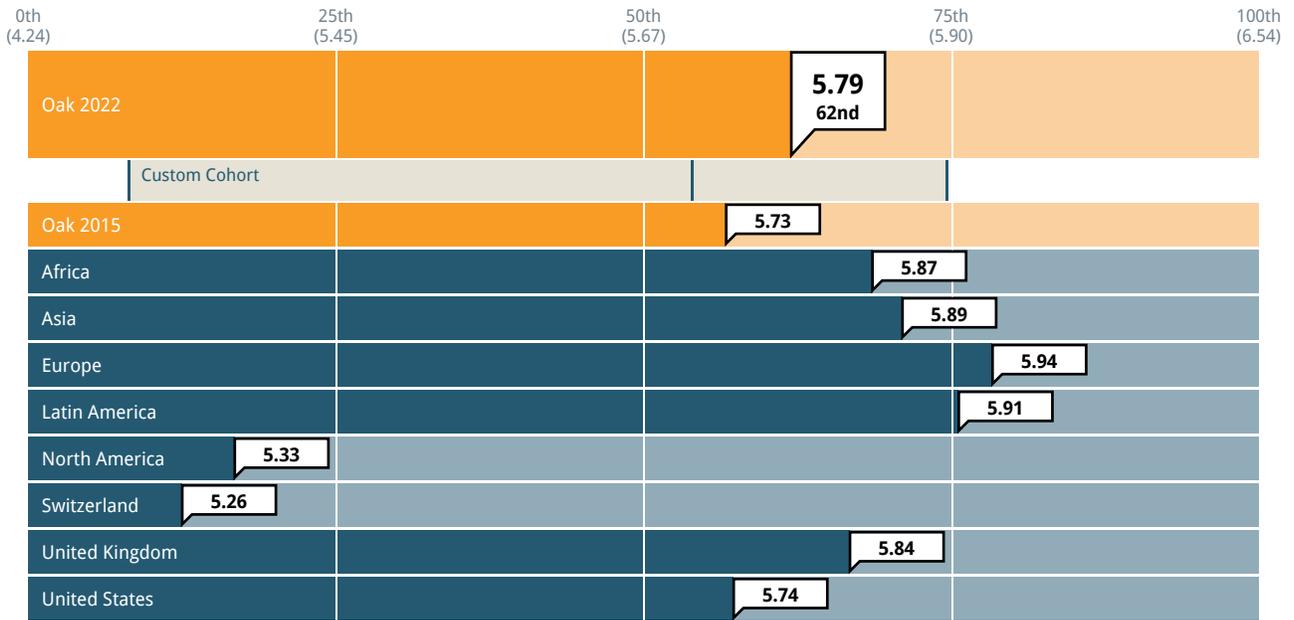


Cohort: None Past results: on Subgroup: Geography

Contextual Understanding

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

1 = Limited understanding 7 = Thorough understanding



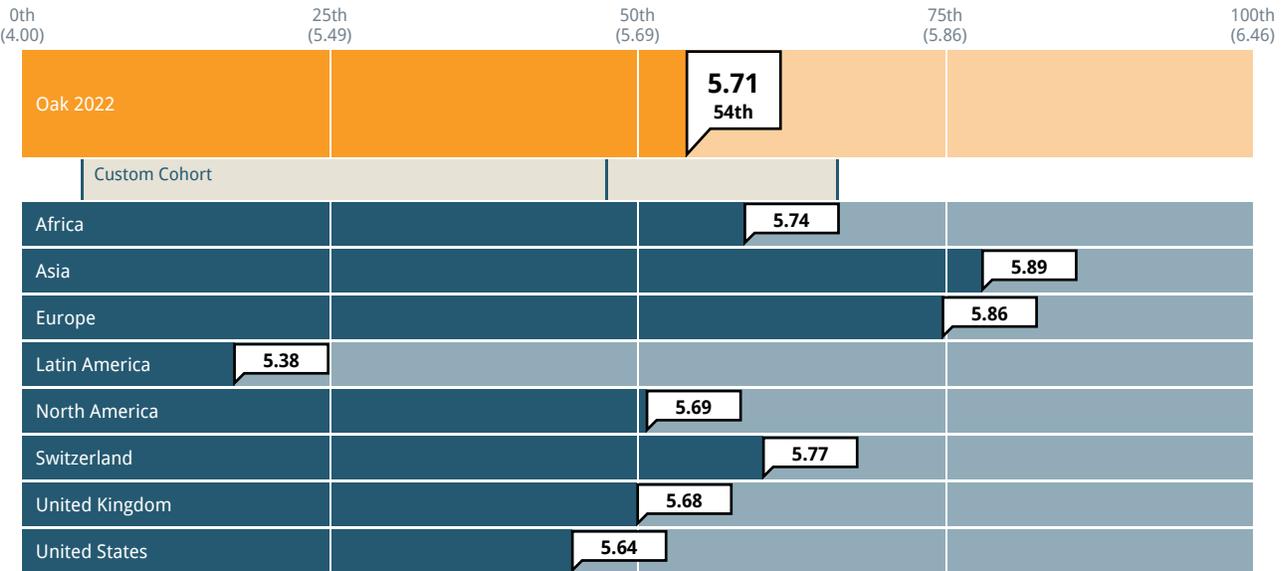
Cohort: Custom Cohort Past results: on Subgroup: Geography

In the following questions, we use the phrase “the people and communities that you serve” to refer to those your organization seeks to serve through the services and/or programs it provides.

Please note that CEP recently modified the following questions. The prior questions were: "How well does the Foundation understand your intended beneficiaries' needs?" and "To what extent do the Foundation's funding priorities reflect a deep understanding of your intended beneficiaries' needs?" The question anchors have not been modified.

How well does Oak understand the needs of the people and communities that you serve?

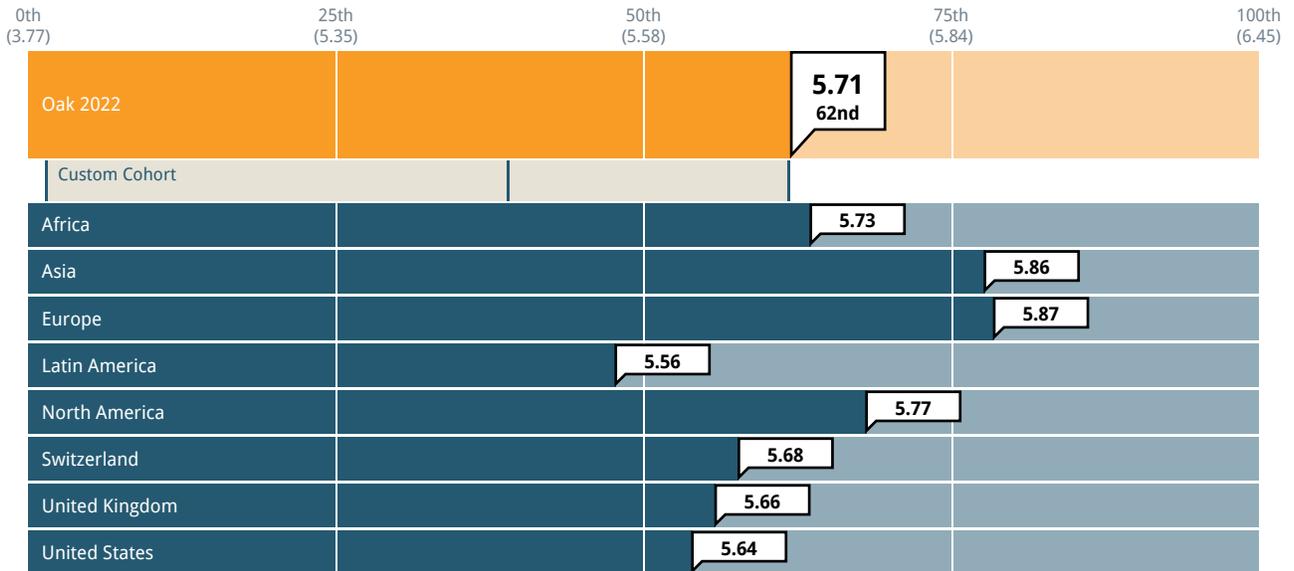
1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort Past results: on Subgroup: Geography

To what extent do Oak's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?

1 = Not at all 7 = To a great extent



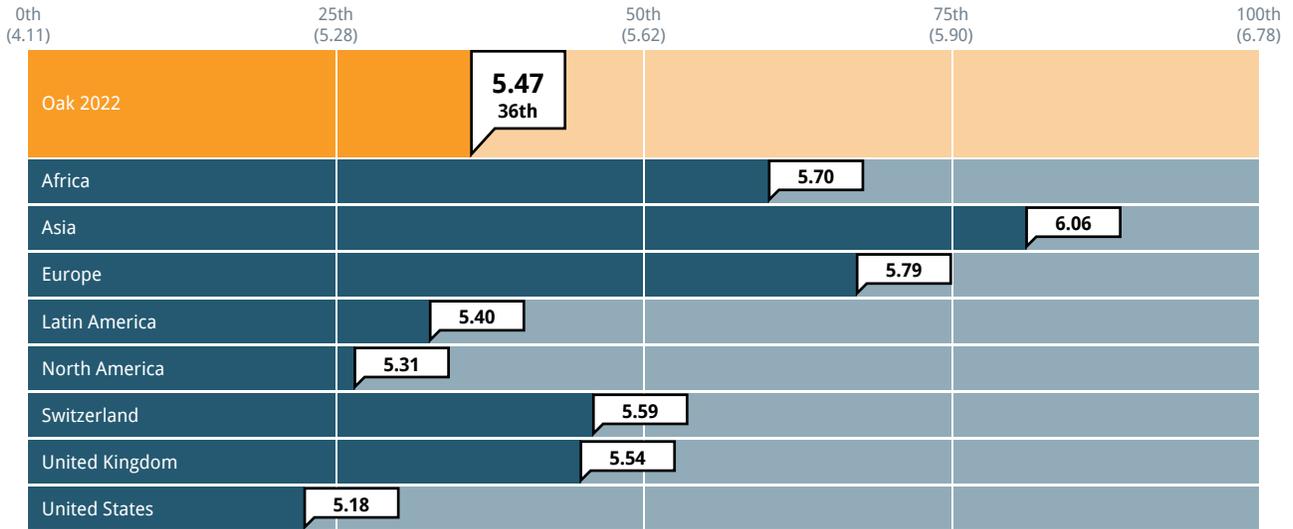
Cohort: Custom Cohort Past results: on Subgroup: Geography

Diversity, Equity, and Inclusion

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

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

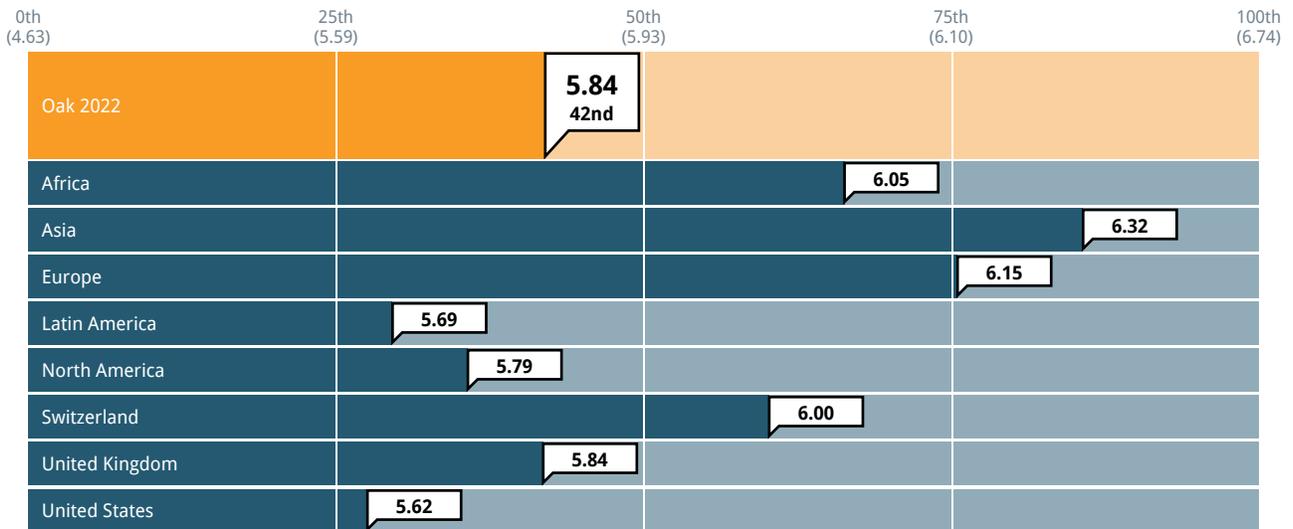
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: None Past results: on Subgroup: Geography

Overall, Oak demonstrates an explicit commitment to diversity, equity, and inclusion in its work

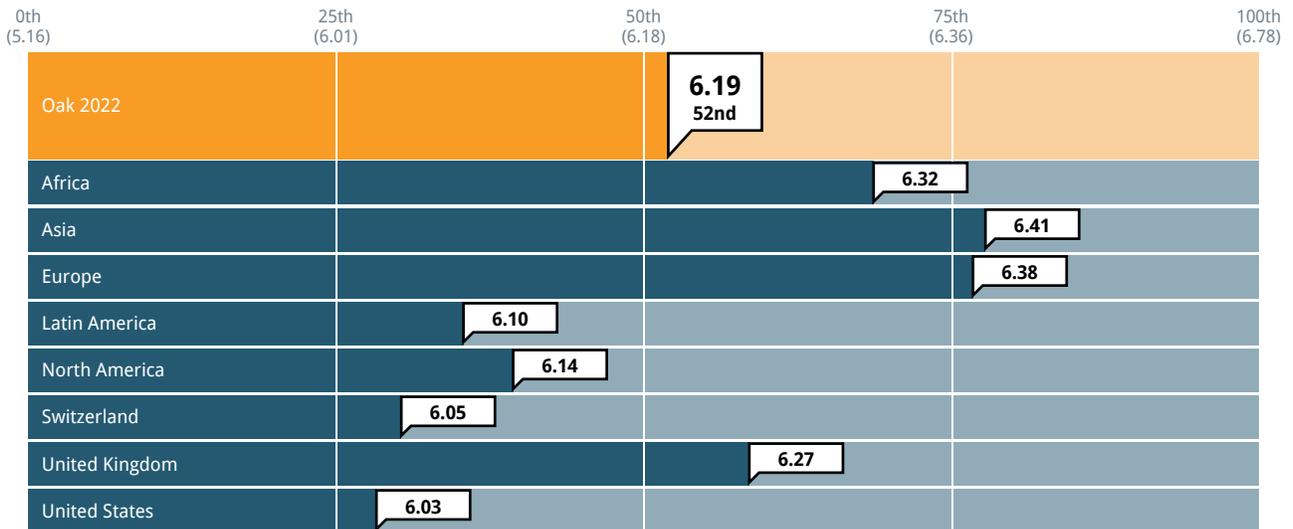
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: None Past results: on Subgroup: Geography

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

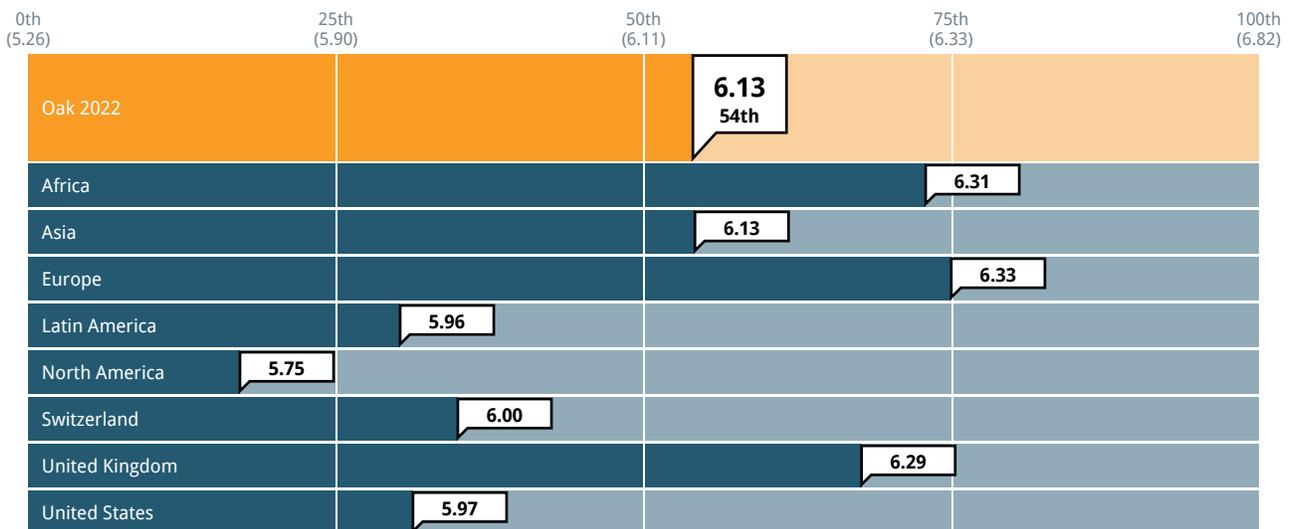
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: None Past results: on Subgroup: Geography

I believe that Oak is committed to combatting racism

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



Cohort: None Past results: on Subgroup: Geography

Grant Processes

Did you submit a proposal to Oak for this grant?

Submitted a proposal Did not submit a proposal

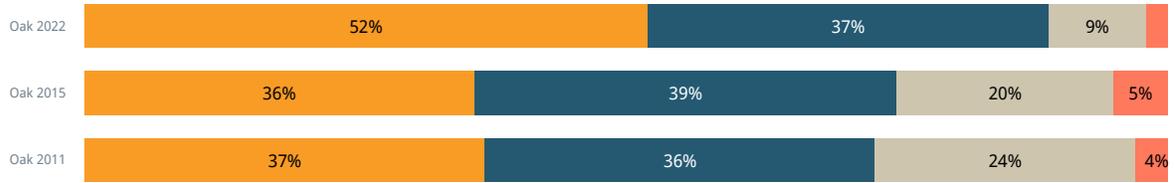


Cohort: Custom Cohort Past results: on

Time Between Submission and Clear Commitment

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

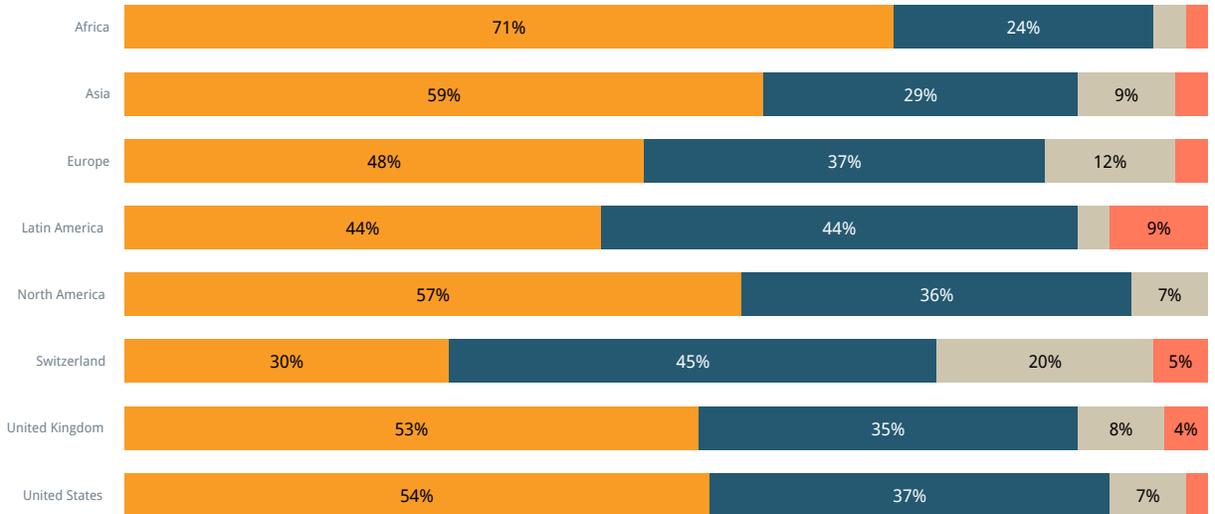
■ 3 months or less
 ■ 4 months - 6 months
 ■ 7 months - 12 months
 ■ More than 12 months



Cohort: None Past results: on

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

■ 3 months or less
 ■ 4 months - 6 months
 ■ 7 months - 12 months
 ■ More than 12 months



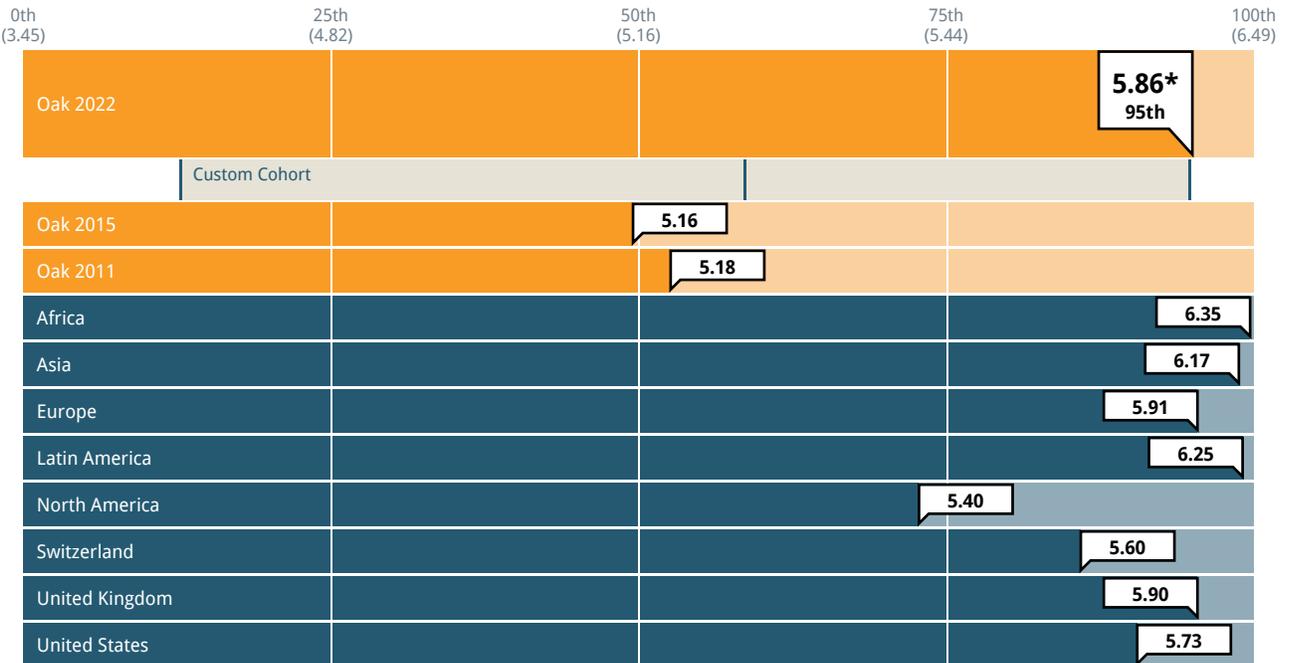
Subgroup: Geography

Selection Process

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

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

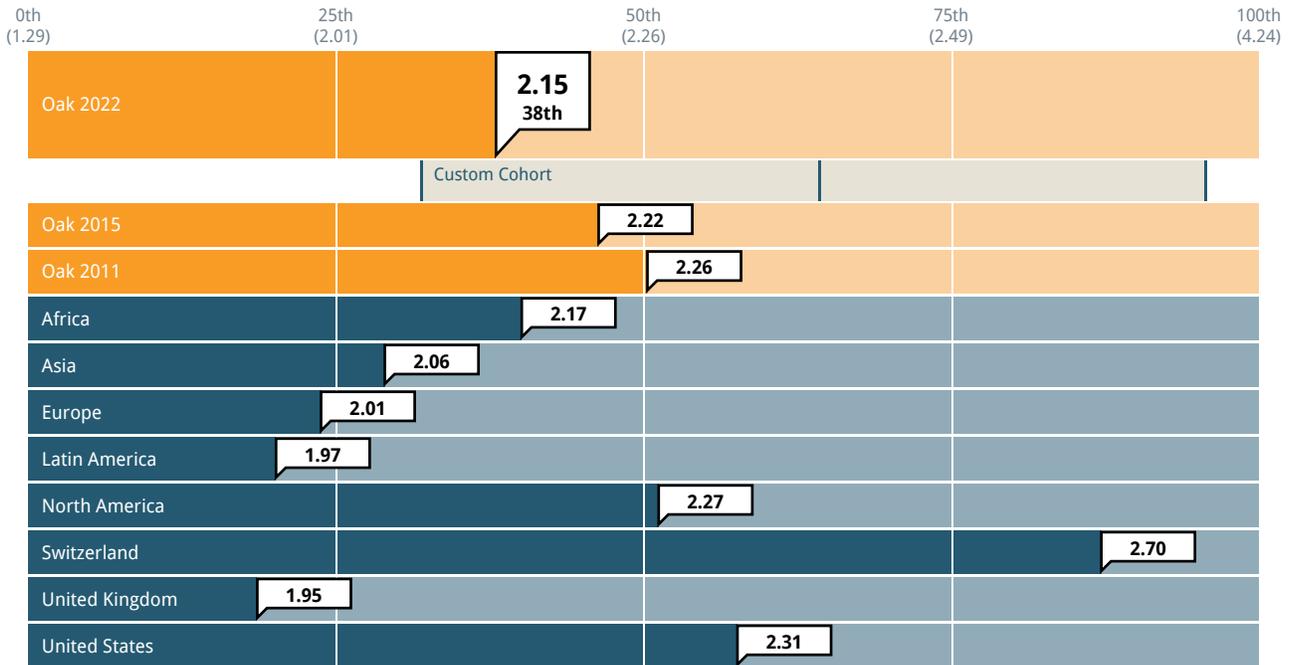
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

As you developed your grant proposal, how much pressure did you feel to modify your organisation's priorities in order to create a grant proposal that was likely to receive funding?

1 = No pressure 7 = Significant pressure



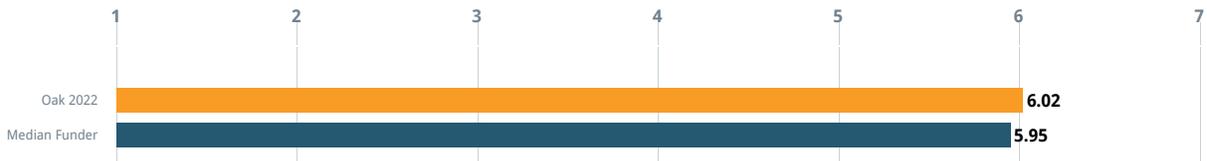
Cohort: Custom Cohort Past results: on Subgroup: Geography

The following questions were recently added to the grantee survey and only represent comparative data from 25 funders.

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

1 = Not at all 7 = To a great extent

■ Oak 2022 ■ Median Funder

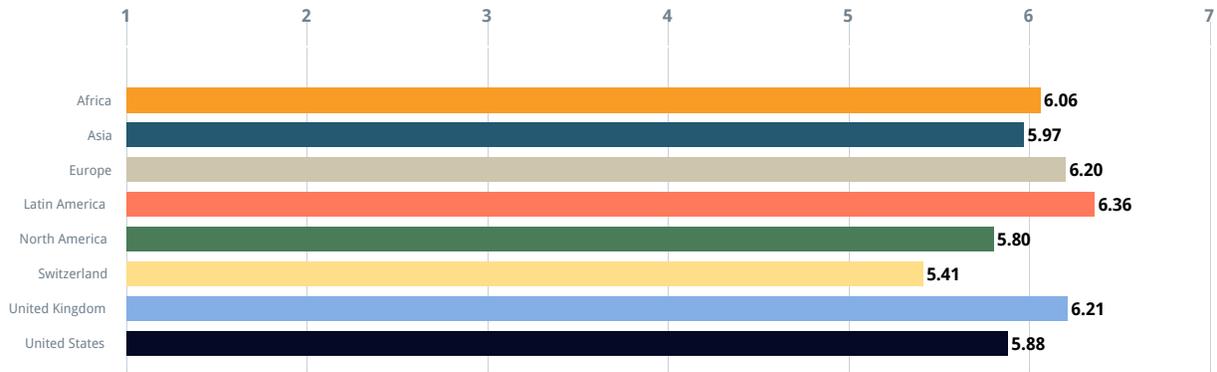


Cohort: None Past results: on

To what extent was Oak's selection process an appropriate level of effort given the amount of funding received? - By Subgroup

1 = Not at all 7 = To a great extent

Africa Asia Europe Latin America North America Switzerland United Kingdom United States

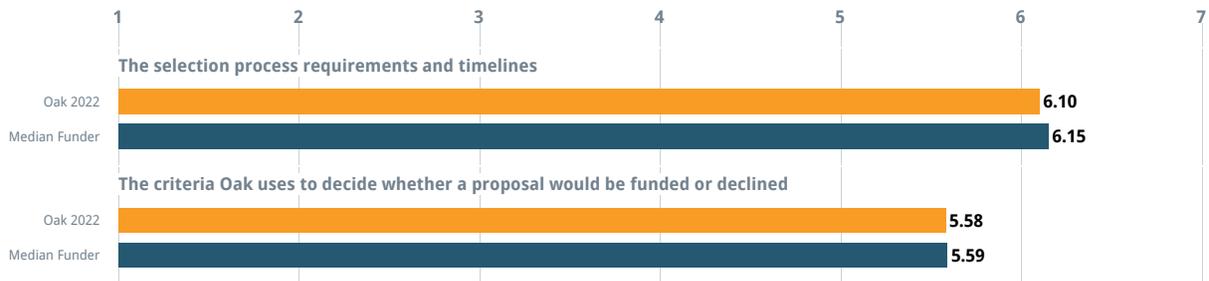


Subgroup: Geography

To what extent was Oak clear and transparent about:

1 = Not at all 7 = To a great extent

Oak 2022 Median Funder

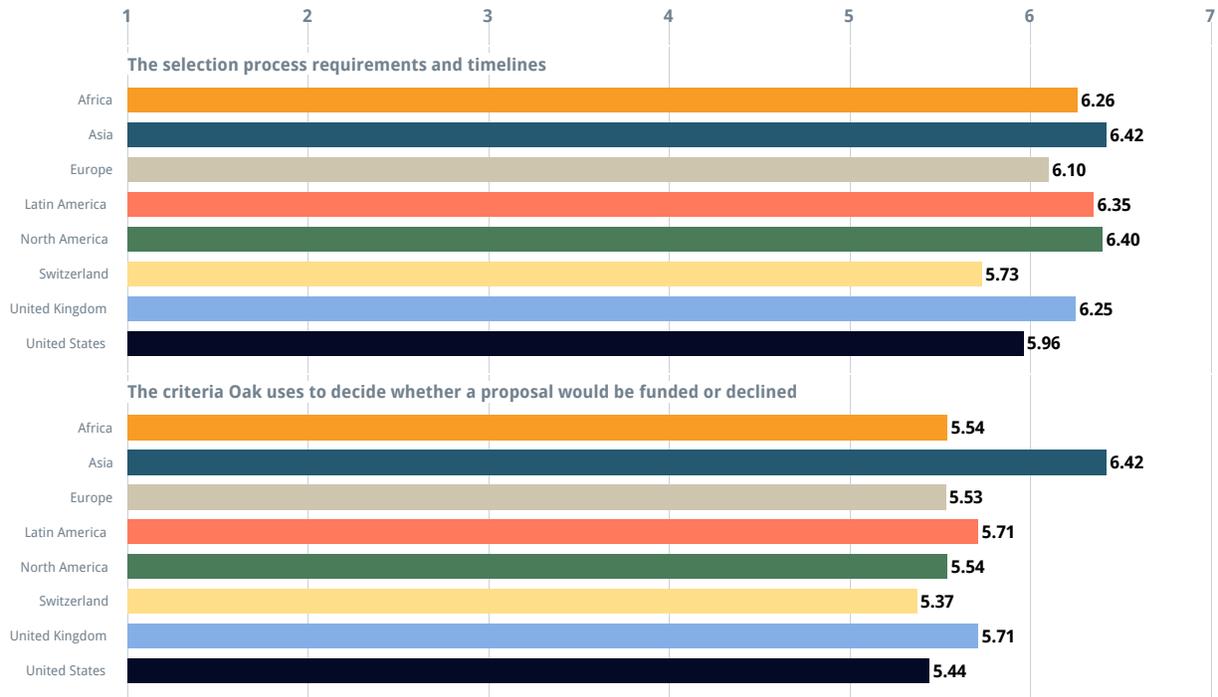


Cohort: None Past results: on

To what extent was Oak clear and transparent about: - By Subgroup

1 = Not at all 7 = To a great extent

Africa Asia Europe Latin America North America Switzerland United Kingdom United States



Subgroup: Geography

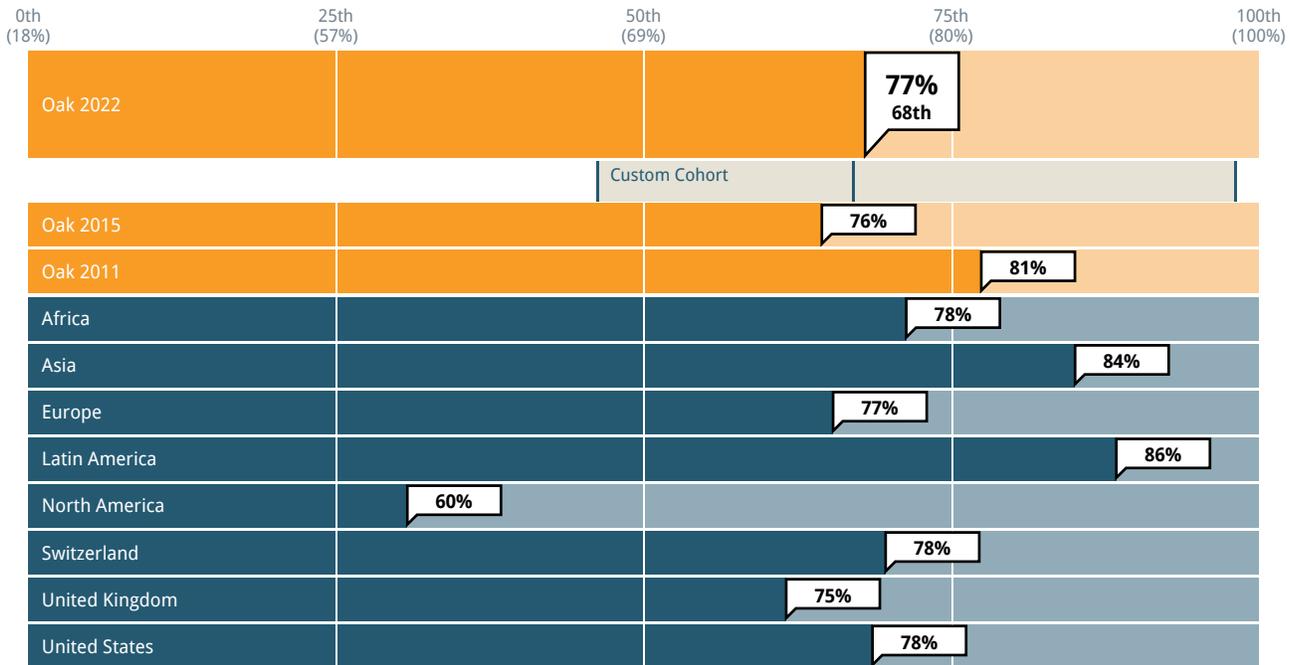
Reporting and Evaluation Process

Definition of Reporting and Evaluation

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

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

Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: on Subgroup: Geography

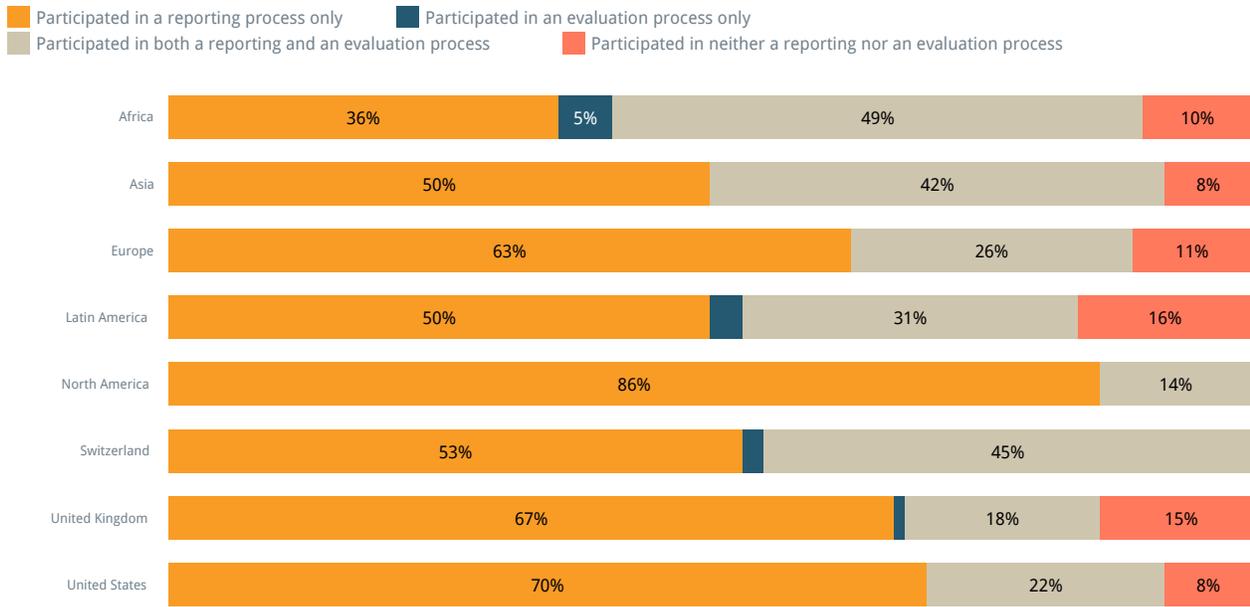
Participation in Reporting and/or Evaluation Processes

- Participated in a reporting process only
- Participated in an evaluation process only
- Participated in both a reporting and an evaluation process
- Participated in neither a reporting nor an evaluation process



Cohort: Custom Cohort Past results: on

Participation in Reporting and/or Evaluation Processes - By Subgroup



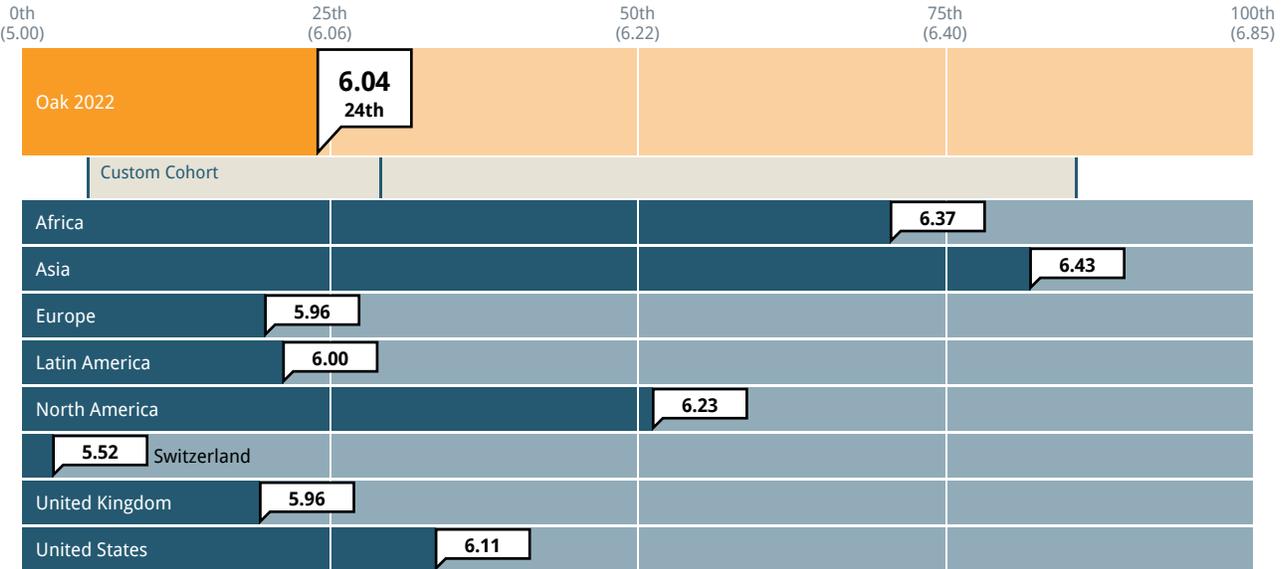
Subgroup: Geography

Reporting Process

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

To what extent was Oak's reporting process straightforward?

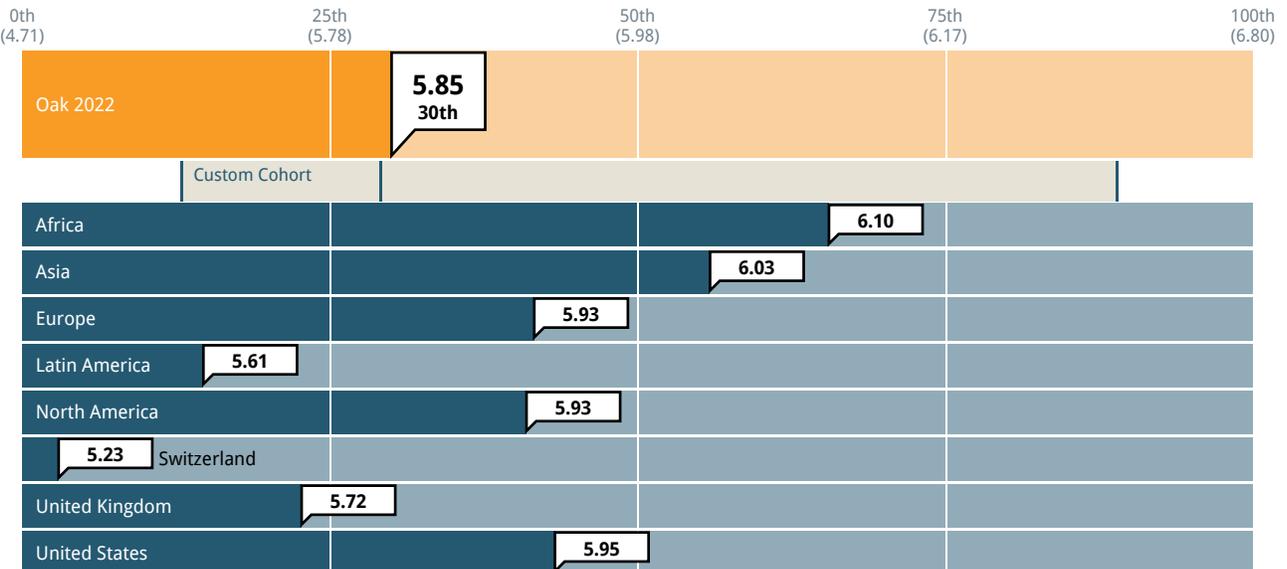
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

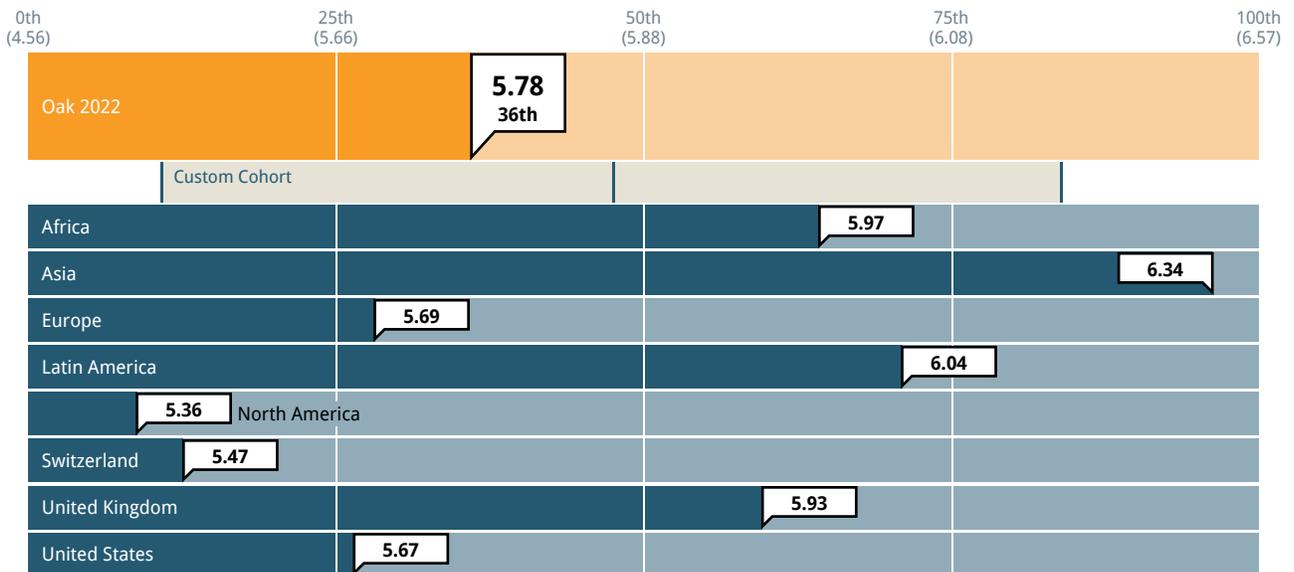
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

1 = Not at all 7 = To a great extent



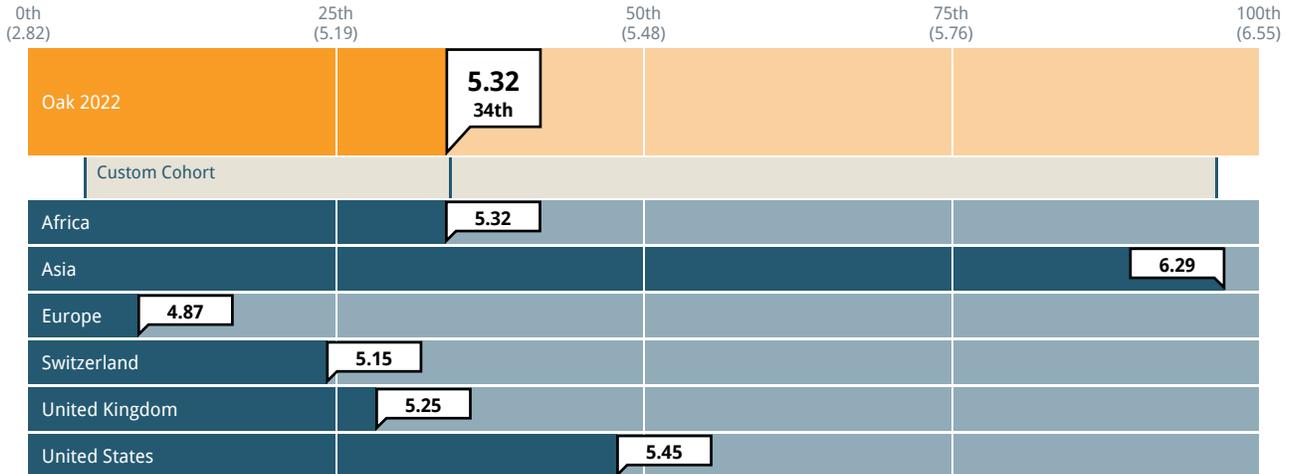
Cohort: Custom Cohort Past results: on Subgroup: Geography

Evaluation Process

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

To what extent did the evaluation incorporate input from your organisation in the design of the evaluation?

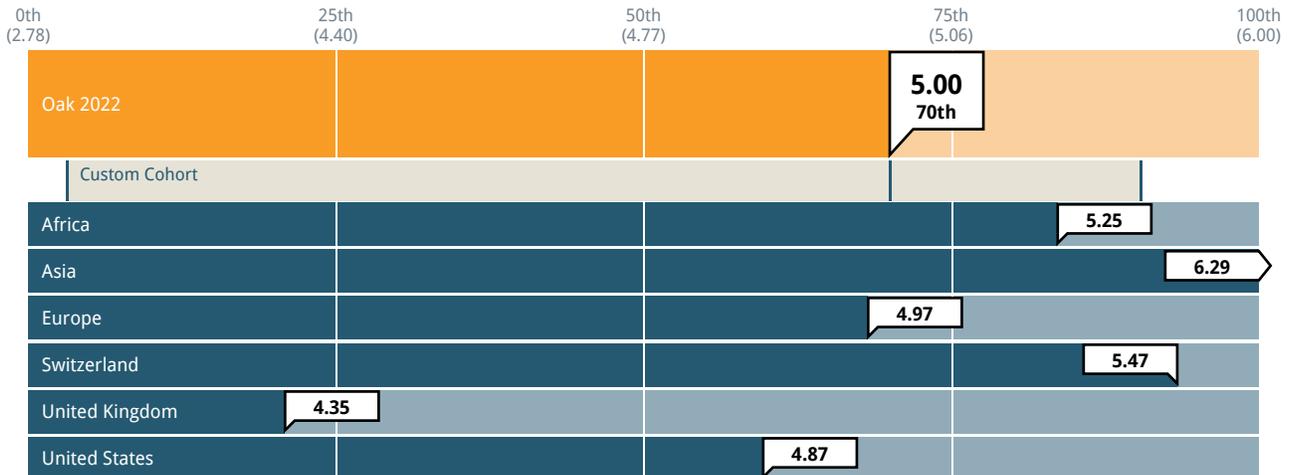
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: on Subgroup: Geography

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

1 = Not at all 7 = To a great extent

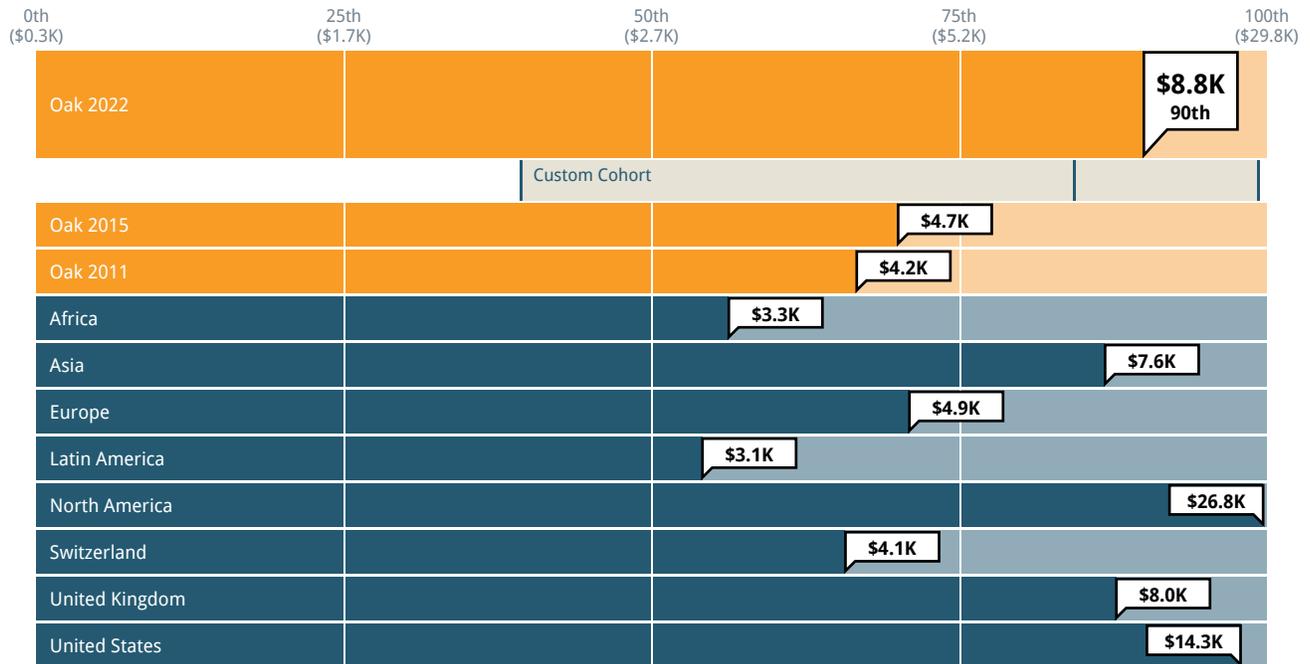


Cohort: Custom Cohort Past results: on Subgroup: Geography

Dollar Return and Time Spent on Processes

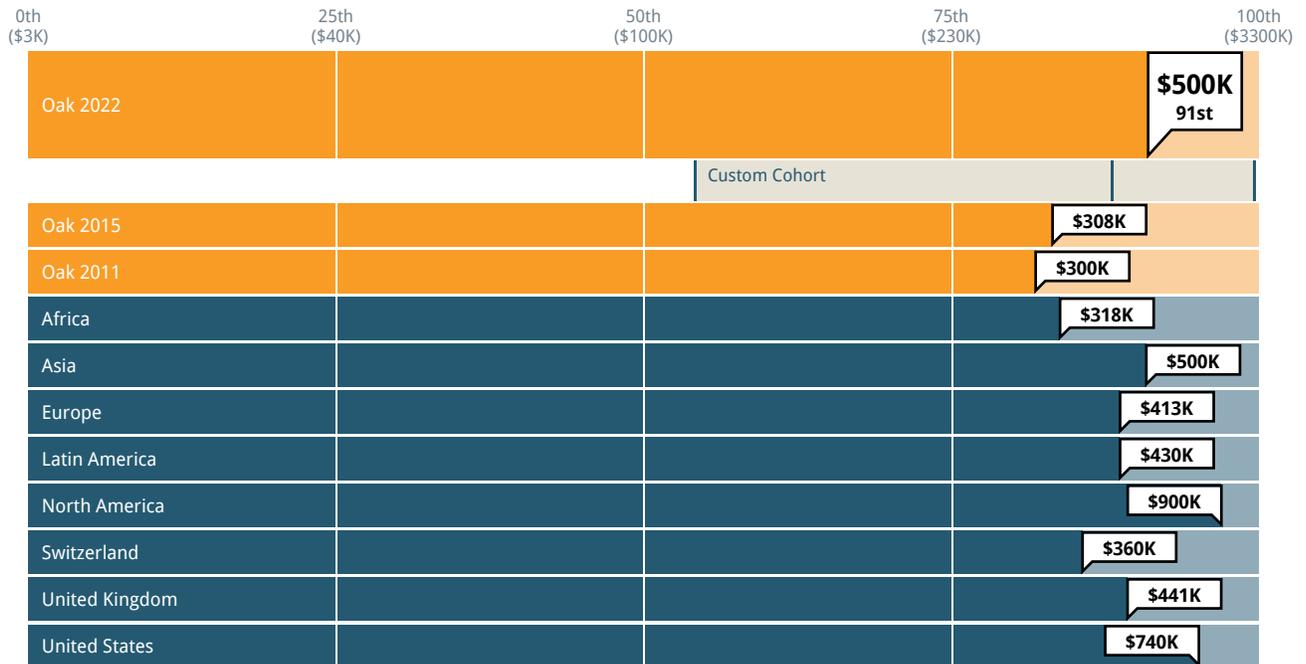
Dollar Return: Median grant dollars awarded per process hour required

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



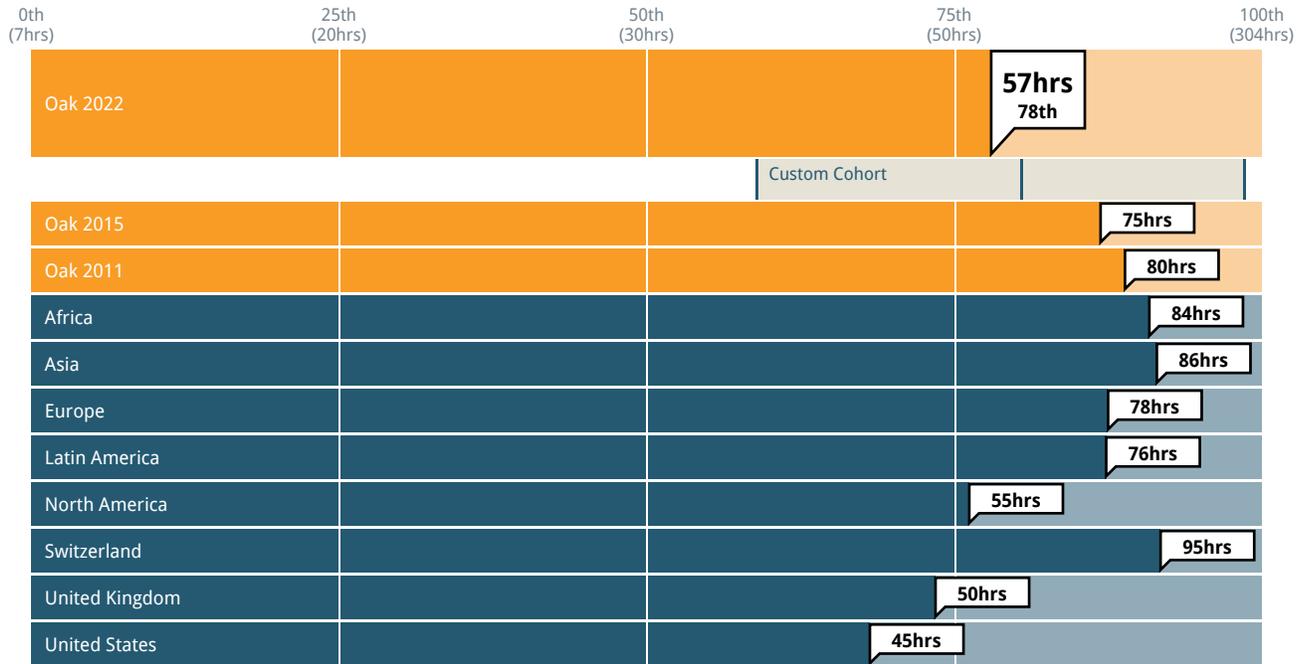
Cohort: Custom Cohort Past results: on Subgroup: Geography

Median Grant Size



Cohort: Custom Cohort Past results: on Subgroup: Geography

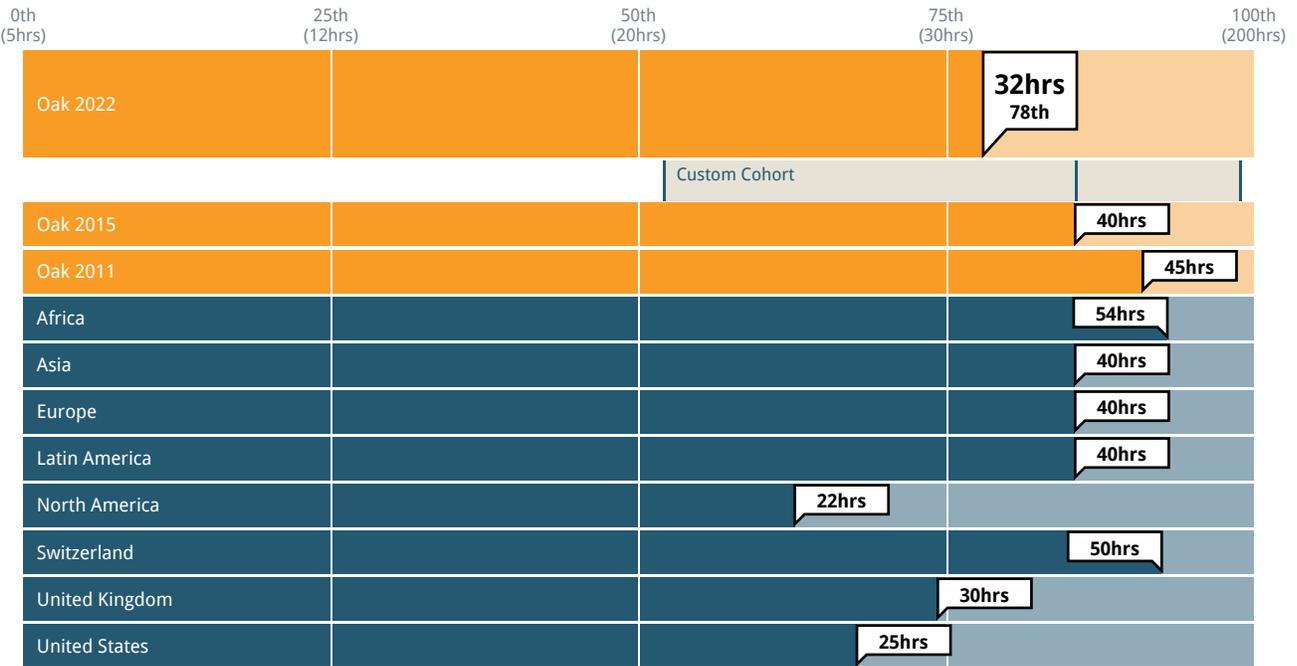
Median hours spent by grantees on funder requirements over grant lifetime



Cohort: Custom Cohort Past results: on Subgroup: Geography

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



Cohort: Custom Cohort Past results: on Subgroup: Geography

Selected Cohort: Custom Cohort					
Time Spent On Proposal And Selection Process	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
1 to 9 hours	7%	4%	4%	23%	9%
10 to 19 hours	16%	10%	7%	21%	13%
20 to 29 hours	19%	13%	17%	17%	14%
30 to 39 hours	11%	10%	8%	7%	9%
40 to 49 hours	14%	15%	15%	11%	15%
50 to 99 hours	18%	24%	24%	11%	17%
100 to 199 hours	10%	16%	18%	6%	14%
200+ hours	4%	6%	7%	3%	10%

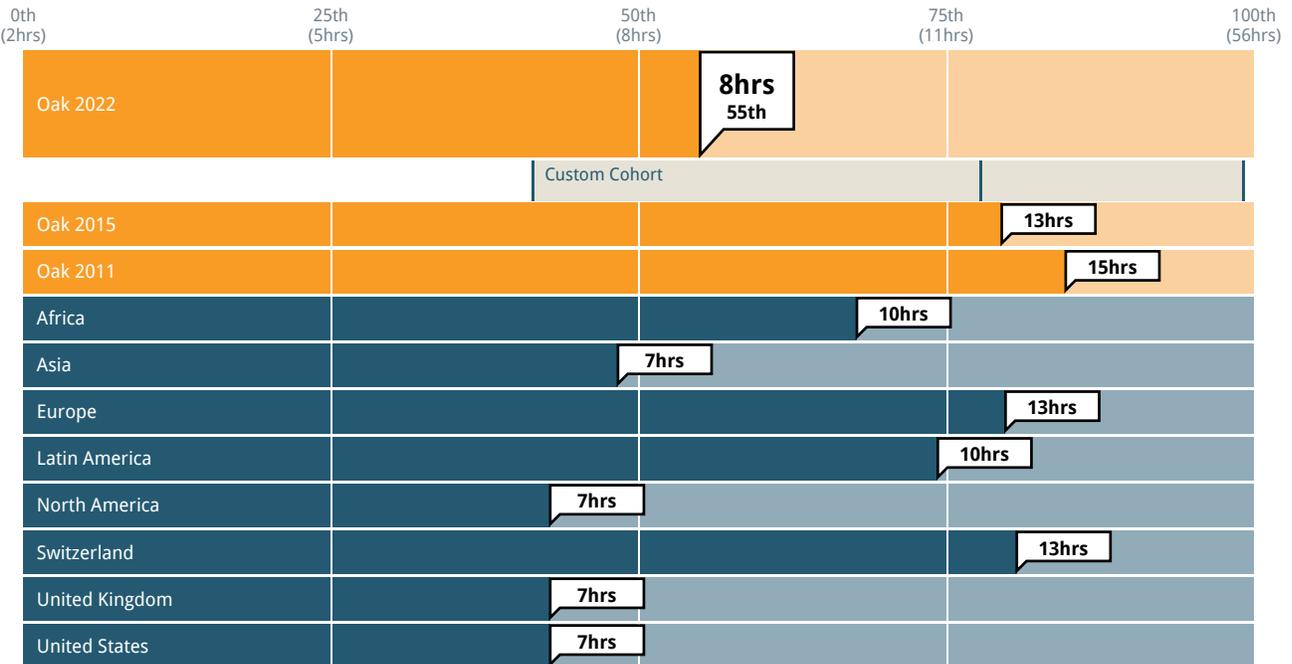
Selected Subgroup: Geography

Time Spent On Proposal And Selection Process (By Subgroup)

	1 to 9 hours	10 to 19 hours	20 to 29 hours	30 to 39 hours	40 to 49 hours	50 to 99 hours	100 to 199 hours	200+ hours
Africa	16%	11%	8%	3%	13%	13%	24%	13%
Asia	9%	16%	12%	6%	12%	31%	6%	6%
Europe	5%	13%	12%	13%	16%	23%	12%	7%
Latin America	3%	6%	15%	9%	27%	27%	9%	3%
North America	0%	43%	14%	14%	7%	21%	0%	0%
Switzerland	2%	7%	12%	7%	17%	26%	24%	5%
United Kingdom	7%	15%	22%	16%	10%	18%	8%	5%
United States	9%	20%	25%	10%	15%	13%	6%	2%

Time Spent on Reporting and Evaluation Process

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



Cohort: Custom Cohort Past results: on Subgroup: Geography

Selected Cohort: Custom Cohort					
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
1 to 9 hours	53%	38%	35%	54%	39%
10 to 19 hours	23%	27%	24%	19%	22%
20 to 29 hours	9%	13%	9%	10%	12%
30 to 39 hours	4%	6%	7%	4%	6%
40 to 49 hours	3%	6%	6%	3%	5%
50 to 99 hours	5%	5%	12%	5%	8%
100+ hours	3%	4%	7%	4%	8%

Selected Subgroup: Geography

Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)

	1 to 9 hours	10 to 19 hours	20 to 29 hours	30 to 39 hours	40 to 49 hours	50 to 99 hours	100+ hours
Africa	47%	24%	12%	3%	0%	9%	6%
Asia	56%	22%	4%	0%	4%	7%	7%
Europe	36%	31%	9%	3%	5%	10%	5%
Latin America	39%	21%	14%	7%	7%	4%	7%
North America	55%	27%	9%	0%	0%	0%	9%
Switzerland	33%	28%	12%	7%	7%	9%	5%
United Kingdom	63%	13%	8%	6%	1%	3%	5%
United States	60%	24%	9%	3%	1%	2%	0%

Customized Questions

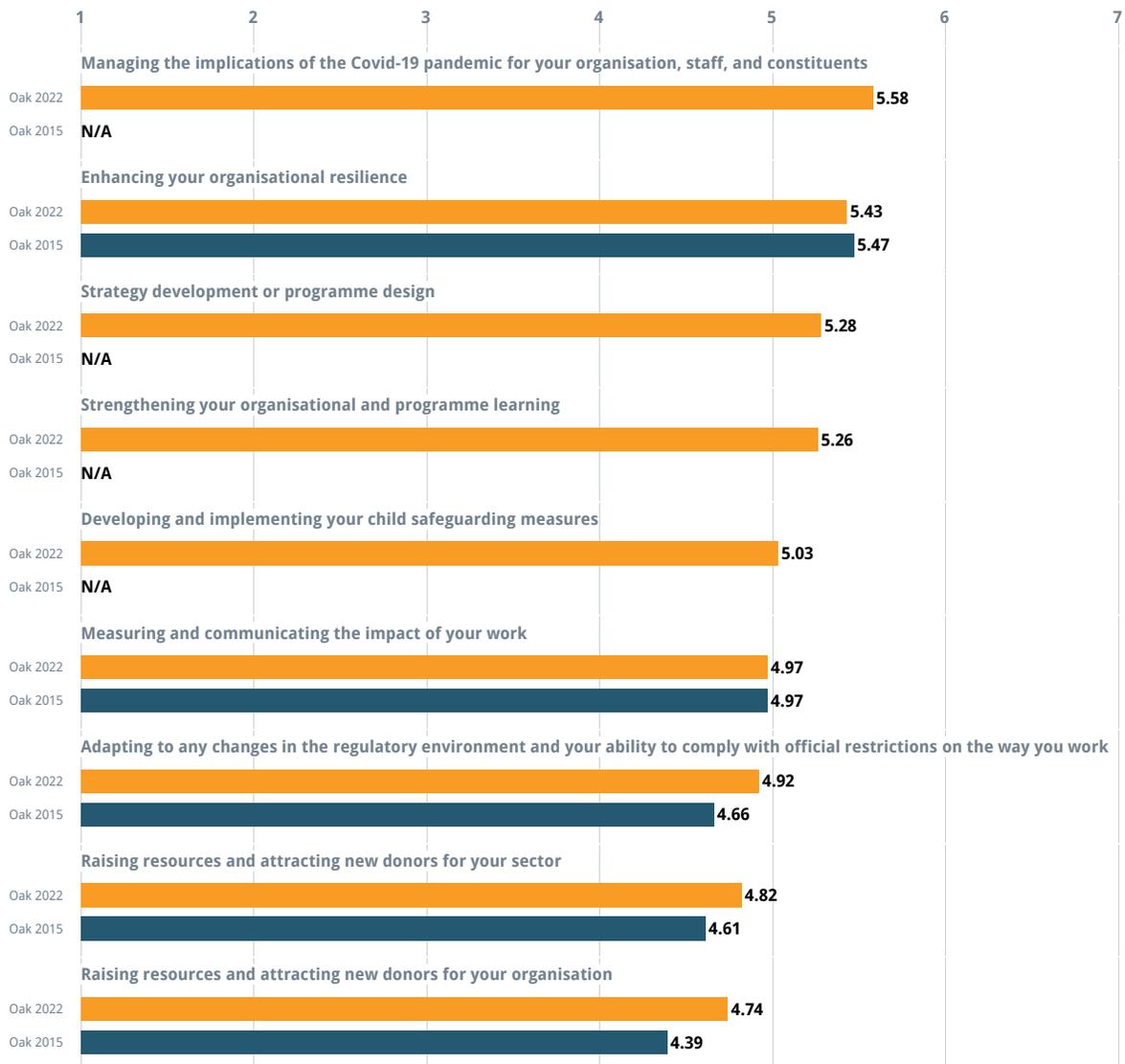
Please note: the subsequent question includes trend data from 2015. The exact text used for answer options in 2015 are:

- "Enhancing your organizational resilience" was "Enhancing your organizational sustainability" in 2015.
- "Measuring and communicating the impact of your work" was "Measuring the impact of your work" in 2015.
- "Adapting to any changes in the regulatory environment and your ability to comply with official restrictions on the way you work" was "Helping you manage any negative changes in the regulatory environment and your ability to comply with official restrictions on the way you work" in 2015.
- "Raising resources and attracting new donors for your sector" was "Raising resources and attracting new donors for the sector in which you work" in 2015.
- "Raising resources and attracting new donors for your organisation" was the same text used in 2015.

How successful was Oak Foundation in supporting your organisation in the following areas:

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

■ Oak 2022 ■ Oak 2015



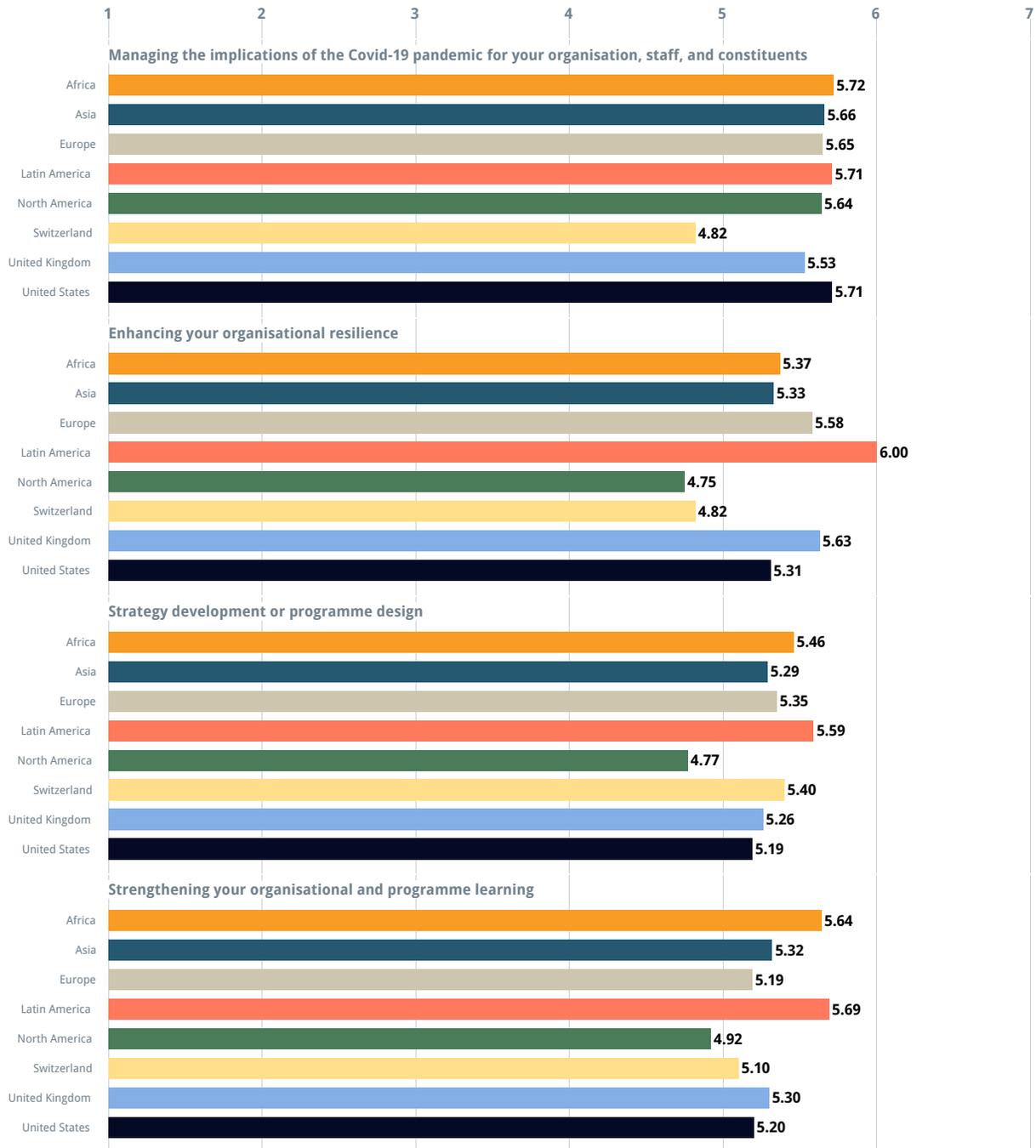
Cohort: None Past results: on

By Subgroup

How successful was Oak Foundation in supporting your organisation in the following areas: - By Subgroup

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

Africa Asia Europe Latin America North America Switzerland United Kingdom United States

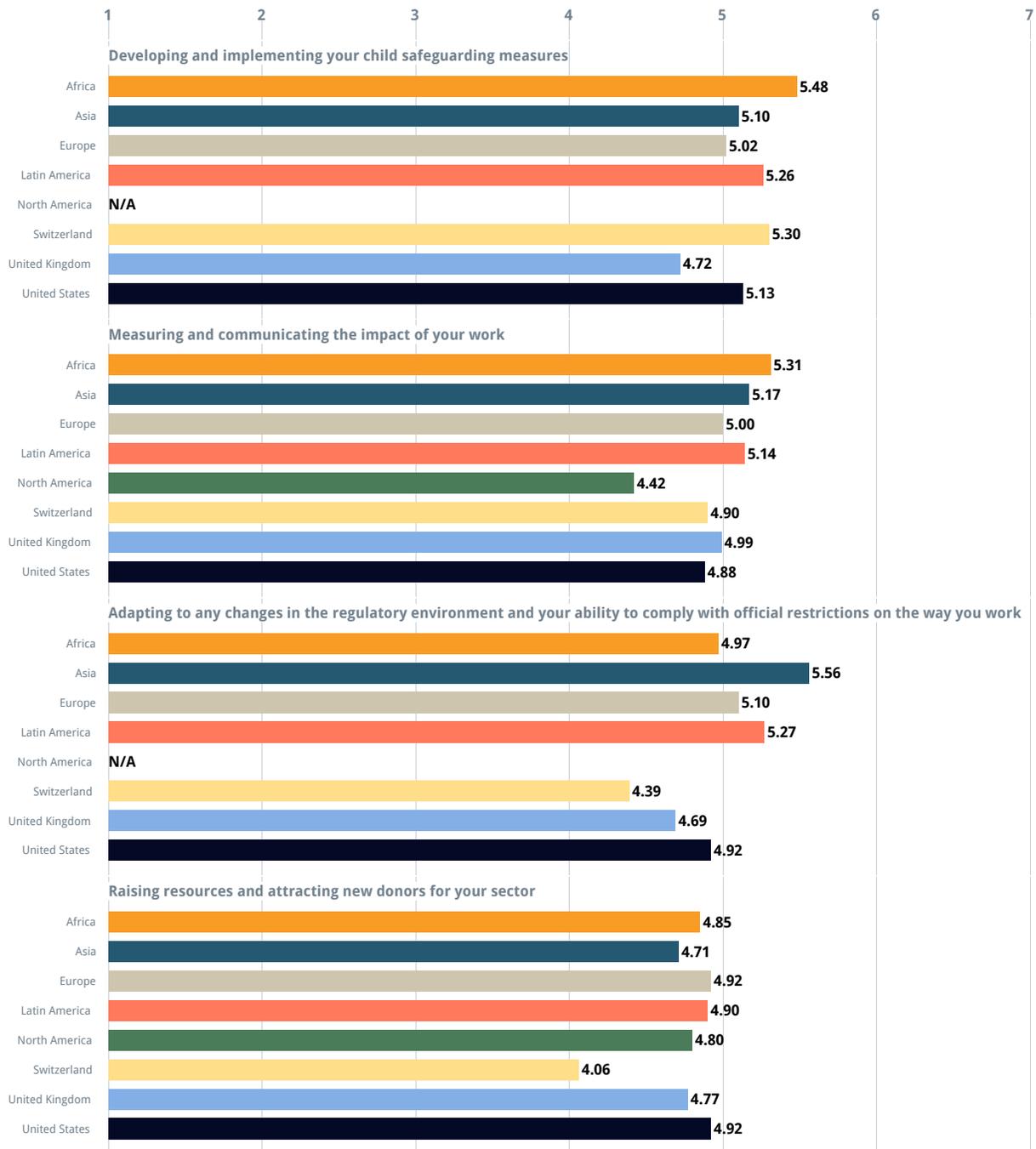


Subgroup: Geography

How successful was Oak Foundation in supporting your organisation in the following areas: - By Subgroup (cont.)

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

Africa Asia Europe Latin America North America Switzerland United Kingdom United States

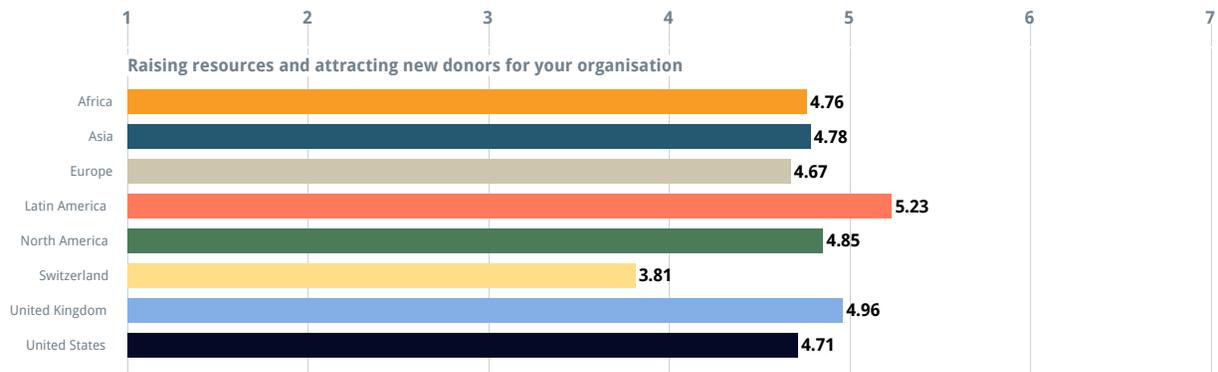


Subgroup: Geography

How successful was Oak Foundation in supporting your organisation in the following areas: - By Subgroup (cont.)

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

Africa Asia Europe Latin America North America Switzerland United Kingdom United States



Subgroup: Geography

Capacity Building

In the survey, the subsequent questions were prefaced with the following text: "Oak Foundation sometimes provides assistance and funding for capacity building in the following ways:

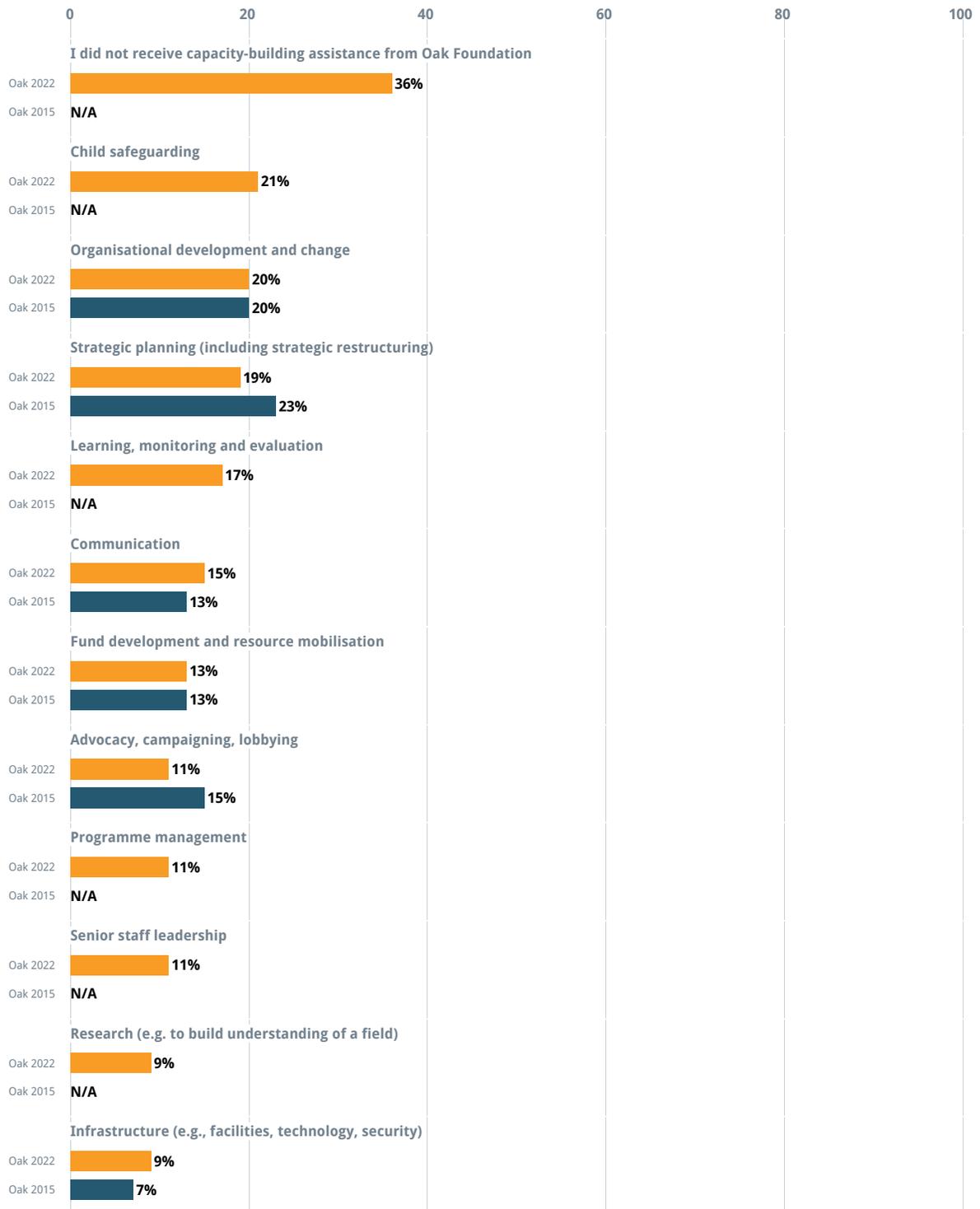
- Core support grants
- Funding integrated into the project / programme grant
- Dedicated capacity building grants
- Linking grantees with a third-party provider paid for by Oak
- Oak staff support."

The subsequent questions include trend data from 2015. The exact text used for answer options in 2015 are:

- "Organisational development and change" was "Organizational Development (including change processes)" in 2015.
- "Strategic planning (including strategic restructuring)" was the same text used in 2015.
- "Communication" was "Communications" in 2015.
- "Fund development and resource mobilisation" was "Fund Development and Resource Mobilization (including income generation)" in 2015.
- "Advocacy, campaigning, lobbying" was "Advocacy Development (including campaigning and lobbying)" in 2015.
- "Infrastructure (e.g., facilities, technology, security)" was "Infrastructure (including facility/resource management; technology, security)" in 2015.
- "Financial management" was the same text used in 2015.
- "Human resources" was "Human Resources (including staff and volunteer management)" in 2015.
- "Compliance with regulations" was "Compliance with National Regulations" in 2015.

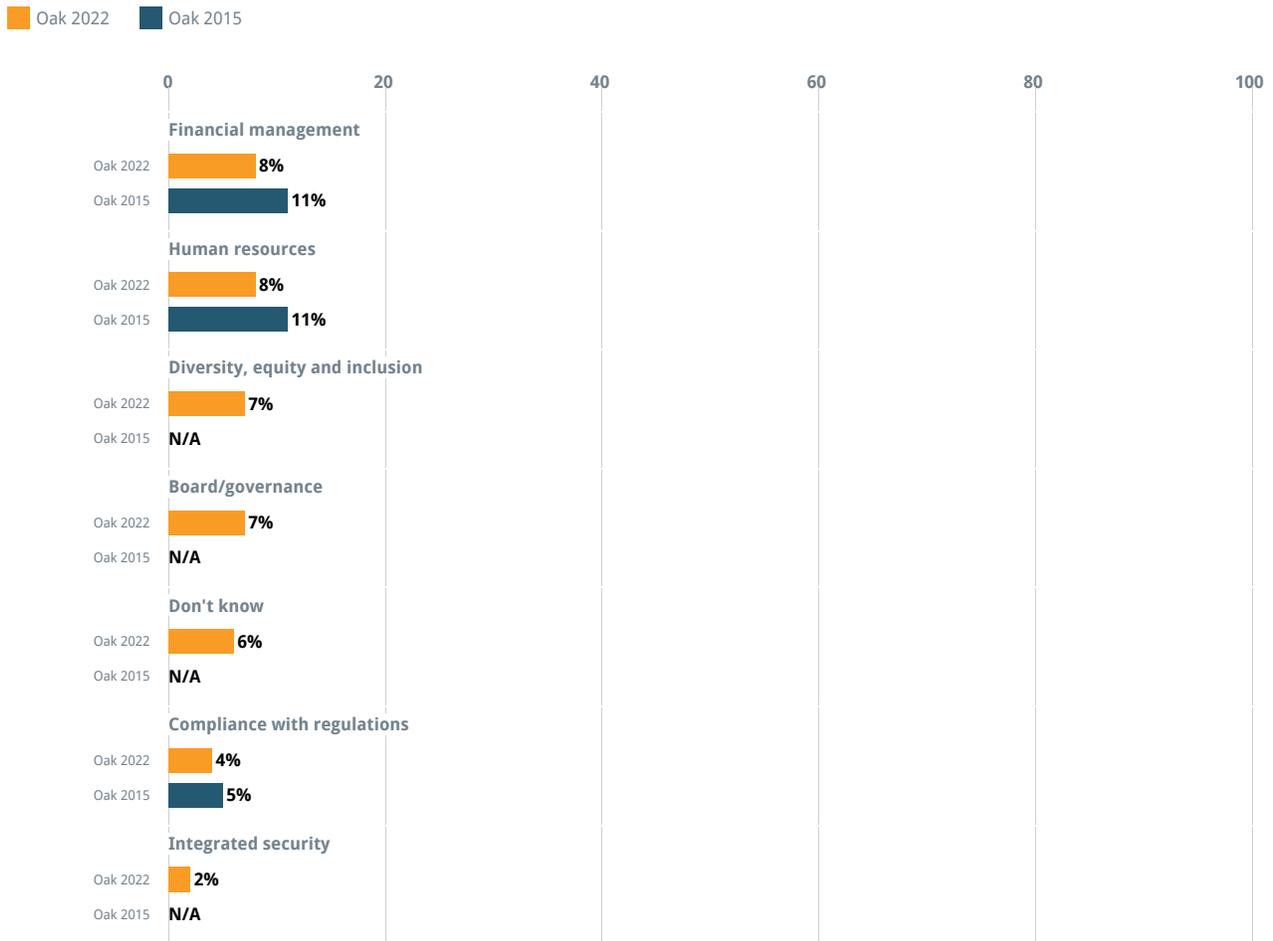
Please indicate whether you received capacity-building assistance (via any of the above methods) from Oak Foundation in any of the following areas: (Please check all that apply)

■ Oak 2022
 ■ Oak 2015



Cohort: None Past results: on

Please indicate whether you received capacity-building assistance (via any of the above methods) from Oak Foundation in any of the following areas: (Please check all that apply) (cont.)



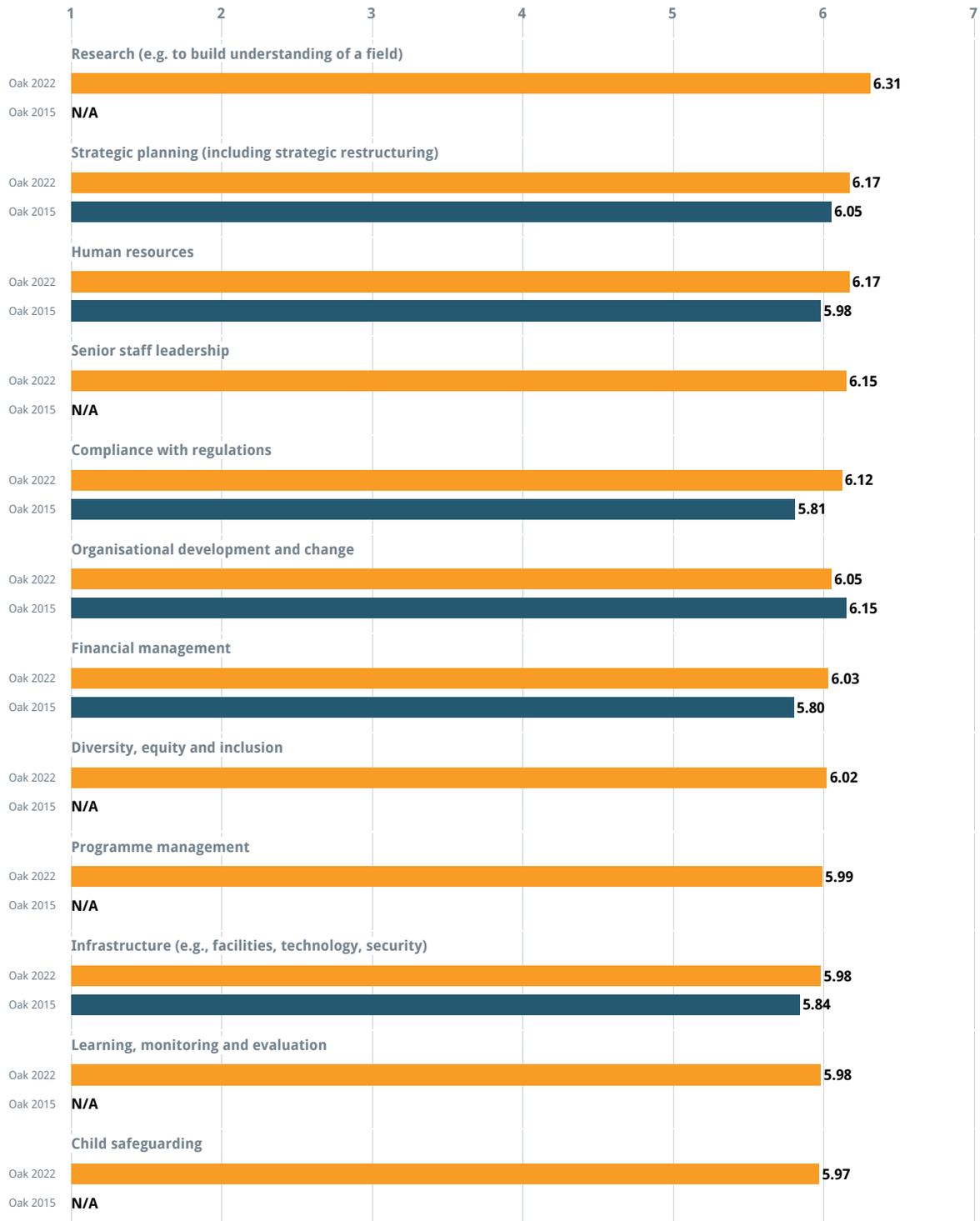
Cohort: None Past results: on

Please note: respondents were only asked to provide input on the capacity-building supports they indicated receiving in the previous question.

To what extent did these forms of capacity-building assistance help you strengthen your organisation's work?

1 = Not at all 7 = To a great extent

■ Oak 2022 ■ Oak 2015

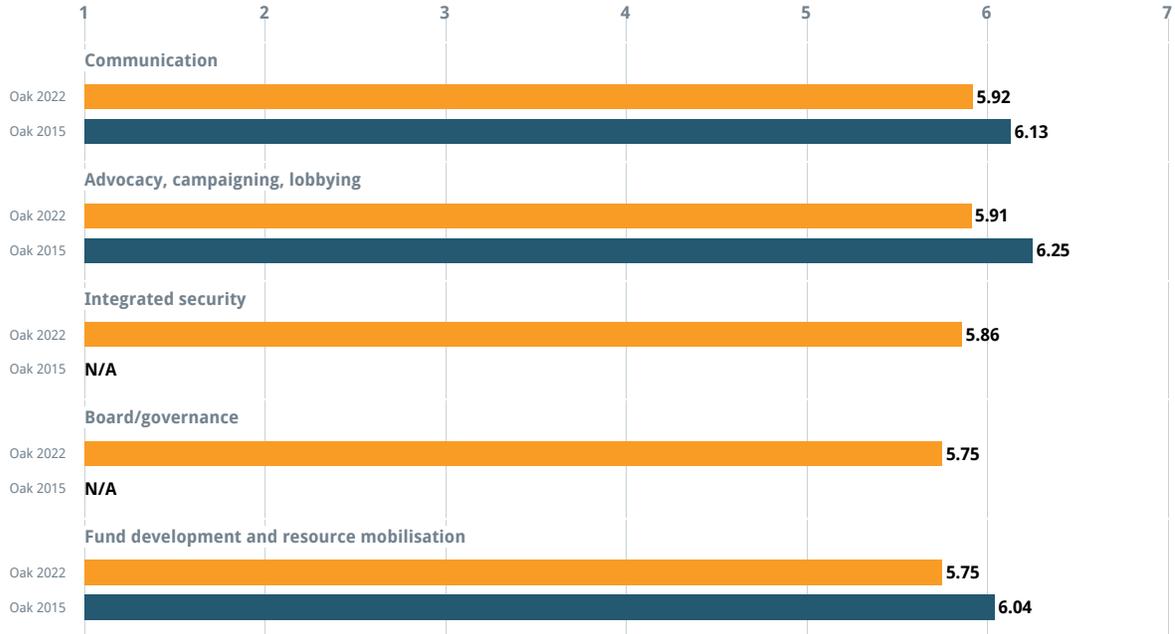


Cohort: None Past results: on

To what extent did these forms of capacity-building assistance help you strengthen your organisation's work? (cont.)

1 = Not at all 7 = To a great extent

■ Oak 2022
 ■ Oak 2015



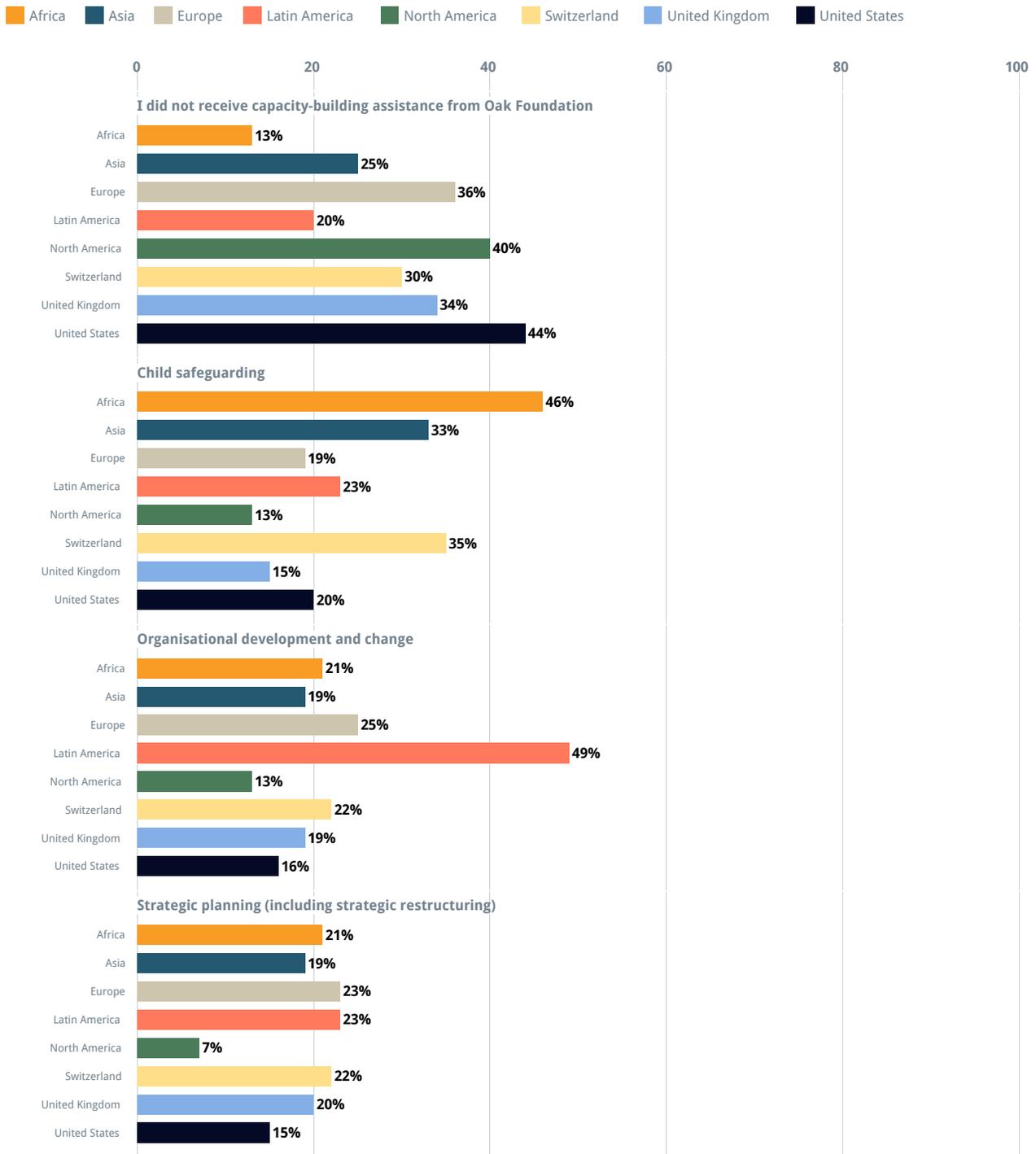
Cohort: None Past results: on

By Subgroup

In the survey, the subsequent questions were prefaced with the following text: "Oak Foundation sometimes provides assistance and funding for capacity building in the following ways:

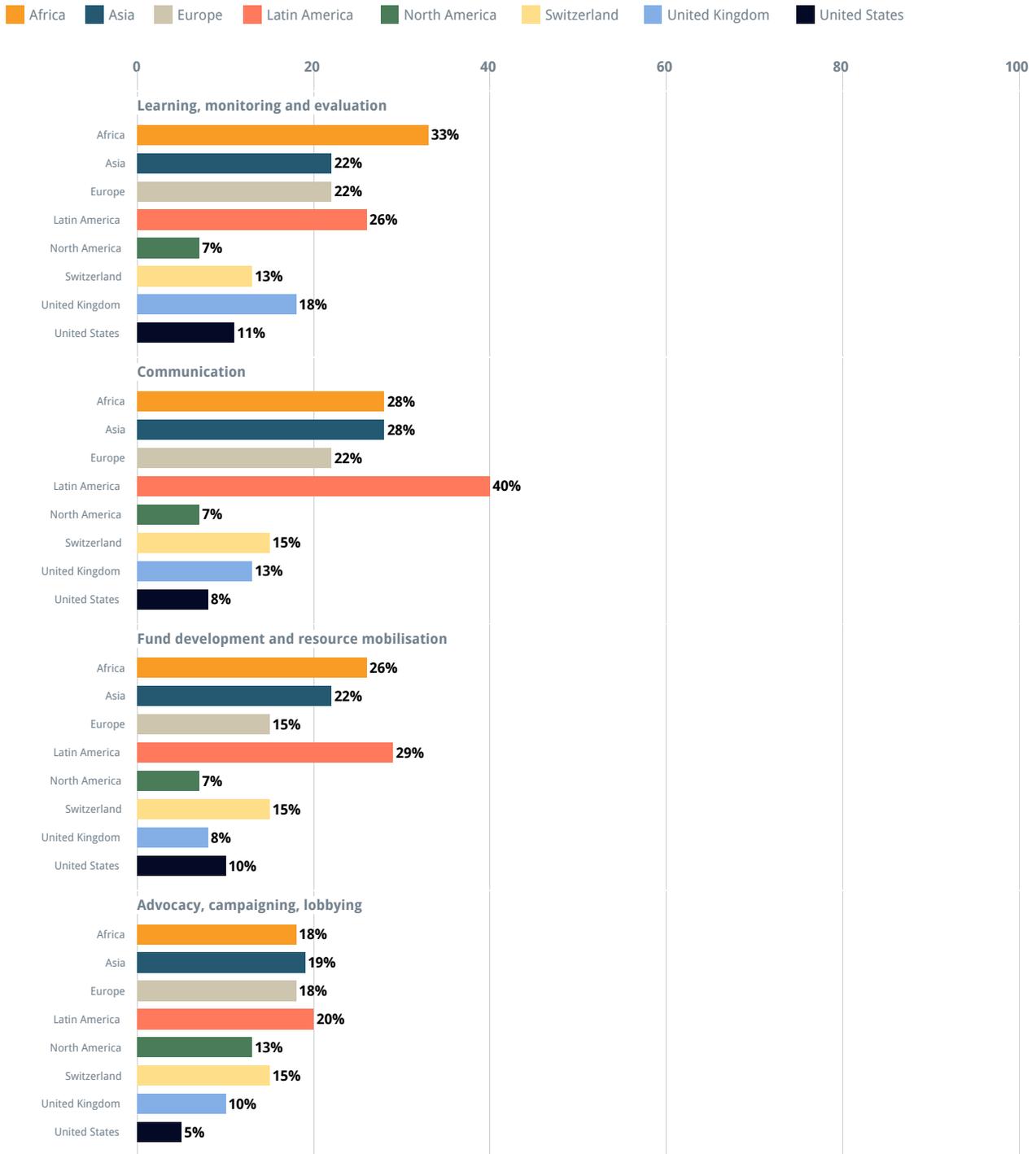
- Core support grants
- Funding integrated into the project / programme grant
- Dedicated capacity building grants
- Linking grantees with a third-party provider paid for by Oak
- Oak staff support."

Please indicate whether you received capacity-building assistance (via any of the above methods) from Oak Foundation in any of the following areas: (Please check all that apply) - By Subgroup



Subgroup: Geography

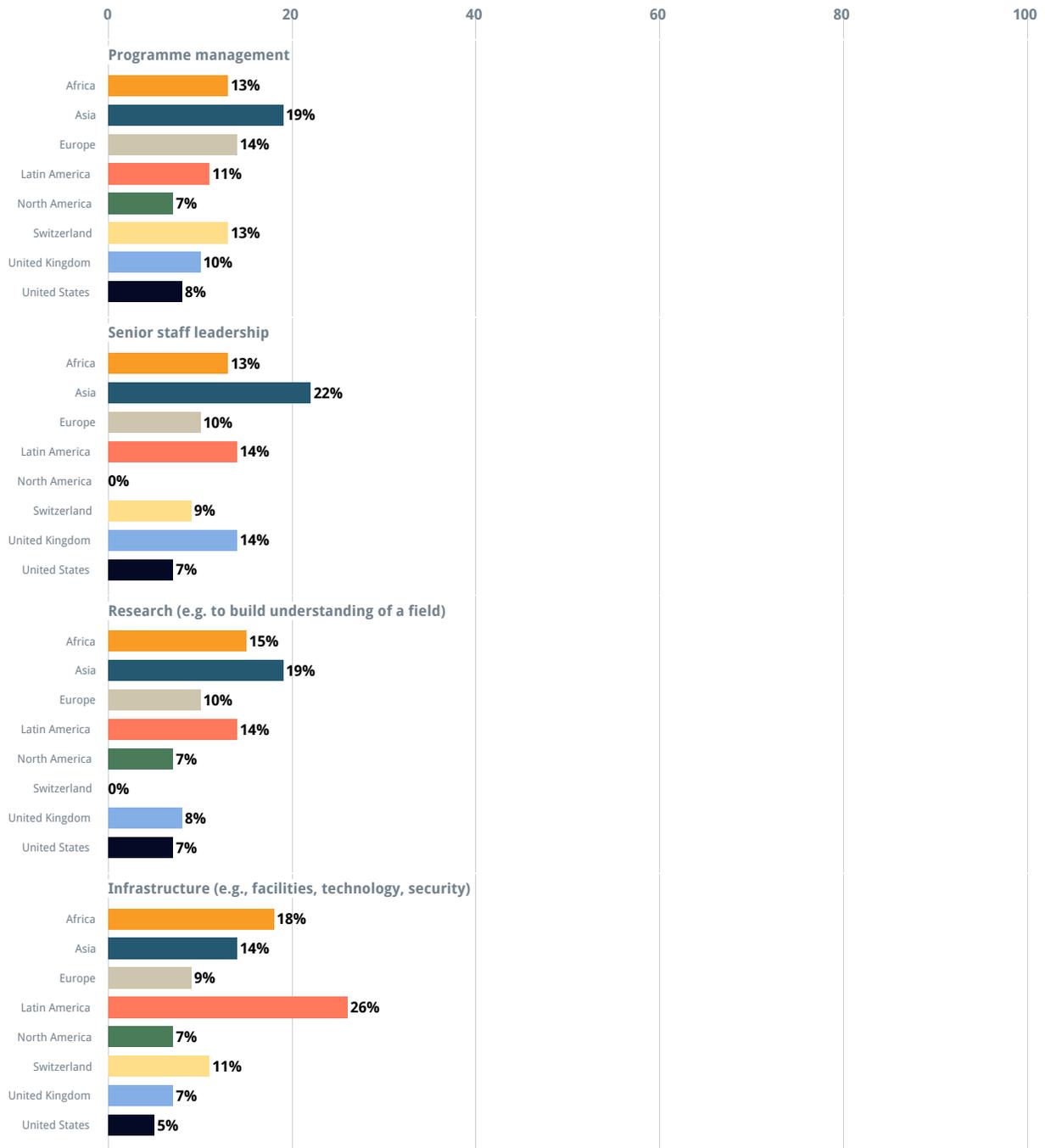
Please indicate whether you received capacity-building assistance (via any of the above methods) from Oak Foundation in any of the following areas: (Please check all that apply) - By Subgroup (cont.)



Subgroup: Geography

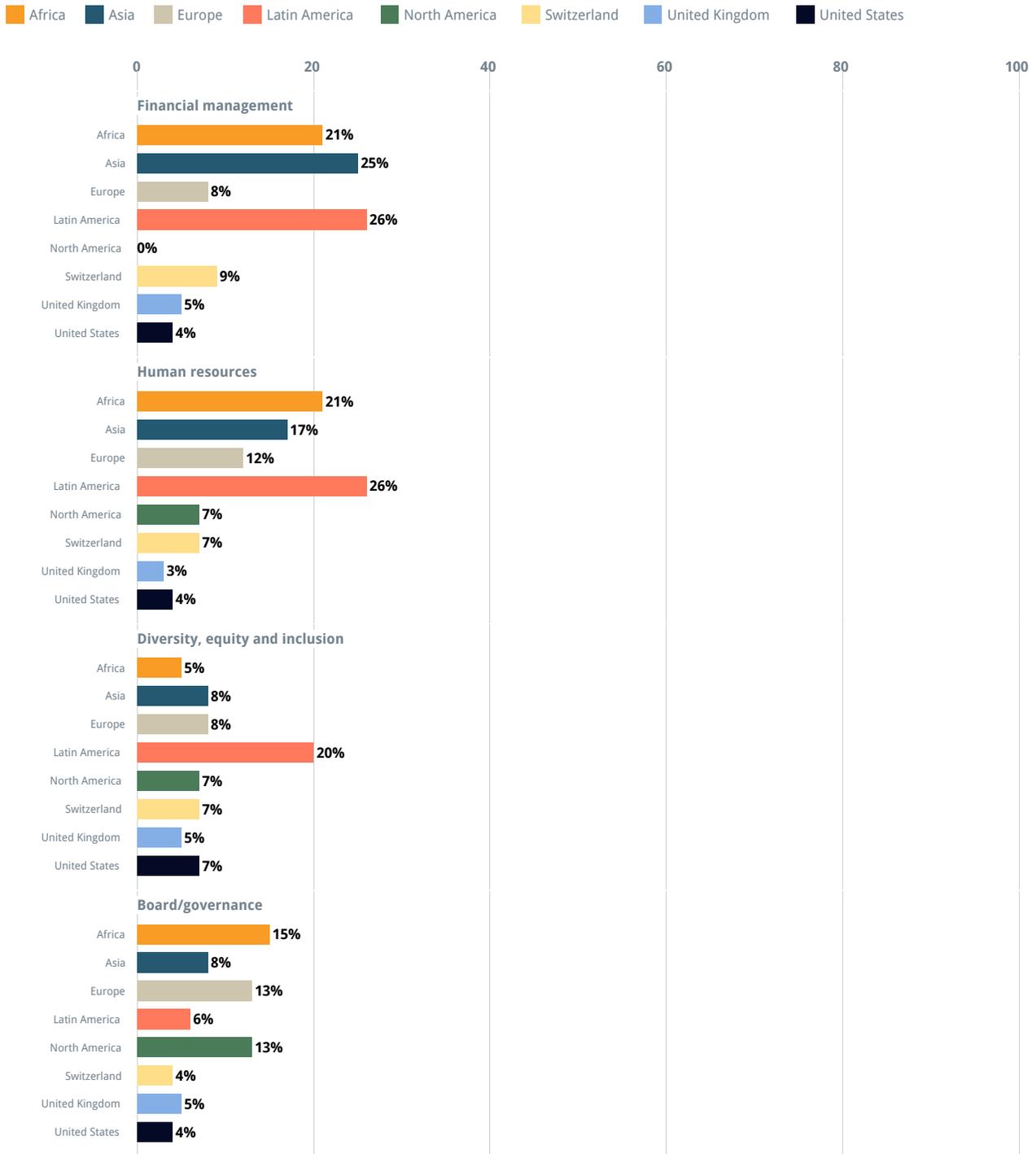
Please indicate whether you received capacity-building assistance (via any of the above methods) from Oak Foundation in any of the following areas: (Please check all that apply) - By Subgroup (cont.)

■ Africa
 ■ Asia
 ■ Europe
 ■ Latin America
 ■ North America
 ■ Switzerland
 ■ United Kingdom
 ■ United States



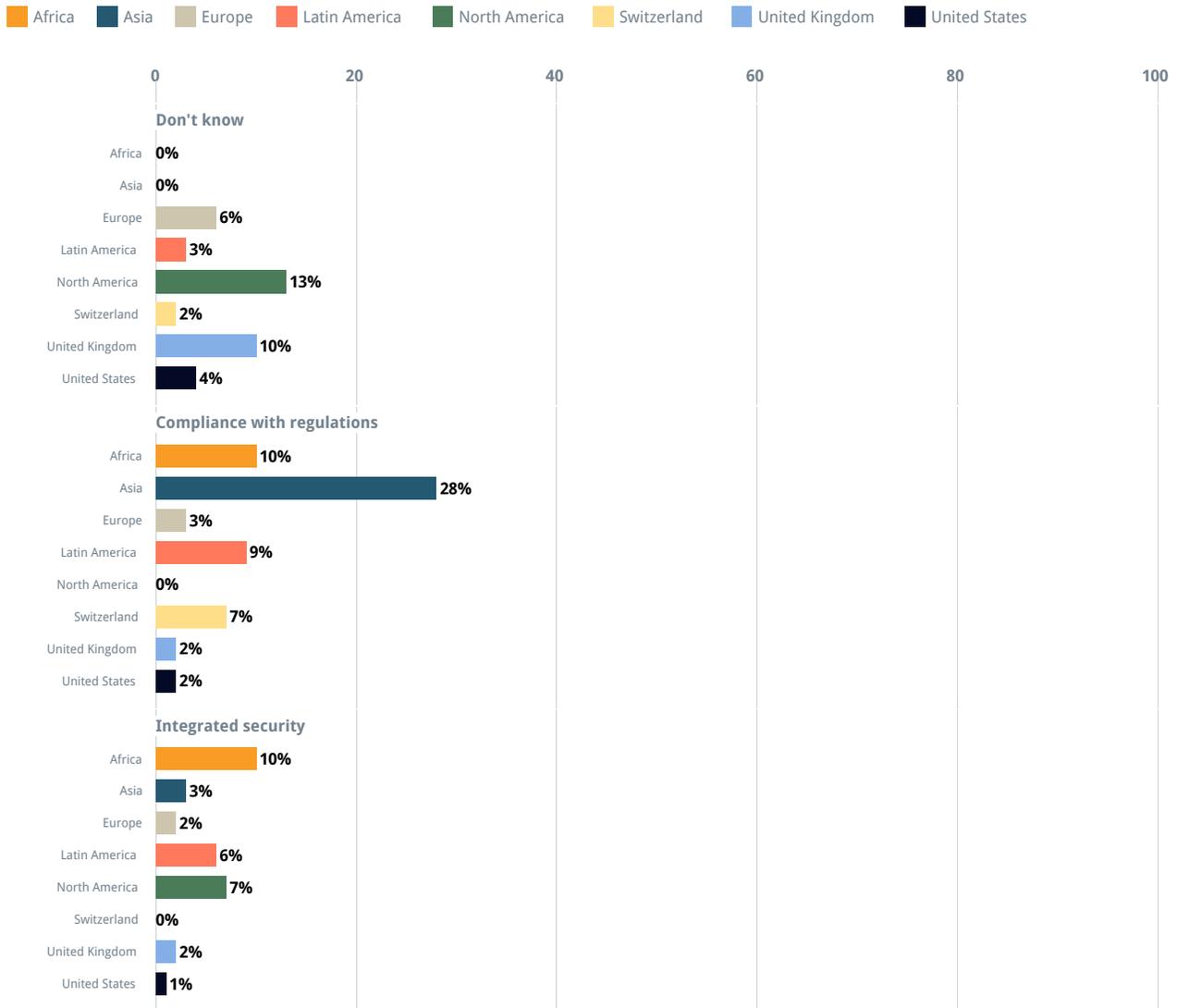
Subgroup: Geography

Please indicate whether you received capacity-building assistance (via any of the above methods) from Oak Foundation in any of the following areas: (Please check all that apply) - By Subgroup (cont.)



Subgroup: Geography

Please indicate whether you received capacity-building assistance (via any of the above methods) from Oak Foundation in any of the following areas: (Please check all that apply) - By Subgroup (cont.)



Subgroup: Geography

Given the small proportions of grantees receiving each type of support and a required minimum of 10 responses to show data, CEP has excluded subgroup charts for the question: "To what extent did these forms of capacity-building assistance help you strengthen your organisation's work?"

External Communications about Grantees

Has the Foundation communicated externally about your organisation or your grant in any of the following ways? (Please check all that apply)

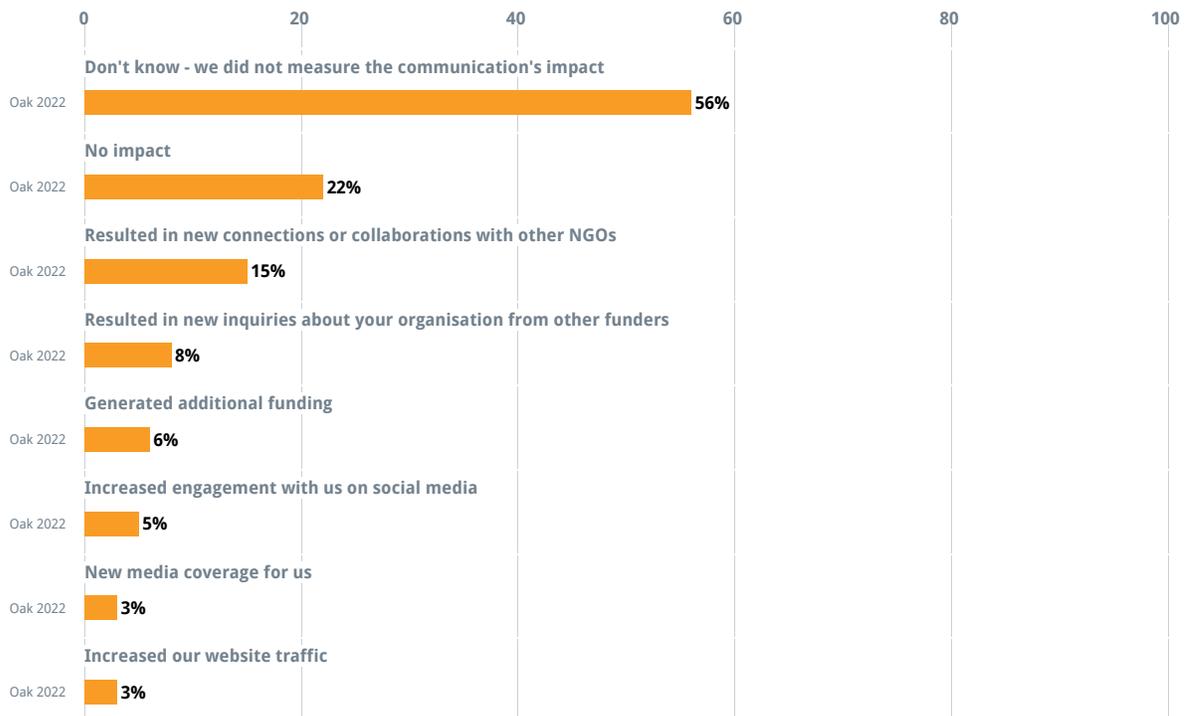
Oak 2022



Cohort: None Past results: on

If the Foundation communicated externally about your organisation or grant, what impact did that communication have? (Please check all that apply)

Oak 2022

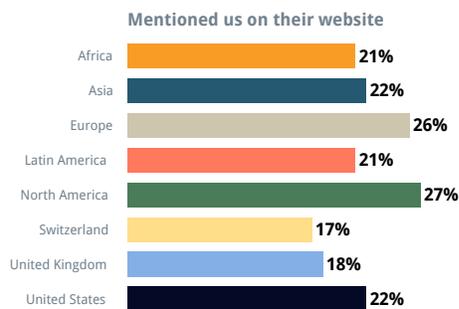
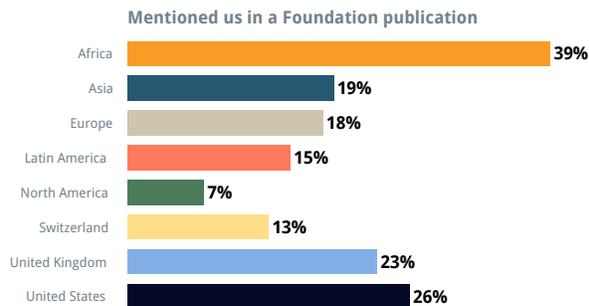
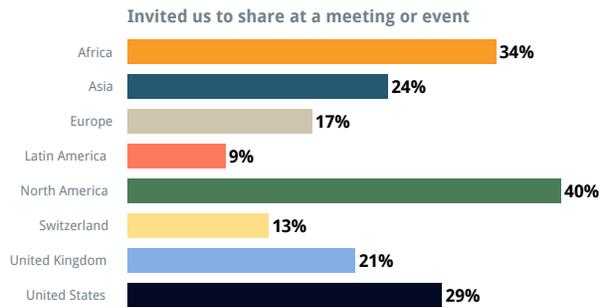
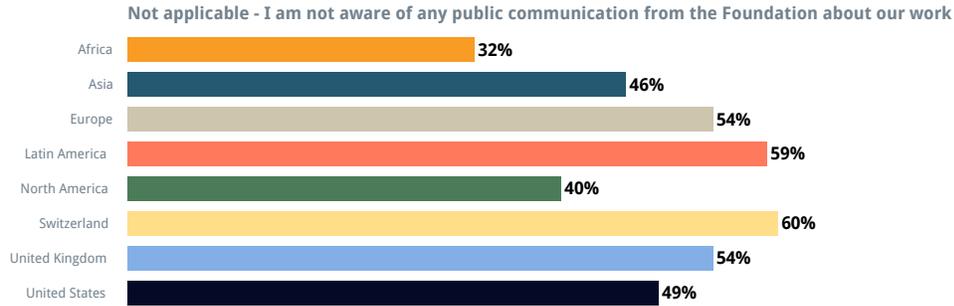


Cohort: None Past results: on

By Subgroup

Has the Foundation communicated externally about your organisation or your grant in any of the following ways? (Please check all that apply) - By Subgroup

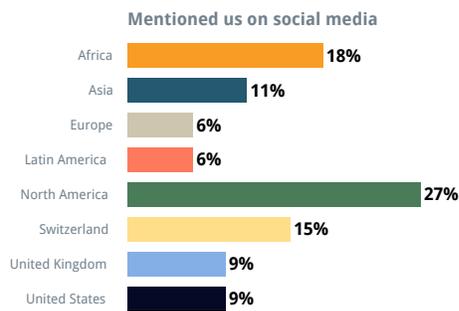
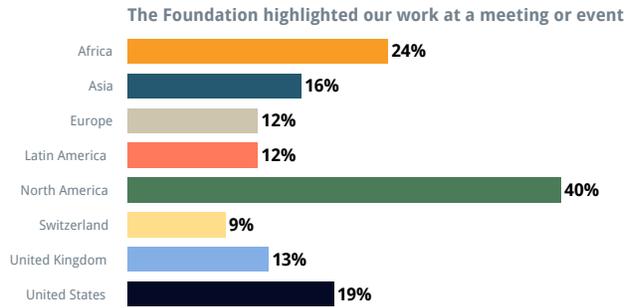
■ Africa
 ■ Asia
 ■ Europe
 ■ Latin America
 ■ North America
 ■ Switzerland
 ■ United Kingdom
 ■ United States



Subgroup: Geography

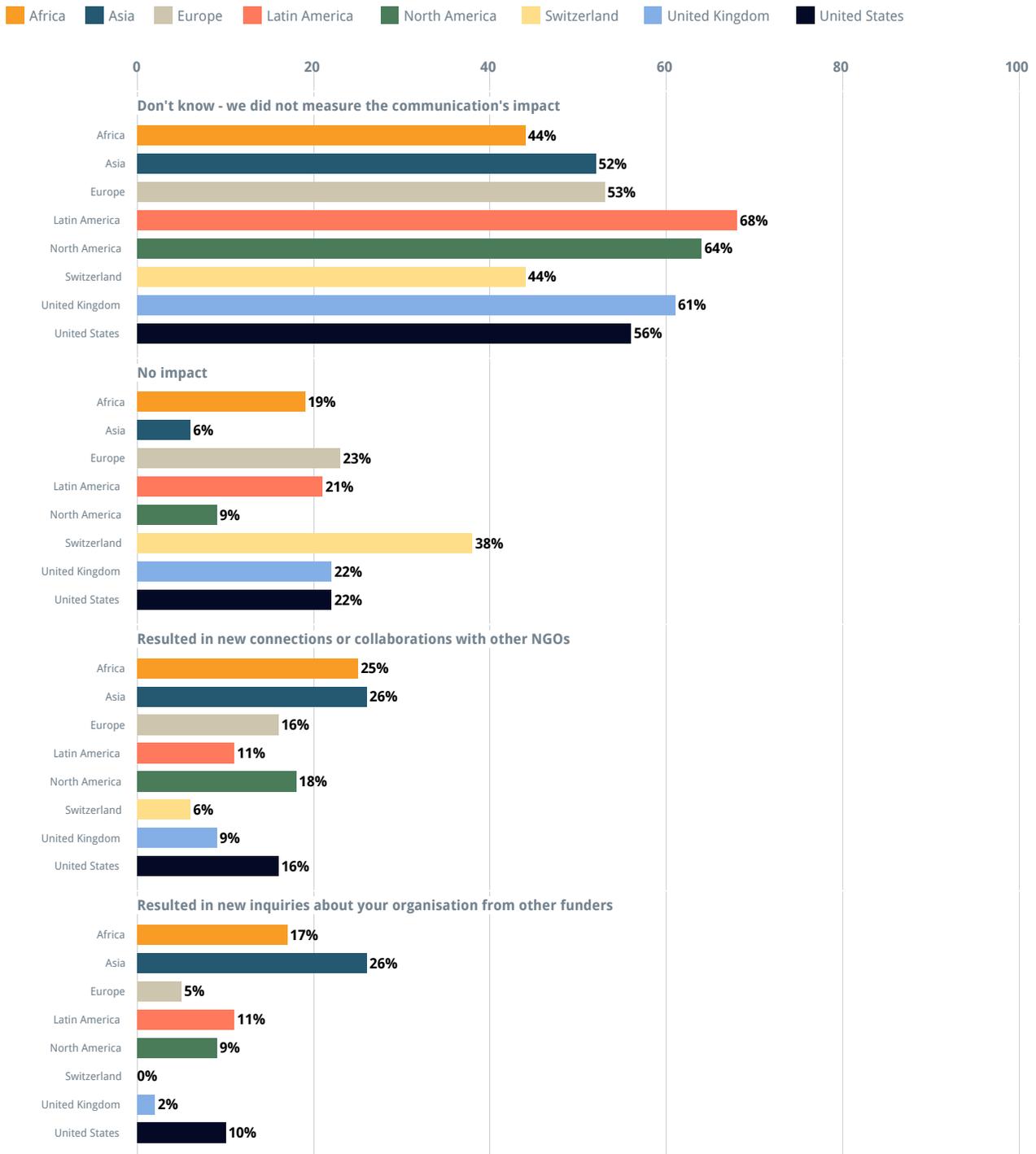
Has the Foundation communicated externally about your organisation or your grant in any of the following ways? (Please check all that apply) - By Subgroup (cont.)

■ Africa
 ■ Asia
 ■ Europe
 ■ Latin America
 ■ North America
 ■ Switzerland
 ■ United Kingdom
 ■ United States



Subgroup: Geography

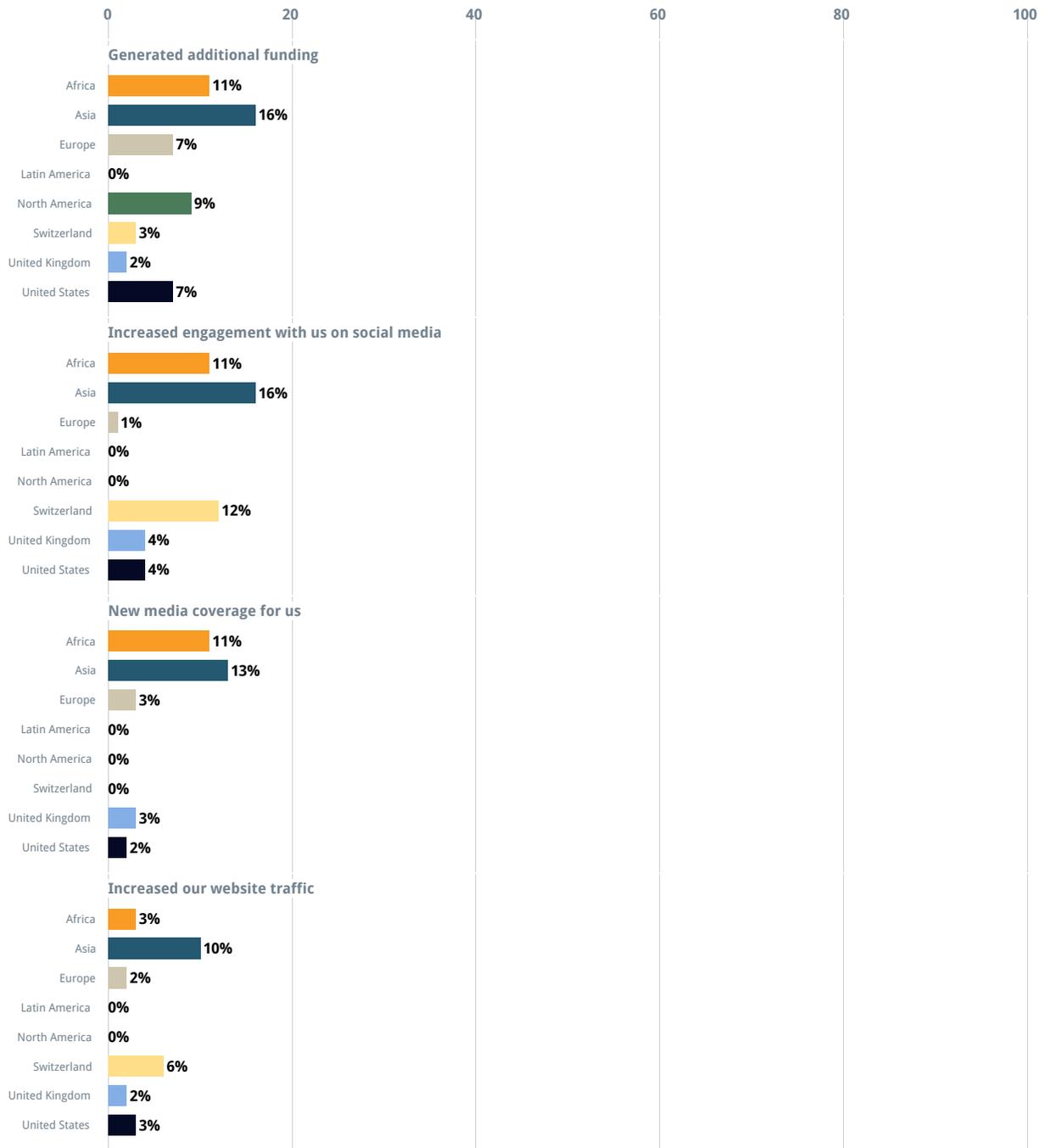
If the Foundation communicated externally about your organisation or grant, what impact did that communication have? (Please check all that apply) - By Subgroup



Subgroup: Geography

**If the Foundation communicated externally about your organisation or grant, what impact did that communication have?
(Please check all that apply) - By Subgroup (cont.)**

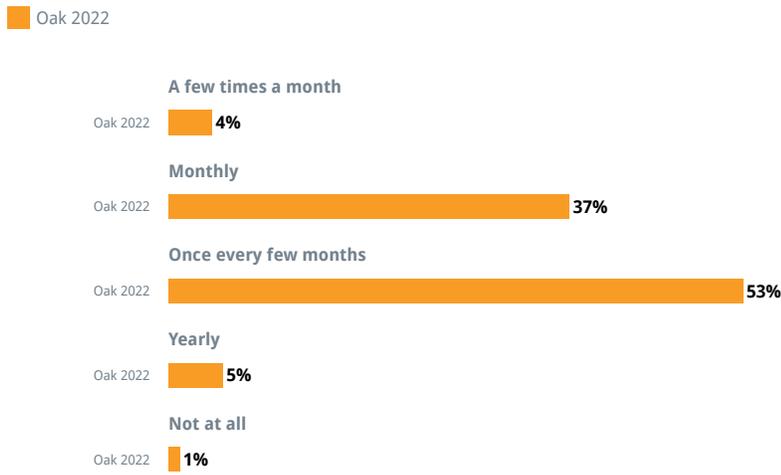
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 ■ Switzerland
 ■ United Kingdom
 ■ United States



Subgroup: Geography

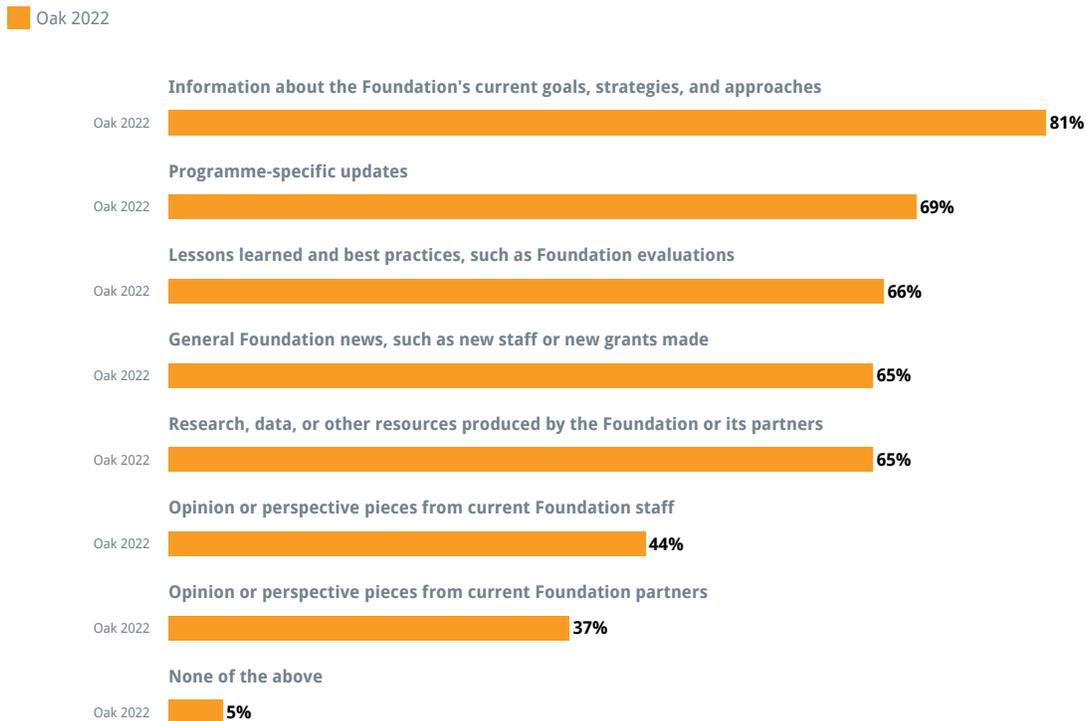
Communications with Grantee Organizations

How frequently would you like to be receiving general communication from the Foundation about its overall work (e.g., newsletters, general emails, updates on issues the Foundation cares about)?



Cohort: None Past results: on

In addition to the direct communications that you have with programme officers at the Foundation, please indicate any of the topics of communication that it is helpful for you to receive – or continue receiving – from the Foundation.

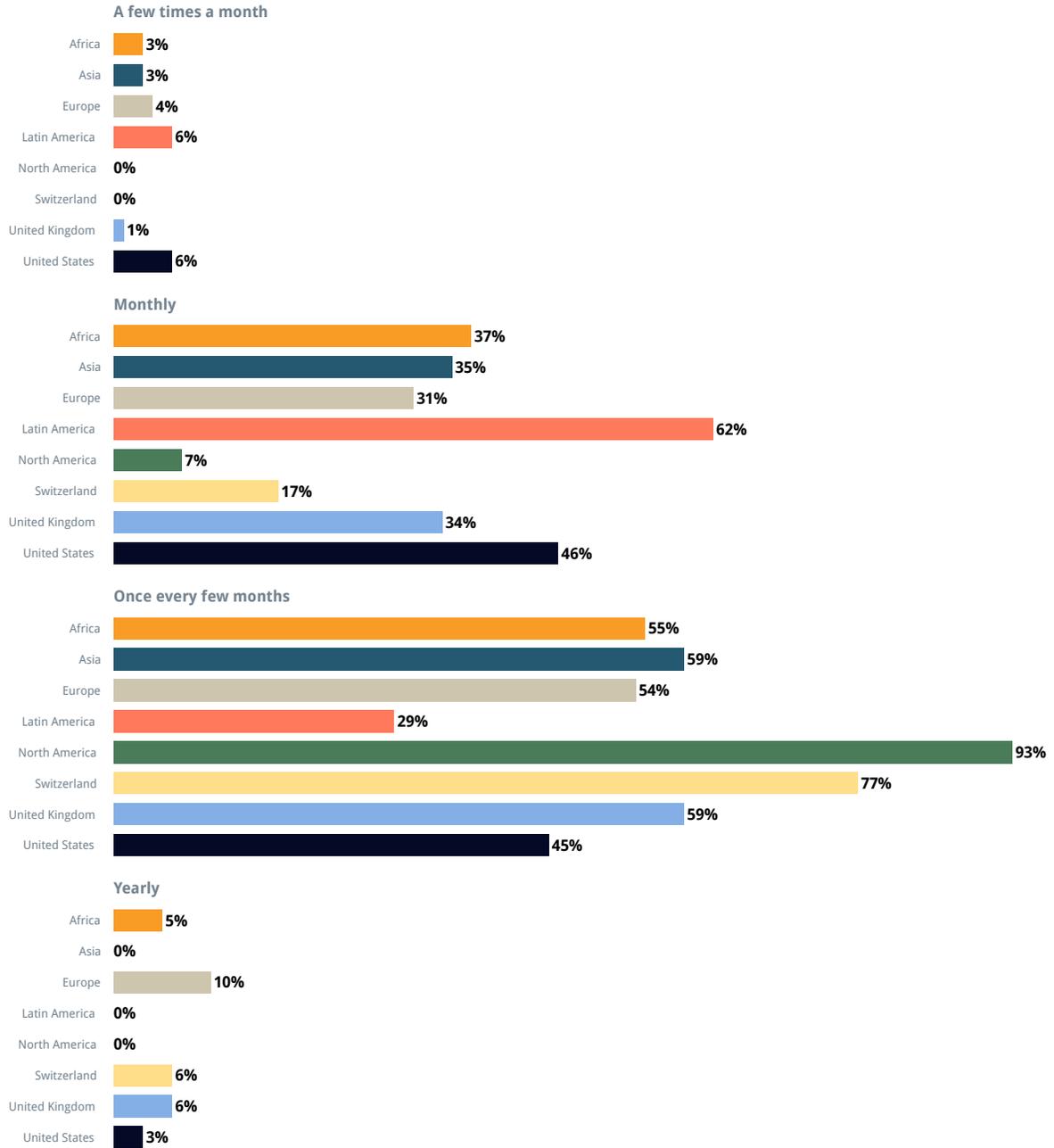


Cohort: None Past results: on

By Subgroup

How frequently would you like to be receiving general communication from the Foundation about its overall work (e.g., newsletters, general emails, updates on issues the Foundation cares about)?

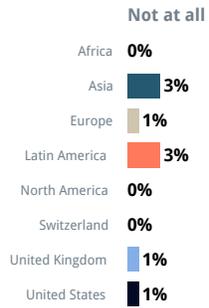
■ Africa
 ■ Asia
 ■ Europe
 ■ Latin America
 ■ North America
 ■ Switzerland
 ■ United Kingdom
 ■ United States



Subgroup: Geography

How frequently would you like to be receiving general communication from the Foundation about its overall work (e.g., newsletters, general emails, updates on issues the Foundation cares about)? (cont.)

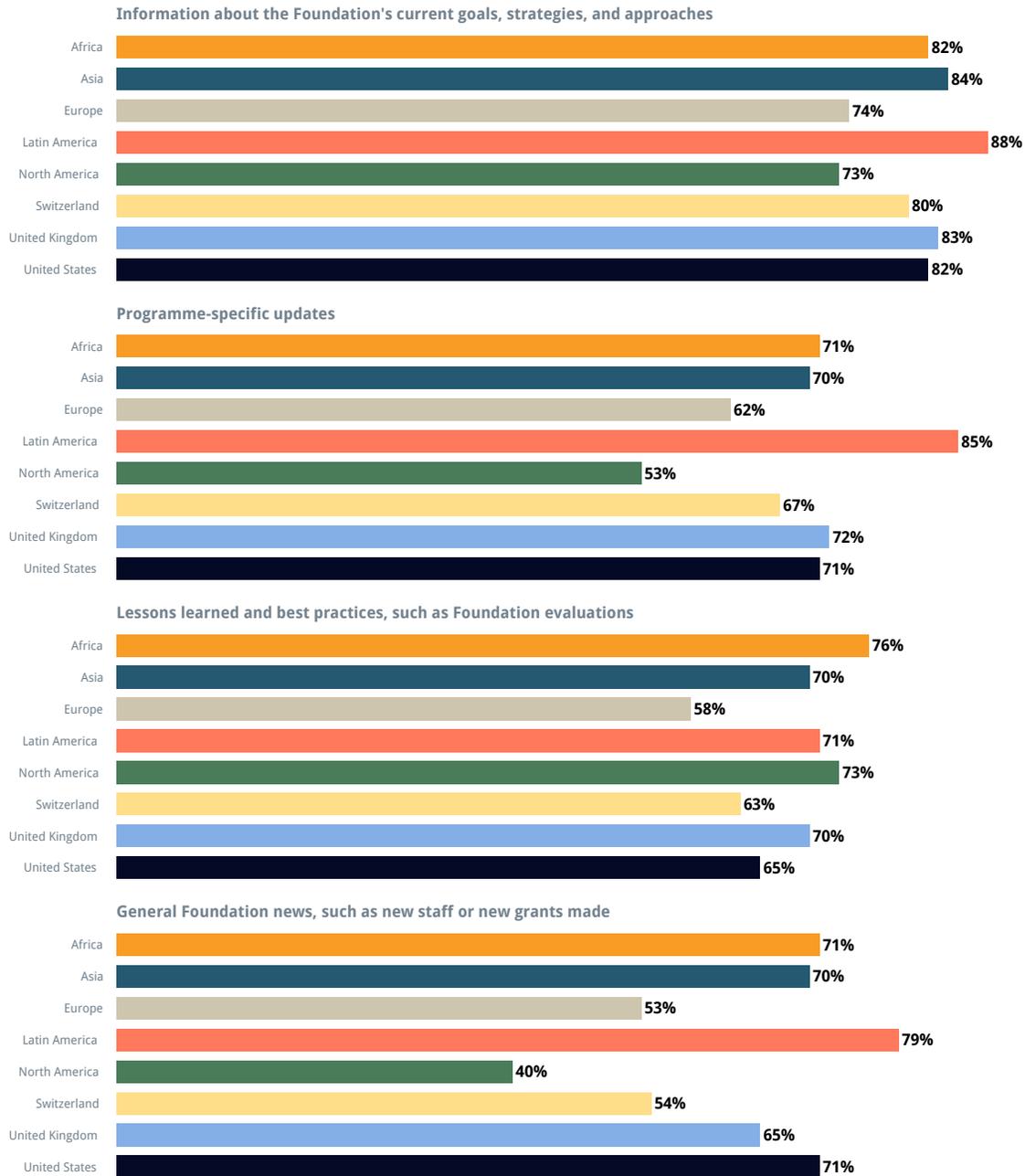
Africa Asia Europe Latin America North America Switzerland United Kingdom United States



Subgroup: Geography

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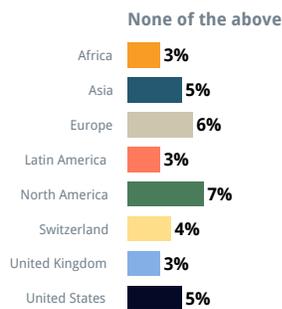
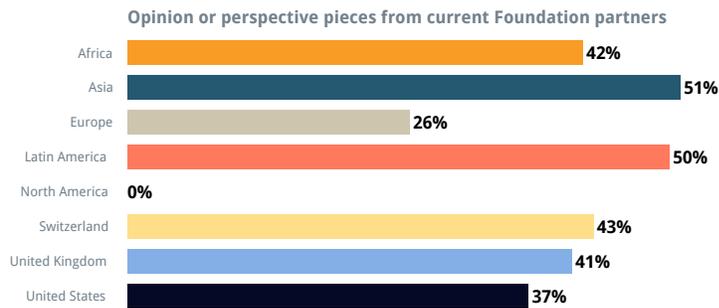
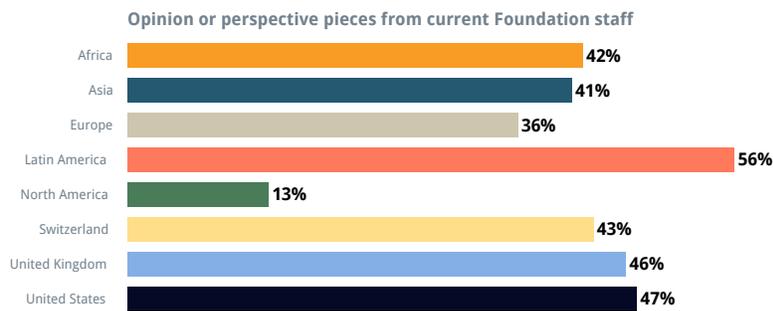
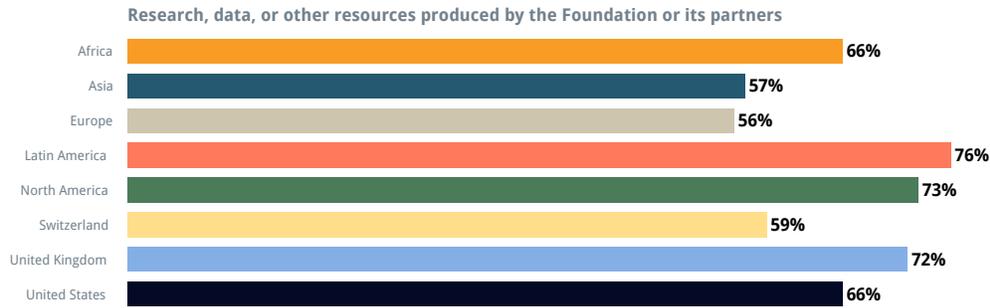
Africa Asia Europe Latin America North America Switzerland United Kingdom United States



Subgroup: Geography

In addition to the direct communications that you have with programme officers at the Foundation, please indicate any of the topics of communication that it is helpful for you to receive – or continue receiving – from the Foundation. (cont.)

■ Africa
 ■ Asia
 ■ Europe
 ■ Latin America
 ■ North America
 ■ Switzerland
 ■ United Kingdom
 ■ United States



Subgroup: Geography

Communication Mediums

Through which media vehicles would you prefer to receive the communications about the topics you selected? (Please check all that apply)

	Twitter	LinkedIn	Email Newsletter	Website	Podcasts	Videos	Webinars	Annual Report
General Foundation news, such as new staff or new grants made	10%	10%	90%	24%	5%	6%	11%	29%
Programme-specific updates	9%	6%	90%	24%	4%	9%	19%	23%
Information about the Foundation's current goals, strategies, and approaches	6%	5%	84%	32%	4%	9%	20%	31%
Lessons learned and best practices, such as Foundation evaluations	8%	6%	78%	26%	12%	14%	35%	26%
Research, data, or other resources produced by the Foundation or its partners	9%	8%	83%	33%	9%	10%	31%	25%
Opinion or perspective pieces from current Foundation staff	16%	13%	82%	29%	17%	13%	20%	15%
Opinion or perspective pieces from current Foundation partners	13%	12%	78%	29%	16%	14%	24%	18%

Grantees' Written Comments

In the Foundation's Grantee Perception Report survey, CEP asks three written questions:

1. "Please comment on the quality of Oak's processes, interactions, and communications."
2. "Thinking beyond the grant you received, please comment on how Oak influences your field, community, or organisation."
3. "What specific improvements would you suggest that would make Oak a better funder?"

Oak also asked two customized written questions, which are shared verbatim without further analysis in the downloadable attachments:

4. For grantees who indicated receiving capacity building support: "Please comment on the capacity-building assistance you received. What did you appreciate about the capacity building assistance you received? What would you suggest to improve Oak's capacity building support?"
5. For grantees who indicated not receiving or not knowing if they received capacity building support: "The Oak Foundation is reviewing the types and approaches to capacity building it provides. What types and approaches of capacity-building support would be most valuable for your organisation now?"

To download the full set of grantee comments and suggestions, please refer to the "Attachments" dropdown menu at the top right of your report. CEP's standard questions may be redacted or removed to protect the confidentiality of respondents. Oak's customized questions are shared verbatim, as clearly indicated to grantees in the question text.

CEP's Qualitative Analysis

CEP conducts comprehensive qualitative analysis on two of these questions in the GPR.

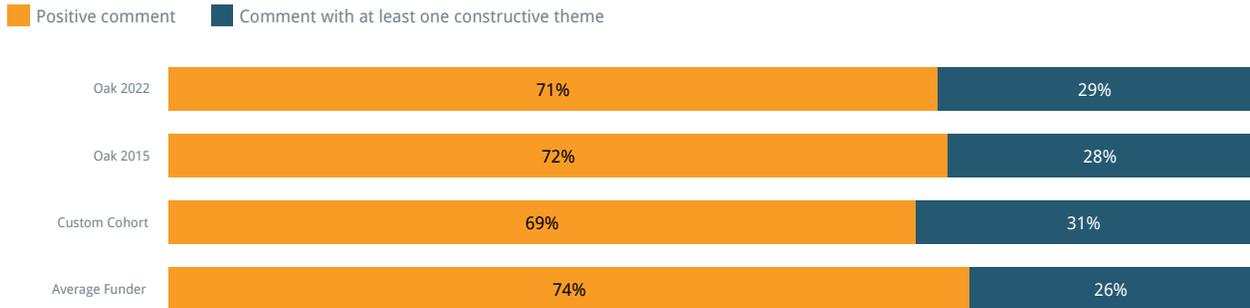
The following pages outline the results of CEP's analyses.

Quality of Processes, Interactions and Communications

Grantees were asked to comment on the quality of Oak's processes, interactions, and communications. Their comments were then categorized by the nature of their content, specifically whether the content is positive, neutral or constructive.

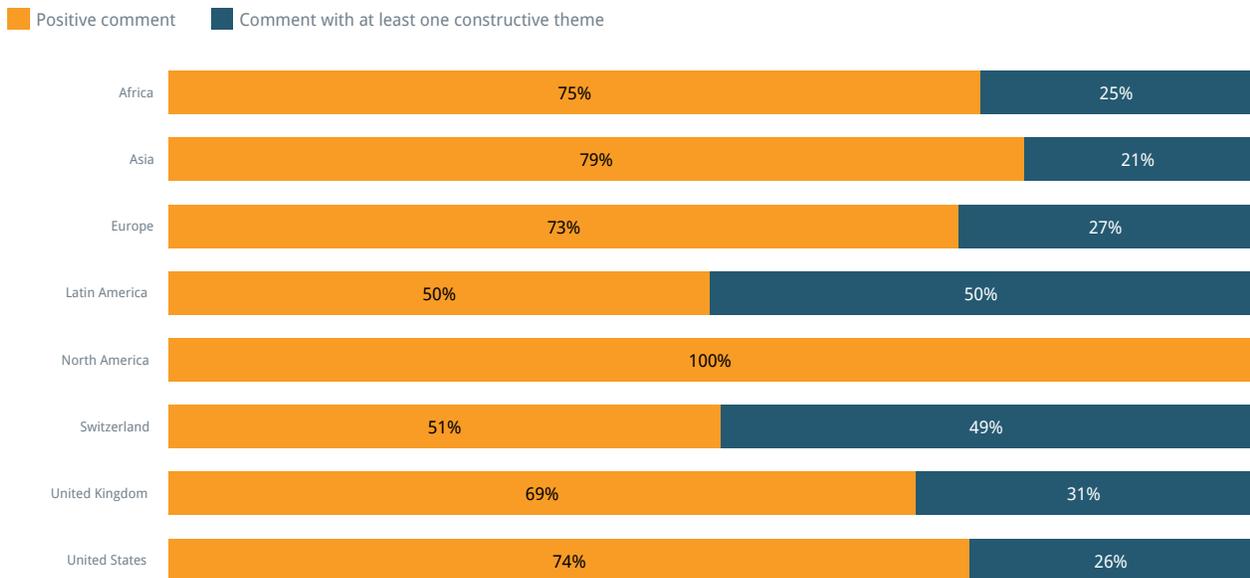
For a comment to be categorized as constructive, there must have been at least one constructive topic in its content.

Positivity of Comments about the Quality of Oak's Processes, Interactions, and Communications



Cohort: Custom Cohort Past results: on

Positivity of Comments about the Quality of Oak's Processes, Interactions, and Communications - By Subgroup



Subgroup: Geography

Suggestion Themes

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

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Processes	27%
Focus and Approach to Impact	19%
Grantmaking Characteristics	18%
Non-Monetary Support	15%
Interactions with Grantees	11%
Communicating Strategy and Impact	10%
Foundation Staff	1%

Selected Suggestions

Grantees were asked to provide suggestions for how the Foundation could improve. A total of 508 Oak Foundation grantees responded to this question. CEP redacted all comments and selected a random sample of 250 to code. To ensure representation across groups for thematic analysis, CEP's random sample was stratified by the following: programme, subprogramme, geography, grant size, grant type, capacity building supports received, respondent gender, and respondent person of color identity (U.S.-based only).

Overall, the 250 grantee comments generated a total of 278 distinct suggestions. The 278 suggestions were thematically categorized by CEP and grouped into the topics below. All proportions quoted are with respect to the 278 distinct coded suggestions.

Processes (27% N=74)

- Streamline and Simplify Process Requirements (N = 20)
 - "Perhaps Oak might be open to using [a] common proposal and reporting document to have its grantees apply for funding and streamline the back and forth."
 - "Reduced / simplified reporting requirements to enable more time to be spent directly on project deliverables."
 - "The requirement for all grantees to be audited (as opposed to having their accounts independently examined) is unusual for a charity the size of [ours], and may be excessive."
- Clarify Process Criteria, Timeline and Requirements (N = 15)
 - "Although the lack of rigid deadlines for funding applications allows for some flexibility, it also can make it difficult to plan. It would be helpful to know that if we apply by X date, we can expect a decision by Y date, funding in hand by Z date, etc."
 - "Outline all steps involved in the grant application process, possibly in written form, and in what timeframe."
 - "It would be helpful for Oak to share their evaluation rubric with applicants so that we better understand what they are looking for and how our application is being evaluated."
- Challenges with Online Portal and Templates (N = 10)
 - "Improve the software used for submitting reports and applications."
 - "Update the portal to be more user friendly."
 - "A much more simplified financial reporting mechanism/process would also be valuable as this caused a number of problems throughout the grant - it was very confusing and the uploading portal was very clunky and difficult to work with."
- Support for Grant End and Processes for Renewal (N = 9)
 - "Guidance on whether future funding might be possible for supporting another developmental need or program would be helpful, but that may yet be made known."
 - "Consider... easier renewal processes for ongoing successful grants."
 - "We would value interactions with Oak now about what comes [after a grant closes] from a perspective of ensuring the sustainability of the processes we are involved in that are of crucial importance to our partners."
- Miscellaneous (N = 7)
 - "We would suggest developing processes for intermediary partners."
 - "Be a resource in completing the application."
 - "As a sector we need to shift our focus to learning rather than monitoring and accountability, so ideally the way we report to and engage with funders should reflect that approach."
- Shorten Time for Award Decisions and Grant Payments (N = 7)
 - "A faster turnaround in the review of some reports and disbursements."
 - "Bureaucratically they could move a lot quicker - from agreeing to fund to signing an agreement and receiving funding can take several months. For a small organisation this can impact on cash flow."
- Increase Flexibility (N = 3)
 - "Less tight deadlines when it comes to the application process."
- Pressure on Grantee Organizations During Processes (N = 3)
 - "Fund organizations as they are and not try to redirect the mission."

Focus and Approach to Impact (19% N=53)

- Specific Issue Focus (N = 15)
 - "Continue funding torture prevention!"
 - "Greater openness to addressing the social and economic dimensions of human rights, and the need for human rights strategies to address growing inequality."
 - "In the context of the contemporary challenges of climate change and conservation of nature it should focus more on the indigenous peoples of the

world, and of India in particular."

- Influence other Funders and Stakeholders (N = 10)
 - "Being more vocal with other funders to raise awareness and share the need to focus on core grants and invest in people, organizations, networks and in building wider alliances and partnerships. It would be fundamental to transform the philanthropic sector and achieve a real lasting social change."
 - "I would urge Oak to have a more activist voice in its spaces. It does this to a large extent but I think the years of credibility in its topics, the technical skills of its staff, and the world we're in all suggest to me that Oak could use its voice more directly with other donors, with governments, with the corporate sector and with wealthy individuals and the media - of course."
 - "Look for ways to use the foundation's voice and influence to elevate issues in the field."
- Approach to Work (N = 9)
 - "Keep investing in networks who anchor movements allowing investing in their priorities and functioning."
 - "As a global funder with themes at that level, it means that geographically specific needs and issues are hard to meet. There is such a broad brush used to cover an entire theme, it means it misses local nuances and, in turn this means that the Foundation doesn't / can't look outside of a narrow focus when it comes to making grant-making decisions. Anything that doesn't directly fit the box, even if it could have really great impact and outcomes in a local area is ignored or dismissed. I think having localised focuses for geographies in which the foundation works would help with this."
 - "Can feel siloed in how they categorize grantees. As organisations become more intersectional, they don't feel geared to respond to this, to support those that work across different ecosystems."
- Seek Strategic Input from Grantees (N = 6)
 - "More opportunities for its grantees to input into its strategic planning and decisions."
 - "Listen to the people running programs."
 - "We appreciate that Oak also conducts evaluations where they ask grantees how they can strengthen their strategies. All these show a commitment to support transformative change efforts and a commitment to strengthen their own strategies and practices to do this effectively. These are not areas of improvement, but rather things to continue to do."
- Deepen Understanding of Grantee Organizations and Challenges (N = 5)
 - "Opportunities to present the organisational ambitions and needs (not limited to the programmes being funded) would be helpful - so the way in which proven methodologies and approaches can be applied to new issues."
 - "Better adapt the objectives and outcomes of projects funded to the social, institutional, political and cultural contexts of the countries where those projects are implemented."
- Foster Understanding of Those Affected by Funded Work (N = 5)
 - "More understanding of the experiences of our beneficiaries."
 - "Attentive listening to the most vulnerable groups strengthens the work overall and makes it easier to channel funding toward diverse, relevant, and respectful solutions."
- Incorporating Diversity, Equity, and Inclusion Lens (N = 3)
 - "It would be helpful if Oak embraced DEI and racial equity policies throughout all of its program areas."

Grantmaking Characteristics (18% N=49)

- Multi-Year, Unrestricted Grants (N = 16)
 - "The importance and value of core and flexible multi-year funding, for us to build capacity and grow the climate ecosystem, pursue our mission in a context that is crisis after crisis, and innovate and scope new work."
 - "Oak should continue to give multi-year flexible support which really helps sustain our work."
 - "Core support - not many funders offer core support to organisations."
- Additional and/or Flexible Funding (N = 13)
 - "Oak should include provisions for social security in its grant such as - health insurance, EPF/PF, etc."
 - "Better support overall financial health of the organization, e.g. raise indirect rate, make more funding available for staff training and evaluation efforts that do not come directly out of the grant budget."
 - "We would like to have the opportunity to receive additional assistance to reformat the work and [create programs in response to a national emergency]."
- End Limits to Supporting Grantees (N = 12)
 - "Eliminate any term limits on supporting an organization."
 - "Making a long-term commitment to their partners is invaluable because the activities we do are becoming more difficult and unpredictable these days."
 - "One issue I would raise is possibly thinking about the longer term support for organisations. I understand the balance between funding new organisations with the those with a track record and a history is difficult. Organisations don't want to be dependent but with limited income streams it is a huge challenge to secure alternative funding... We have been a grant recipient for many years and the loss of this funding would have an impact on our services in that it prevents us from growing/improving/developing. Perhaps re-consider if there is a cut-off point?"
- Support for Co-Funding Requirements (N = 6)
 - "It is challenging to secure 50% of the budget of submitted proposals. As a donor, the foundation would be more supportive if they lowered this

- requirement."
- "The high % of co-funding requirement is a challenge, especially given the donor fundraising climate. If this can be reduced to 80-20% it would align more strongly with trends of other donors."
- "For some small organizations, it can be difficult to meet the matching requirement. We appreciate the flexibility given to meet the match but we often found ourselves putting administrative/indirect costs towards match."
- Other (N = 2)
 - "Better scaled funding for different types of organizations."

Non-Monetary Support (15% N=41)

- Facilitate Grantee Connections and Collaborations (N = 23)
 - "It would be great if Oak could convene their grantees for each area of focus to share ideas and challenges and solutions (even across different countries)."
 - "I would like Oak to conduct an in-person meeting with program officers and other grantees so we can have a better sense of the ecosystem and how we can seek support or provide support to this network."
 - "Promotion of meetings/seminars to bring grantees together with similar agendas to exchange experiences and strengthen alliances."
- Connect Grantees to Funders (N = 10)
 - "It would be great if they... were willing to make introductions to other funders that we otherwise would have to cold call."
 - "Support to secure new donors."
 - "More willingness to be ombudspersons for grantees to other funders."
- Support Capacity Building (N = 5)
 - "Oak should increase capacity building workshops for its partners, twice or thrice a year."
 - "To have more trainings and more exchange programs even with other countries if possible."
- Elevate Grantees' Work (N = 3)
 - "The Oak Foundation could be more supportive in highlighting our project on their website, in their digital/social media, in Oak publications, including our organization in panel discussions/webinars, etc. to increase the visibility of our work to the field."

Interactions with Grantees (11% N=30)

- More Frequent Interactions (N = 17)
 - "More regular meetings with the grant manager might help to develop a better understanding of the work we are doing - and if there are other things we could be doing."
 - "We have had good development talks with our contact in the past. It will be good to continue this and turn it up."
 - "Increased follow-up and support during the execution of projects."
- Improve Responsiveness (N = 8)
 - "Quicker responses or automatic responses to provide reassurances during busy periods that messages have been received."
 - "Respond to emails, communicate with your grantees, think about your grantees and reach out to them with some regularity. There are very simple ways, that don't take time, to maintain a professional level of communication with grantees. Giving support is great and helpful. Giving support and completely disregarding your grantees and never responding to anything is not the way a foundation should work."
 - "The staff also seem constantly overwhelmed and the Foundation should consider increasing support and/or junior and administrative staff to allow for faster response times."
- Reduce Power Dynamics in Interactions (N = 4)
 - "Be open to engagement on the development of mutual strategies to enhance alignment and have greater impact. While the engagements are respectful and understanding it still reflects a funder-grantee relationship that comes with particular power dynamics. Adopting a true partnership approach would be mutually beneficial."
 - "Oak would be a better funder if it were more flexible and trusted communities' abilities more. At times it seems that Oak is moving in the direction of being more like larger donors with highly structured work plans and timetables that can limit creativity and local problem-solving. It sometimes has a tendency to impose its own ideas (or those of an 'expert' it has hired as a consultant)."

Communicating Strategy and Impact (10% N=28)

- Clearly Communicating Strategy and Goals (N = 9)
 - "Greater transparency in the evolution and development of programmatic focus and strategic development."
 - "It would be good to receive more information on relevant developments at the organisation - for example we only know that they have a new strategy from 2021-2026 because we have gone to the website, this was not directly communicated."
 - "Having an overall document on Oak's objectives would also be useful."
- Providing Information on Foundation's Work and Impact (N = 9)
 - "Oak could tell more about their collaborations and how they solve societal problems together."
 - "It would be great to receive semi annual or annual updates from Oak about their grant-making priorities, accomplishments, challenges, etc. (a brief

- annual report of sorts)."
 - "I would suggest being clearer with grantees about their anti-racist initiatives they are doing within the org. What are they doing to promote DEIJ among their Board members and staff? Are they trying to hire or meet a certain diversity mark among their board and staff?"
- Connecting Funded Work into Foundation Strategy (N = 5)
 - "I really don't have a sense of Oak's funding priorities and how our work fits into them or not. There is not a lot of transparency around how decisions are made and why certain materials are necessary to support decision making. I would definitely appreciate more insight into Oak's grantmaking."
 - "We experienced a basic contradiction in Oak's funding strategy: At one side we have been encouraged to develop our own strategy which fits to OUR needs and OUR organisational culture. At the same time Oak gave us to understand that they know exactly what is the RIGHT strategy for us. Both approaches seem ok to us. But to mix these two approaches is very difficult to handle and left us regularly quite helpless what we should do now. "
- Managing Changes to Strategy (N = 3)
 - "Internal reorganising feels very drawn out and leads to a hold on conversations and longer-term, consistent funding. "
- General Feedback (N = 2)
 - "Continue to be transparent when working with grantees."

Foundation Staff (1% N=3)

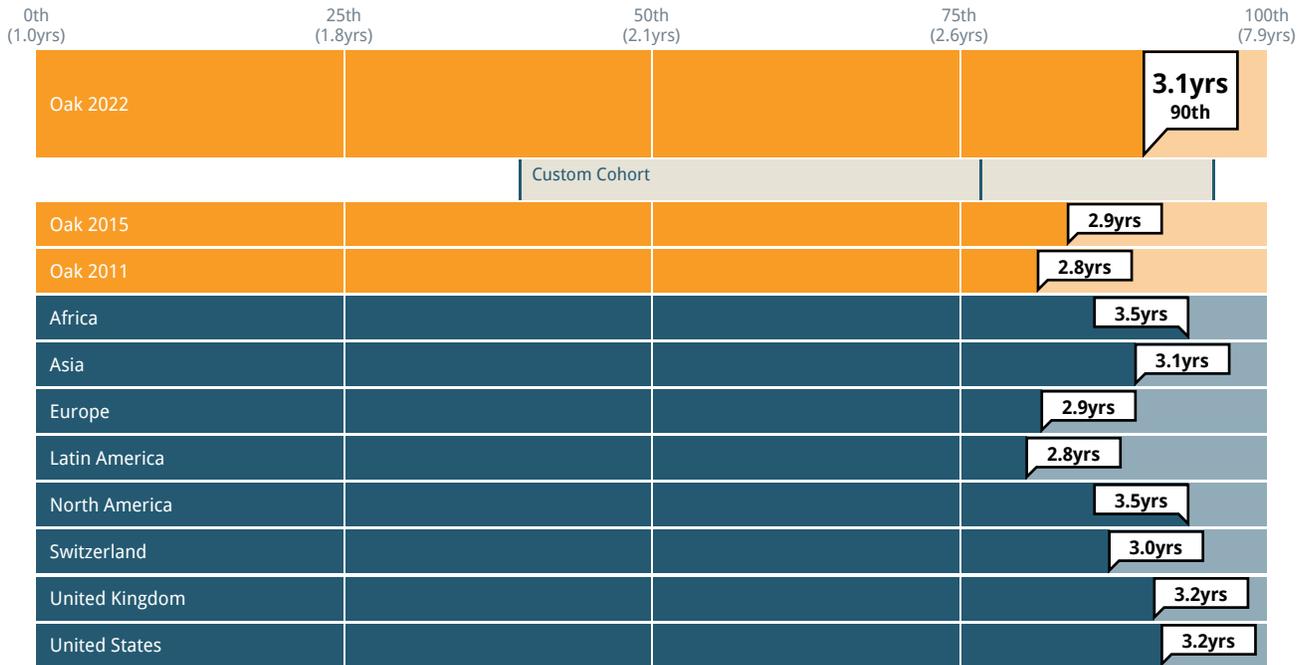
- Foundation Staff (N = 3)
 - "Perhaps it would be beneficial if the people who interact directly with organizations had more decision-making powers."

Contextual Data

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

Grantmaking Characteristics

Average Grant Length



Cohort: Custom Cohort Past results: on Subgroup: Geography

Selected Cohort: Custom Cohort					
Length of Grant Awarded	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Average grant length	3.1 years	2.9 years	2.8 years	2.1 years	2.6 years

Selected Cohort: Custom Cohort					
Length of Grant Awarded	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
0 - 1.99 years	12%	12%	14%	48%	26%
2 - 2.99 years	15%	18%	28%	22%	29%
3 - 3.99 years	49%	54%	49%	19%	27%
4 - 4.99 years	10%	7%	2%	3%	7%
5 - 50 years	15%	9%	7%	8%	10%

Selected Cohort: Custom Cohort			
Proportion of Unrestricted Funding	Oak 2022	Average Funder	Custom Cohort
No, this funding was not restricted to a specific use (i.e. general operating, core support)	39%	26%	25%
Yes, this funding was restricted to a specific use (e.g. supported a specific program, project, capital need, etc.)	61%	74%	75%

Grantmaking Characteristics - By Subgroup

Selected Subgroup: Geography	
Length of Grant Awarded (By Subgroup)	
Average grant length	
Africa	3.5 years
Asia	3.1 years
Europe	2.9 years
Latin America	2.8 years
North America	3.5 years
Switzerland	3 years
United Kingdom	3.2 years
United States	3.2 years

Selected Subgroup: Geography					
Length of Grant Awarded (By Subgroup)					
	0 - 1.99 years	2 - 2.99 years	3 - 3.99 years	4 - 4.99 years	5 - 50 years
Africa	25%	10%	42%	8%	15%
Asia	15%	12%	47%	18%	9%
Europe	18%	14%	54%	5%	9%
Latin America	17%	20%	54%	6%	3%
North America	7%	7%	40%	27%	20%
Switzerland	12%	21%	50%	6%	10%
United Kingdom	14%	12%	44%	10%	20%
United States	6%	17%	49%	11%	16%

Selected Subgroup: Geography		
Proportion of Unrestricted Funding (By Subgroup)		
	No, this funding was not restricted to a specific use (i.e. general operating, core support)	Yes, this funding was restricted to a specific use (e.g. supported a specific program, project, capital need, etc.)
Africa	22%	78%
Asia	38%	62%
Europe	37%	63%
Latin America	69%	31%
North America	40%	60%
Switzerland	44%	56%
United Kingdom	43%	57%
United States	36%	64%

Grant Size

Selected Cohort: Custom Cohort					
Grant Amount Awarded	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Median grant size	\$500K	\$308K	\$300K	\$100K	\$400K

Selected Cohort: Custom Cohort					
Grant Amount Awarded	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
Less than \$10K	2%	2%	1%	9%	2%
\$10K - \$24K	0%	0%	1%	12%	1%
\$25K - \$49K	1%	1%	2%	12%	2%
\$50K - \$99K	3%	6%	4%	15%	7%
\$100K - \$149K	5%	7%	9%	9%	6%
\$150K - \$299K	15%	26%	28%	16%	18%
\$300K - \$499K	19%	25%	26%	9%	15%
\$500K - \$999K	26%	18%	12%	8%	18%
\$1MM and above	27%	14%	17%	9%	31%

Selected Cohort: Custom Cohort					
Median Percent of Budget Funded by Grant (Annualized)	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	10%	10%	10%	4%	6%

Grant Size - By Subgroup

Selected Subgroup: Geography	
Grant Amount Awarded (By Subgroup)	
Median grant size	
Africa	\$317.5K
Asia	\$500K
Europe	\$413K
Latin America	\$430K
North America	\$900K
Switzerland	\$360K
United Kingdom	\$440.7K
United States	\$740.5K

Selected Subgroup: Geography									
Grant Amount Awarded (By Subgroup)									
	Less than \$10K	\$10K - \$24K	\$25K - \$49K	\$50K - \$99K	\$100K - \$149K	\$150K - \$299K	\$300K - \$499K	\$500K - \$999K	\$1MM and above
Africa	2%	0%	10%	12%	5%	15%	22%	20%	12%
Asia	0%	0%	0%	0%	9%	24%	15%	41%	12%
Europe	7%	0%	3%	4%	7%	17%	18%	25%	18%
Latin America	20%	0%	0%	0%	6%	11%	23%	17%	23%
North America	0%	0%	0%	0%	0%	20%	7%	27%	47%
Switzerland	0%	0%	0%	2%	4%	28%	23%	28%	15%
United Kingdom	1%	1%	1%	3%	7%	18%	26%	20%	23%
United States	0%	0%	0%	1%	3%	10%	16%	30%	39%

Selected Subgroup: Geography	
	Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)
	Size of grant relative to size of grantee budget
Africa	13%
Asia	13%
Europe	14%
Latin America	23%
North America	9%
Switzerland	12%
United Kingdom	10%
United States	5%

Grantee Characteristics

Selected Cohort: Custom Cohort					
Operating Budget of Grantee Organisation	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Median Budget	\$2M	\$1.5M	\$1.4M	\$1.5M	\$3M

Selected Cohort: Custom Cohort					
Operating Budget of Grantee Organisation	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
<\$100K	6%	5%	4%	8%	4%
\$100K - \$499K	13%	23%	24%	18%	12%
\$500K - \$999K	14%	15%	13%	13%	10%
\$1MM - \$4.9MM	35%	31%	30%	30%	29%
\$5MM - \$24MM	19%	15%	16%	18%	24%
>=\$25MM	13%	11%	13%	12%	22%

Grantee Characteristics - By Subgroup

Selected Subgroup: Geography	
Operating Budget of Grantee Organisation (By Subgroup)	
Median Budget	
Africa	\$0.8M
Asia	\$0.9M
Europe	\$1M
Latin America	\$0.7M
North America	\$4M
Switzerland	\$1.4M
United Kingdom	\$1.4M
United States	\$4.5M

Selected Subgroup: Geography						
Operating Budget of Grantee Organisation (By Subgroup)						
	<\$100K	\$100K - \$499K	\$500K - \$999K	\$1MM - \$4.9MM	\$5MM - \$24MM	>=\$25MM
Africa	16%	16%	24%	34%	11%	0%
Asia	4%	21%	25%	39%	7%	4%
Europe	12%	18%	17%	32%	16%	5%
Latin America	24%	15%	18%	33%	3%	6%
North America	0%	20%	0%	40%	40%	0%
Switzerland	4%	13%	20%	35%	15%	13%
United Kingdom	6%	17%	14%	34%	17%	13%
United States	0%	5%	9%	36%	27%	22%

Funding Relationship

Selected Cohort: Custom Cohort					
Funding Status	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from Oak	88%	90%	82%	82%	85%

Selected Cohort: Custom Cohort					
Pattern of Grantees' Funding Relationship with Oak	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
First grant received from Oak	29%	42%	43%	29%	32%
Consistent funding in the past	58%	46%	42%	54%	48%
Inconsistent funding in the past	12%	12%	15%	18%	20%

Funding Relationship - by Subgroup

Selected Subgroup: Geography	
Funding Status (By Subgroup)	
Percent of grantees currently receiving funding from Oak	
Africa	90%
Asia	85%
Europe	86%
Latin America	89%
North America	100%
Switzerland	88%
United Kingdom	85%
United States	89%

Selected Subgroup: Geography

Pattern of Grantees' Funding Relationship with Oak (By Subgroup)

	First grant received from Oak	Consistent funding in the past	Inconsistent funding in the past
Africa	30%	65%	5%
Asia	21%	71%	9%
Europe	29%	55%	16%
Latin America	29%	66%	6%
North America	20%	60%	20%
Switzerland	17%	68%	15%
United Kingdom	38%	49%	12%
United States	28%	61%	11%

Funder Characteristics

Selected Cohort: Custom Cohort					
Financial Information	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Total assets	N/A	N/A	N/A	\$257.8M	\$6030.1M
Total giving	\$314.6M	\$240M	\$116.7M	\$19M	\$284.5M

Selected Cohort: Custom Cohort					
Funder Staffing	Oak 2022	Oak 2015	Oak 2011	Median Funder	Custom Cohort
Total staff (FTEs)	91	62	52	17	124
Percent of staff who are program staff	64%	70%	67%	43%	49%

Selected Cohort: Custom Cohort			
Grantmaking Processes	Oak 2022	Median Funder	Custom Cohort
Proportion of grants that are invitation-only	2%	50%	92%
Proportion of grantmaking dollars that are invitation-only	2%	64%	96%

Respondents and Communities Served

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

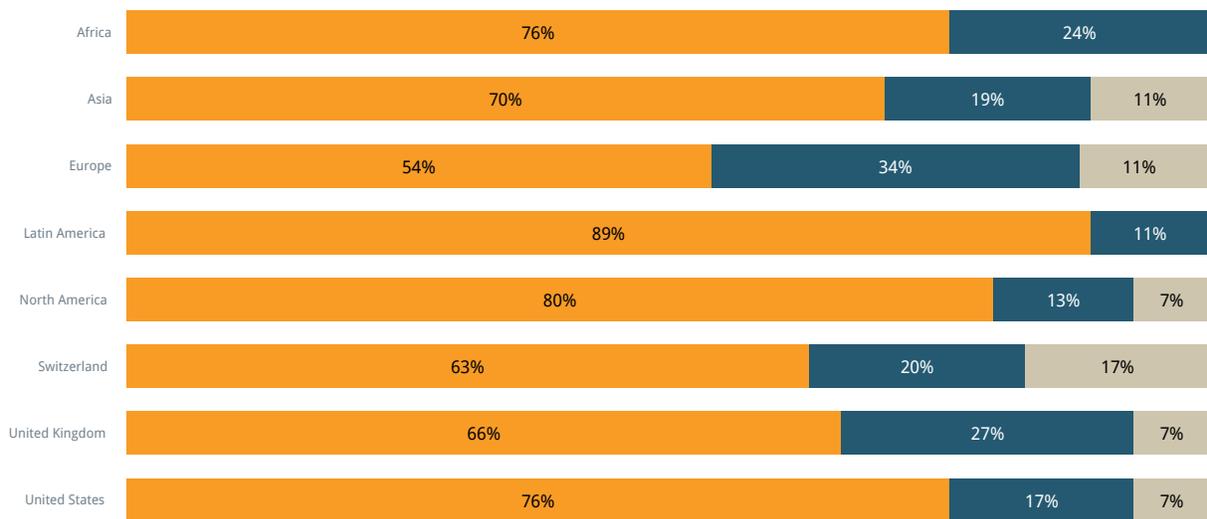
Yes No Don't know



Cohort: None Past results: on

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

Yes No Don't know

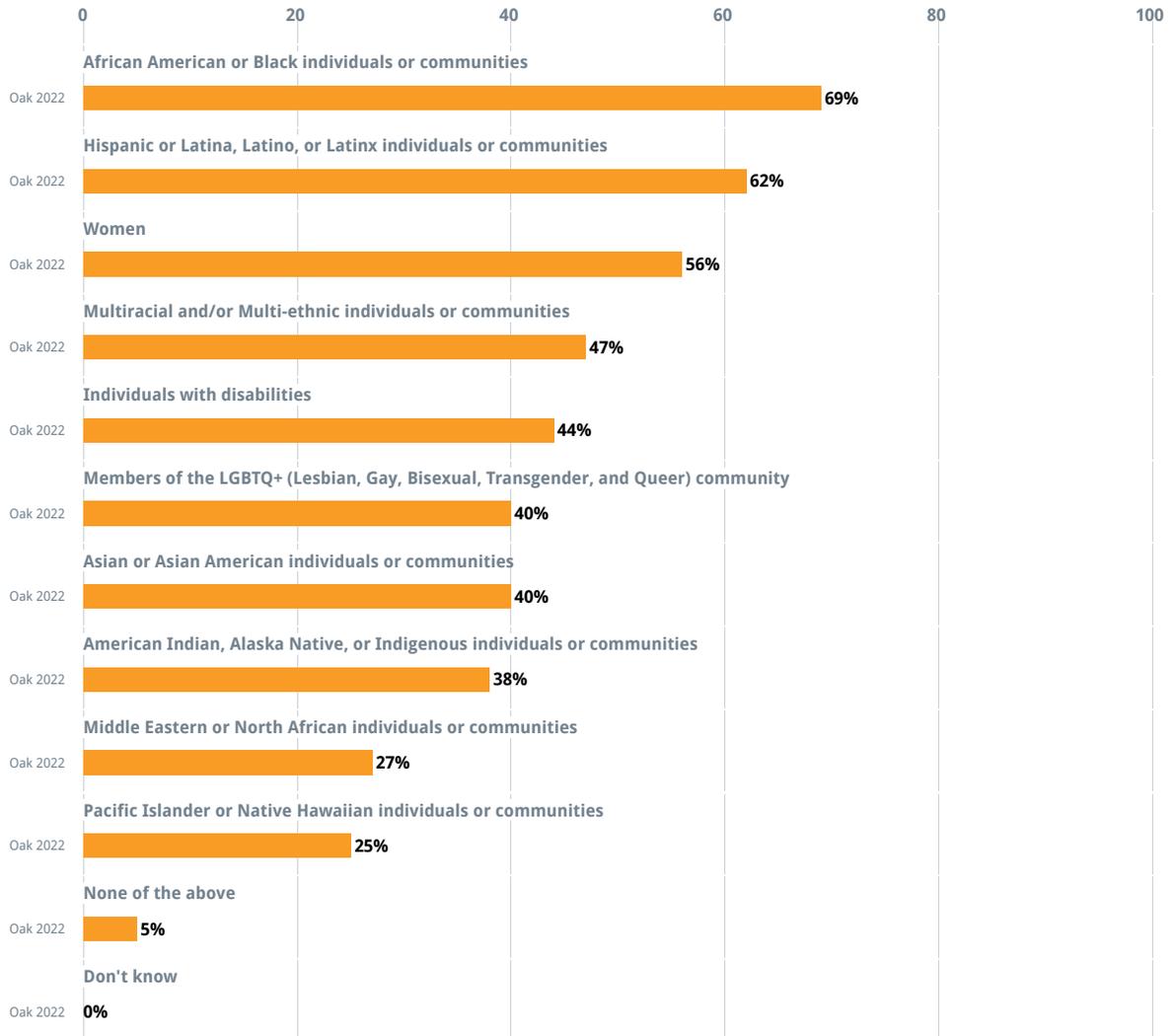


Subgroup: Geography

The following question is asked only of U.S.-based grantees who answered "yes" to the question "Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?"

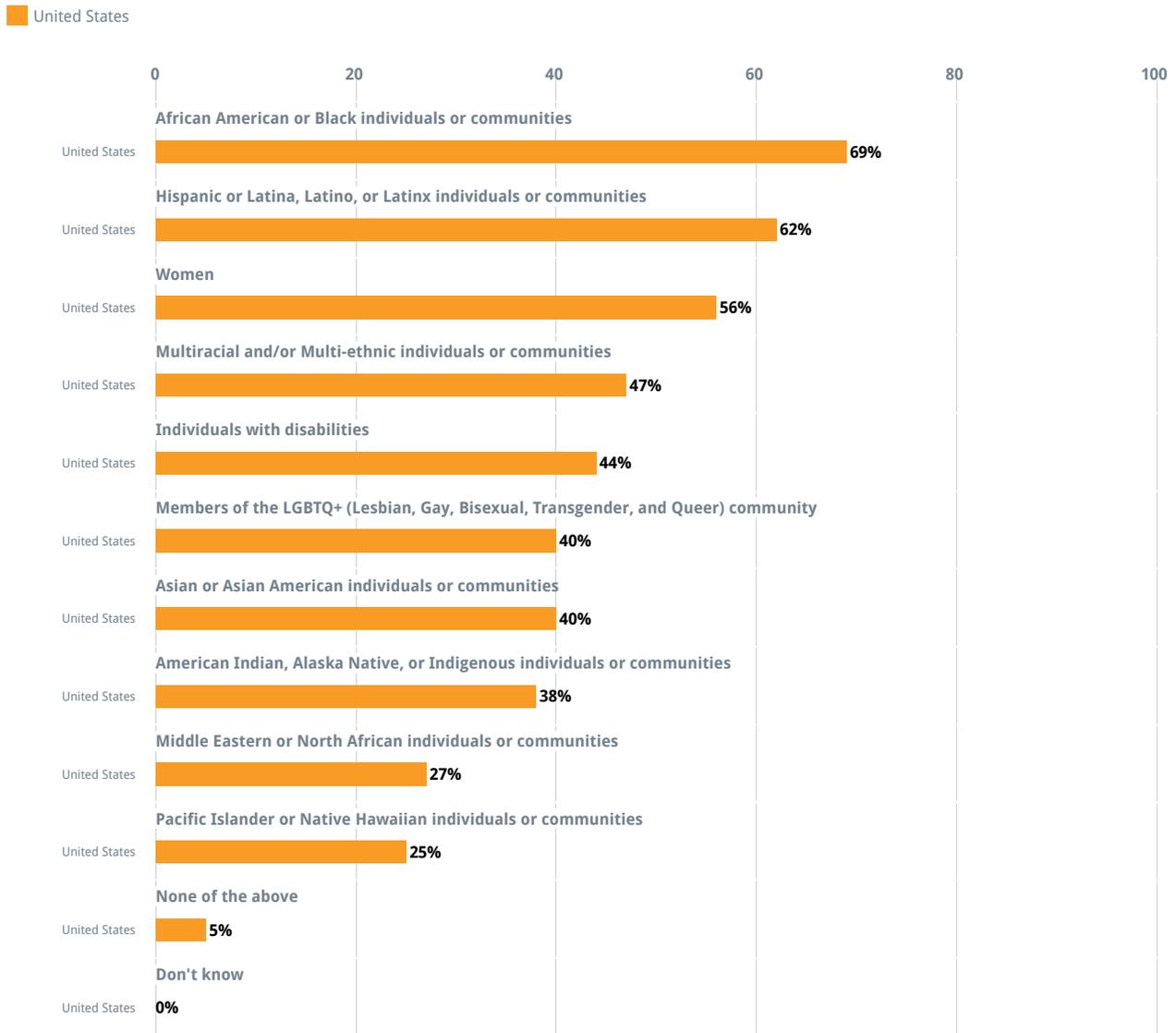
Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant?

■ Oak 2022



Cohort: None Past results: on

Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant? - By Subgroup

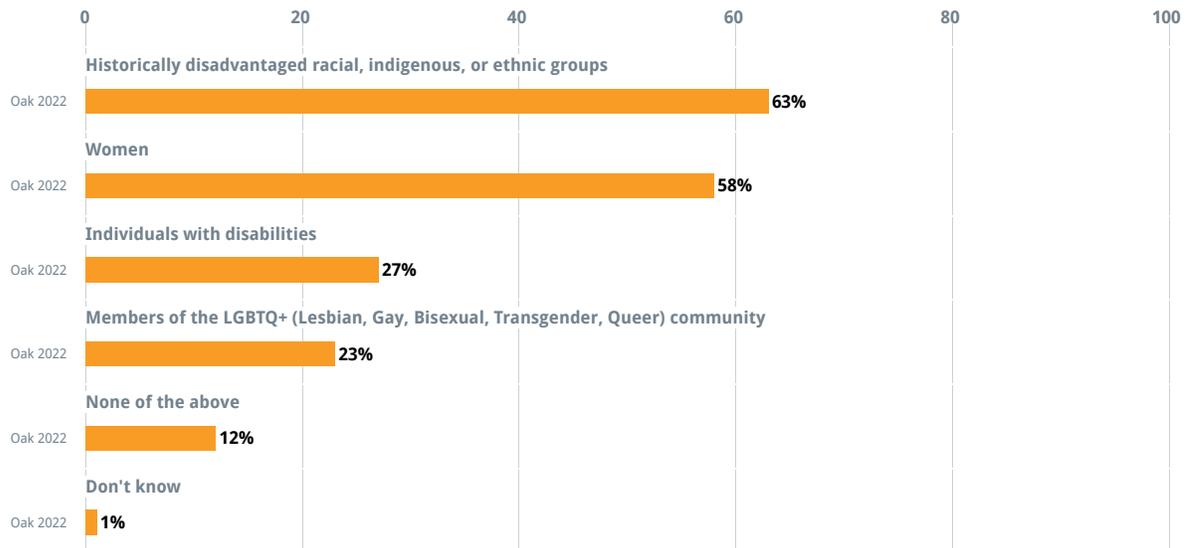


Subgroup: Geography

The following question is asked only of grantees based outside of the U.S. who answered "yes" to the question "Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?"

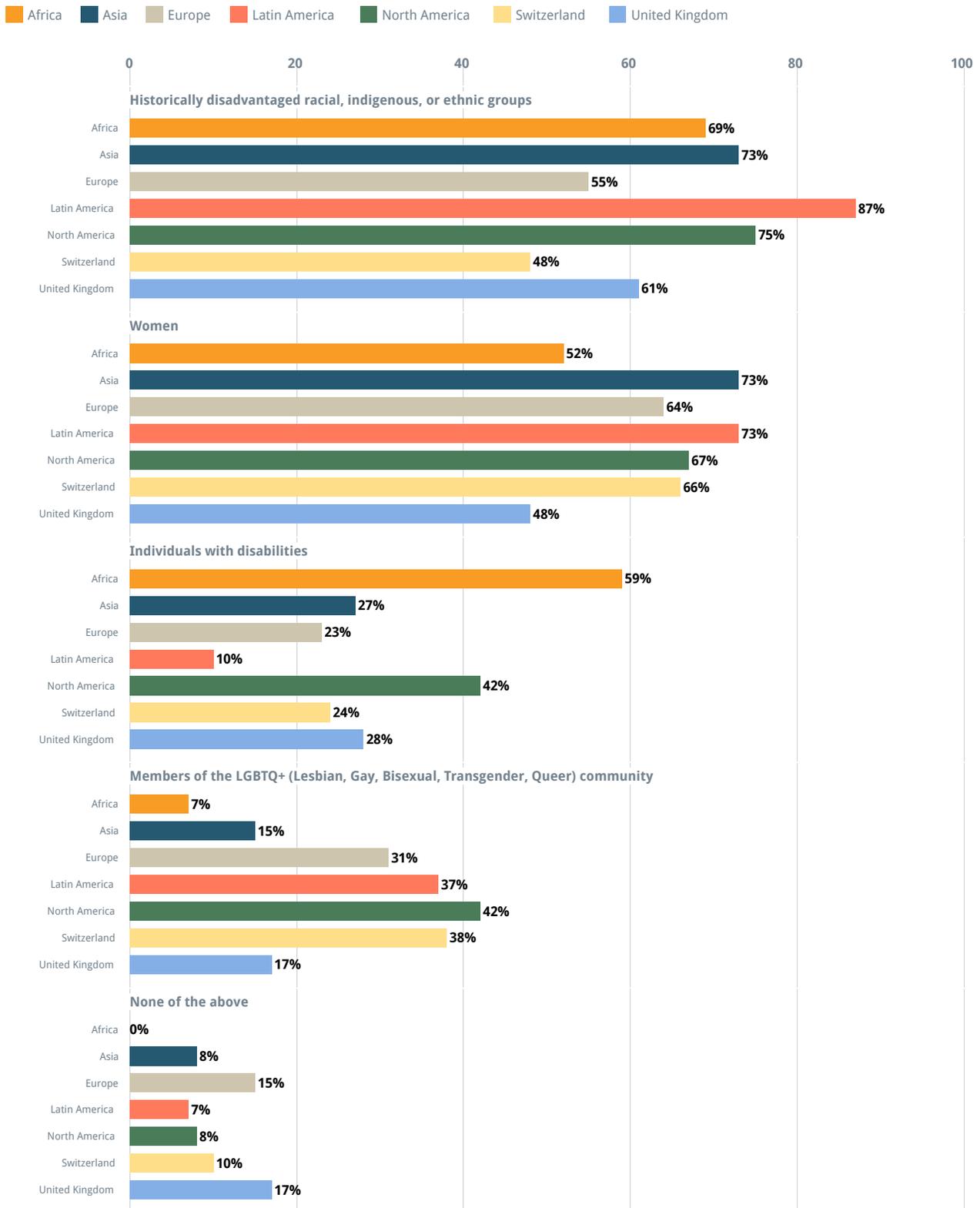
Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant?

Oak 2022



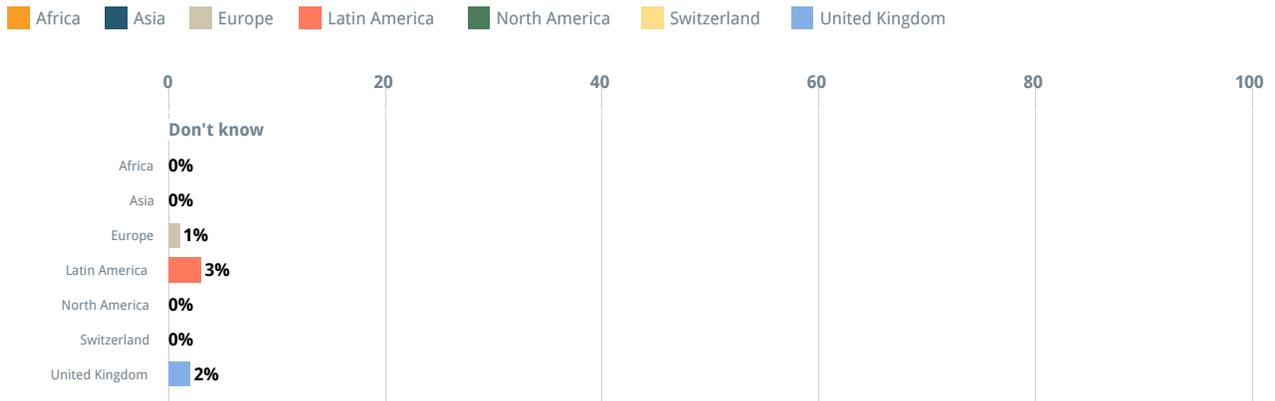
Cohort: None Past results: on

Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant? - By Subgroup



Subgroup: Geography

Specifically, are any of the following populations the primary intended people and/or communities served by the efforts funded by this grant? - By Subgroup (cont.)



Subgroup: Geography

Respondent Demographics

Note: Survey questions about respondents' demographics were recently modified or added to match best practices, and depict comparative data from over 50 funders in the dataset. Demographic questions related to grantees' POC and racial/ethnic identity are only asked of respondents in the United States.

Survey language and response options for questions about race and ethnicity are guided by best practices shared by [National Institutes of Health](#), [Pew Research Center](#), [Psi Chi Journal of Psychological Research](#), and the [US Census Bureau](#).

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

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

Differences in Ratings by Respondent Demographics

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

Person of Color Identity (U.S. Only)

Ratings from grantees who identify as a person of color are significantly *less positive* than grantees who identify as not a person of color for the following measures:

- Impact on grantees' fields
- Understanding of grantees' fields
- Advancing knowledge in the field
- Funder's effect on public policy in grantees' fields
- Understanding of contextual factors affecting grantees' work
- Understanding of the needs of the people and communities served
- Extent to which programmatic priorities reflect understanding of needs of people and communities served
- Impact on grantee organisations
- Understanding of grantees' goals and strategy
- Awareness of challenges facing grantee organisations
- Grantee comfort approaching the funder if a problem arises
- Clarity of the funder's communication of its goals and strategy
- Consistency of information provided by communications resources
- Funder's transparency
- The extent to which the funder is open to ideas from grantees
- Trust in grantee organisation's staff
- Candor about the foundation's perspectives on grantees' work
- Respectful interactions
- Compassion for those affected by grantees' work
- Helpfulness of the selection process to grantees in strengthening the efforts of funded organisation/programme
- Appropriate effort level of selection process given amount funded
- Level of pressure to modify grantees' priorities to create a request that was likely to receive funding
- The extent to which the reporting process is straightforward
- The extent to which the reporting process is relevant, with questions and measures pertinent to the work funded by this grant
- Agreement that the Foundation has clearly communicated what diversity, equity, and inclusion means for its work
- Agreement that the Foundation demonstrates an explicit commitment to diversity, equity, and inclusion in its work
- Agreement that most Foundation staff embody a strong commitment to explicit commitment to diversity, equity, and inclusion
- Agreement that the Foundation is committed to combatting racism
- How successful was Oak Foundation in supporting your organisation in the following areas: Enhancing your organisational resilience
- How successful was Oak Foundation in supporting your organisation in the following areas: Raising resources and attracting new donors for your sector

Respondent Gender: There are no consistent, significant differences by gender identity.

Intersectional Identities (U.S. Only): There are no consistent, significant differences by intersectional gender and person of color identity.

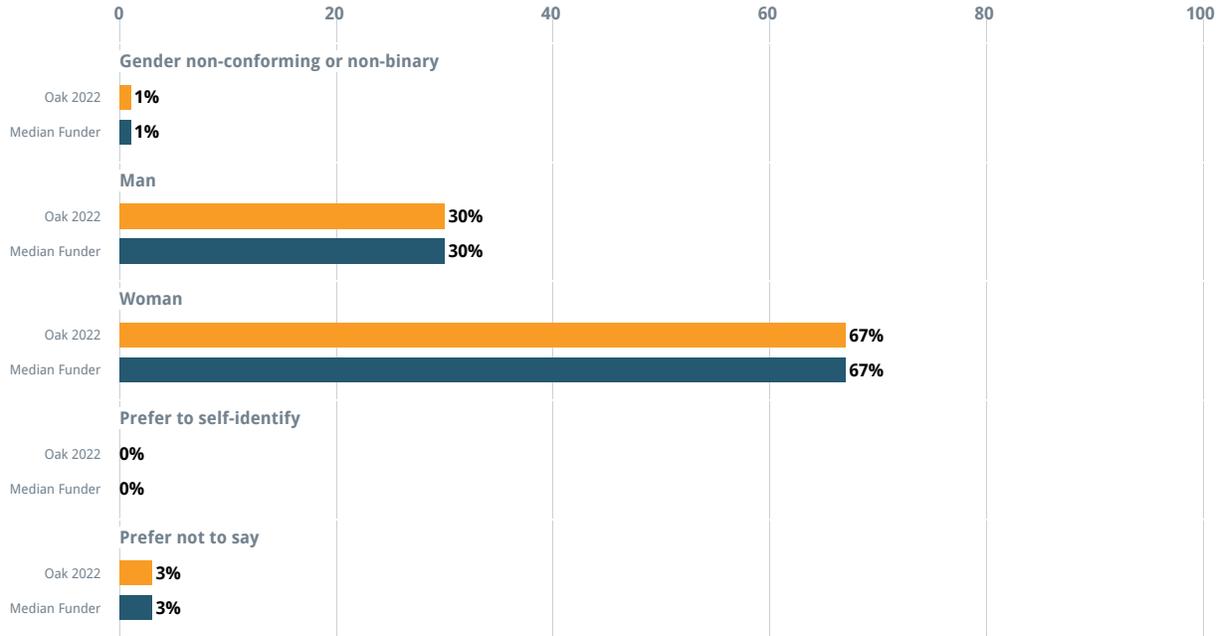
Transgender Identity: There are not enough respondents who identify as transgender to run statistical tests (N<10).

LGBTQ+ Identity: There are no consistent, significant patterns of differences based on LGBTQ+ identity.

Disability Identity: There are no consistent, significant patterns of differences based on disability identity.

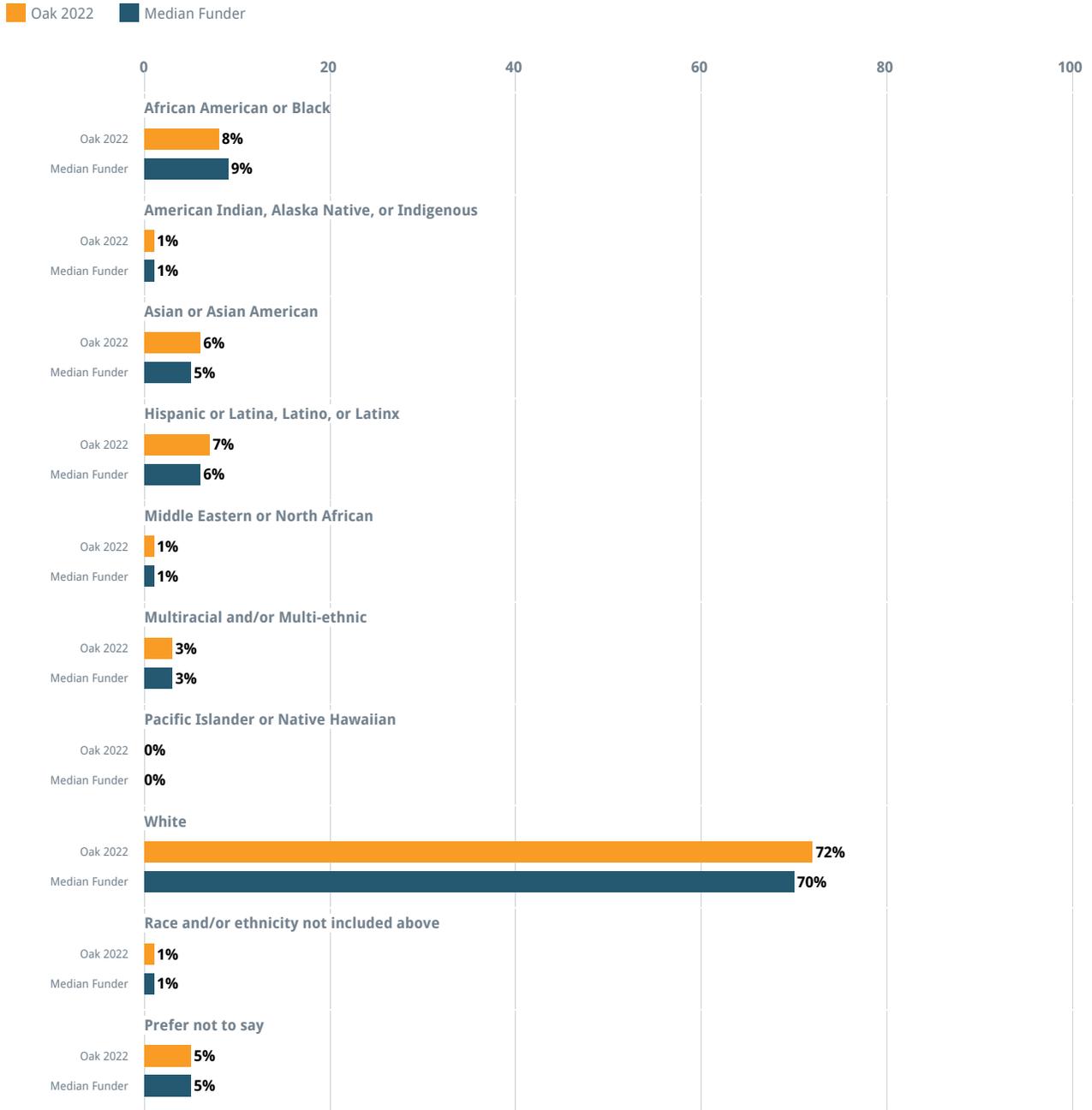
Please select the option that represents how you describe yourself:

Oak 2022 Median Funder



Cohort: None Past results: on

How would you describe your race and/or ethnicity?



Cohort: None Past results: on

Selected Cohort: None		
Do you identify as a person of color?	Oak 2022	Average Funder
Yes	20%	22%
No	76%	73%
Prefer not to say	4%	5%

Selected Cohort: None		
Are you transgender?	Oak 2022	Average Funder
Yes	0%	1%
No	97%	96%
Prefer not to say	3%	3%

Selected Cohort: None		
Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community?	Oak 2022	Average Funder
Yes	11%	11%
No	84%	84%
Prefer not to say	5%	5%

Selected Cohort: None		
Do you have a disability?	Oak 2022	Average Funder
Yes	4%	5%
No	91%	90%
Prefer not to say	5%	4%

Respondent Job Title

Selected Cohort: Custom Cohort					
Job Title of Respondents	Oak 2022	Oak 2015	Oak 2011	Average Funder	Custom Cohort
Executive Director/CEO	42%	41%	37%	47%	37%
Other Senior Team (i.e., reporting to Executive Director/CEO)	28%	20%	15%	18%	24%
Project Director	12%	13%	14%	13%	22%
Development Staff	14%	8%	11%	9%	8%
Volunteer	0%	0%	0%	1%	0%
Other	3%	9%	11%	5%	3%

Additional Survey Information

On many questions in the grantee survey, grantees are allowed to select “don't know” or “not applicable” if they are not able to provide an alternative answer. In addition, some questions in the survey are only displayed to a select group of grantees for which that question is relevant based on a previous response.

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Oak's grantee survey was 801.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your field?	747
How well does the Foundation understand the field in which you work?	771
To what extent has the Foundation advanced the state of knowledge in your field?	638
To what extent has the Foundation affected public policy in your field?	502
Overall, how would you rate the Foundation's impact on your local community?	598
How well does the Foundation understand the local community in which you work?	618
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	782
How well does the Foundation understand your organisation's strategy and goals?	775
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	718
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	773
How often do/did you have contact with your programme officer during this grant?	800
Who most frequently initiated the contact you had with your programme officer during this grant?	782
Has your main contact at the Foundation changed in the past six months?	778
Did you submit a proposal to the Foundation for this grant?	793
As you developed your grant proposal, how much pressure did you feel to modify your organisation's priorities in order to create a grant proposal that was likely to receive funding?	769
To what extent was the Foundation's application process a helpful opportunity to strengthen the efforts funded by the grant?	710
To what extent was the Foundation's application process an appropriate level of effort given the amount of funding received?	737
To what extent was the Foundation clear and transparent about the application process requirements and timelines?	754
To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether an application would be funded or declined?	715
At any point during this grant, including the application process, did Foundation staff visit your offices or programmes?	800
Are you currently receiving funding from the Foundation?	785
Which of the following best describes the pattern of your organisation's funding relationship with the Foundation?	780
How well does the Foundation understand the needs of the people and communities that you serve?	718
To what extent do the Foundation's funding priorities reflect a deep understanding of the needs of the people and communities that you serve?	721
Have you participated in a reporting or evaluation process?	775
To what extent was the Foundation's reporting process... Adaptable, if necessary, to fit your circumstances?	636
To what extent was the Foundation's reporting process... A helpful opportunity for you to reflect and learn?	676
To what extent was the Foundation's reporting process... Relevant, with questions and measures pertinent to the work funded by this grant?	676
To what extent was the Foundation's reporting process... Straightforward?	632
To what extent did the evaluation... Result in you making changes to the work that was evaluated?	174
To what extent did the evaluation... Incorporate your input in the design of the evaluation?	176
Did you receive any non-monetary support from the Foundation during this grant period?	743

Question Text	Number of Responses
How would you describe the benefit - to your organisation or work - of any non-monetary support that you received?	300
To what extent did the Foundation exhibit the following during this grant... Trust in your organisation's staff	798
To what extent did the Foundation exhibit the following during this grant... Candor about the Foundation's perspectives on your work	790
To what extent did the Foundation exhibit the following during this grant... Respectful interaction	798
To what extent did the Foundation exhibit the following during this grant... Compassion for those affected by your work	791
Was the funding you received restricted to a specific use?	788
Please rate the extent to which you agree or disagree with the following statements about Diversity, Equity and Inclusion:	
The Foundation has clearly communicated what Diversity, Equity and Inclusion means for its work	680
Overall, the Foundation demonstrates an explicit commitment to Diversity, Equity and Inclusion in its work	690
Overall, most staff I have interacted with at the Foundation embody a strong commitment to Diversity, Equity and Inclusion	706
I believe that the Foundation is committed to combatting racism	649
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	791
Primary Intended People and/or Communities	
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	791
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant?	212
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant?	330
How successful was Oak Foundation in supporting your organisation in the following areas:	
Strategy development or programme design	694
Measuring and communicating the impact of your work	688
Strengthening your organisational and programme learning	696
Developing and implementing your child safeguarding measures	495
Enhancing your organisational resilience	688
Raising resources and attracting new donors for your organisation	691
Raising resources and attracting new donors for your sector	583
Adapting to any changes in the regulatory environment and your ability to comply with official restrictions on the way you work	516
Managing the implications of the Covid-19 pandemic for your organisation, staff, and constituents	672
To what extent did these forms of capacity-building assistance help you strengthen your organisation's work? (Only asked of those who indicated receiving a particular type of assistance)	
Strategic planning (including strategic restructuring)	143
Child safeguarding	157
Senior staff leadership	80
Fund development and resource mobilisation	97
Organisational development and change	154
Compliance with regulations	34
Financial management	59
Human resources	58
Diversity, equity and inclusion	55
Board/governance	53
Infrastructure (e.g., facilities, technology, security)	64
Integrated security	14
Programme management	82

Question Text	Number of Responses
Learning, monitoring and evaluation	127
Advocacy, campaigning, lobbying	88
Research (e.g. to build understanding of a field)	67
Communication	117

About CEP and Contact Information

Mission:

CEP provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness. We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.

Vision:

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

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

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

About the GPR

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

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

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