



THE CENTER FOR  
EFFECTIVE PHILANTHROPY

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Jo Cohen, Grants Administration & Communications, Trump Foundation

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**Subject:** Key Findings and Recommendations from Trump Foundation 2014 Grantee and Non-Grantee Partner Survey

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In May and June 2014, The Center for Effective Philanthropy (CEP) conducted a survey of the Trump Foundation’s grantee and non-grantee partners. The memo below outlines the key findings from the Foundation’s Grantee Perception Report (GPR) as well as the methodology used to collect this feedback.

Assessing funder performance is challenging, and a range of data resources is required. The Grantee Perception Report provides one set of perspectives that can be useful in understanding philanthropic funder performance over time and should be interpreted in light of the Trump Foundation’s (also referred to as “the Foundation”) particular goals and strategy. The survey covers many areas in which partners’ perceptions might be useful to the Foundation. The Foundation should place emphasis on the areas covered according to its specific priorities. Low ratings in an area that is not core to its strategy may not be concerning.

## Overview

Overall, feedback from the Trump Foundation’s partners reveals specific areas of strength for the Foundation as well as some opportunities to improve on these baseline results:

- Almost 90 percent of partners believe that the Foundation’s goals are achievable and, when asked about the Foundation’s greatest strengths, 14% of partners mention the Foundation’s strategy and focus.

- A larger than typical proportion of Trump Foundation grantees report receiving field-focused non-monetary assistance from the Foundation and nearly three-quarters are interested in increased efforts by the Foundation to convene grantees and other partners.
- The Foundation receives truly exceptional ratings for the strength of its funder-grantee relationships – higher than 99 percent of funders in CEP’s dataset – although non-grantee partners rate consistently lower than grantees on these relationships measures.
- Partners rate the Foundation’s impact on their organizations, fields of focus, and ability to sustain the work funded by the Foundation less positively than grantees of most funders in CEP’s dataset.

### **Clear Focus and Achievable Goals, but Mixed Feedback on Strategic Approach**

Trump Foundation partners indicate that the Foundation’s goals are clear and achievable.

- Nearly 90% of Trump Foundation partners believe that the Foundation’s goal to see a 20 percent increase in the number of high school students studying advanced Physics and a 15 percent rise in students studying advanced Mathematics in ten years is feasible.
- Many partners also describe the Foundation’s “clear focus” as one of its greatest strengths.
  - They rate the clarity of the Foundation’s communication of its goals and strategy more positively than grantees of 96 percent of funders.
  - When asked to describe the Foundation’s greatest strengths, 14 percent of comments mentioned the Foundation’s clear focus and strategy, and another 14 percent described aspects of its external work and image.

Still, when asked about the Foundation’s greatest weaknesses, many partners comment on the scope of the work and the Foundation’s approach to external work.

- 38 percent of partners comment on the Foundation’s external work and 30 percent comment on the narrow scope of the Foundation’s work as the Foundation’s greatest weakness.
  - Partners’ comments about weaknesses in the Foundation’s external work were inconsistent – even sometimes contradictory. They included a range of views such as: the Foundation’s level of expertise and understanding of the field, redundancy with existing programs, a lack of innovation, and criticism about which projects were funded.
  - Regarding the scope of the Foundation’s work, several partners describe a “lack of flexibility” and “excessive focus” on the Foundation’s goals as a weakness.

*Recommendation:* Partner feedback indicates that the Foundation has been very clear about what it expects to achieve and how it plans to achieve it, but the Foundation may also need to continue advocacy and education with its diverse set of partners about why it believes its strategic approach is the best path to success.

## High Level of Non-Monetary Support and Desire for Increase in Convening Efforts

Compared to the typical funder, Trump Foundation provides a larger proportion of its grantees with intensive patterns of non-monetary assistance – particularly what CEP calls field-focused assistance – and this assistance is meaningfully related to perceptions of the Foundation’s impact. Many partners suggest that the Foundation increase its efforts to convene partners and grantees.

- 30 percent of grantees reports receiving field-focused assistance compared to only 8 percent at the typical foundation.
  - Intensive, field-focused assistance involves providing grantees with at least 3 of the following resources:
    - Introductions to leaders in the field (received by 67% of Trump grantees)
    - Facilitation of collaboration (64%)
    - Insight and advice on grantees’ field of focus (48%)
    - Seminars/forums/convenings (36%)
    - Research or best practices (24%)
- Grantees that receive intensive field-focused assistance rate the Foundation’s impact on their fields as well as the Foundation’s leadership in new thinking and practice more positively than grantees receiving little or no non-monetary assistance.
- In addition, 61 percent of the Foundation’s partners report participating in at least one convening, organized by the Foundation.
  - Grantees rate the helpfulness of convenings more positively than non-grantee partners.

Most partners indicate they would like the Foundation to increase its efforts to convene grantees and partners.

- 74 percent of Trump partners would like to see more efforts from the Trump Foundation to convene partners and grantees. When asked what types of events would be most useful to their organizations:
  - 85 percent of grantees and partners indicate that general knowledge sharing events would be most useful;
  - 81 percent of grantee partners and 63 percent of non-grantee partners indicate that small groups focused on a particular topic would be useful;
  - 71 percent of grantees partners and 58 percent of non-grantee partners report that enrichment events with experts would be useful.
- In addition, when asked how the Foundation can improve, partners most frequently suggest focusing on learning from and collaborating with public, philanthropic, nonprofit, and grassroots organizations.

*Recommendation:* Given the strong interest expressed by partners for the Foundation to convene grantees and partners, the Foundation should consider opportunities to further increase its efforts in this area. In addition, the Foundation should consider how it can enhance the helpfulness of these

events for its non-grantee partners, as well as how it can use these events to learn from partners across all sectors.

## Exceptionally Strong Relationships with Grantees

Trump Foundation's relationships with its partners is one of the Foundation's greatest strengths, positioning it well for future efforts working with partners to achieve its goals.

- Trump receives higher ratings than 99 percent of funders in CEP's dataset for the overall strength of its relationships with grantees.
  - Trump grantees rate higher than *any* other funder's grantees for the fairness of their treatment by the Foundation.
  - Grantees also rate their comfort approaching the Foundation if a problem arises more positively than nearly all funders in CEP's dataset.
- The Foundation also receives strong ratings (an average rating higher than a 6 on a 7-point scale) from partners when asked to what extent it "approaches the relationship with respect," "respects partners' expertise in their area of focus," and "trusts partners to carry out the work specified in the partnership."
- When asked about the Foundation's greatest strengths, many of Trump's partners describe the Foundation's interactions, emphasizing staff's "professionalism," "openness," and "ability to cooperate."
- These strong relationships are also seen during the Foundation's work with grantees during the application phase. Compared to grantees of the typical funder, Trump Foundation grantees indicate the Foundation's staff was more involved in development of their proposal and 78 percent of grantees – a larger than typical proportion – report they have had individual communication with Foundation staff during this process. Still, grantees reported feeling very little pressure to modify their own goals in order to craft a proposal that was likely to receive funding.

Although the Foundation receives positive ratings on many relationships measures, non-grantee partners rate consistently less positively than grantees on relationships measures.

- In particular, non-grantee partners rate significantly less positively than grantees for their comfort approaching the Foundation if a problem arises, responsiveness of Foundation staff, and the clarity of the Foundation's goals and strategy – providing ratings that are lower than typical for *grantees* across CEP's dataset. (Ratings of non-grantee partners are also lower than typical compared to the typical response in CEP's surveys of other funders' non-grantee stakeholders.)
- Non-grantee partners report having less frequent contact with the Foundation and are less likely to initiate contact as frequently as their primary contact.

*Recommendation:* The Foundation should seek to maintain its exceptionally strong relationships with grantee partners and consider to what extent it can enhance relationships with non-grantee partners.

## **Significant Room to Improve on Baseline Impact Ratings**

As a relatively new Foundation, but also one with a limited life span, partners' perspectives on the Foundation's current and future impact are important to understand. In this baseline 2014 survey, at a time still early in the Foundation's existence, partners rate the Trump Foundation's impact on their organizations and their fields of focus substantially lower than typical.

- Partners' ratings of the Foundation's impact on their fields are lower than 98 percent of funders in CEP's dataset, and ratings of impact on their organizations are the lowest in CEP's dataset of grantee survey results.
- A larger than typical proportion of grantees (55%) reports using the grant to add new program work, and grantees rate the Foundation's impact on their ability to sustain the funded work less positively than grantees of all other funders in CEP's dataset.
- Ratings of several key predictors of impact ratings are more positive, though.
  - Perceptions of the Foundation's understanding of the fields in which grantees work are rated positively and typically compared to other funders. The same is true for perceptions of the extent to which Trump understands grantees' goals and strategies.
  - As mentioned above, the Foundation's relationships with grantees are also very strong.
- Ratings also differ across the Foundation's grantee partners:
  - Trump Foundation's strategic grantees rated the Foundation's impact on their fields significantly more positively than other grantees.
  - Grantees that reported receiving grants equal to or larger than  $\approx$ 475K rate the Foundation's impact on their fields more positively than grantees receiving smaller grants. They also rate the Foundation's impact on their organizations more positively than other grantees, although the difference is not statistically significant.

*Recommendation:* Given partner feedback, CEP recommends that the Trump Foundation reflect on whether these ratings align with its expectations for partners' perspectives of the Foundation's impact at this point in its efforts. The Foundation should also consider how confident it is, given the other strengths identified in partner feedback, that it will see improvements in perceptions of impact if it stays its current course. There may also be opportunities for the Foundation to strengthen how it communicates its progress and impact with partners over time.

## **Recommendations**

Overall, CEP recommends that the Trump Foundation consider the following in order to build on its strengths and address potential opportunities for improvement:

- Given the mixed perspectives on the efficacy of the Foundation’s choice of goals and strategy, Trump Foundation should build on the exceptional clarity of its goals and strategy by further educating partners about why it believes its goals and strategy will be successful.
- Increase the Foundation’s efforts to bring together grantees and non-grantee partners through general knowledge sharing events, small groups, and enrichment events with experts.
- Reflect on whether strengthening relationships with non-grantee partners is important and increasing focus on interaction with and responsiveness to that group.
- Reflect on the Foundation’s expectations for impact at this stage in its life-cycle and evaluate whether the Foundation believes it will be able to improve on the baseline impact ratings it considers most important.

## **Methodology**

The Center for Effective Philanthropy (CEP) surveyed 114 grantees and non-grantee partners of the Trump Foundation during May and June of 2014. Overall, CEP received 61 completed responses for a 54 percent response rate. CEP achieved a 63% response rate with the Foundation’s grantees and a 45% response rate with non-grantee partners.<sup>1</sup>

## **Contact Information**

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<sup>1</sup> CEP’s typical response rate for grantee surveys is 67% and the typical response rate for non-grantee stakeholder surveys is 45%.