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# Oak Foundation's response to the grantee perception survey 2022 results

## Introduction

In 2022, our grantee partners gave us the gift of feedback by responding to a grantee perception survey, administered by the Center for Effective Philanthropy on behalf of Oak. If you completed the survey, we thank you for the time you took to respond. The full results of the survey can be found on our website.

We periodically undertake a grantee perception survey to gather information about our partners' experiences working with Oak; the last time we conducted the survey was in 2015. The results have helped us learn more about how we can improve as an organisation and as a partner.

Although our grant-making budget has grown steadily, the number of staff will remain as it is today (approximately 95 staff members). This staffing structure drives many of our decisions in how we structure our grant-making and how we engage with our partners: we have to be strategic in terms of how we spend our time and what we prioritise. That is why getting feedback from our partners is such a gift. It helps us to improve our relationship with our partners and to continue to strive to reflect our values and meet our mission.

The information on the next few pages highlights areas where we are doing well and areas where we can improve. We categorised our response into three broad areas of improvement: grant-making process, communications and partnership, and capacity building.

In summary, as a foundation, we commit to:

- continuing to provide longer and larger grants, with an emphasis on core support, when possible;
- right-sizing our grant-making process to reduce partner burden, so that we can focus on impact;
- communicating better to ensure our partners understand our grant-making strategies and where they fit into broader efforts;
- ensuring that we are responsive to our partners' needs and context in which they operate; and
- continuing to provide responsive capacity building support.

## Grant-making process

### What we learned

Oak provides larger and longer grants than over 90 percent of funders in CEP's dataset. Almost 40 percent of partners receive unrestricted support, more than five times the proportion at the typical funder in CEP's dataset. The typical Oak partner now spends 57 hours on Oak process requirements. We have decreased the amount of time it takes by nearly 20 hours since 2015, and time spent is now more similar to funders that provide grant sizes similar to Oak. For each hour spent on processes, Oak partners receive a median of USD 8.8k in funding. This is a high rate of return compared to other foundations. However, this return varies widely by grant size – with recipients of smaller grants experiencing a lower return on time.

While processes have improved, partners suggest Oak: streamline even further; clarify timelines and funding criteria; make the online grant portal and templates more user-friendly and straight forward; and provide guidance on renewal processes.

### **Our commitment**

In response, we will continue to commit multi-year, unrestricted grants where we can and when it fits within broader efforts. At Oak, core support has increased, from 22 per cent in 2013 to 42 per cent in 2021, and the intention is to continue this upward trend in the coming years. However, sometimes Oak pursues a specific objective within a partner organisation's broader focus. In those situations, we may explore flexible project support where our priorities align.

Oak is committed to ensuring it covers the true costs of project support grants (i.e., a full and fair share of the indirect costs associated with projects). In practice this means that: (1) we encourage partners to include a fair share of indirect costs in project budgets; (2) we have a flexible rate for indirect costs; and (3) we are committed to funding capacity building to support grantee partners' development of their cost recovery policies.

We will continue efforts to right size our grant-making processes, particularly for smaller grants and in our reporting requirements, and work to ensure templates, systems, and guidance are simple and user friendly. We are developing a new online grant portal, which we will launch this year. We hope this new system will improve efficiency, reporting, and communications with our partners. We are also experimenting with other ways to lighten the burden on partners.

## **Partnership and communication**

### **What we learned**

Partners perceive Oak to have a strong positive impact on their organisations and to be highly aware of challenges within their organisations and in communities. Partners indicate feeling comfortable approaching Oak if a problem arises in their work. Partners find that the foundation clearly communicates its goals and is transparent.

However, there is room for improvement in the consistency of communication across different channels. Partners felt Oak could do more to help them understand how their work fits into Oak's broader efforts. Partners expressed a desire for more information about the Foundation's goals, impact, and how their work connects to it. Partners also encouraged Oak to provide connections to other funders and to: "look for ways to use the foundation's voice and influence to elevate issues in the field."

### **Our commitment**

In response, we will improve our efforts to strengthen our relationships with our partners. Within the constraints of our staffing model and our need to be strategic about how we spend our time, we will consider ways to facilitate connections between partners and other funders to share learnings and best practices, alongside other support.

We will continue to be purposeful and strategic in our grant-making to support our partners in their efforts to achieve high impact, and understand and respond to the challenges and the context in which our partners operate. We will be clear and consistent in our communications about programme strategies and approaches, lessons learned, and impact, and share how partners fit into broader efforts within programmes and across the foundation.

We will continue to let our partners lead on communications. Although some partners would like us to use the foundation's voice and influence to elevate issues, we do not see this as our role. We do not aspire to be knowledge holders; we want to support our partners in their advocacy and communication.

## Capacity building

### What we learned

Oak's capacity building coverage among partners grew an estimated 25 percent between 2015 and 2022. Now, 64 per cent of partners receive assistance, up 14 points from 51 per cent in 2015. The majority of our partners were positive about the capacity building support given to their organisation. In addition, partners who received two or more forms of capacity building support rate significantly higher on measures of impact and perceptions of Oak.

### Our commitment

In response, we will continue to provide capacity building support to our partners, while improving communications in terms of what is available and having discussions on how we can provide deeper levels of support. The capacity building team will continue to focus on sourcing and facilitating access to quality, local expert support for our partners.

[See our website for more information on our capacity building support.](#)

### Do you need further information?

Please reach out to your programme officer if you have further questions.