
Archstone Foundation 2024 Grantee Perception Report

Generated on September 23, 2024



THE CENTER FOR
EFFECTIVE PHILANTHROPY

675 Massachusetts Avenue
7th Floor
Cambridge, MA 02139
617-492-0800

131 Steuart Street
Suite 501
San Francisco, CA 94105
415-391-3070

cep.org

The online version of this report can be accessed at cep.surveystats.org

Survey Information 1

Key Ratings Summary 3

Grantmaking Characteristics 4

Overall Impact 7

Advancing Knowledge and Public Policy..... 7

Overall Understanding..... 9

Assistance Beyond the Grant..... 11

People and Communities Served 16

Justice, Equity, Diversity, and Inclusion 20

Funder-Grantee Relationships..... 21

Interaction Patterns 22

Communication..... 25

Grant Processes 27

Selection Process 27

Reporting and Evaluation Process 29

Reporting Process 30

Evaluation Process..... 31

Dollar Return and Time Spent on Processes..... 33

Time Spent on Selection Process 33

Time Spent on Reporting and Evaluation Process 35

Customized Questions 37

JEDI in Archstone's Work 39

Catchfire 41

CA's Master Plan for Aging..... 45

Grantees' Written Comments 47

Quality of Processes, Interactions and Communications 47

Suggestion Topics..... 47

Suggestions 48

Contextual Data 50

Grantee Characteristics 54

Funder Characteristics 56

Methodology, Analysis, and Respondent Demographics 58

Standard Comparative Cohorts 58

Subgroup Methodology and Differences 59

Respondent Demographics 60

Respondent Job Title 63

Additional Survey Information 64

About CEP and Contact Information 67

Survey Information

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Archstone 2024	April and May 2024	54	37	69%
Archstone 2022	February and March 2022	61	41	67%
Archstone 2019	May and June 2019	61	47	77%

Throughout this report, Archstone Foundation's survey results are compared to CEP's broader dataset of more than 60,000 grantee responses from over 350 funders built up over more than a decade of grantee surveys. A list of some funders who have recently participated in the GPR can be found on [CEP's website](#).

Subgroups

In addition to showing Archstone's overall ratings, this report shows ratings segmented by Priority Area. The online version of this report also shows ratings segmented by Catchafire User, Geographical Area Served, Respondent Gender, and Respondent Person of Color Identity.

Priority Area	Number of Responses
Three Ts	12
Capacity Building & Innovations	16
Legacy & Other	10

Catchafire User	Number of Responses
User	10
Not a User	27

Geographical Area Served	Number of Responses
Southern California	13
Other	24

Respondent Gender	Number of Responses
Identifies as a Man	12
Identifies as a Woman	22

Respondent Person of Color Identity	Number of Responses
Identifies as a Person of Color	10
Does not identify as a Person of Color	23

Customized Cohort

Archstone selected a set of 17 funders to create a smaller comparison group that more closely resembles Archstone in scale and scope.

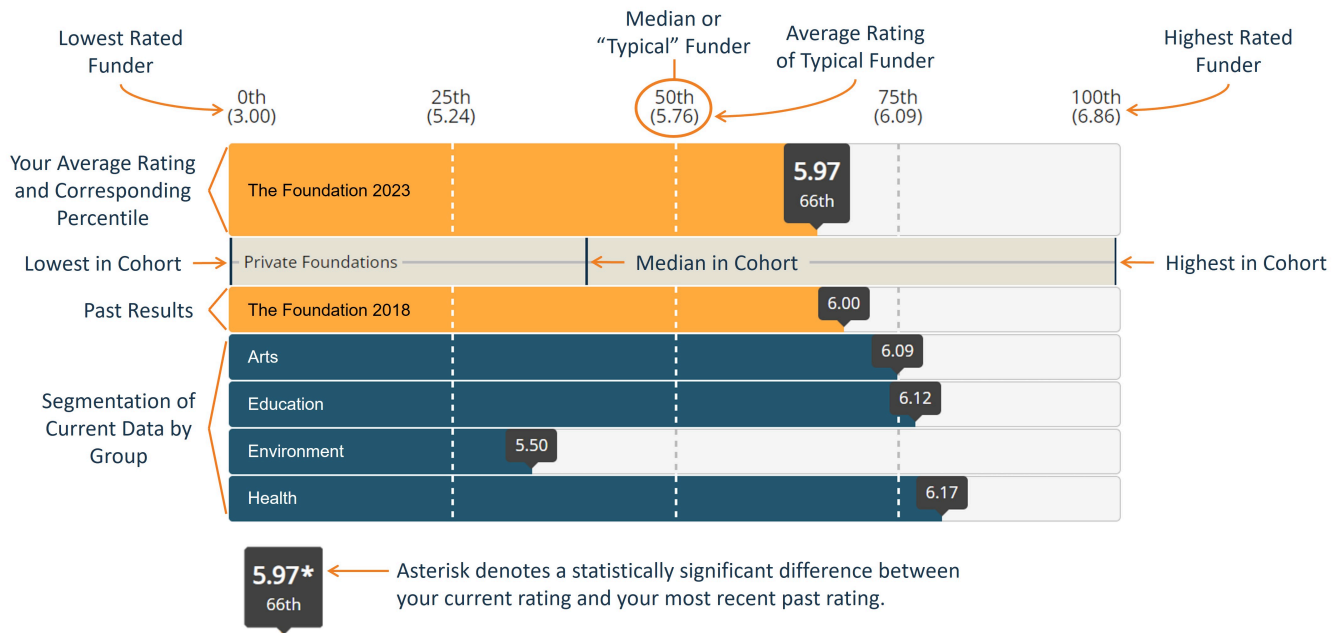
Custom Cohort
Archstone Foundation
Bader Philanthropies, Inc.
Episcopal Health Foundation
Maine Health Access Foundation
May and Stanley Smith Charitable Trust
Moses Taylor Foundation

Custom Cohort

New York Health Foundation
Paso del Norte Health Foundation
St. David's Foundation
The California Wellness Foundation
The Jacob and Valeria Langeloth Foundation
The John A. Hartford Foundation, Inc.
The PATH Foundation
The Ralph C. Wilson, Jr. Foundation
The Ralph M. Parsons Foundation
Tufts Health Plan Foundation
Weingart Foundation

Interpreting Your Charts

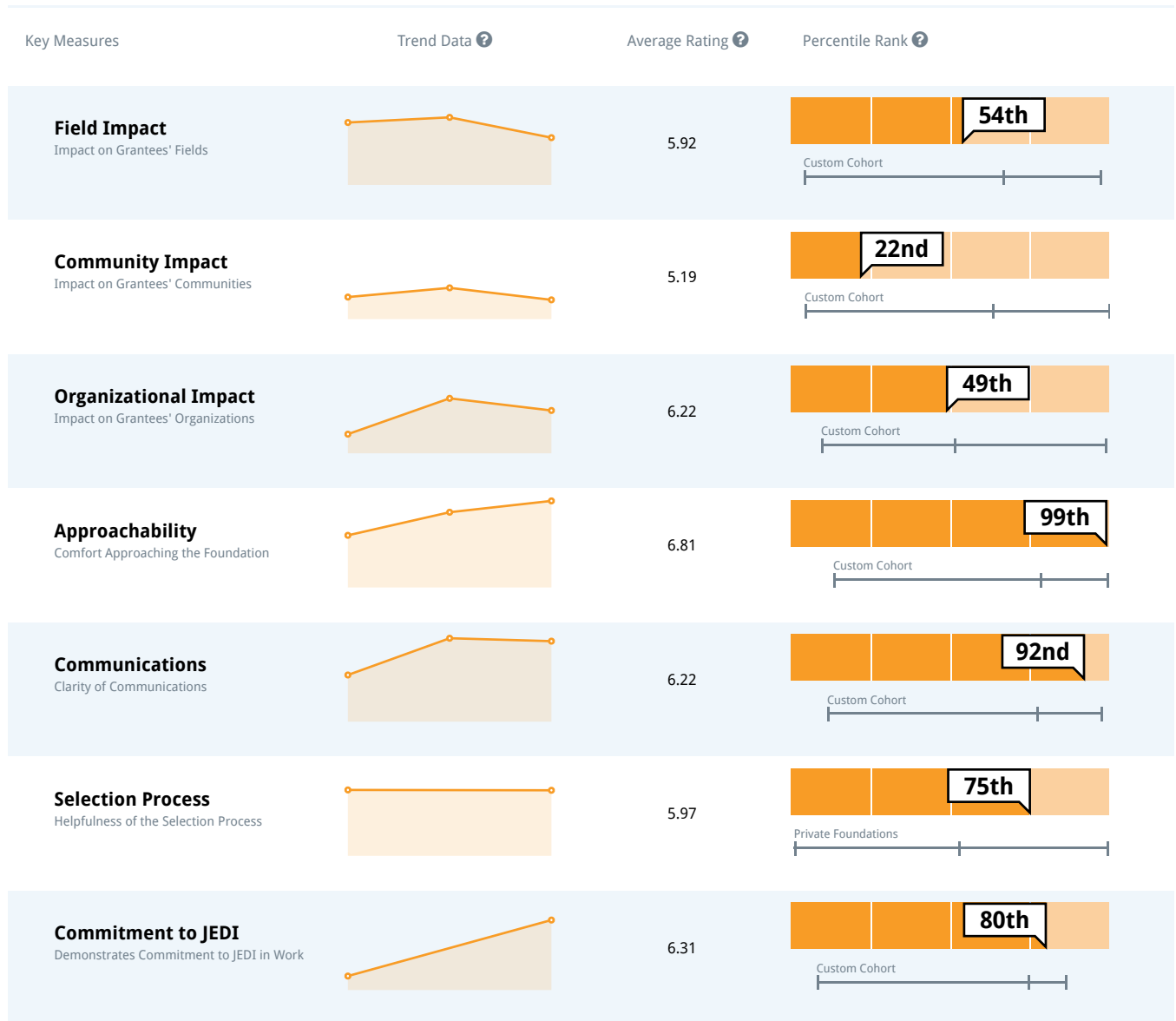
Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.



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 eight responses.

Key Ratings Summary

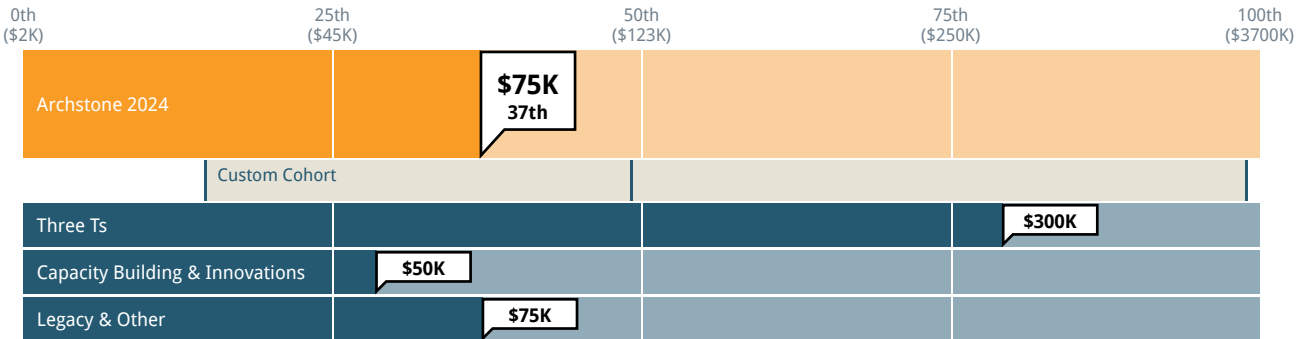
The following chart highlights a selection of Archstone Foundation's key results. Each of these data points corresponds to an individual survey measure that is displayed with additional detail in the subsequent pages of this report.



Grantmaking Characteristics

Funders 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.

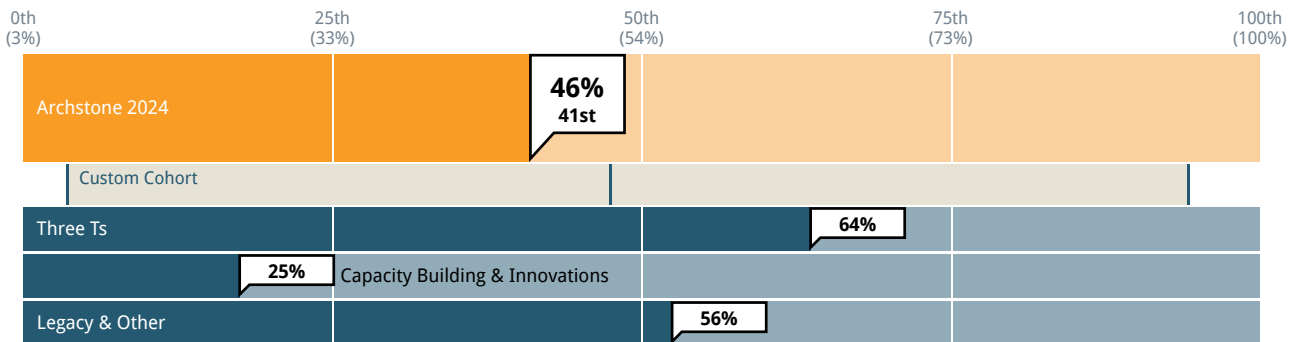
Median Grant Size



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Proportion of Multi-year Grants

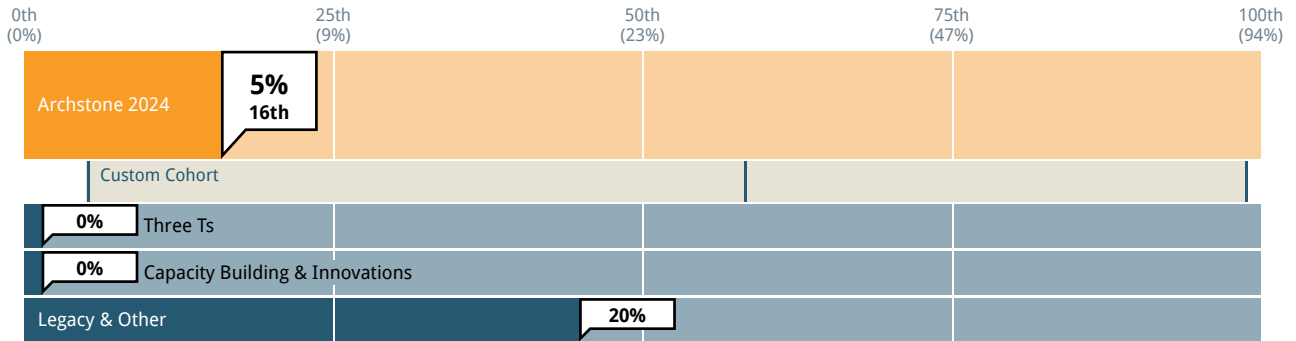
Proportion of grantees that report receiving grants for two years or longer



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Proportion of Unrestricted Funding

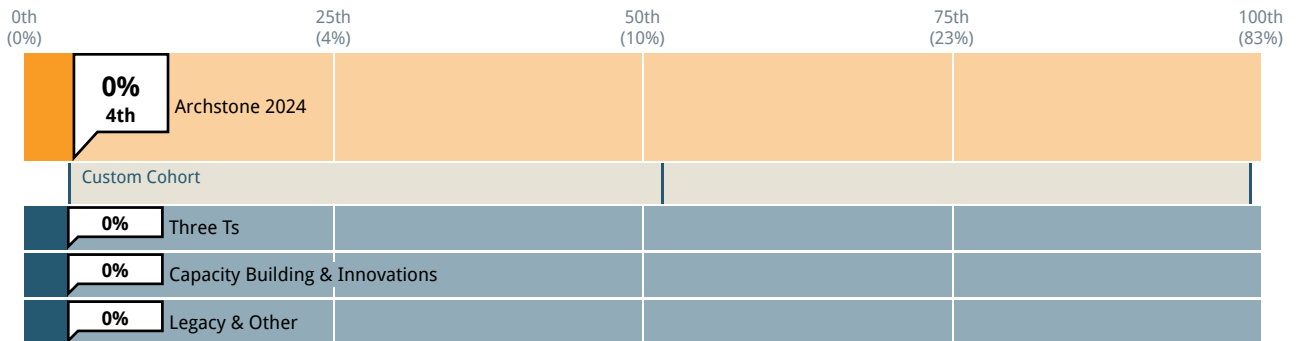
Proportion of grantees responding 'No, this funding was not restricted to a specific use (e.g., general operating, core support)'



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Proportion of Multi-year Unrestricted Grants

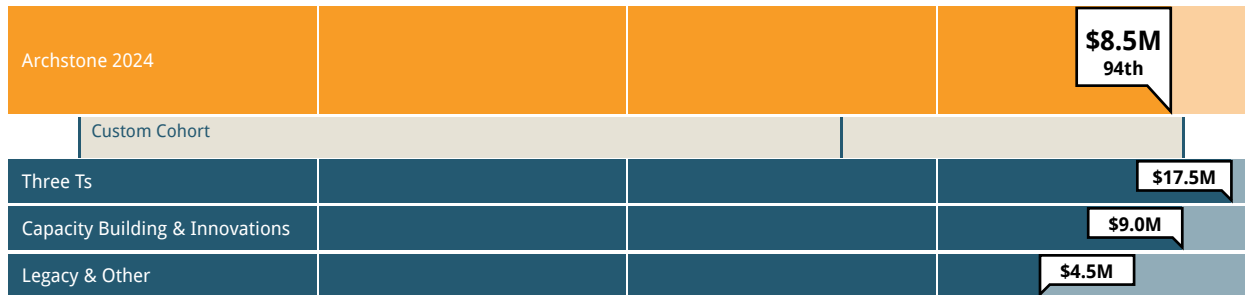
Proportion of grantees that report receiving grants for two years or longer and who report receiving general operating support funding that was not restricted to a specific use.



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Median Organizational Budget

0th (\$0.0M) 25th (\$1.0M) 50th (\$1.7M) 75th (\$3.3M) 100th (\$86.0M)



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

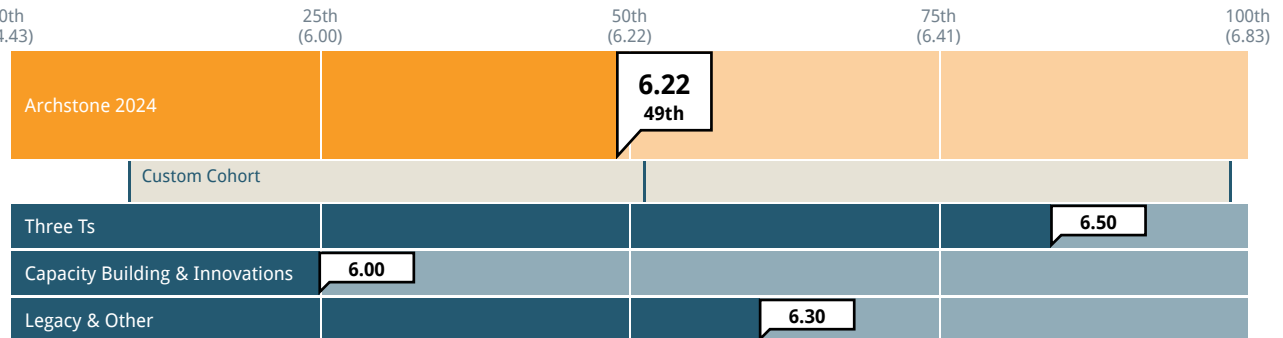
Selected Cohort: Custom Cohort			
Grant History	Archstone 2024	Average Funder	Custom Cohort
Percentage of first-time grants	38%	29%	27%

Selected Cohort: Custom Cohort			
Program Staff Load	Archstone 2024	Median Funder	Custom Cohort
Dollars awarded per program full-time employee	\$0.4M	\$2.6M	\$2.8M
Applications per program full-time employee	3	22	27
Active grants per program full-time employee	10	30	31

Overall Impact

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

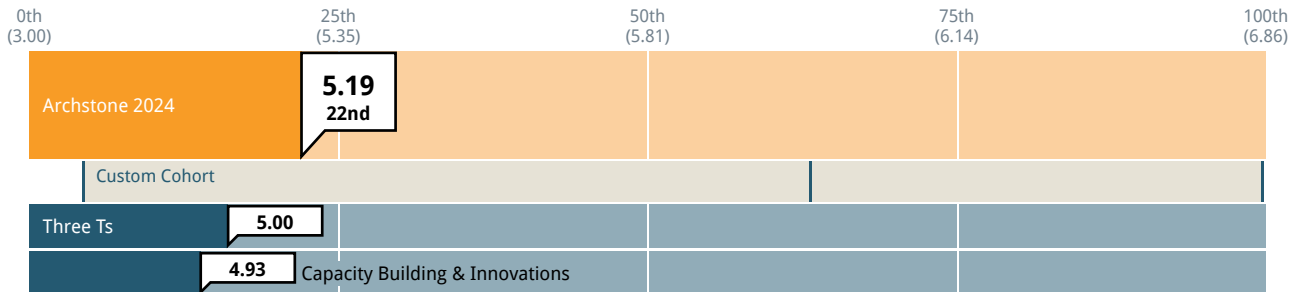
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

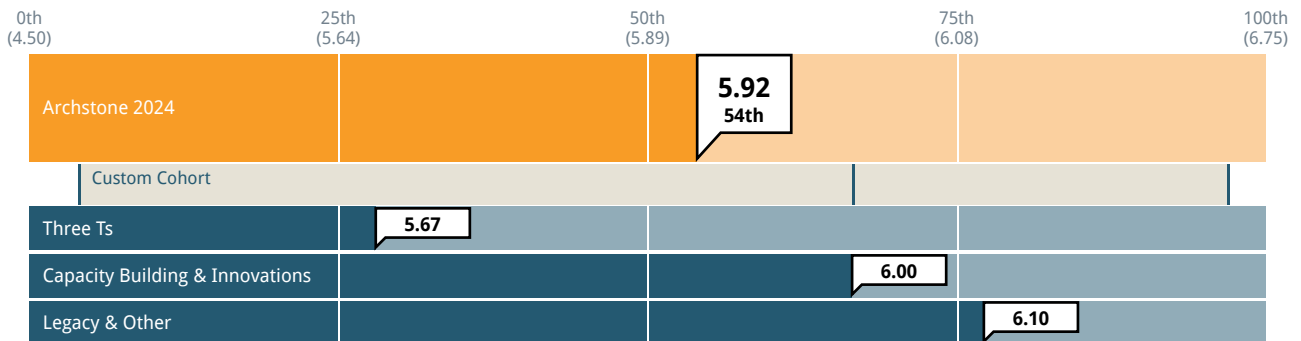
1 = No impact 7 = Significant positive impact



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

1 = No impact 7 = Significant positive impact

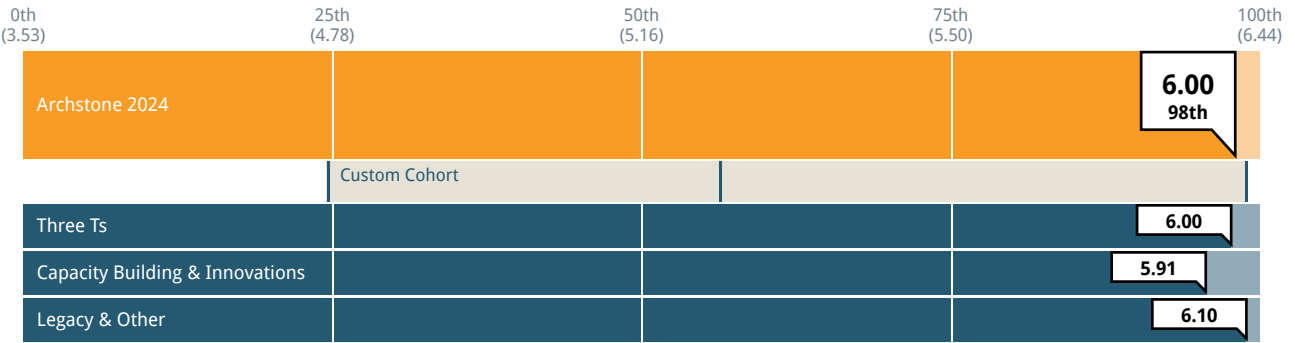


Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Advancing Knowledge and Public Policy

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

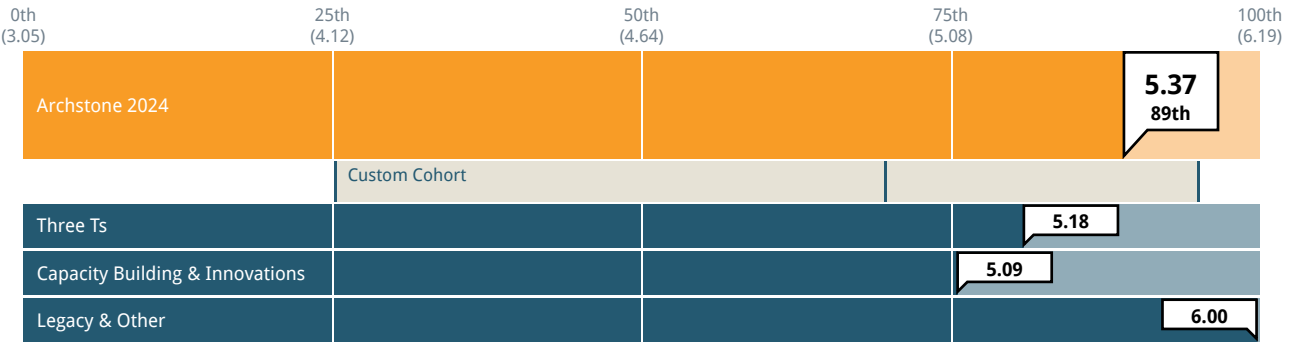
1 = Not at all 7 = Leads the field to new thinking and practice



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

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

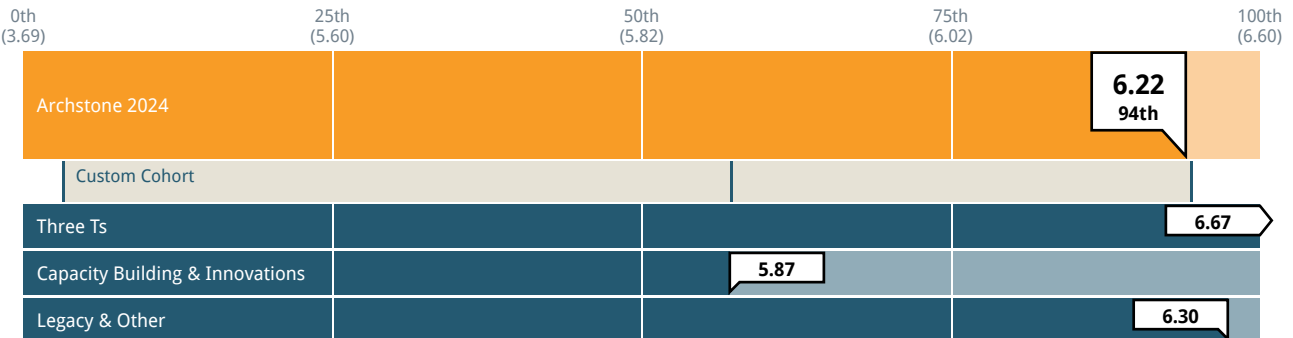


Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Overall Understanding

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

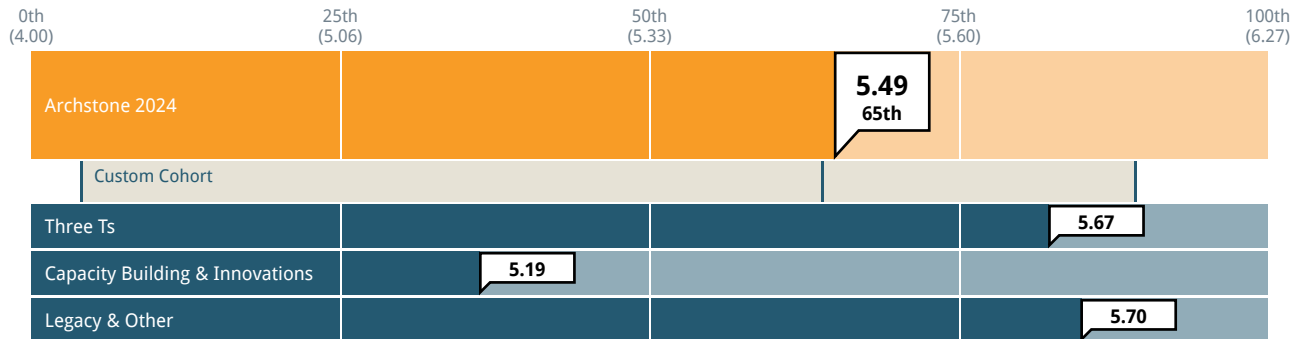
1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

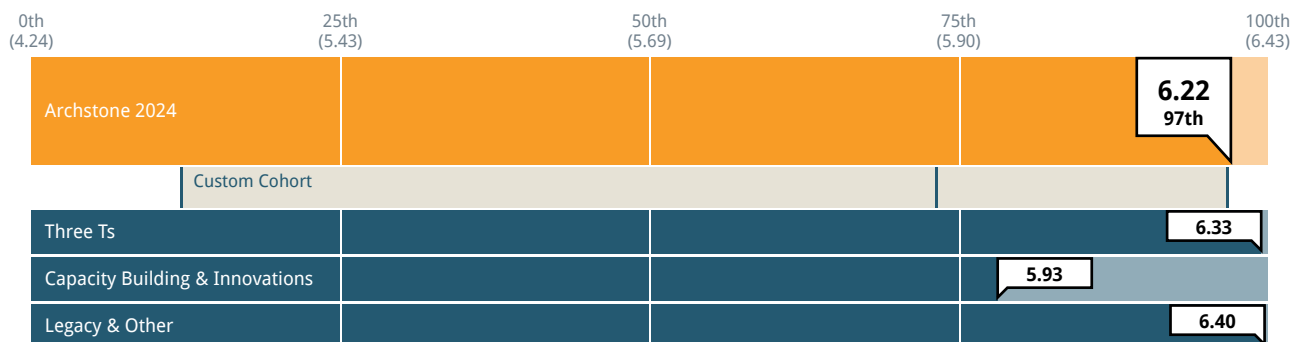
1 = Not at all aware 7 = Extremely aware



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

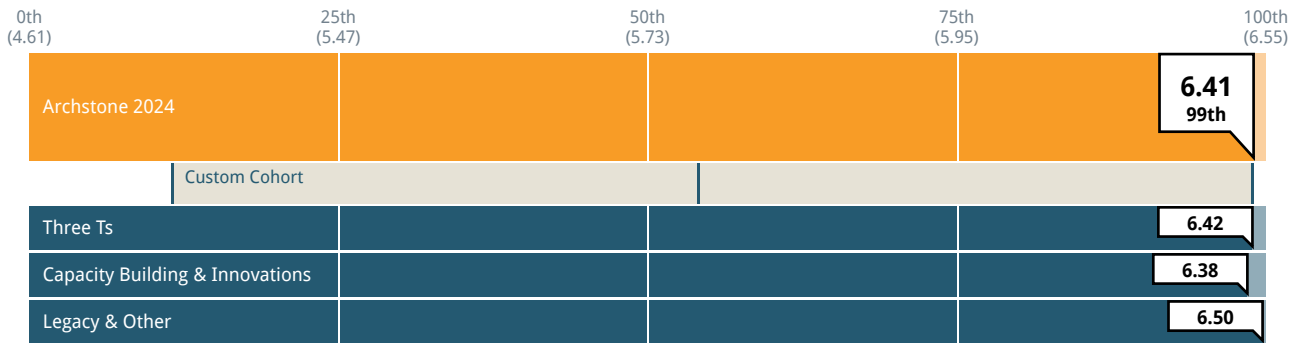
1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

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

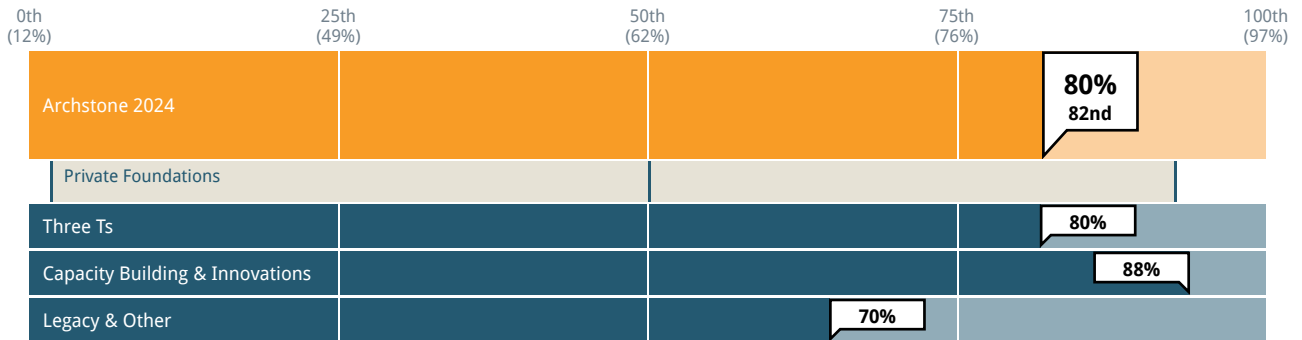


Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Assistance Beyond the Grant

Proportion of Grantees Receiving Assistance Beyond the Grant

Proportion of grantees who indicate receiving at least one form of assistance beyond the grant

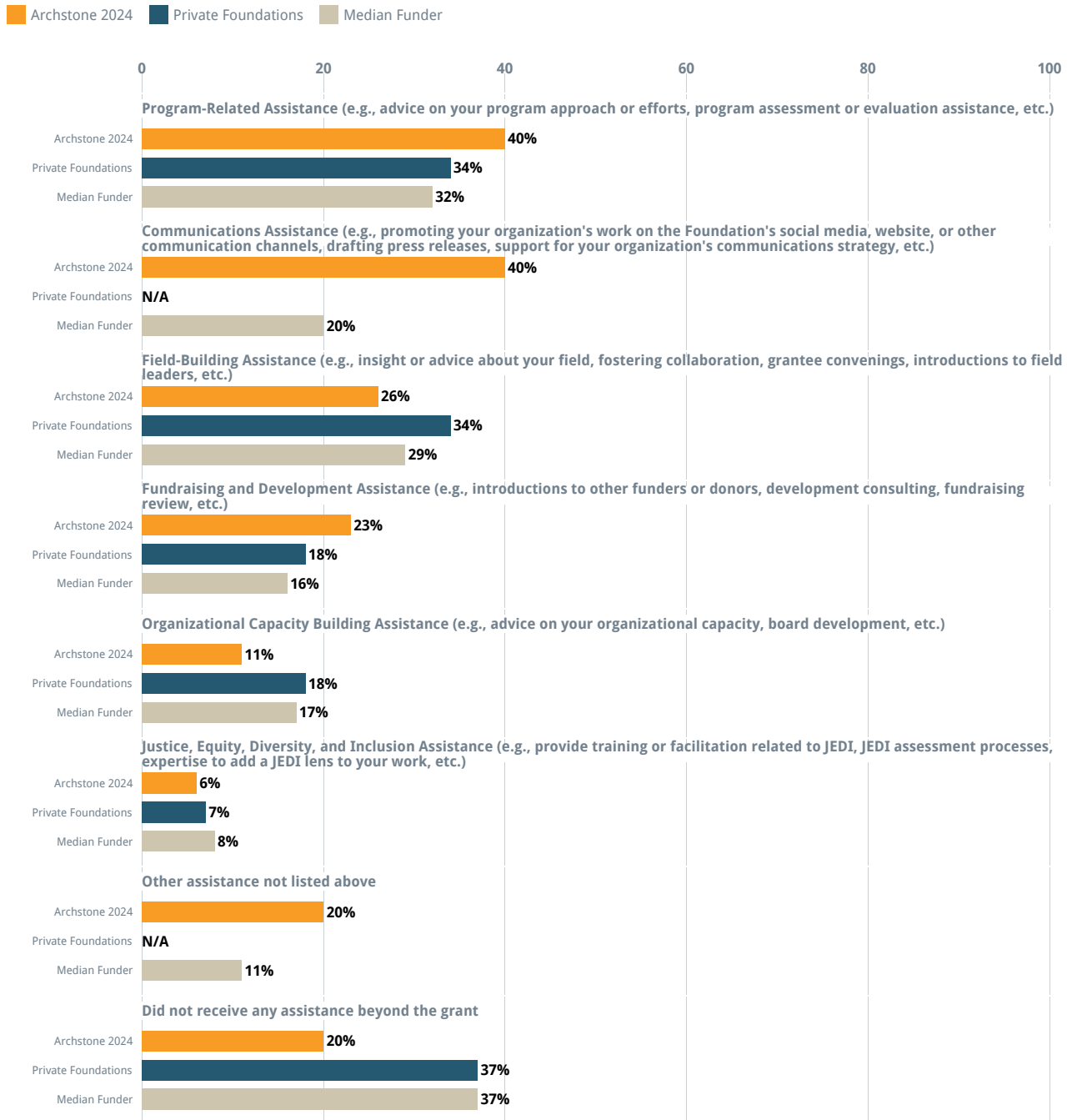


Cohort: Private Foundations Past results: off Subgroup: Priority Area

In the survey, respondents were asked about the assistance beyond the grant they received in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous assistance beyond the grant question.

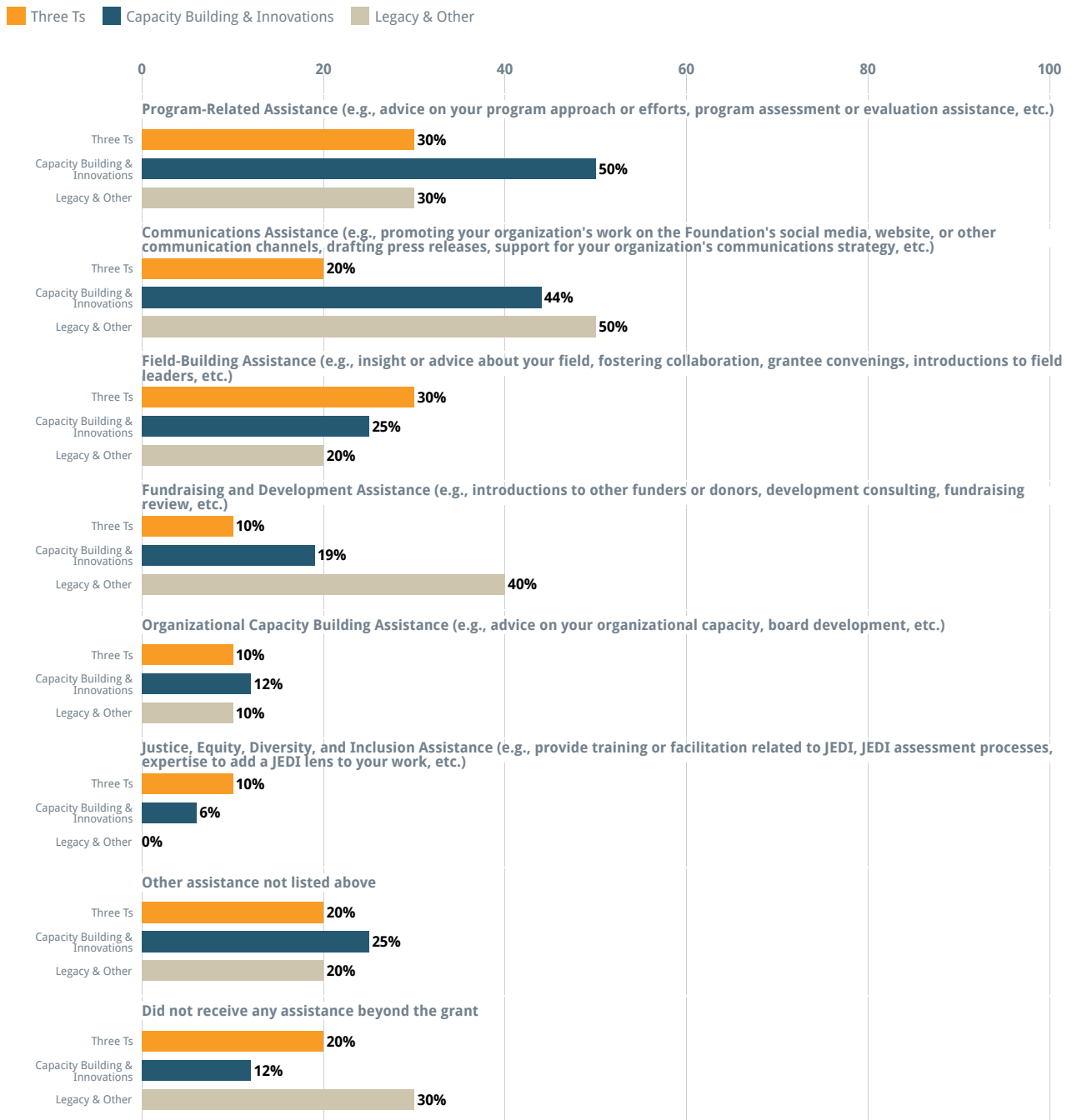
Please note that "Communications Assistance" and "Other assistance not listed above" were added as options to this question in 2024, and these options depict comparative data from fewer than 50 funders in the dataset.

Please indicate any types of assistance beyond the grant that were a component of what you received from the Foundation (from staff or a third party paid for by the Foundation).



Cohort: Private Foundations Past results: off

Please indicate any types of assistance beyond the grant that were a component of what you received from the Foundation (from staff or a third party paid for by the Foundation). - By Subgroup



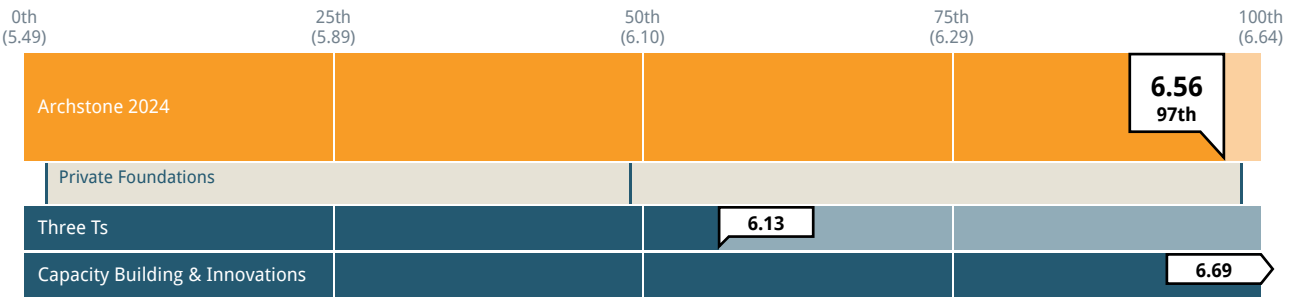
Subgroup: Priority Area

Note: The following questions were asked only of grantees who indicated receiving at least one form of assistance beyond the grant in the previous question.

Please rate the extent to which you agree with the following statements about the assistance beyond the grant you received from the Foundation.

The support I received met an important need for my organization and/or program

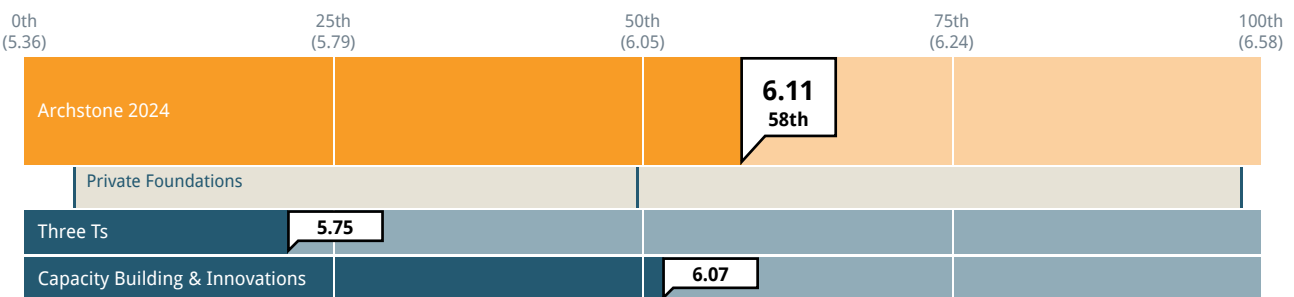
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Private Foundations Past results: off Subgroup: Priority Area

The support I received strengthened my organization and/or program

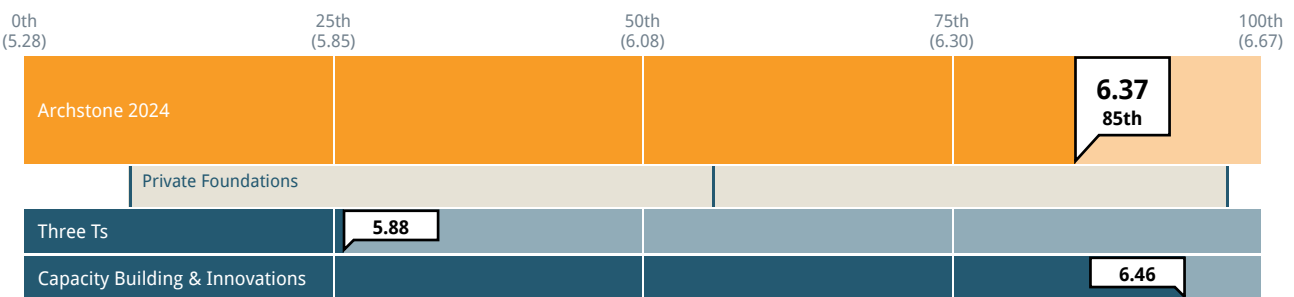
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Private Foundations Past results: off Subgroup: Priority Area

The Foundation's assistance beyond the grant was a worthwhile use of the time required of us

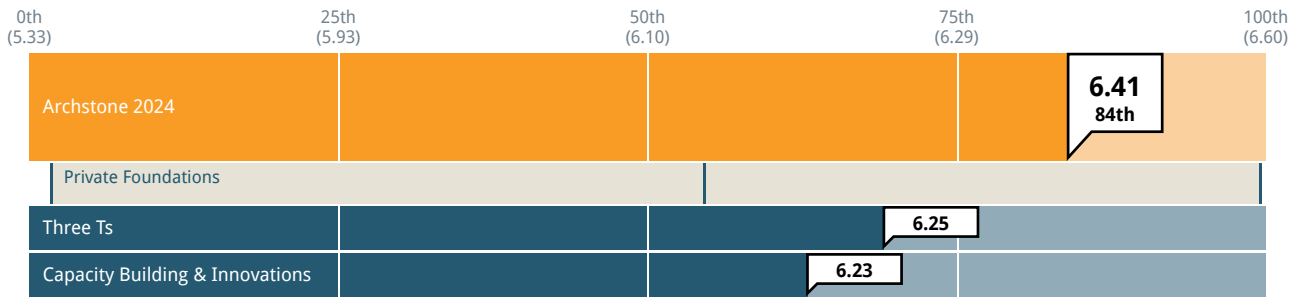
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Private Foundations Past results: off Subgroup: Priority Area

I felt the Foundation would be open to feedback about the assistance beyond the grant it provided

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



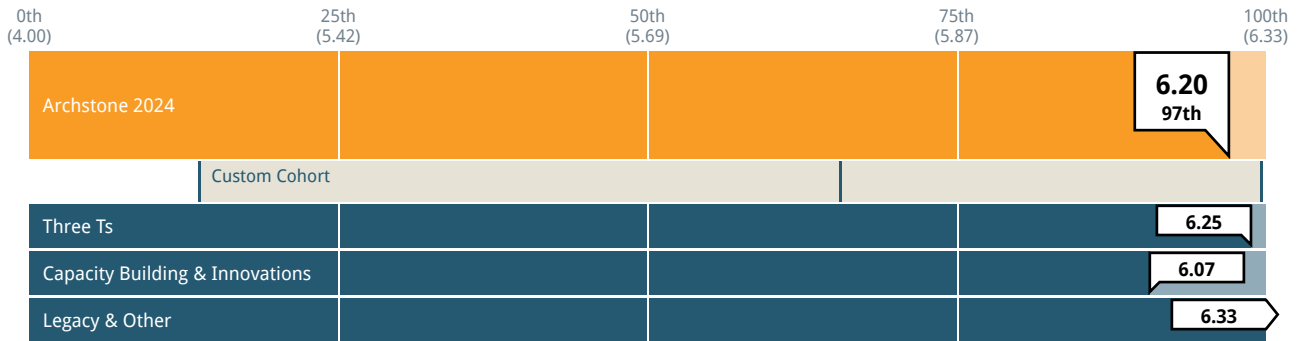
Cohort: Private Foundations Past results: off Subgroup: Priority Area

People and Communities Served

In the following question, 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.

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

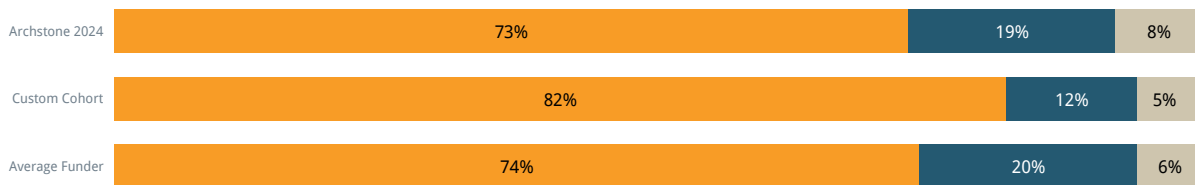
1 = Limited understanding 7 = Thorough understanding



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

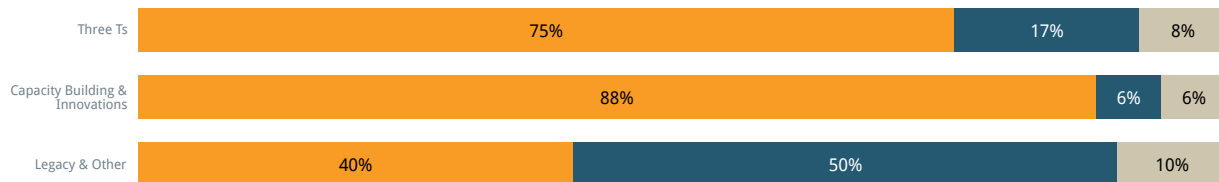
Yes No Don't know



Cohort: Custom Cohort Past results: off

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

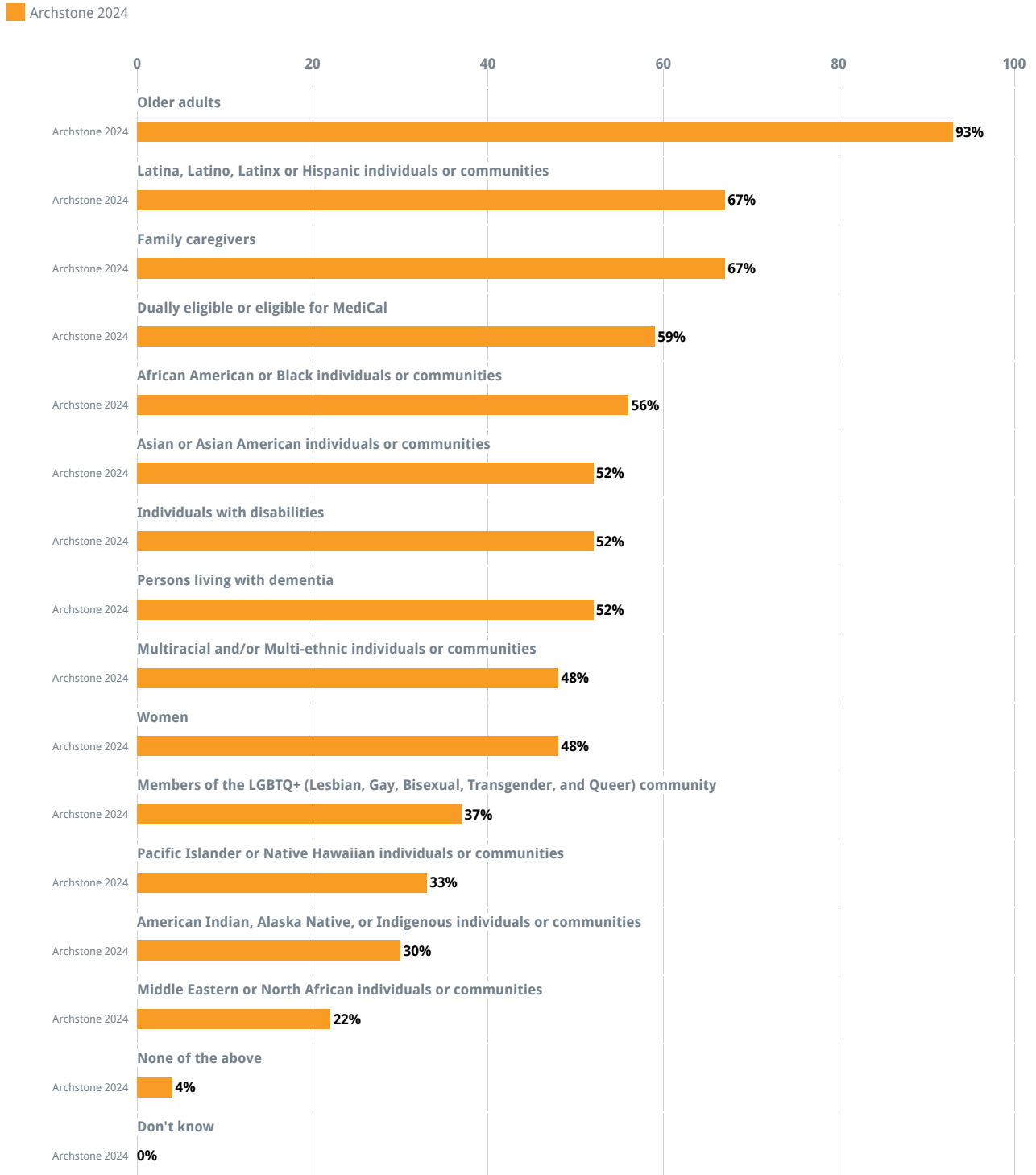
Yes No Don't know



Subgroup: Priority Area

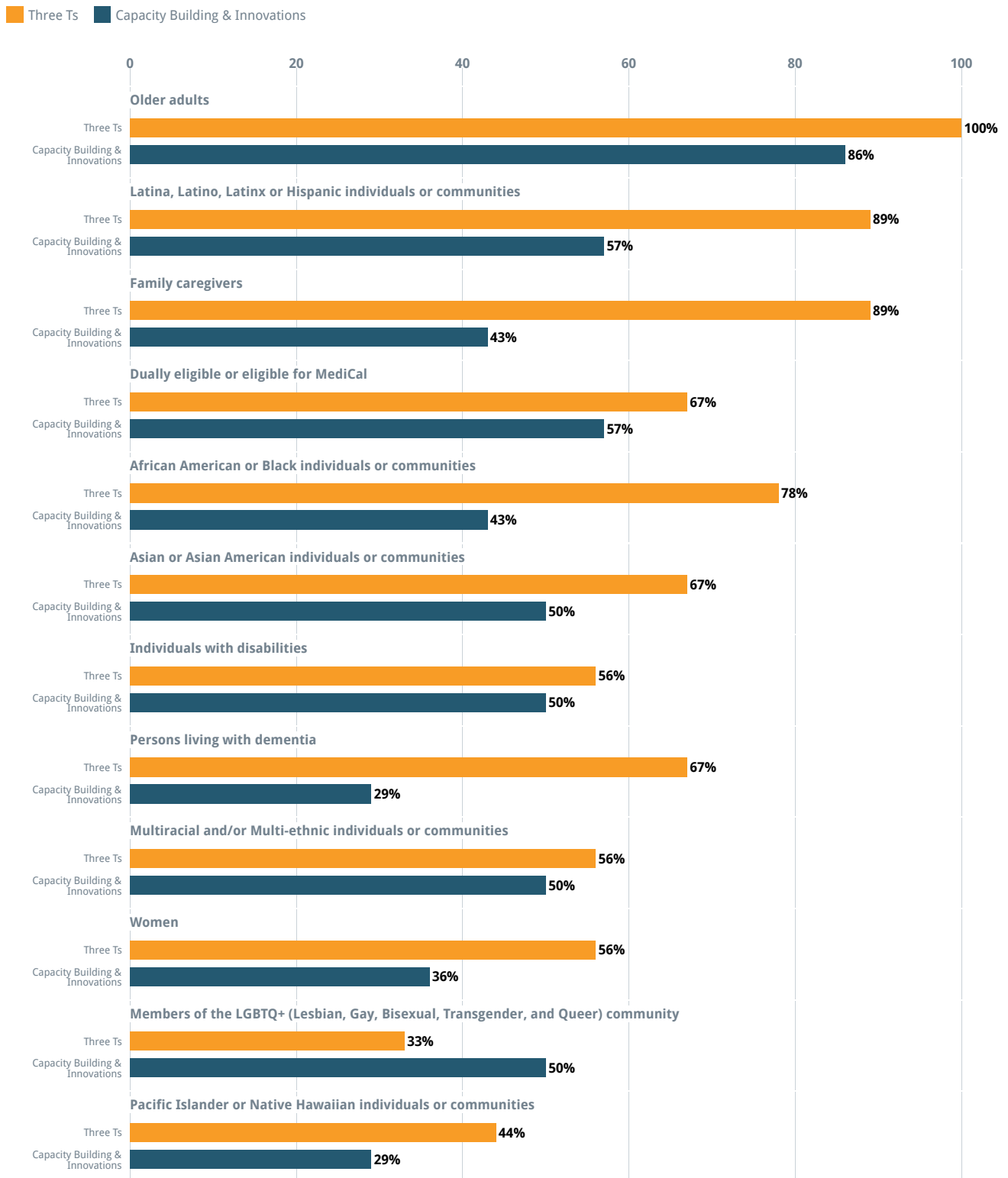
The following question is asked only of grantees who answered "yes" to the question "Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?"

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



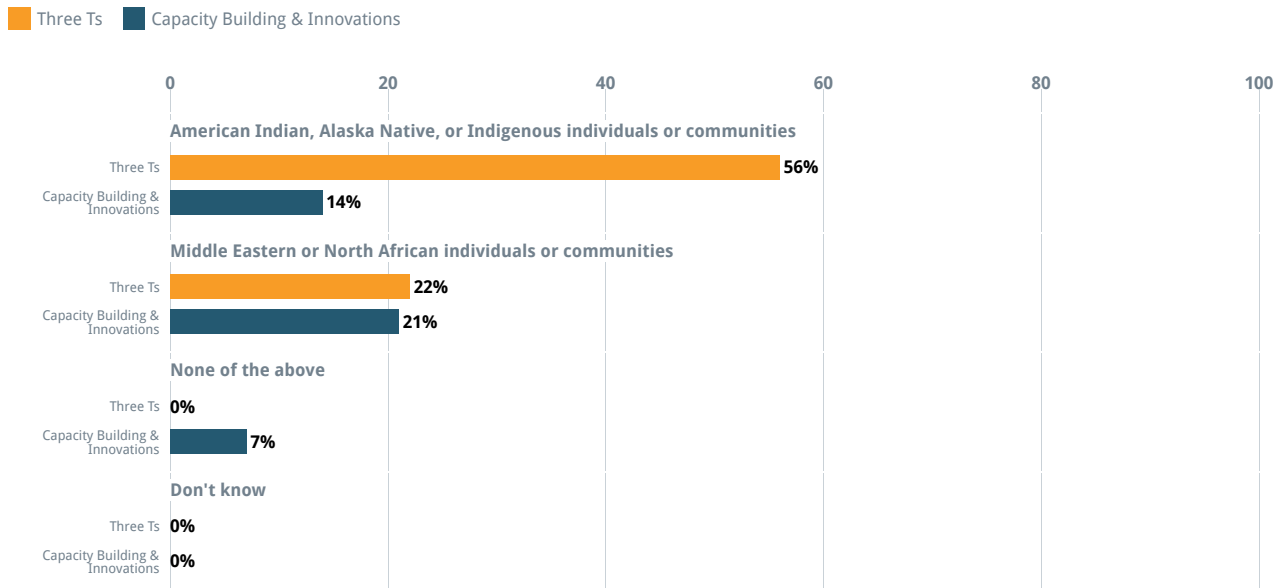
Cohort: None Past results: off

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: Priority Area

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.)

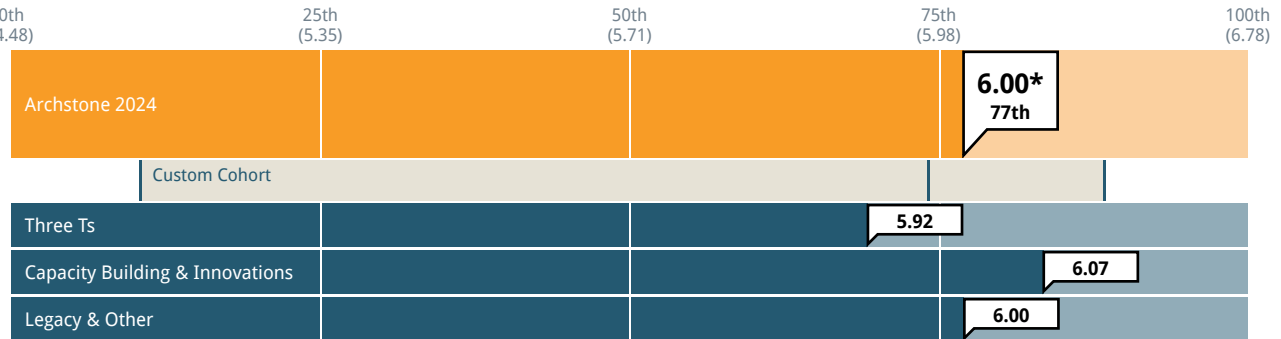


Subgroup: Priority Area

Justice, Equity, Diversity, and Inclusion

To what extent do you agree or disagree that the Foundation has clearly communicated what justice, equity, diversity, and inclusion means for its work?

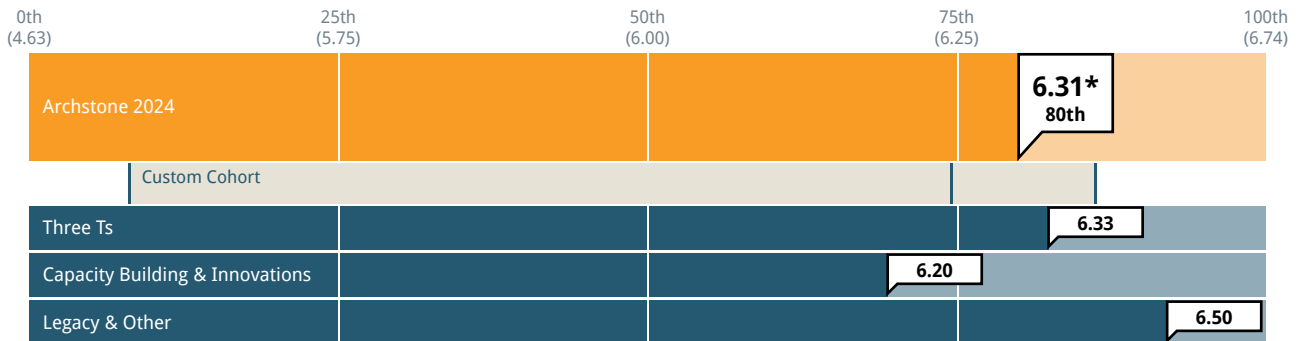
1 = Strongly disagree 4 = Neither agree nor disagree 7 = Strongly agree



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

To what extent do you agree or disagree that the Foundation demonstrates an explicit commitment to justice, equity, diversity, and inclusion in its work?

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

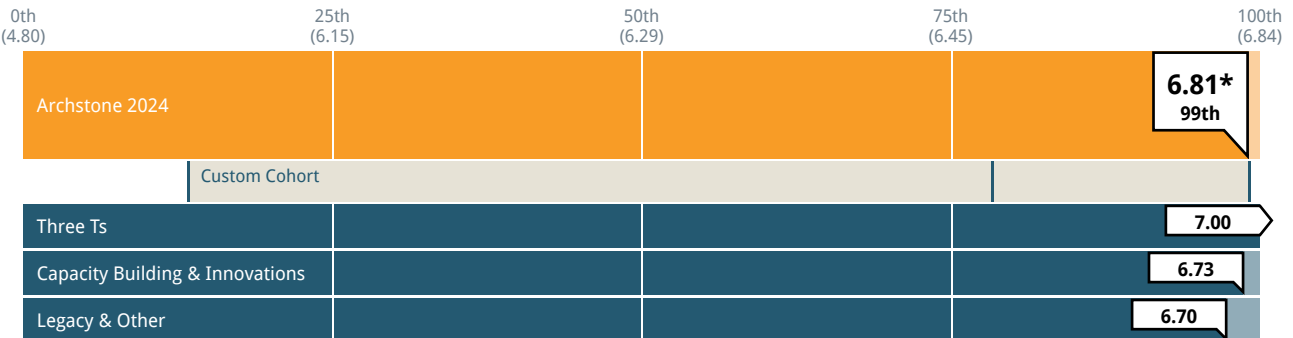


Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Funder-Grantee Relationships

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

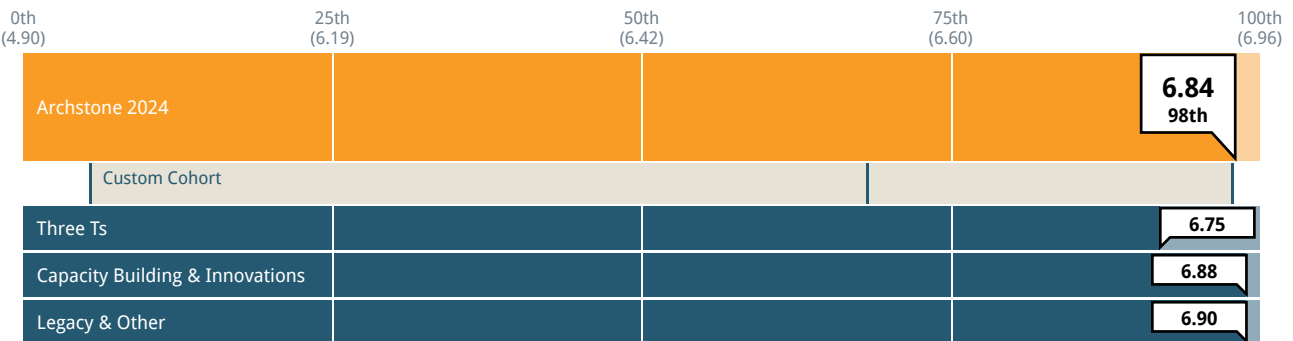
1 = Not at all comfortable 7 = Extremely comfortable



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Overall, how responsive was Foundation staff?

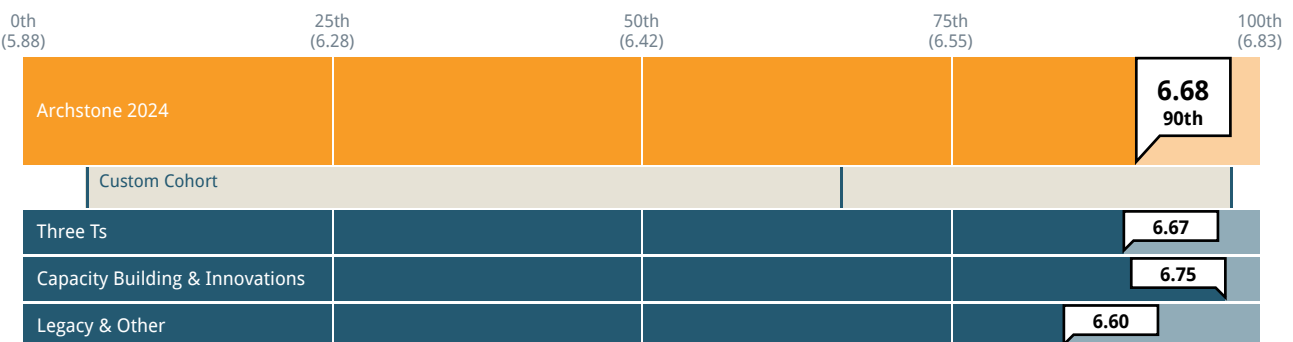
1 = Not at all responsive 7 = Extremely responsive



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

To what extent did the Foundation exhibit trust in your organization's staff during this grant?

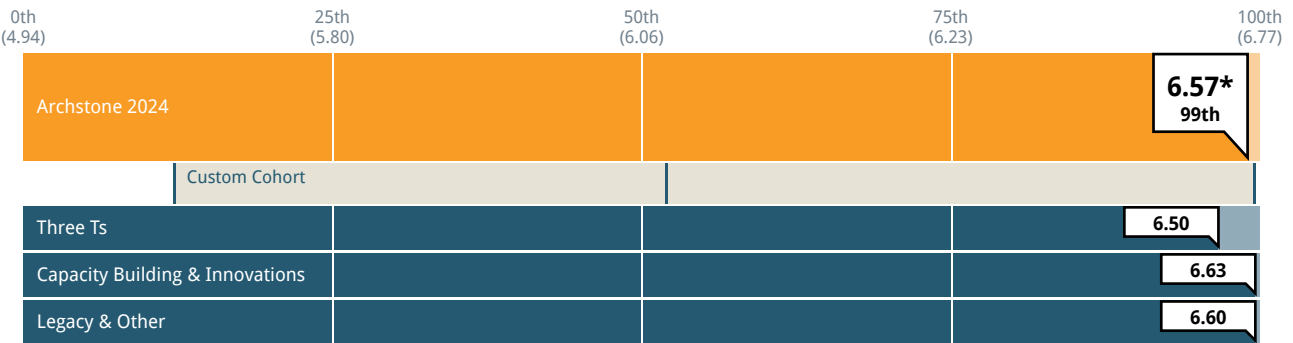
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

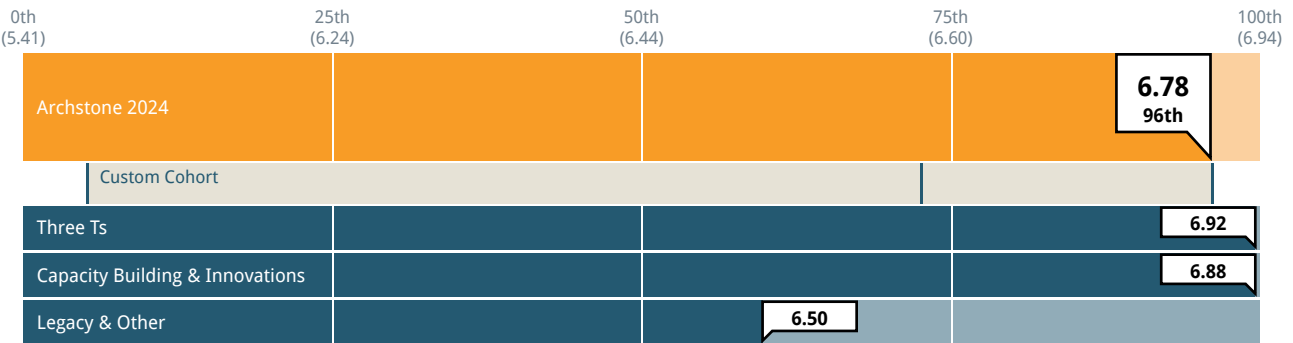
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

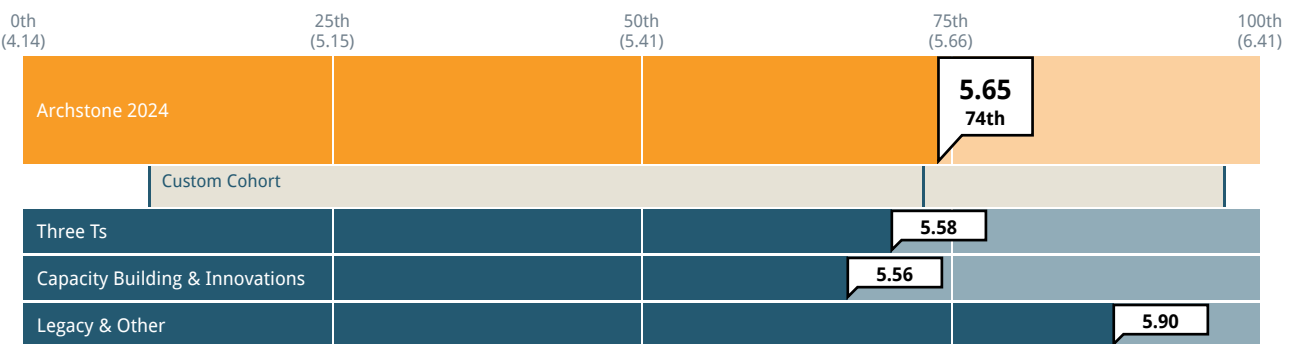
1 = Not at all 4 = Somewhat 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

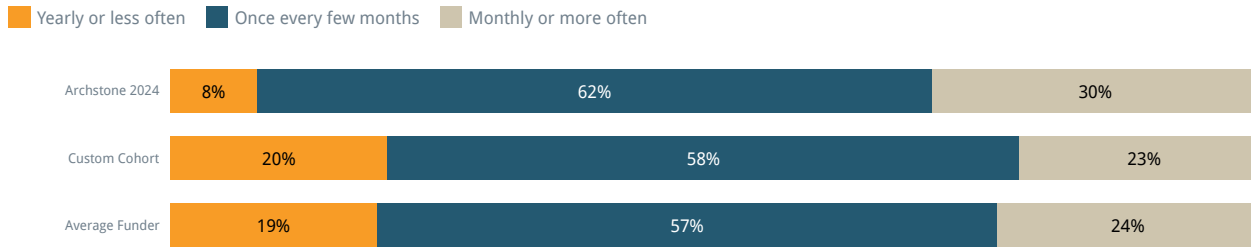
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

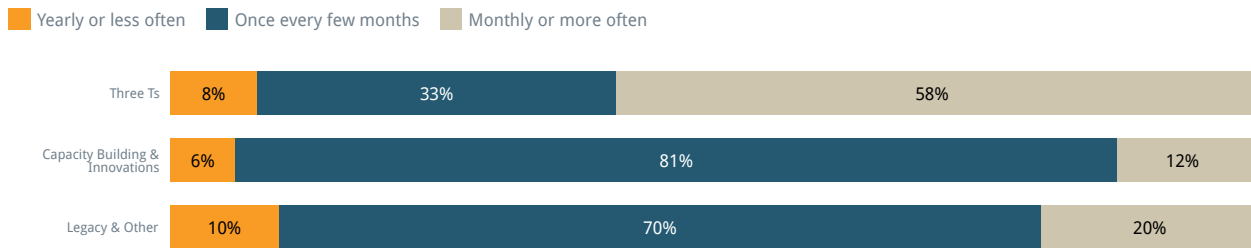
Interaction Patterns

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



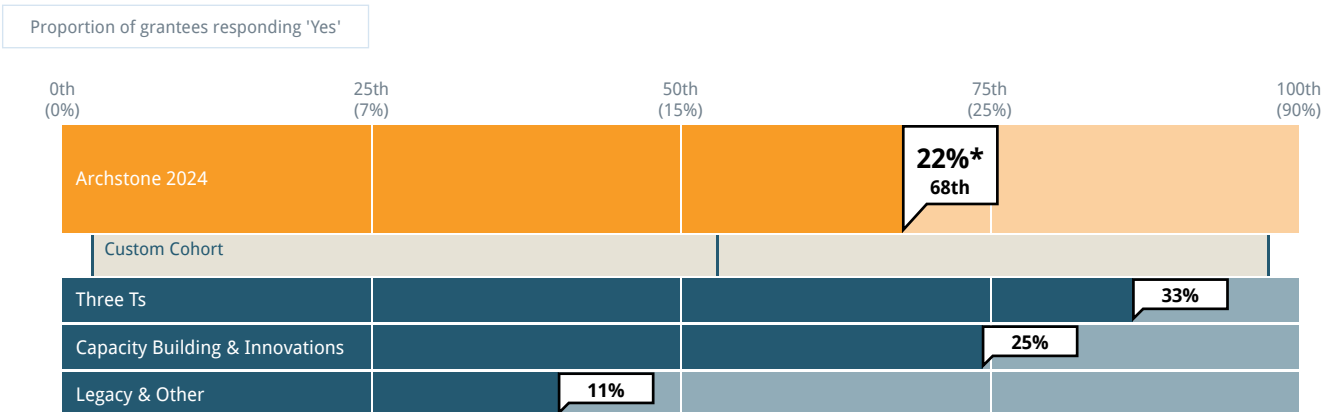
Cohort: Custom Cohort Past results: off

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



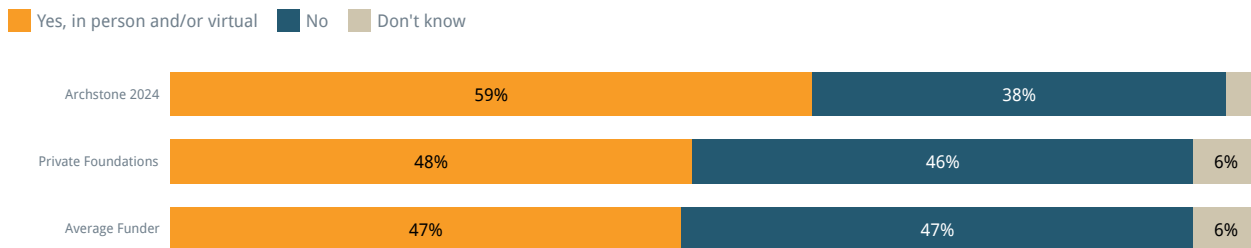
Subgroup: Priority Area

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



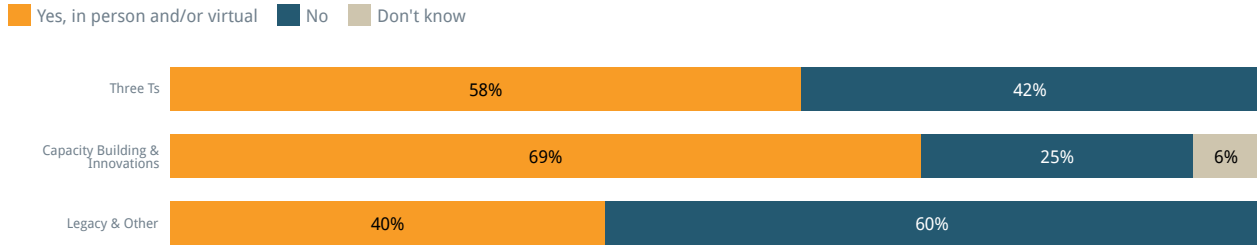
Cohort: Custom Cohort Past results: off Subgroup: Priority Area

At any point during this grant, including the selection process, did Foundation staff conduct a site visit?



Cohort: Private Foundations Past results: off

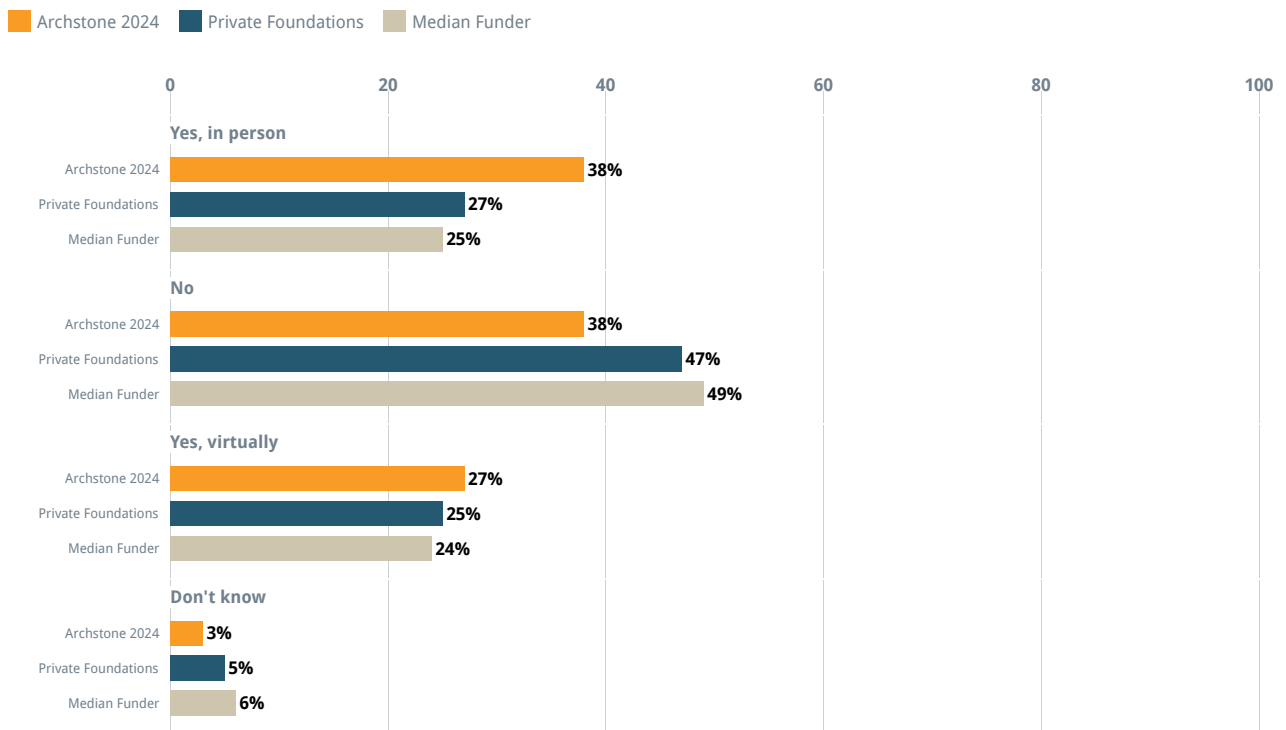
At any point during this grant, including the selection process, did Foundation staff conduct a site visit? - By Subgroup



Subgroup: Priority Area

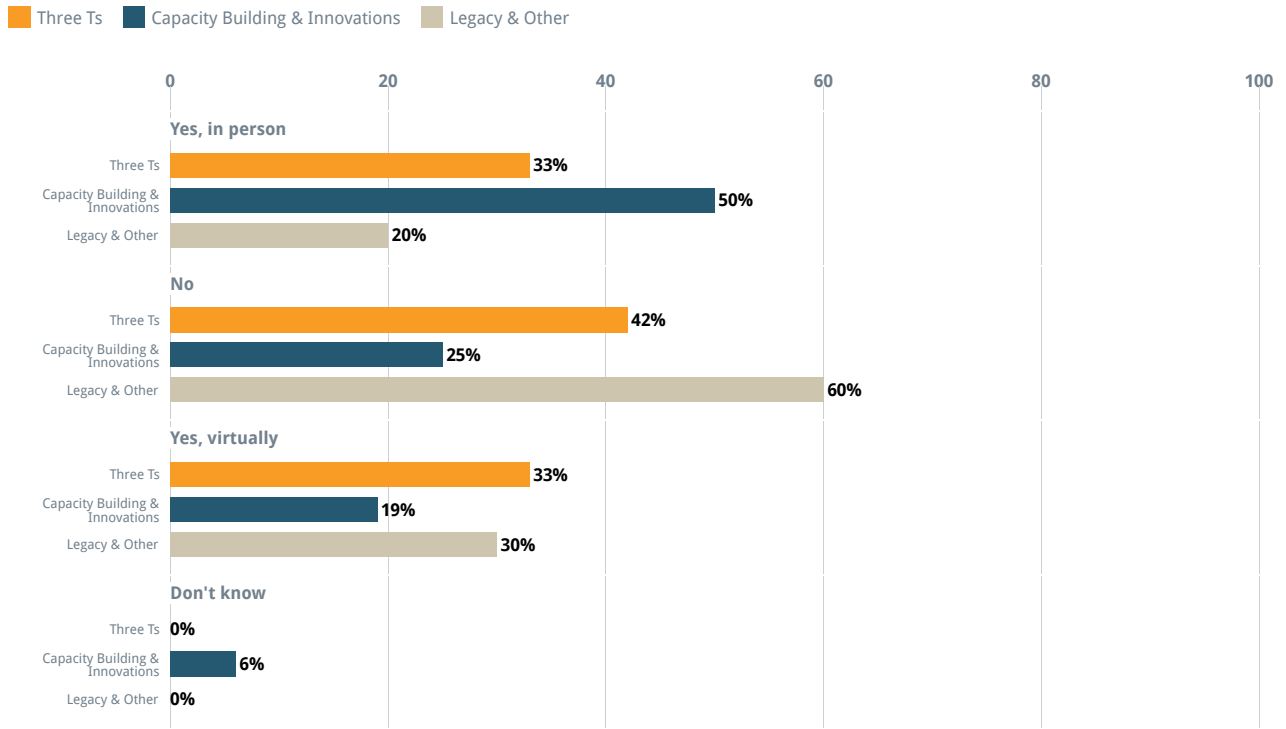
In the survey, respondents were asked the site visit question in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous site visit question.

At any point during this grant, including the selection process, did Foundation staff conduct a site visit?



Cohort: Private Foundations Past results: off

At any point during this grant, including the selection process, did Foundation staff conduct a site visit? - By Subgroup

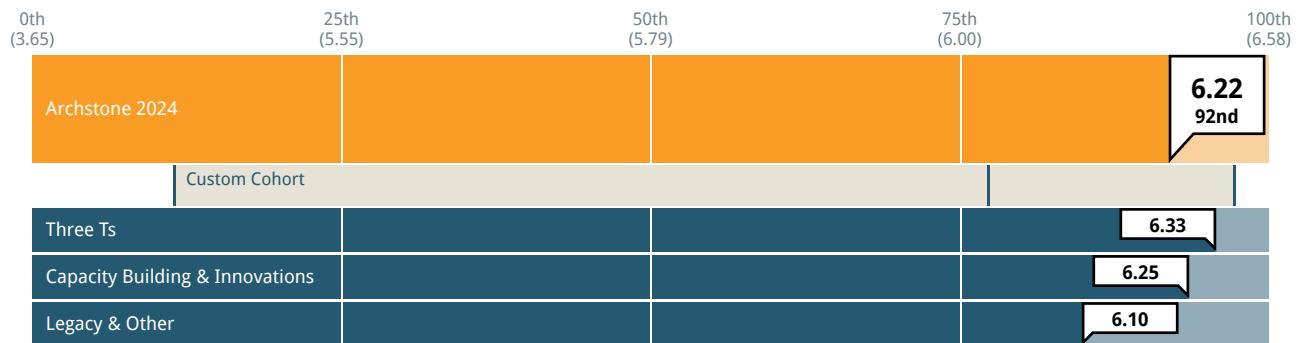


Subgroup: Priority Area

Communication

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

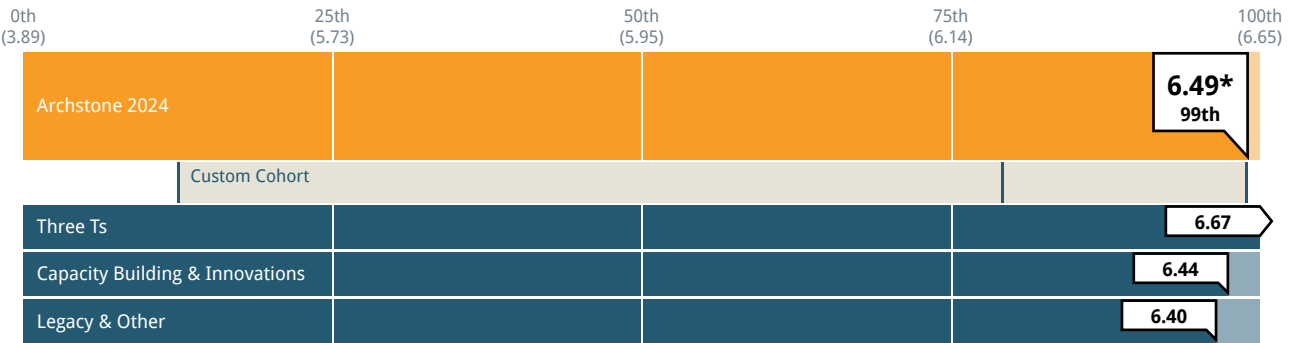
1 = Not at all clearly 7 = Extremely clearly



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

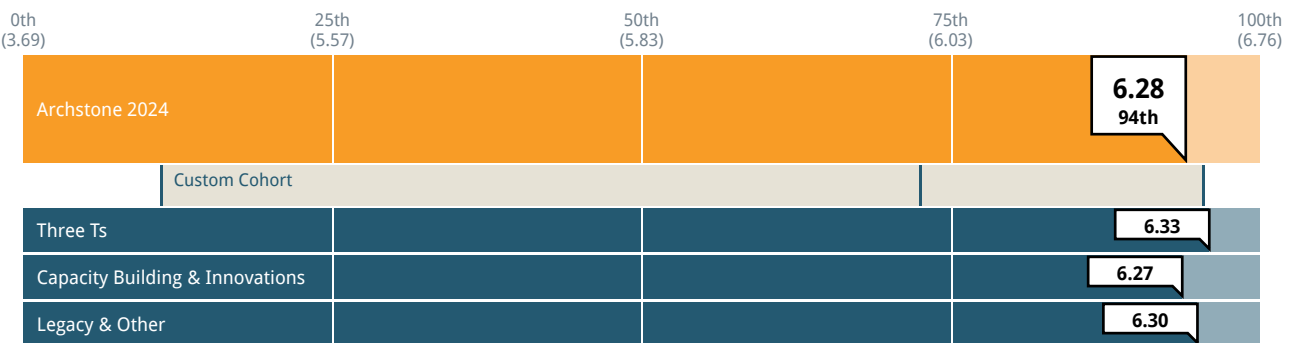
1 = Not at all consistent 7 = Completely consistent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Overall, how transparent is the Foundation with your organization?

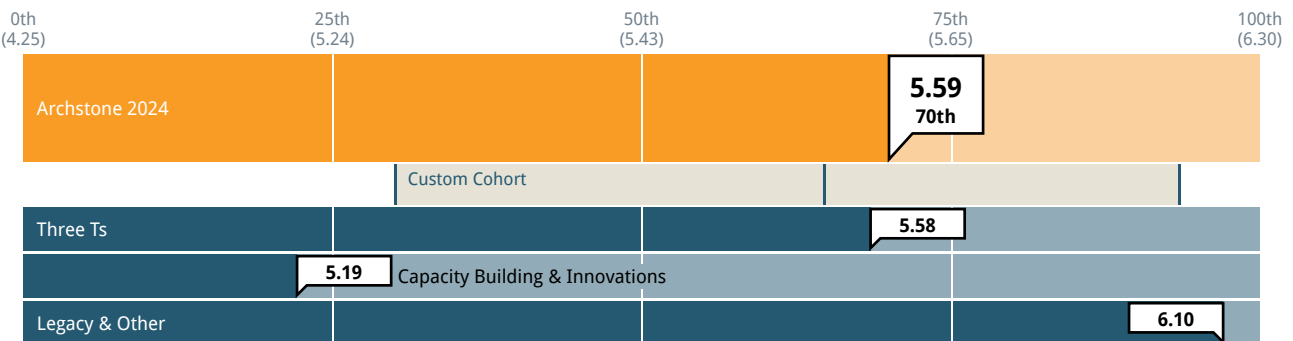
1 = Not at all transparent 7 = Extremely transparent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

1 = Limited understanding 7 = Thorough understanding

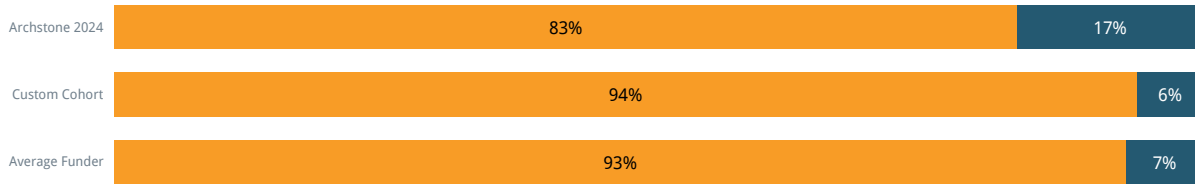


Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Grant Processes

Did you submit a proposal to the Foundation for this grant?

Submitted a proposal Did not submit a proposal

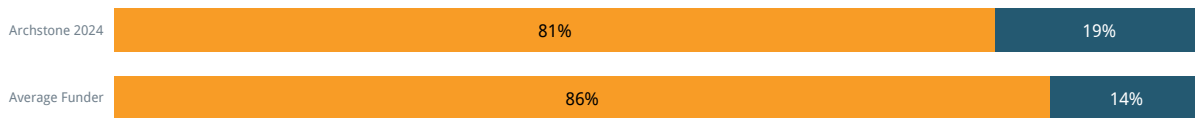


Cohort: Custom Cohort Past results: off

The following question was only asked of grantees that indicated submitting a proposal for their grant. This question was recently added to the grantee survey and depicts comparative data from fewer than 50 funders in the dataset.

Did you have contact with a Foundation staff member via phone, email, or in-person/video before you applied?

Yes No



Cohort: None Past results: off

Did you have contact with a Foundation staff member via phone, email, or in-person/video before you applied? - By Subgroup

Yes No



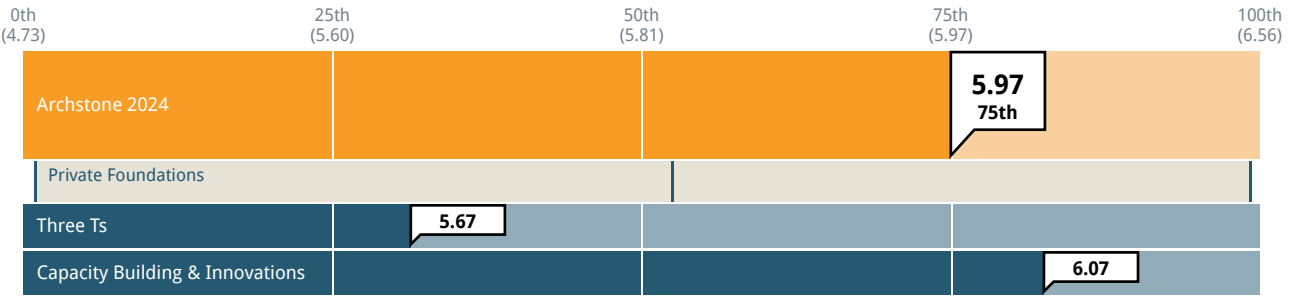
Subgroup: Priority Area

Selection Process

Note: CEP modified the following question in 2022 and determined, through recent analysis, that responses were not comparable to those provided prior to 2022. CEP has removed data from prior to 2022 from this question's comparative dataset. As a result, percentile rankings relative to CEP's comparative dataset may look different in this report than they did in your previous report.

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

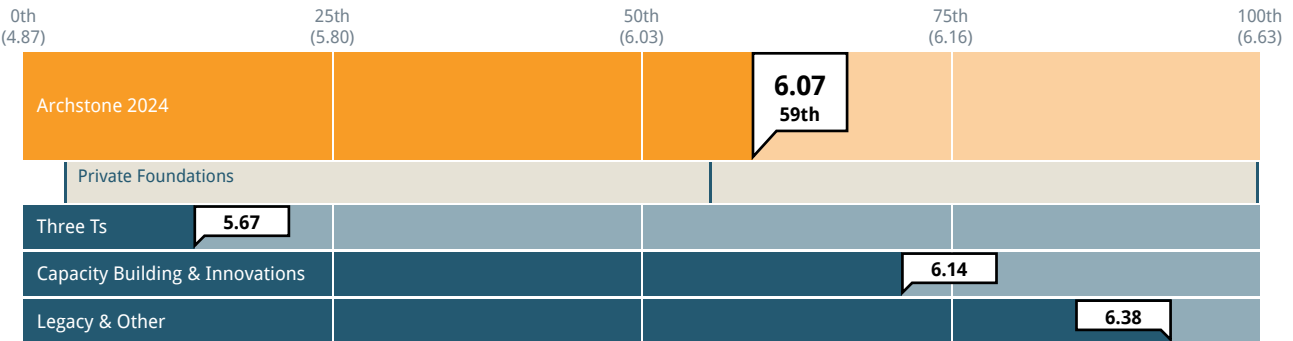
1 = Not at all 7 = To a great extent



Cohort: Private Foundations Past results: off Subgroup: Priority Area

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

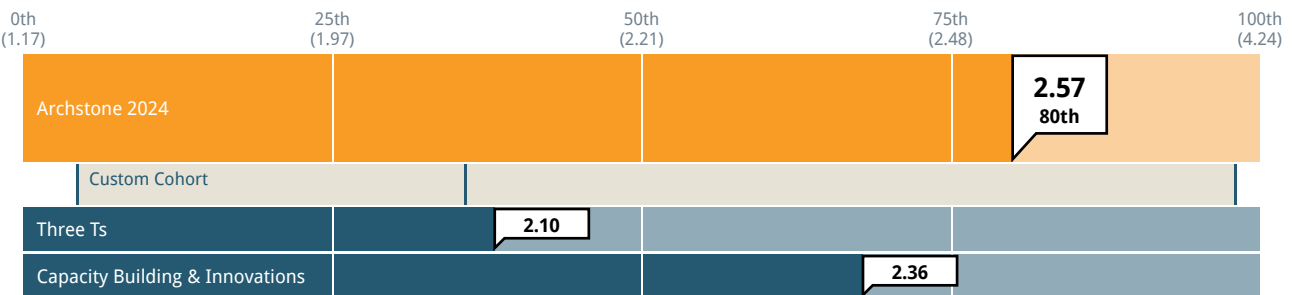
1 = Not at all 7 = To a great extent



Cohort: Private Foundations Past results: off Subgroup: Priority Area

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

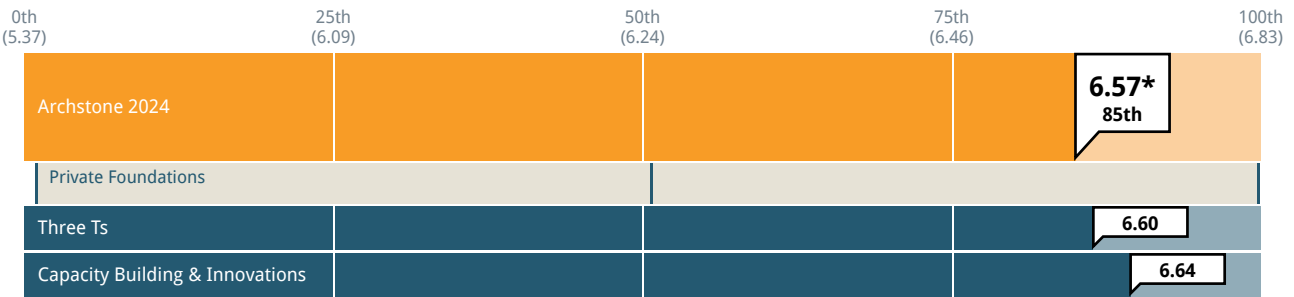
1 = No pressure 7 = Significant pressure



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

To what extent was the Foundation clear and transparent about the selection process requirements and timelines?

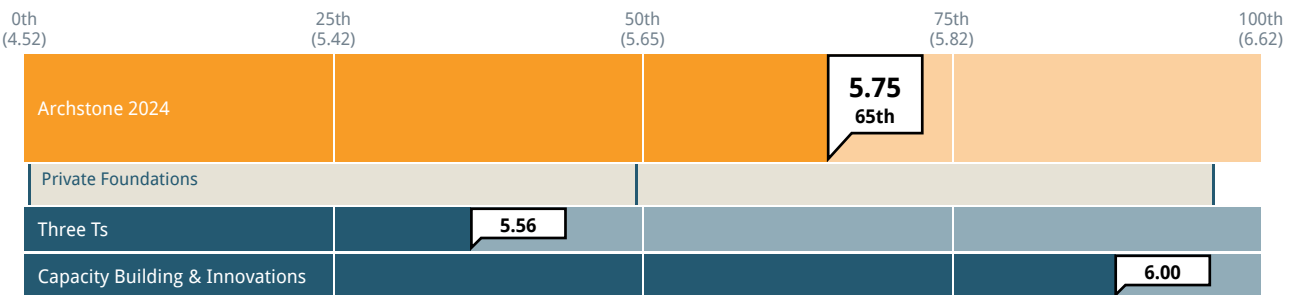
1 = Not at all 7 = To a great extent



Cohort: Private Foundations Past results: off Subgroup: Priority Area

To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether a proposal would be funded or declined?

1 = Not at all 7 = To a great extent



Cohort: Private Foundations Past results: off Subgroup: Priority Area

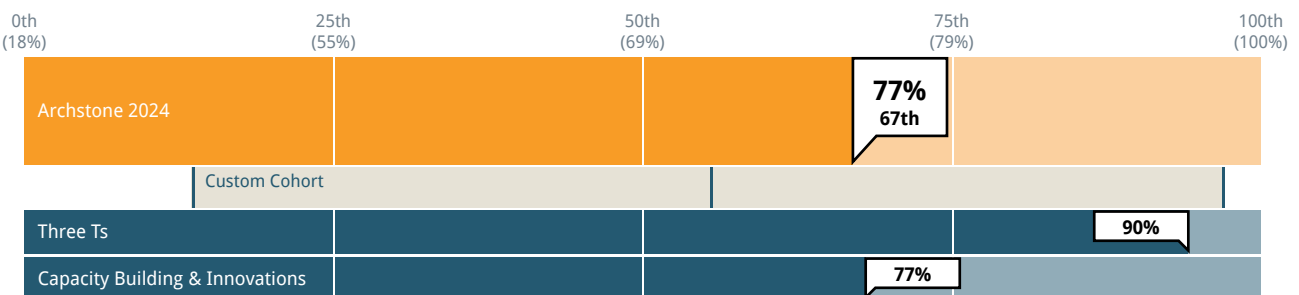
Reporting and Evaluation Process

Definition of Reporting and Evaluation

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

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

Proportion of grantees responding 'Yes'



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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: off

Participation in Reporting and/or Evaluation Processes - By Subgroup

■ 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



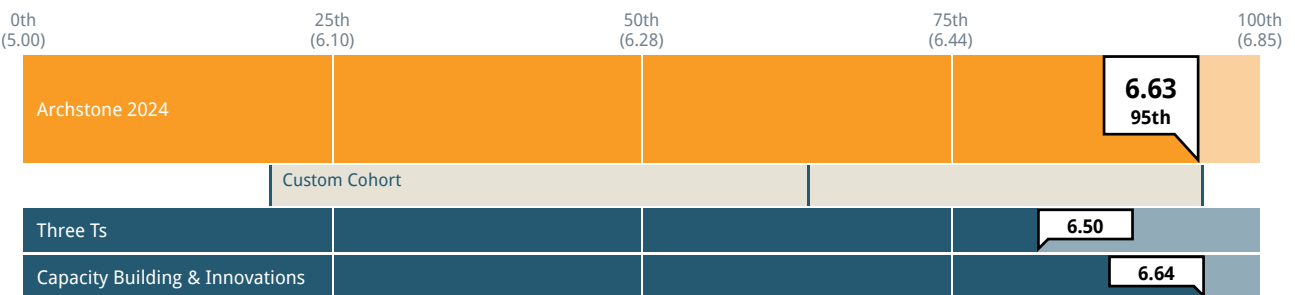
Subgroup: Priority Area

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 the Foundation's reporting process straightforward?

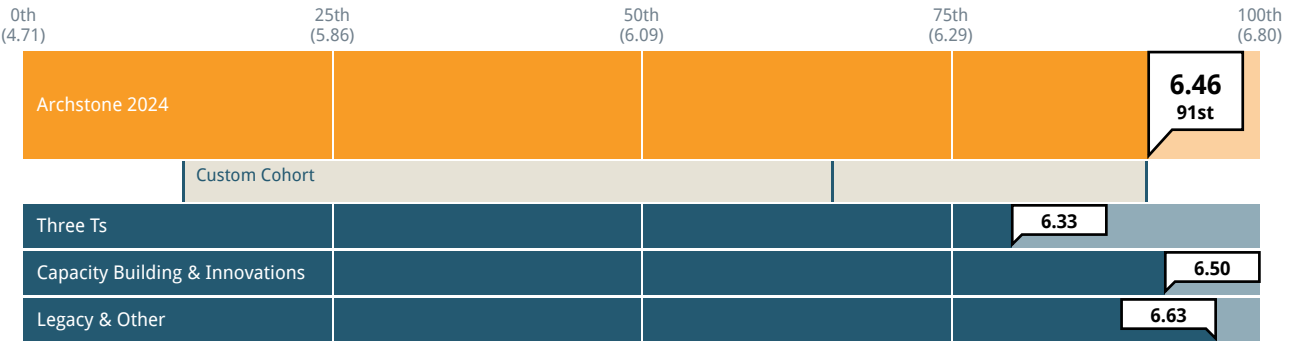
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

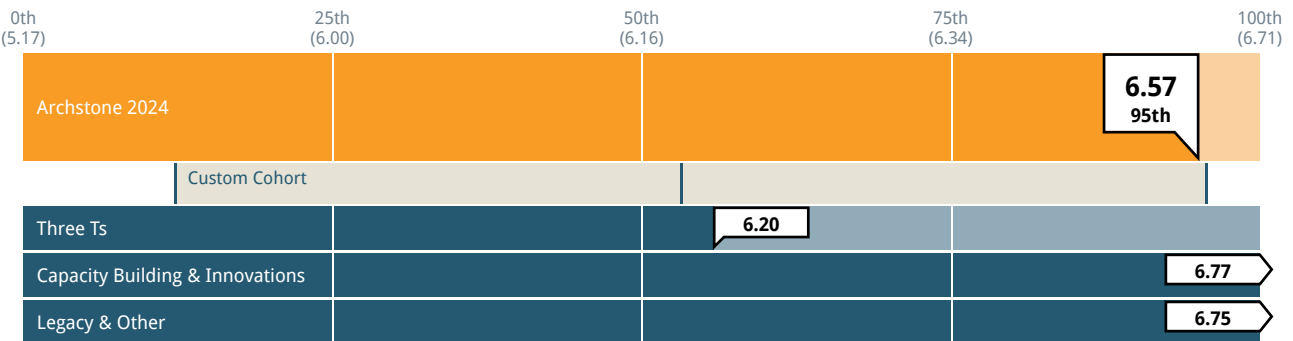
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

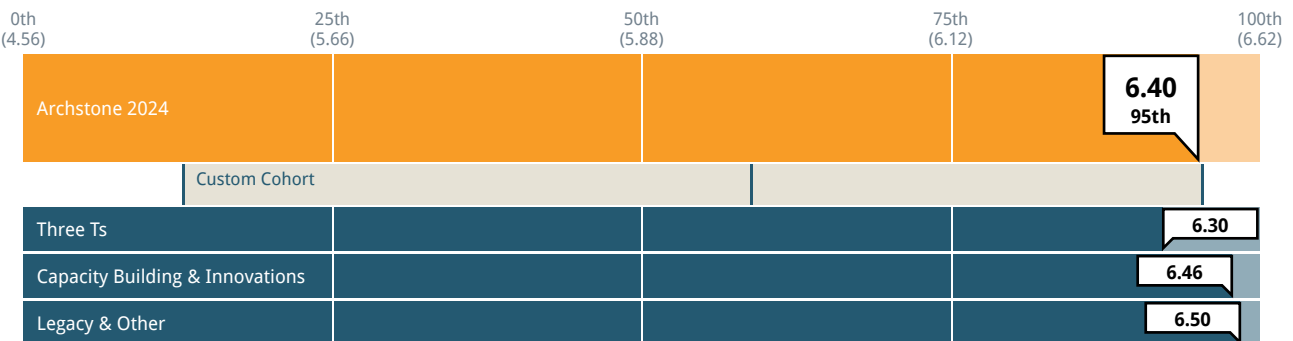
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

1 = Not at all 7 = To a great extent



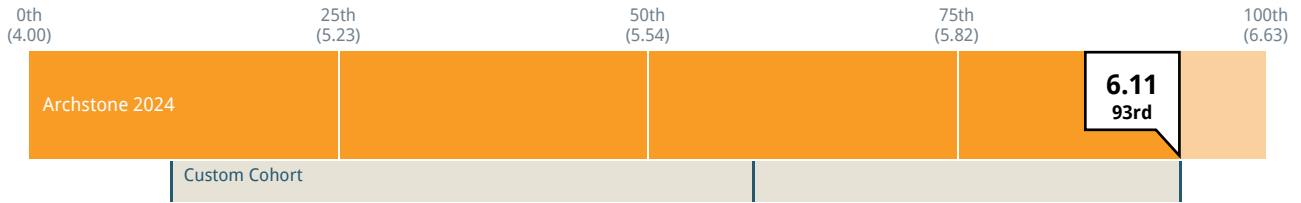
Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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 organization in the design of the evaluation?

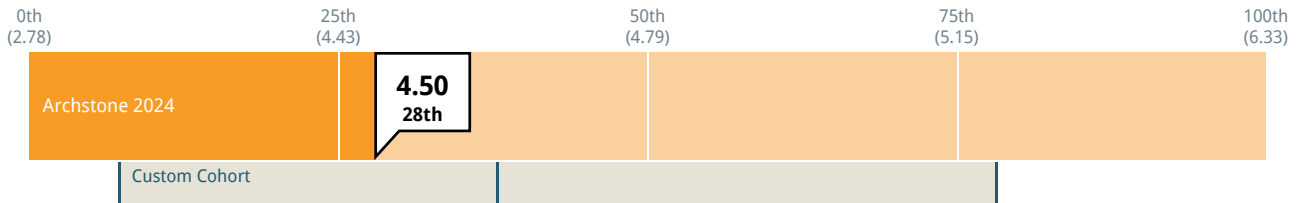
1 = Not at all 7 = To a great extent



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

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

1 = Not at all 7 = To a great extent

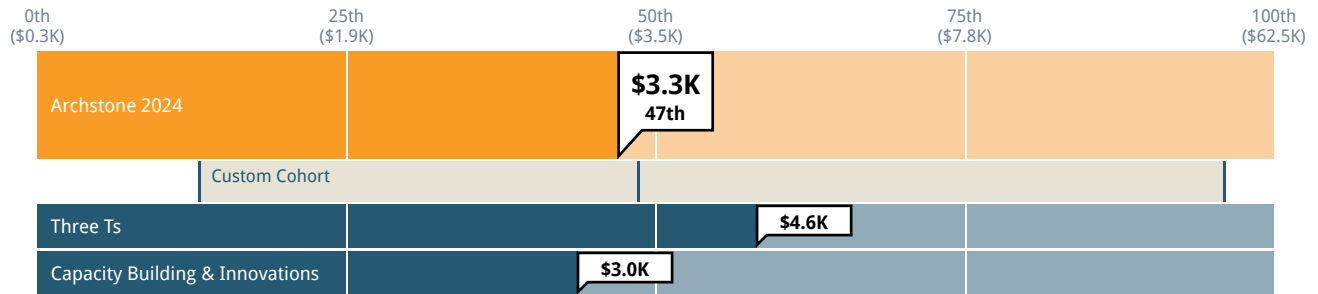


Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Dollar Return and Time Spent on Processes

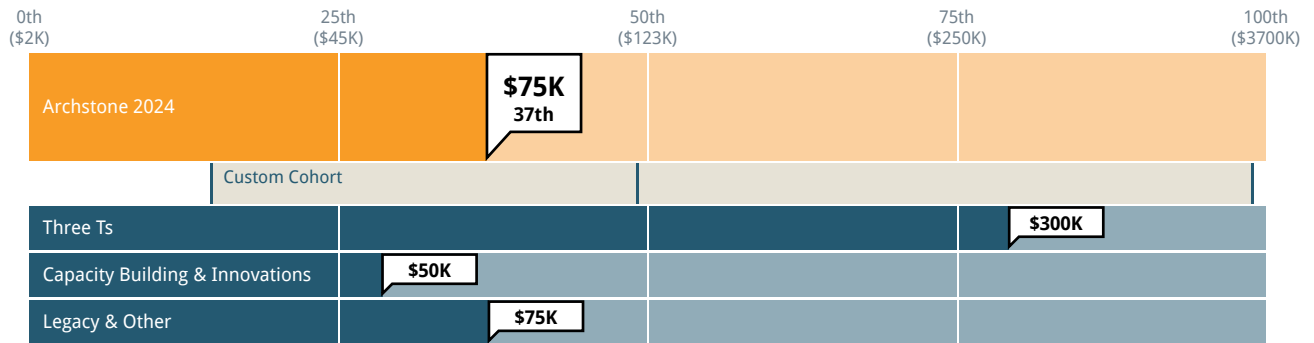
Dollar Return: Median grant dollars awarded per process hour required

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



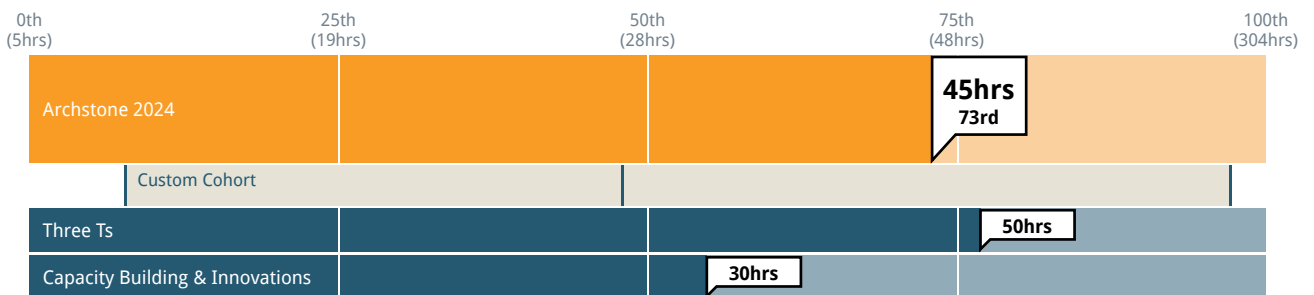
Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Median Grant Size



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

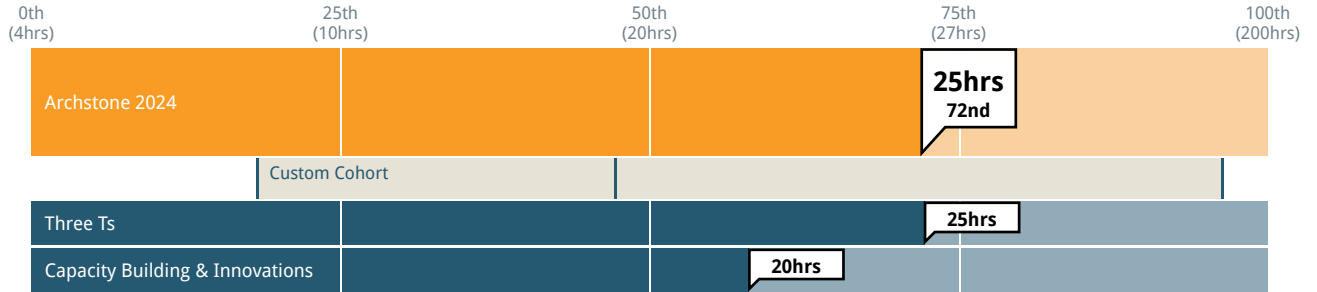
Median hours spent by grantees on funder requirements over grant lifetime



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Time Spent on Selection Process

Median Hours Spent on Proposal and Selection Process



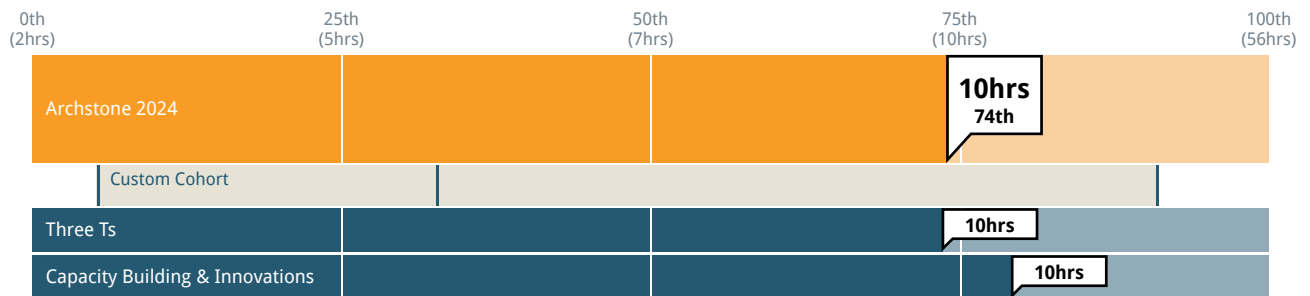
Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Selected Cohort: Custom Cohort			
Time Spent On Proposal and Selection Process	Archstone 2024	Average Funder	Custom Cohort
1 to 9 hours	30%	27%	25%
10 to 19 hours	3%	22%	23%
20 to 29 hours	27%	16%	19%
30 to 39 hours	7%	6%	6%
40 to 49 hours	13%	10%	13%
50 to 99 hours	7%	10%	8%
100 to 199 hours	10%	5%	5%
200+ hours	3%	3%	1%

Selected Subgroup: Priority Area			
Time Spent On Proposal and Selection Process (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
1 to 9 hours	20%	40%	N/A
10 to 19 hours	0%	7%	N/A
20 to 29 hours	50%	13%	N/A
30 to 39 hours	0%	7%	N/A
40 to 49 hours	0%	13%	N/A
50 to 99 hours	10%	7%	N/A
100 to 199 hours	20%	7%	N/A
200+ hours	0%	7%	N/A

Time Spent on Reporting and Evaluation Process

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



Cohort: Custom Cohort Past results: off Subgroup: Priority Area

Selected Cohort: Custom Cohort			
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized)	Archstone 2024	Average Funder	Custom Cohort
1 to 9 hours	44%	58%	61%
10 to 19 hours	19%	18%	16%
20 to 29 hours	11%	9%	9%
30 to 39 hours	4%	3%	3%
40 to 49 hours	11%	3%	3%
50 to 99 hours	4%	4%	3%
100+ hours	7%	4%	4%

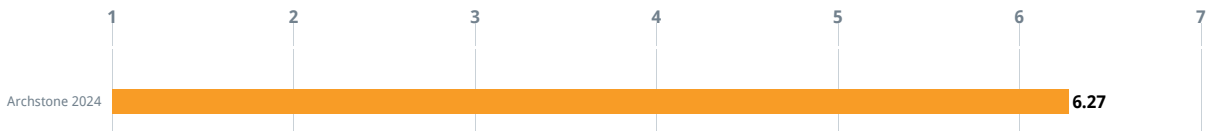
Selected Subgroup: Priority Area			
Time Spent On Monitoring, Reporting, And Evaluation Process (Annualized) (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
1 to 9 hours	38%	43%	N/A
10 to 19 hours	25%	14%	N/A
20 to 29 hours	0%	14%	N/A
30 to 39 hours	12%	0%	N/A
40 to 49 hours	12%	14%	N/A
50 to 99 hours	0%	7%	N/A
100+ hours	12%	7%	N/A

Customized Questions

Thinking about the Foundation's work over the past few years, to what extent do you agree or disagree with the following statement: **The Foundation is on the right track to improve the health and well-being of California's older adults and their caregivers.**

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

Archstone 2024

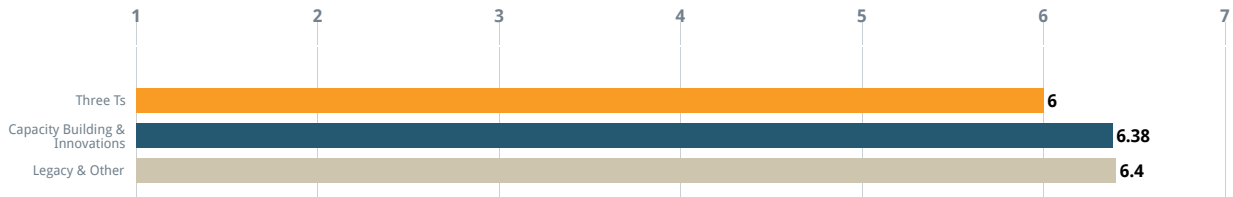


Cohort: None Past results: off

Thinking about the Foundation's work over the past few years, to what extent do you agree or disagree with the following statement: **The Foundation is on the right track to improve the health and well-being of California's older adults and their caregivers. - By Subgroup**

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

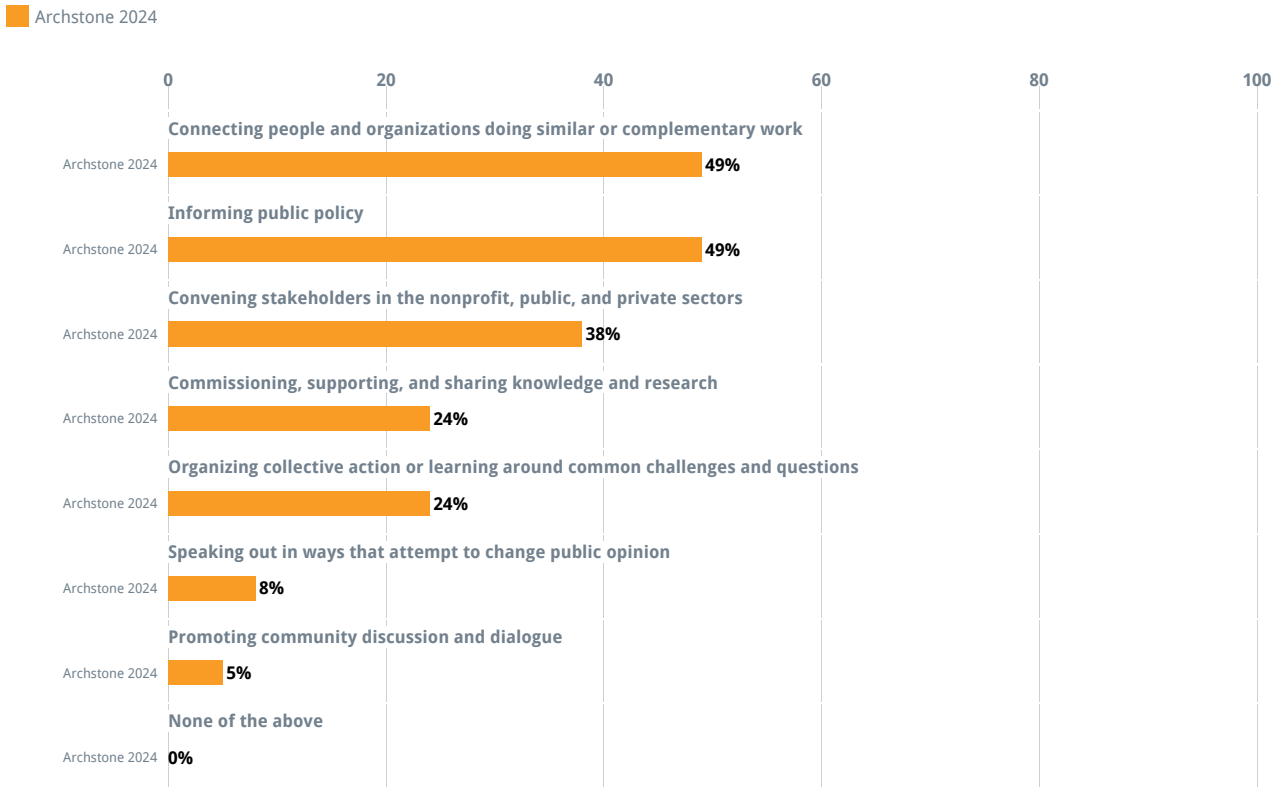
Three Ts Capacity Building & Innovations Legacy & Other



Subgroup: Priority Area

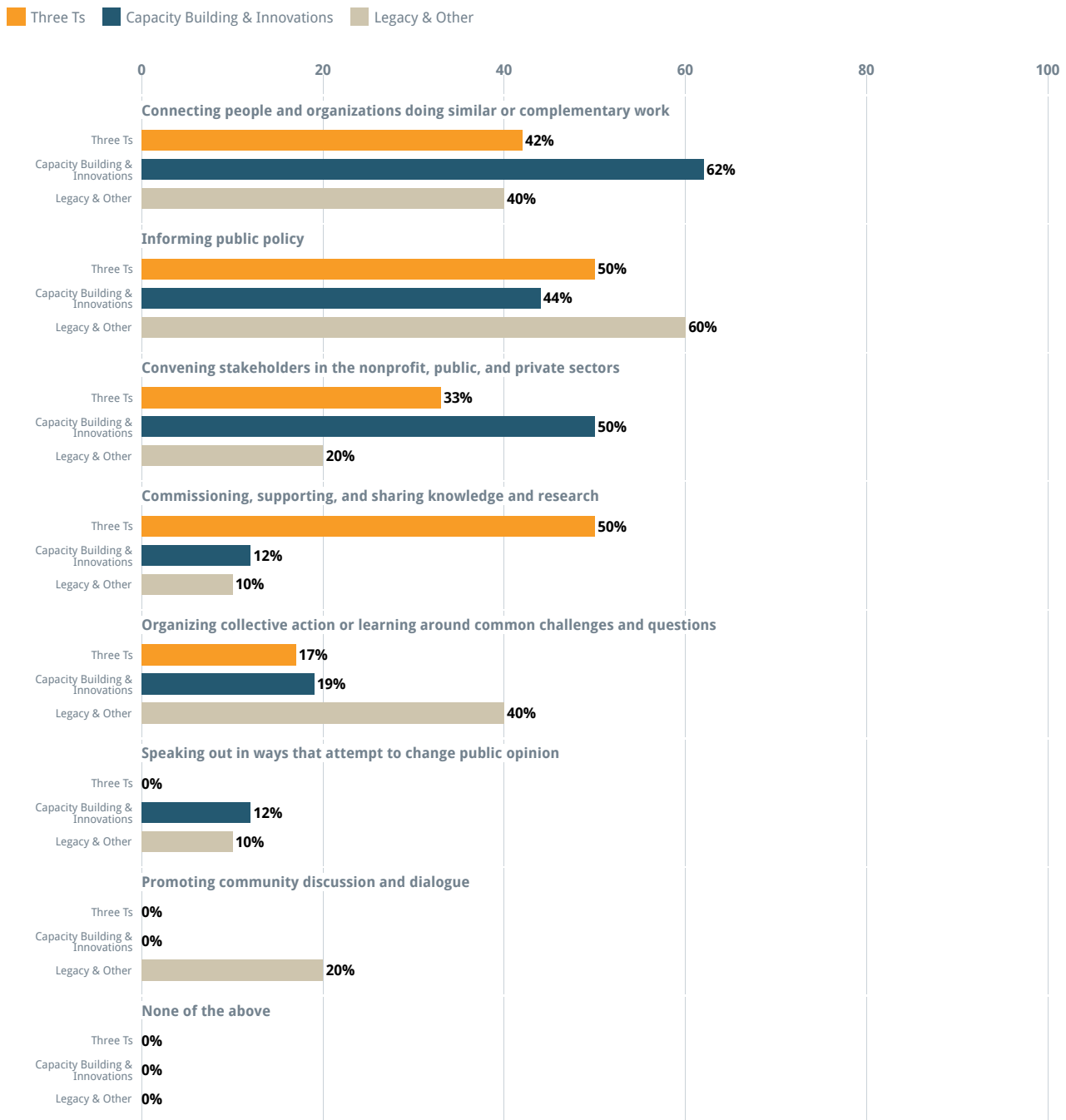
In the survey, respondents were asked to select up to two future roles the Foundation could play beyond grantmaking.

Thinking about the roles the Foundation could play beyond grantmaking, which role(s) do you think it's most important for the Foundation to play in the future? Keep in mind what you think the Foundation could be well positioned to do effectively.



Cohort: None Past results: off

Thinking about the roles the Foundation could play beyond grantmaking, which role(s) do you think it's most important for the Foundation to play in the future? Keep in mind what you think the Foundation could be well positioned to do effectively. - By Subgroup



Subgroup: Priority Area

JEDI in Archstone's Work

Since 2020, Archstone Foundation has been more specific about its commitments to building principles of justice, equity, diversity, and inclusion (JEDI) and analysis in all of its grantmaking. Have you discussed with or received communication about how JEDI informs any of the following aspects of the Foundation's work?

The Foundation's vision and values

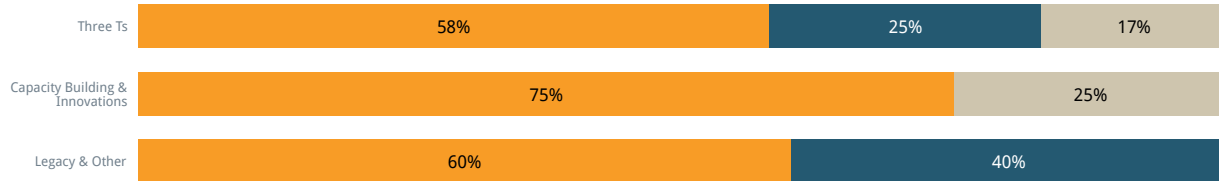
Yes No Don't know



Cohort: None Past results: off

The Foundation's vision and values - By Subgroup

Yes No Don't know



Subgroup: Priority Area

The Foundation's Three T strategy

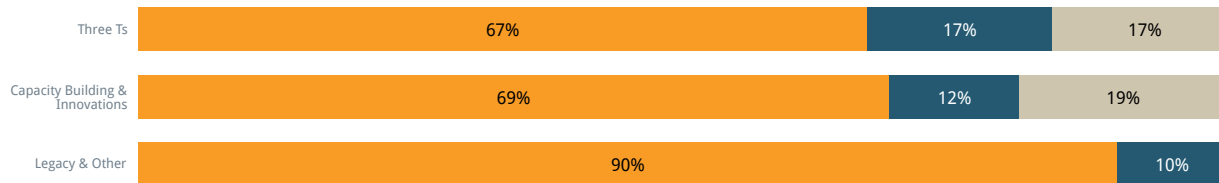
Yes No Don't know



Cohort: None Past results: off

The Foundation's Three T strategy - By Subgroup

Yes No Don't know



Subgroup: Priority Area

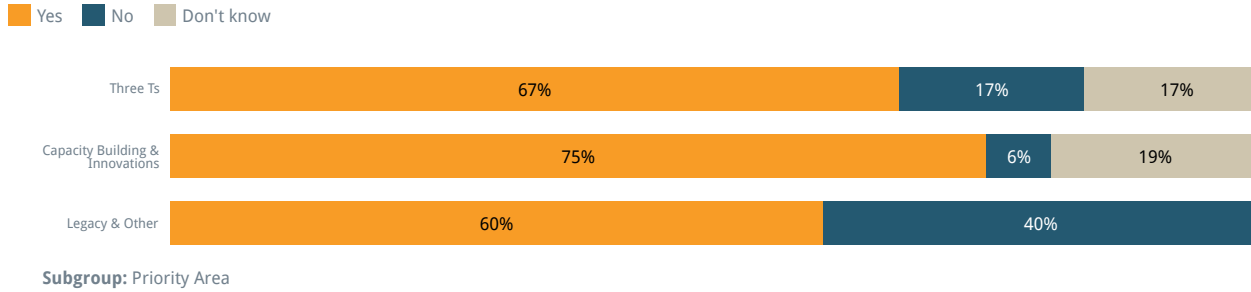
The work funded by our Archstone grant

Yes No Don't know



Cohort: None Past results: off

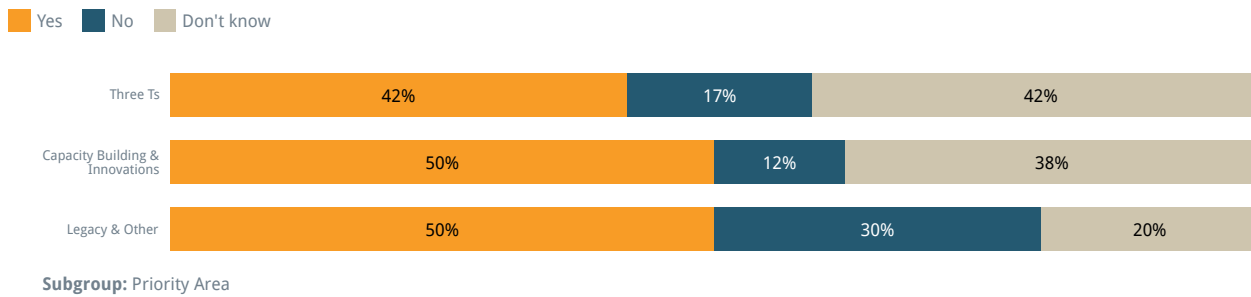
The work funded by our Archstone grant - By Subgroup



The Foundation itself (e.g., its board, staff, or internal practices)



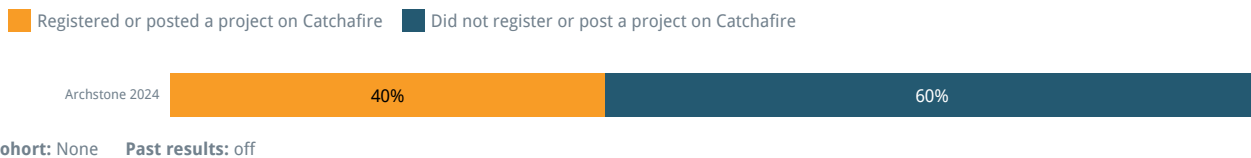
The Foundation itself (e.g., its board, staff, or internal practices) - By Subgroup



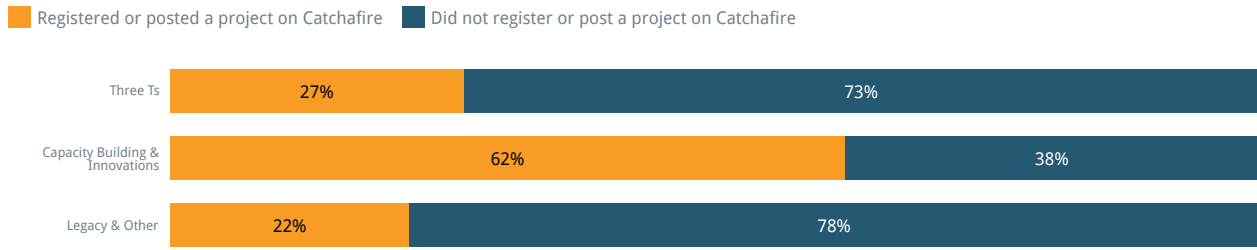
Catchfire

Archstone Foundation offers free access to the Catchfire online volunteer matching service to many nonprofits. With Catchfire, nonprofits can list projects and find volunteers to support their work.

Proportion of Grantees Registering or Posting a Project on Catchfire



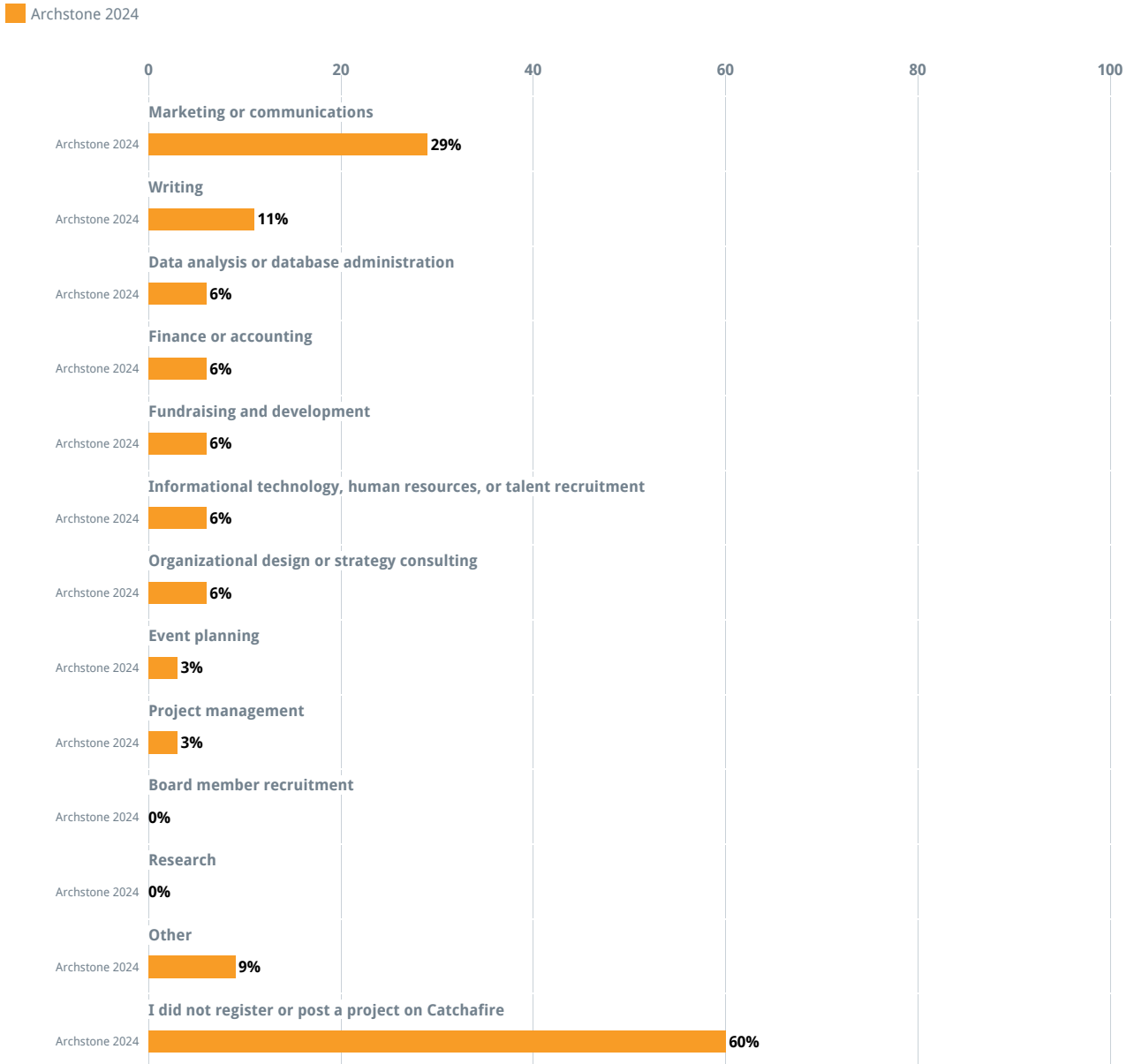
Proportion of Grantees Registering or Posting a Project on Catchafire - By Subgroup



Subgroup: Priority Area

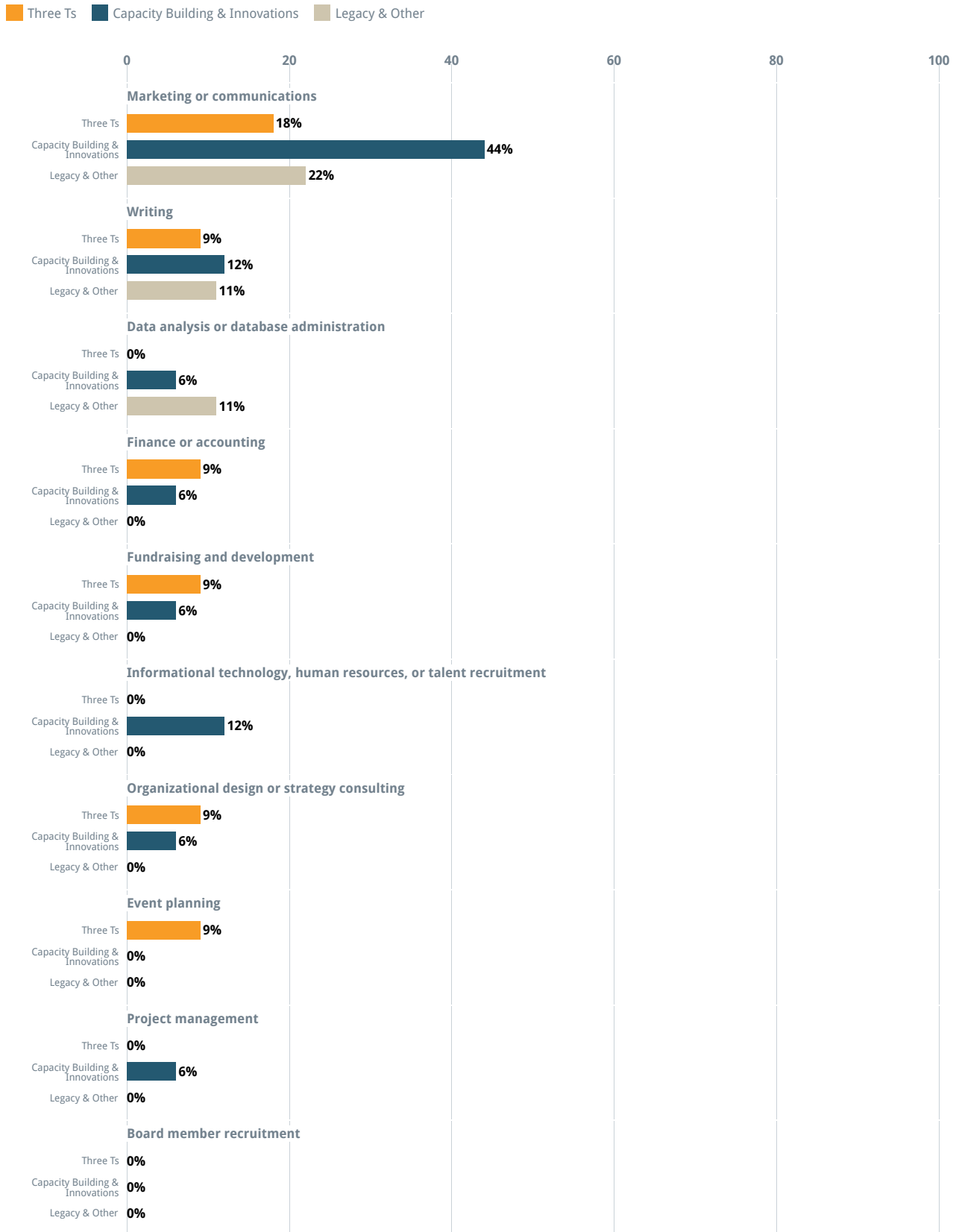
In the survey, respondents were asked about the kinds of support they were looking for on Catchafire in a check-all-that-apply format. Therefore, the following charts provide greater detail on the previous question.

If you registered and posted a project on Catchafire, what kind(s) of support were you looking for?



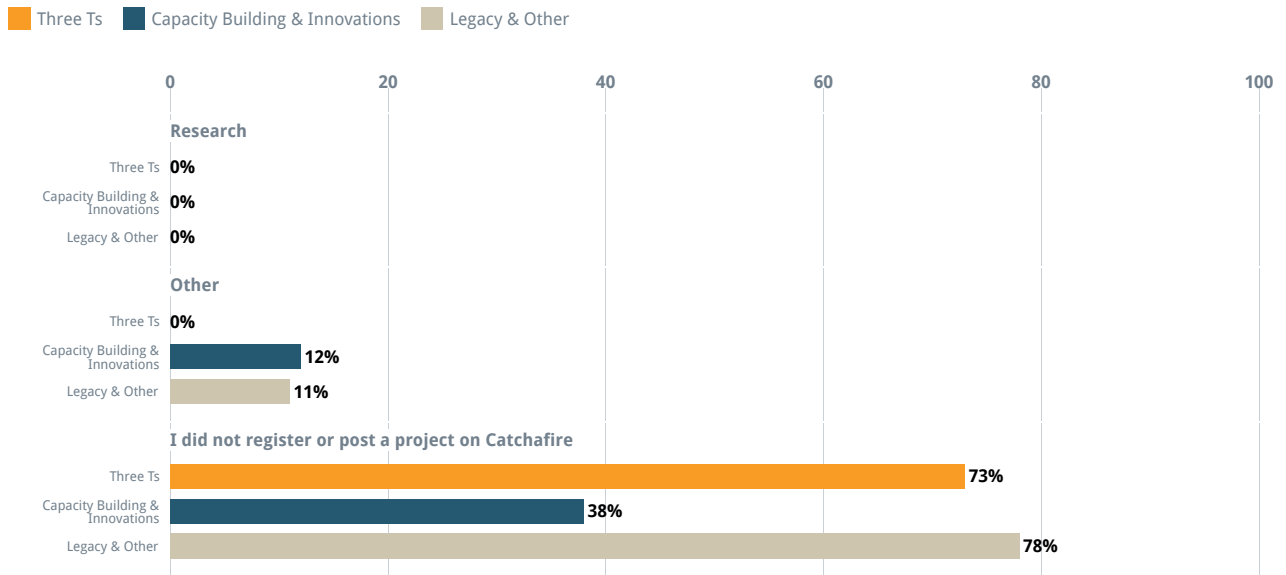
Cohort: None Past results: off

If you registered and posted a project on Catchafire, what kind(s) of support were you looking for? - By Subgroup



Subgroup: Priority Area

If you registered and posted a project on Catchafire, what kind(s) of support were you looking for? - By Subgroup (cont.)

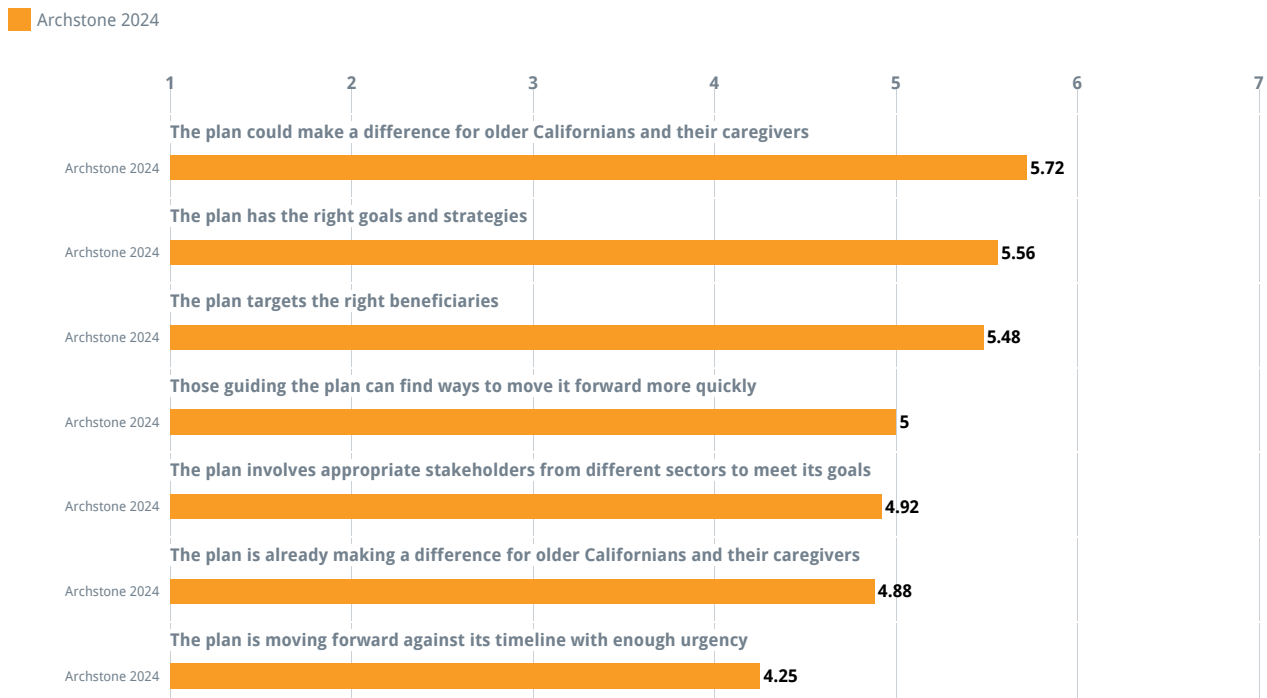


Subgroup: Priority Area

CA's Master Plan for Aging

To what extent do you agree or disagree with the following statements about California's Master Plan for Aging ?

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

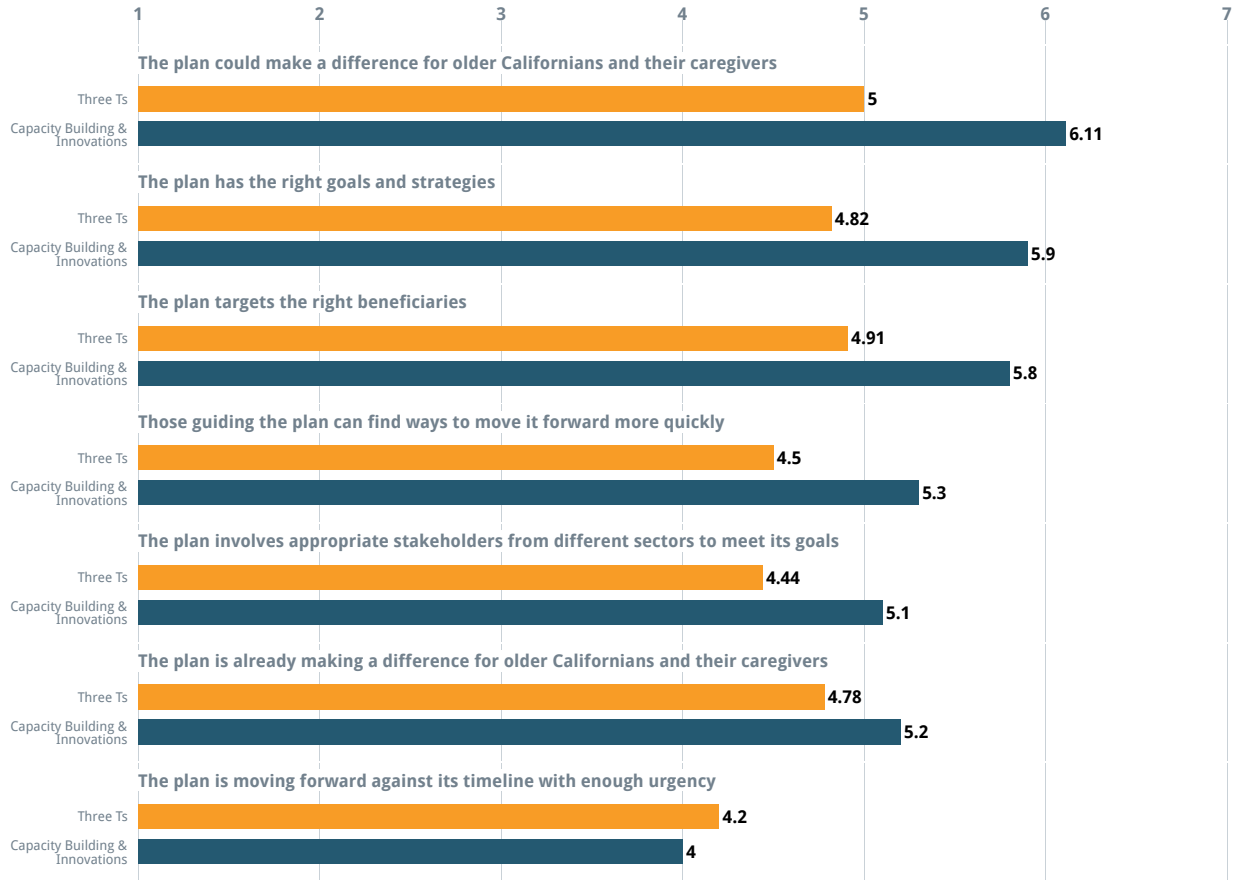


Cohort: None Past results: off

To what extent do you agree or disagree with the following statements about California's Master Plan for Aging ? - By Subgroup

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

Three Ts Capacity Building & Innovations



Subgroup: Priority Area

Grantees' Written Comments

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

1. "Please comment on the quality of the Foundation's processes, interactions, and communications."
2. "Thinking beyond the grant you received, please comment on how the Foundation influences your field, community, or organization."
3. "What specific improvements would you suggest that would make the Foundation a better funder?"
4. "What advice would you offer about Archstone Foundation's strategy to achieve integrated health and social services through the Three Ts – Teams, Training, and Technology – with justice, equity, diversity, and inclusion (JEDI) interwoven throughout, as the Foundation seeks to improve the health and well-being of older Californians and their caregivers?"
5. "Please share examples of how the Foundation contributes to JEDI."
6. "What federal, state, or local policy changes (i.e., regulations, funding, etc.) would help you most in your work to improve the health and well-being of older Californians and their caregivers?"

To download the full set of grantee comments and suggestions, please refer to the Attachments in the "Report Overview" section of your report. Please note that some comments may be redacted or removed to protect the confidentiality of respondents.

CEP's Qualitative Analysis

CEP thoroughly reviews each comment submitted and conducts comprehensive qualitative analysis on two of these questions in the GPR.

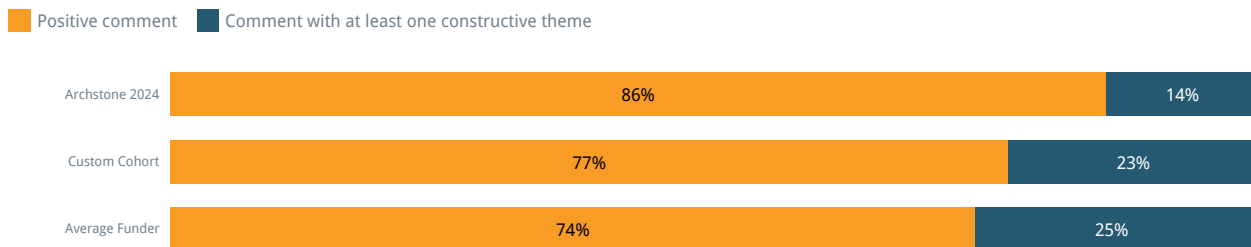
The following pages outline the results of CEP's analyses.

Quality of Processes, Interactions and Communications

Grantees were asked to comment on the quality of the Foundation'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.

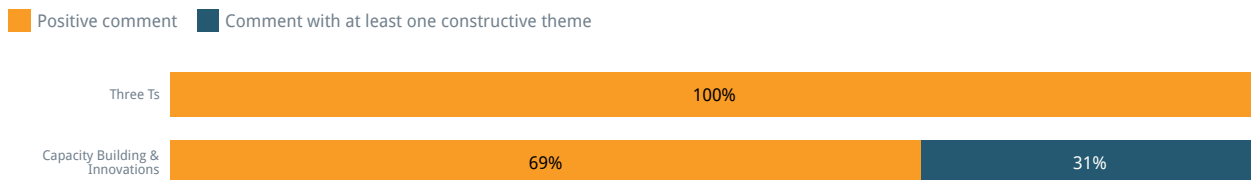
For a comment to be categorized as constructive, there must have been at least one constructive topic in its content.

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



Cohort: Custom Cohort Past results: off

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



Subgroup: Priority Area

Suggestion Topics

Grantees were asked to provide any suggestions for how the Foundation could improve. The 37 grantees that responded to the survey provided 19 constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Proportion of Grantee Suggestions by Topic

Topic of Suggestion	Proportion
Grantmaking Characteristics	42%
Grant Processes	21%
Overall Impact	21%
Funder-Grantee Relationships	16%

Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. The 37 grantees that responded to the survey provided a total of 19 distinct suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

Grantmaking Characteristics (42% N=8)

- Larger and/or longer-term grant funding (N = 5)
 - "The need for continued funding in areas of the marginalized and communities of color, especially when all deliverables are met, is an important distinction, (is my hope) for future funding.... In other words, Archstone's support of our continued organizational stability speaks to a high level of dedication to our current and future success."
 - "We wish Archstone and lots more resources that would allow it to do more!"
 - "More on-going funding."
 - "Please fund every year."
 - "Larger award amounts over longer periods of time to increase the impact of project and demonstrate commitment to the community it's serving.... Opportunity for awards for capital projects or long-term projects that require multi-year projects."
- More flexible funding (N = 3)
 - "Provide flexible funding."
 - "I always like demand-responsive grants rather than just topic areas.... So for past grantees the Foundation knows and trusts - ask them what they need and if they fit with the Foundation's overall goals, then boom - be a gift in a hard time! Or be the seed that started something amazing!"
 - "Small unrestricted grants to grantees in the current portfolio would be helpful. Nonprofit funding is cyclical ... it is common for nonprofits to experience budgetary shortfalls ... so the ability to receive a small amount of unrestricted funding for immediate need from a current grantor would be a big benefit to nonprofits."

Grant Processes (21% N=4)

- Streamlining processes (N = 3)
 - "Shorter application process for organizations that have a history of receiving awards."
 - "To save time for grantees, I would encourage the Foundation to consider turning one of the two yearly reports into a virtual meeting."
 - "More streamlined reporting (Archstone board updates could better coincide w/regular reporting)."
- Other (N = 1)
 - "Tweak their processes to acknowledge that not all grantees are direct service organizations."

Overall Impact (21% N=4)

- Strategy (N = 3)
 - "Continuing to encourage organizations to develop programs / services that address the needs of underserved communities."
 - "Provide more funding for innovative, culturally-tailored health promotion programming targeting Black and Latino older adults and caregivers in low-income demographic neighborhoods."
 - "More diversity in the types of program areas the Foundation supports."
- Introduction to other funders (N = 1)
 - "Given the Foundation's influence in the field, we would appreciate it if they helped our organization establish relationships with new funders and reinforce our relationships with existing funders in the field in California."

Funder-Grantee Relationships (16% N=3)

- More information (N = 2)
 - "Provide more background on the rationale for changes in the Foundation's commitment to continue funding ongoing initiatives."

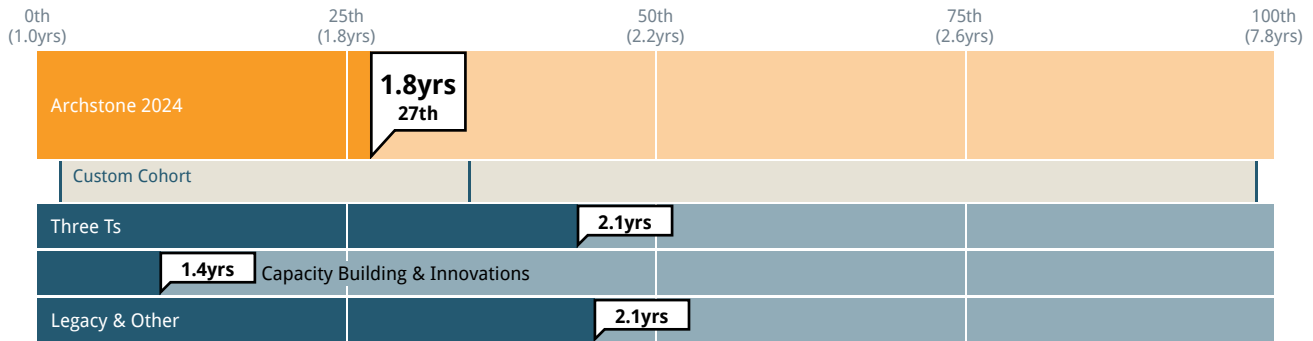
- "Better communication about its successes."
- More interactions (N = 1)
 - "Need more staff so there is more time with projects."

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: off Subgroup: Priority Area

Selected Cohort: Custom Cohort			
Length of Grant Awarded	Archstone 2024	Median Funder	Custom Cohort
Average grant length	1.8 years	2.2 years	1.9 years

Selected Cohort: Custom Cohort			
Length of Grant Awarded	Archstone 2024	Average Funder	Custom Cohort
0 - 1.99 years	54%	47%	45%
2 - 2.99 years	14%	23%	29%
3 - 3.99 years	26%	19%	19%
4 - 4.99 years	6%	3%	3%
5 - 50 years	0%	8%	5%

Selected Cohort: Custom Cohort			
Proportion of Unrestricted Funding	Archstone 2024	Average Funder	Custom Cohort
No, this funding was not restricted to a specific use (e.g., general operating, core support)	5%	29%	33%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	95%	71%	67%

Grantmaking Characteristics - By Subgroup

Selected Subgroup: Priority Area			
Length of Grant Awarded (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
Average grant length	2.1 years	1.4 years	2.1 years

Selected Subgroup: Priority Area			
Length of Grant Awarded (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
0 - 1.99 years	36%	75%	44%
2 - 2.99 years	18%	6%	22%
3 - 3.99 years	45%	19%	11%
4 - 4.99 years	0%	0%	22%
5 - 50 years	0%	0%	0%

Selected Subgroup: Priority Area			
Proportion of Unrestricted Funding (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
No, this funding was not restricted to a specific use (e.g., general operating, core support)	0%	0%	20%
Yes, this funding was restricted to a specific use (e.g., supported a specific program, project, capital need, etc.)	100%	100%	80%

Grant Size

Selected Cohort: Custom Cohort			
Grant Amount Awarded	Archstone 2024	Median Funder	Custom Cohort
Median grant size	\$75K	\$122.7K	\$120K

Selected Cohort: Custom Cohort			
Grant Amount Awarded	Archstone 2024	Average Funder	Custom Cohort
Less than \$10K	6%	8%	4%
\$10K - \$24K	0%	10%	9%
\$25K - \$49K	3%	12%	10%
\$50K - \$99K	44%	15%	20%
\$100K - \$149K	3%	10%	11%
\$150K - \$299K	22%	17%	23%
\$300K - \$499K	14%	10%	10%
\$500K - \$999K	6%	9%	7%
\$1MM and above	3%	10%	8%

Selected Cohort: Custom Cohort			
Median Percent of Budget Funded by Grant (Annualized)	Archstone 2024	Median Funder	Custom Cohort
Size of grant relative to size of grantee budget	1%	4%	3%

Grant Size - By Subgroup

Selected Subgroup: Priority Area			
Grant Amount Awarded (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
Median grant size	\$300K	\$50K	\$75K

Selected Subgroup: Priority Area			
Grant Amount Awarded (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
Less than \$10K	0%	0%	20%
\$10K - \$24K	0%	0%	0%
\$25K - \$49K	0%	0%	10%
\$50K - \$99K	18%	75%	30%
\$100K - \$149K	0%	0%	10%
\$150K - \$299K	27%	19%	20%
\$300K - \$499K	36%	6%	0%
\$500K - \$999K	18%	0%	0%
\$1MM and above	0%	0%	10%

Selected Subgroup: Priority Area			
Median Percent of Budget Funded by Grant (Annualized) (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
Size of grant relative to size of grantee budget	N/A	1%	1%

Grantee Characteristics

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

Selected Cohort: Custom Cohort			
Operating Budget of Grantee Organization	Archstone 2024	Median Funder	Custom Cohort
Median Budget	\$8.5M	\$1.7M	\$2.9M

Selected Cohort: Custom Cohort			
Operating Budget of Grantee Organization	Archstone 2024	Average Funder	Custom Cohort
<\$100K	7%	8%	5%
\$100K - \$499K	3%	18%	13%
\$500K - \$999K	3%	13%	12%
\$1MM - \$4.9MM	27%	30%	32%
\$5MM - \$24MM	40%	19%	23%
>=\$25MM	20%	12%	15%

Grantee Characteristics - By Subgroup

Selected Subgroup: Priority Area			
Operating Budget of Grantee Organization (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
Median Budget	\$17.5M	\$9M	\$4.5M

Selected Subgroup: Priority Area			
Operating Budget of Grantee Organization (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
<\$100K	0%	7%	11%
\$100K - \$499K	0%	0%	11%
\$500K - \$999K	12%	0%	0%
\$1MM - \$4.9MM	25%	29%	33%
\$5MM - \$24MM	12%	57%	33%
>=\$25MM	50%	7%	11%

Funding Relationship

Selected Cohort: Custom Cohort			
Funding Status	Archstone 2024	Median Funder	Custom Cohort
Percent of grantees currently receiving funding from the Foundation	51%	82%	79%

Selected Cohort: Custom Cohort			
Pattern of Grantees' Funding Relationship with the Foundation	Archstone 2024	Average Funder	Custom Cohort
First grant received from the Foundation	38%	29%	27%
Consistent funding in the past	16%	53%	52%
Inconsistent funding in the past	46%	18%	21%

Funding Relationship - by Subgroup

Selected Subgroup: Priority Area			
Funding Status (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
Percent of grantees currently receiving funding from the Foundation	67%	50%	30%

Selected Subgroup: Priority Area			
Pattern of Grantees' Funding Relationship with the Foundation (By Subgroup)	Three Ts	Capacity Building & Innovations	Legacy & Other
First grant received from the Foundation	42%	44%	20%
Consistent funding in the past	8%	12%	30%
Inconsistent funding in the past	50%	44%	50%

Funder Characteristics

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

Selected Cohort: Custom Cohort			
Financial Information	Archstone 2024	Median Funder	Custom Cohort
Total assets	\$106.6M	\$319.9M	\$362.1M
Total giving	\$2.2M	\$20.8M	\$18M

Selected Cohort: Custom Cohort			
Funder Staffing	Archstone 2024	Median Funder	Custom Cohort
Total staff (FTEs)	8	18	16
Percent of staff who are program staff	62%	45%	43%

Selected Cohort: Custom Cohort			
Grantmaking Processes	Archstone 2024	Median Funder	Custom Cohort
Proportion of grants that are invitation-only	59%	59%	59%
Proportion of grantmaking dollars that are invitation-only	90%	73%	64%

Methodology, Analysis, and Respondent Demographics

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Archstone 2024	April and May 2024	54	37	69%
Archstone 2022	February and March 2022	61	41	67%
Archstone 2019	May and June 2019	61	47	77%

Survey Year	Year of Active Grants
Archstone 2024	April 2021 - January 2024
Archstone 2022	2021 - 2022
Archstone 2019	June 2018 - May 2019

Standard Comparative Cohorts

CEP included 18 standard cohorts to allow for comparisons to a variety of different types of funders.

Strategy Cohorts

Cohort Name	Count	Description
Small Grant Providers	34	Funders with median grant size of \$20K or less
Large Grant Providers	126	Funders with median grant size of \$200K or more
High Touch Funders	33	Funders for which a majority of grantees report having contact with their primary contact monthly or more often
Proactive Grantmakers	121	Funders that make at least 90% of grants by invitation only
Responsive Grantmakers	110	Funders that make at most 10% of grants by invitation only
Intermediary Funders	25	Funders that primarily regrant philanthropic dollars
International Funders	62	Funders that fund outside of their own country

Annual Giving Cohorts

Cohort Name	Count	Description
Funders Giving Less Than \$5 Million	57	Funders with annual giving of less than \$5 million
Funders Giving \$50 Million or More	96	Funders with annual giving of \$50 million or more

Foundation Type Cohorts

Cohort Name	Count	Description
Private Foundations	181	All private foundations in the GPR dataset
Family Foundations	93	All family foundations in the GPR dataset
Community Foundations	41	All community foundations in the GPR dataset
Health Conversion Foundations	31	All health conversion foundations in the GPR dataset
Corporate Foundations	26	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	63	Funders that were established in 2000 or later
Funders Surveyed During COVID-19	146	Funders who surveyed grantees during COVID-19 (2020 - 2022)
European Funders	27	Funders that are headquartered in Europe

Subgroup Methodology and Differences

The following page outlines the methodology used to determine the subgroups that are displayed in the report, along with any differences in grantee perceptions. Differences should be interpreted in the context of the Foundation's goals and strategy.

CEP conducts statistical analysis on groups of 10 or larger. Ratings described as "significantly" higher or lower reflect statistically significant differences at a P-value less than or equal to 0.1. Ratings described as "trending" higher or lower reflect a 0.3-point difference larger or smaller than the overall average rating.

Subgroup Methodology

Priority Area

Using the grantee list provided by Archstone, CEP tagged grantees based on Priority Area. For grantees with multiple Priority Areas, they are included in all areas tagged. CEP then regrouped categories, with input from Archstone, specifically:

- "Three Ts" consists of grantees tagged to Teams, Training, or Technology.
- "Capacity Building & Innovations" consists of grantees tagged to Capacity Building, Capacity Building - DEI, or General DEI.
- "Legacy & Other" consists of grantees tagged to Aging in Community, Depression in Late-Life, Family Caregiving, Conference, or Other/Responsive Grantmaking.

Catchfire User

Using the grantee list provided by Archstone, CEP tagged grantees based on whether or not they are a Catchfire user.

Geographical Area Served

Using the grantee list provided by Archstone, CEP tagged grantees based on Geographical Area Served. CEP then regrouped categories, with input from Archstone, specifically:

- "Southern California" consists only of grantees tagged to Southern California.
- "Other" consists of grantees tagged to Northern California, Statewide (CA), National, or Other.

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

Using data grantees provided in the survey, CEP tagged grantees based on their person of color identity.

Subgroup Differences

Priority Area

No group consistently rates significantly higher or lower when grantees are segmented by priority area.

Catchfire User

No group consistently rates significantly higher or lower when grantees are segmented by use of Catchfire.

Geographical Area Served

No group consistently rates significantly higher or lower when grantees are segmented by geographical area served.

For information on differences in ratings by respondent demographics, please see the "Respondent Demographics" section.

Respondent Demographics

Respondents are asked questions related to their gender identity, transgender identity, racial/ethnic identity, identity as a person of color, disability identity, and identity as a member of the LGBTQ+ community.

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 [Fundors 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 eight respondents.

All demographic survey questions are optional.

Differences in Ratings by Respondent Demographics

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

Gender

No group consistently rates significantly higher or lower when grantees are segmented by gender.

Transgender Identity

There are too few respondents to analyze results by Transgender Identity.

Person of Color Identity

No group consistently rates significantly higher to lower when grantees are segmented by Person of Color identity.

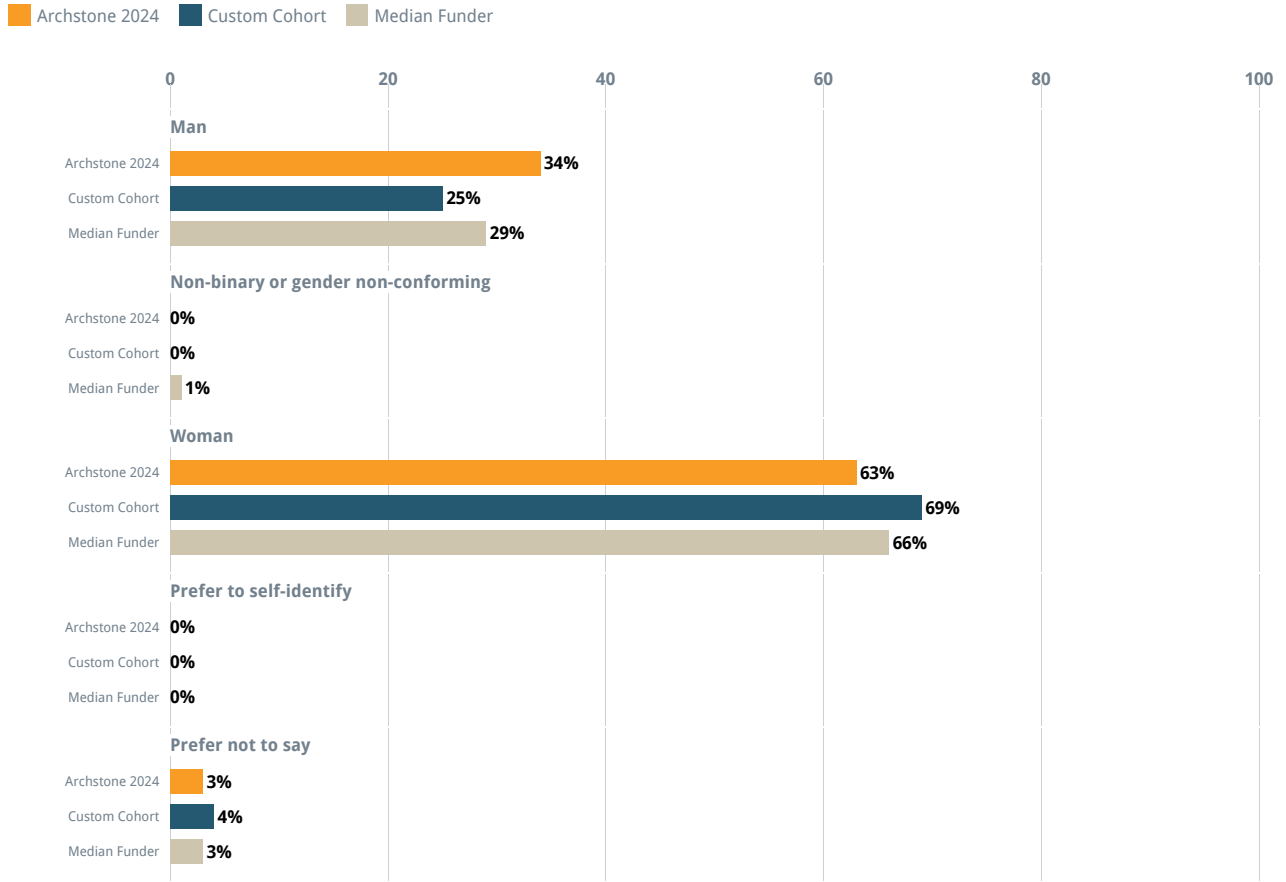
Disability Identity

There are too few respondents to analyze results by Disability Identity.

LGBTQ+ Identity

There are too few respondents to analyze results by LGBTQ+ Identity.

Please select the option that represents how you describe yourself:

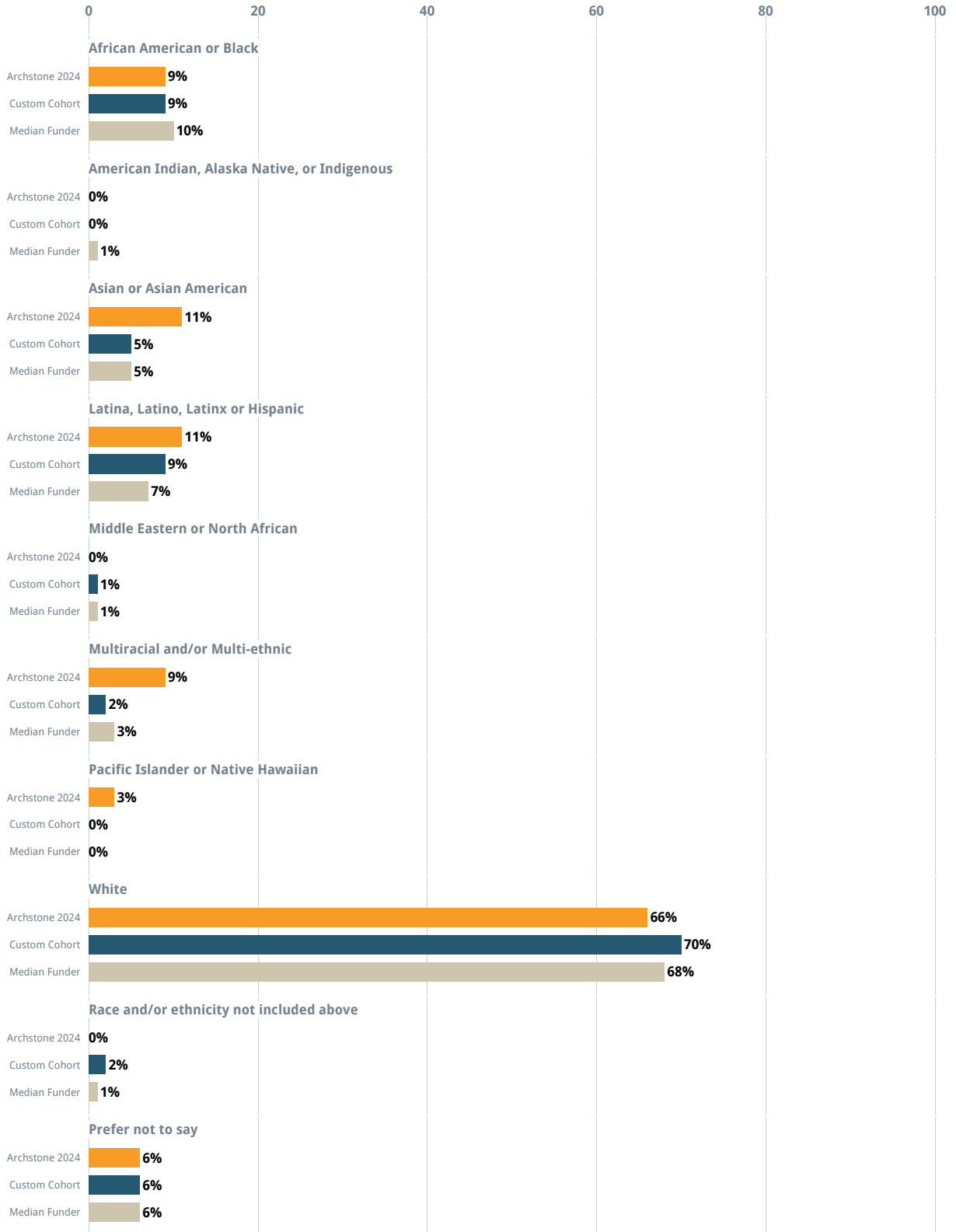


Cohort: Custom Cohort Past results: off

Selected Cohort: Custom Cohort			
Are you transgender?	Archstone 2024	Average Funder	Custom Cohort
Yes	0%	1%	0%
No	97%	96%	95%
Prefer not to say	3%	4%	5%

How would you describe your race and/or ethnicity?

Archstone 2024 Custom Cohort Median Funder



Cohort: Custom Cohort Past results: off

Selected Cohort: Custom Cohort			
Do you identify as a person of color?	Archstone 2024	Average Funder	Custom Cohort
Yes	29%	25%	24%
No	68%	69%	70%
Prefer not to say	3%	6%	6%

Selected Cohort: Custom Cohort			
Do you have a disability?	Archstone 2024	Average Funder	Custom Cohort
Yes	6%	6%	6%
No	89%	88%	88%
Prefer not to say	6%	5%	5%

Selected Cohort: Custom Cohort			
Do you identify as a member of the LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, and Queer) community?	Archstone 2024	Average Funder	Custom Cohort
Yes	14%	11%	9%
No	83%	83%	84%
Prefer not to say	3%	6%	6%

Respondent Job Title

Selected Cohort: Custom Cohort			
Job Title of Respondents	Archstone 2024	Average Funder	Custom Cohort
Executive Director/CEO	35%	47%	44%
Other Senior Team (i.e., reporting to Executive Director/CEO)	35%	20%	23%
Project Director	11%	11%	11%
Development Staff	11%	16%	17%
Volunteer	0%	1%	1%
Other	8%	5%	5%

Additional Survey Information

Grantees may decide not to answer any question in the grantee survey. On many questions in the 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 in each of the survey measures. The total number of respondents to Archstone's grantee survey was 37.

Question Text	Number of Responses
Overall, how would you rate the Foundation's impact on your organization?	37
Overall, how would you rate the Foundation's impact on your local community?	32
Overall, how would you rate the Foundation's impact on your field?	36
To what extent has the Foundation advanced the state of knowledge in your field?	31
To what extent has the Foundation affected public policy in your field?	30
How well does the Foundation understand your organization's strategy and goals?	36
How aware is the Foundation of the challenges that your organization is facing?	37
How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?	36
How well does the Foundation understand the field in which you work?	37
Please indicate any types of assistance beyond the grant that were a component of what you received from the Foundation.	35
Please rate the extent to which you agree with the following statements about the assistance beyond the grant you received from the Foundation:	
The assistance beyond the grant I received met an important need for my organization and/or program	27
The assistance beyond the grant I received strengthened my organization and/or program	28
The Foundation's assistance beyond the grant was a worthwhile use of the time required of us	27
I felt the Foundation would be open to feedback about the assistance beyond the grant it provided	27
How well does the Foundation understand the needs of the people and communities that you serve?	35
Are the efforts funded by this grant primarily meant to benefit historically disadvantaged groups?	37
Specifically, are any of the following the primary intended people and/or communities served by the efforts funded by this grant?	27
To what extent do you agree or disagree that the Foundation has clearly communicated what justice, equity, diversity, and inclusion means for its work?	35

Question Text	Number of Responses
To what extent do you agree or disagree that the Foundation demonstrates an explicit commitment to justice, equity, diversity, and inclusion in its work?	36
How comfortable do you feel approaching the Foundation if a problem arises?	36
Overall, how responsive was the Foundation staff?	37
To what extent did the Foundation exhibit trust in your organization's staff during this grant?	37
To what extent did the Foundation exhibit candor about the Foundation's perspectives on your work during this grant?	37
To what extent did the Foundation exhibit compassion for those affected by your work during this grant?	37
To what extent is the Foundation open to ideas from grantees about its strategy?	37
How often do/did you have contact with your program contact during this grant?	37
Has your main contact at the Foundation changed in the past six months?	36
At any point during this grant, including the selection process, did Foundation staff conduct a site visit?	37
How clearly has the Foundation communicated its goals and strategy to you?	37
How consistent was the information provided by different communication resources, both personal and written, that you used to learn about the Foundation?	37
Overall, how transparent is the Foundation with your organization?	36
How well do you understand the way in which the work funded by this grant fits into the Foundation's broader efforts?	37
Did you submit a proposal to the Foundation for this grant?	36
Did you have contact with a Foundation staff member via phone, email, or in-person/video before you applied?	27
To what extent was the Foundation's selection process a helpful opportunity to strengthen the efforts funded by the grant?	29
To what extent was the Foundation's selection process an appropriate level of effort given the amount of funding received?	30
As you developed your grant proposal, how much pressure did you feel to modify your organization's priorities in order to create a grant proposal that was likely to receive funding?	28
To what extent was the Foundation clear and transparent about the selection process requirements and timelines?	30
To what extent was the Foundation clear and transparent about the criteria the Foundation uses to decide whether a proposal would be funded or declined?	24
At any point during the proposal or the grant period, did the Foundation and your organization exchange ideas regarding how your organization would assess the results of the work funded by this grant?	30
Have you participated in a reporting or evaluation process?	37
To what extent was the Foundation's reporting process straightforward?	27
To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?	28
To what extent was the Foundation's reporting process relevant, with questions and measures pertinent to the work funded by this grant?	30
To what extent was the Foundation's reporting process a helpful opportunity for you to reflect and learn?	30
To what extent did the evaluation incorporate your input in the design of the evaluation?	9
To what extent did the evaluation result in you making changes to the work that was evaluated?	8
Total funding committed for this grant	36
Total number of years of approved funding for this grant	35
Was the funding you received restricted to a specific use?	37
What is the approximate annual operating budget of your organization?	30
Are you currently receiving funding from the Foundation?	37
Which of the following best describes the pattern of your organization's funding relationship with the Foundation?	37
Customized Questions	
Thinking about the Foundation's work over the past few years, to what extent do you agree or disagree with the following statement: The Foundation is on the right track to improve the health and well-being of California's older adults and their caregivers	37
Thinking about the roles the Foundation could play beyond grantmaking, which role(s) do you think it's most important for the Foundation to play in the future? Keep in mind what you think the Foundation could be well positioned to do effectively	37

Question Text	Number of Responses
Have you discussed with or received communication about how JEDI informs the Foundation's vision and values?	37
Have you discussed with or received communication about how JEDI informs the Foundation's Three T strategy?	37
Have you discussed with or received communication about how JEDI informs the work funded by our Archstone grant?	37
Have you discussed with or received communication about how JEDI informs the Foundation itself (e.g., its board, staff, or internal practices)?	37
If you registered and posted a project on Catchafire, what kind(s) of support were you looking for?	35
California's Master Plan for Aging has the right goals and strategies	27
California's Master Plan for Aging targets the right beneficiaries	27
California's Master Plan for Aging is moving forward against its timeline with enough urgency	24
Those guiding California's Master Plan for Aging can find ways to move it forward more quickly	26
California's Master Plan for Aging involves appropriate stakeholders from different sectors to meet its goals	25
California's Master Plan for Aging is already making a difference for older Californians and their caregivers	24
California's Master Plan for Aging could make a difference for older Californians and their caregivers	25

About CEP and Contact Information

The Center for Effective Philanthropy's mission is to provide 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.

CEP pursues this mission through several core activities:

Assessment and Advisory Services: Our [assessments](#) provide actionable insights on funders' work with and influence on key stakeholders through comparative benchmarking. Our assessments include the Grantee and Declined Applicant Perception Reports (GPR/APR), Donor Perception Report (DPR) for community foundations, and Staff Perception Report (SPR) for foundation staff. Our customized [advisory projects](#) offer data-driven services to help funders answer pressing questions about their work.

CEP Learning Institute: The [CEP Learning Institute](#) draws on CEP's rigorous research and decades of experience advising foundations to offer learning cohorts, trainings, and custom workshops for individuals and groups looking to improve philanthropic practice.

Programming and External Relations: CEP works to promote philanthropic effectiveness through resources such as our [website](#), [blog](#), [podcast](#), [newsletter](#), speaking engagements, social media, free webinars, and biennial national conferences.

Research: CEP's research provides data-based insights about effective foundation practices and trends in the philanthropic sector. All of CEP's research reports can be downloaded for free at our online [resource library](#).

YouthTruth: The [YouthTruth](#) initiative partners with schools, districts, states, educational organizations, and education funders to enhance learning for all young people through validated survey instruments for students, families, and staff, as well as tailored advisory services.

Contact Information

Liz Kelley Sohn
Manager, Assessment and Advisory Services
elizabeths@cep.org

Joyce Cheng
Senior Analyst, Assessment and Advisory Services
joycec@cep.org