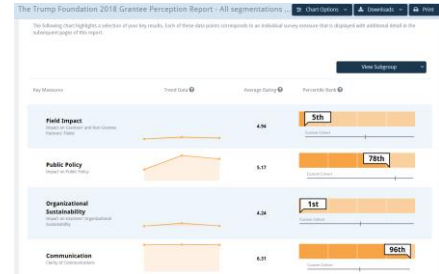


Key Findings and Recommendations from the Trump Foundation 2018 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

In May and June 2018 the Center for Effective Philanthropy (CEP) conducted surveys of the Trump Foundation’s grantees and non-grantee partners¹, achieving a 56 percent response rate overall².

This memo of key findings and recommendations accompanies the comprehensive survey results found in the Foundation’s interactive online report at <https://cep.surveymaterials.org> and in the downloadable online materials.



The Foundation’s full report also contains more information about survey analysis and methodology.

Introduction

We are pleased to provide you with your 2018 Grantee Perception Report (“GPR”) for the Trump Foundation (referred to as “the Foundation” and “Trump”). We look forward to discussing the results of this survey of your grantees and non-grantee partners (“partners”).

Assessing funder performance is challenging, and a range of data sources is required. The GPR provides one set of perspectives that can be useful in understanding philanthropic funder performance. The comparative benchmarking available for the GPR— from grantees of more than 300 foundations – can help illuminate Trump’s unique strengths and opportunities for improvement, relative to grantees of other foundations CEP has surveyed.

The results of these assessments should be interpreted in light of the Foundation’s particular context, goals and strategy. Context matters – in terms of interpreting results, planning for future action based on these results, and reflecting on the Foundation’s desired legacy. It is important to recognize that it has been a time of change at the Foundation. While the surveys cover many areas in which grantees’ and partners’ perceptions might be useful to the Foundation, low ratings in an area that is not core to the Foundation’s strategy may not be concerning. It is our hope that this set of feedback will inform planning and learning efforts underway by providing perspectives of some of your crucial stakeholders about the Foundation’s relative strengths and opportunities for improvement.

It is important to bear in mind some inherent differences between grantees and non-grantee partners. For grantees, the experience of receiving funding is intrinsically positive and grantees overwhelmingly use the positive side of the 1-7 scale; the comparative data helps normalize and control for this positivity.

¹ Throughout this memo, data refers to grantee and non-grantee partners, unless otherwise noted.

² Please refer to Appendix A: Methodology for more details.

For non-grantee partners, however, the experience is often more mixed – their ratings tend to be less positive than those of grantees. Bearing these dynamics in mind can be helpful as you interpret and act on this feedback.

Unless otherwise noted, this memo compares Trump grantee ratings to grantee ratings of all funders in CEP’s datasets based on percentile rank. Trump ratings are described as “higher than typical” when they fall above the 65th percentile, and “lower than typical” when they fall below the 35th percentile.

Selected respondent comments are shown throughout this memo and highlight key themes.

Overview of 2018 Results, Changes Over Time & Key Subgroup Differences

Summary of 2018 Results

On the whole, grantee and non-grantee partners’ 2018 perceptions are similar to 2016 and 2014 overall ratings, with some key differences³.

Across GPR measures, ratings vary widely across key dimensions. While there are some clear strengths and ratings that are higher than typical, ratings are lower than the typical funder in CEP’s GPR dataset on a number of key GPR measures.

There are a number of significant changes in ratings when examining respondent ratings over time and when segmenting by respondent type. Of note, there are more differences in 2018 between grantees and non-grantee partners than past surveys. These differences are described below in more detail.

Trump also selected a “custom cohort” – a secondary comparison comprised of a group of 10 funders selected by the Foundation to represent funders more similar to Trump in size, scope and approach. With few exceptions Trump’s ratings are similar when compared to this cohort and CEP’s full benchmarking dataset.

Changes in Ratings by Respondent Type

- ▶ In 2018, there are more significant differences between grantees’ and non-grantee partners’ ratings than in past years. Grantees provide significantly more positive ratings than non-grantee partners on a number of report measures, including the Foundation’s impact on their fields, local communities, and organizations, and Trump’s approachability and transparency.

Changes in Overall Foundation Ratings Over Time

- ▶ 2018 v 2016 - When comparing the Foundation’s overall 2018 ratings to the overall 2016 ratings, a significantly smaller proportion of respondents report changes in their Foundation primary contact than in the past. Ratings have declined on a few key measures, including the Foundation’s impact on their organizations and the fairness of the Foundation’s treatment.

Differences Over Time by Respondent Type – Grantees & Non-Grantee Partners

- ▶ Grantees’ Ratings: 2018 v 2016 – The Foundation’s 2018 grantees provide significantly more positive ratings than the 2016 grantees for perceptions of the Foundation’s impact on their local communities and overall transparency; and, they also report receipt of significantly longer grants than in 2016. Ratings from 2018 grantees are significantly less positive for the

³ For more information, please refer to Appendix B: Statistically Significant Changes Over Time.

Foundation's impact on their organizational sustainability and understanding of their intended beneficiaries' needs than grantees in 2016.

- ▶ Non-Grantee Partners' Ratings: 2018 v 2016 – The Foundation's 2018 non-grantee partners provide significantly less positive ratings than the 2016 non-grantee partners on many measures, including aspects of the Foundation's impact on and understanding of their fields, local communities, and organizations, and the strength of their relationships with the Foundation.

Differences in 2018 Perceptions by Grantee Segmentation

- ▶ Grantee Strategy – When analyzing grantee responses by segmentation, there are no consistent significant differences by grantee strategy (Implementation, Opportunity, and Expertise).
- ▶ Grant Size – Grantees with grants of 1,000,000 NIS and above (strategic grants) provide significantly more positive ratings for a few key report measures, including the Foundation's impact on their organizations and the Foundation's impact on the teaching of mathematics and science in Israeli high schools when compared to those from grantees with grants of up to 999,999 NIS.
- ▶ Grant Approval Date – Ratings from the Foundation's New grantees trend higher on some report measures, including the Foundation's understanding of their fields and organizations, as well as the helpfulness of the Foundation's processes when compared to those from the Foundation's Old and Old/New grantees.

The Foundation's Unique Approach and Impact on Respondents' Fields

As in the past, respondents find the Foundation to be focused squarely on its specific mission. They see Trump as having a strong impact on the teaching of mathematics and science in Israeli high schools and on public policy, and they think the Foundation's ultimate goal is feasible. However, ratings continue to be lower than typical for the Foundation's broad understanding of and impact on the broader fields in which respondents' work, as well as Trump's understanding of the needs and contexts of grantees' intended beneficiaries. Respondents' comments suggest that grantees tend to conceptualize their work more broadly than Trump's focused goals, and grantees suggest modifications to Trump's overall orientation and strategy.

The Foundation's Approach

- ▶ As in the past, respondents report incredibly strong and clear communications about the Foundation's goals and strategies. The Foundation continues to receive ratings in the top 5 percent of funders in CEP's overall comparative dataset for the clarity of its communications with respondents about its overall goals and strategy.
- ▶ The Foundation also continues to receive solidly typical ratings for its overall transparency with respondents' organizations. In fact, grantees' ratings for the Foundation's transparency have significantly increased when compared to those from Trump's 2016 grantees, and are now in the top quarter of CEP's comparative dataset.
- ▶ When asked to describe the Foundation in one word, respondents most commonly used the words "focused" to describe the Trump Foundation. Additionally, as in past years, respondents frequently describe the Foundation as "professional," and, in a custom question, respondents report strongest agreement that the Foundation demonstrates "skilled professionalism."

- ▶ Nevertheless, as in 2016, the number one suggestion, from nearly half of both grantees and non-grantee partners, relates to adjustments to the Foundation’s broad strategy and orientation. Most often, respondents suggest a broader, more holistic focus beyond math and science in high schools (e.g., more socio-emotional learning, more work outside of high schools, going beyond 5-credits, more research, more efforts to influence public opinion).
 - In respondents’ comments two additional minority themes emerge: 1) requests for more Foundation efforts to partner with Municipal leaders and agencies, and 2) requests for a greater Foundation focus on ensuring that the Foundation’s work will be sustainable after the Foundation sunsets.



“The Foundation has a very clear roadmap...sometimes, there is a sensation of rigidity and a lack of flexibility in the way they look at goals, as well as the broader environment from which such goals are to be achieved.”



““Expand its program beyond the population of math students at the 5-credit matriculation examination level...to advance math education for the entire population, not only for those with higher math skills.”



“I am apprehensive about the day when the Foundation leaves...leaving behind an education system that has become too accustomed to receiving funding for things that could not be funded in the future.”



“We saw a significant rigidity in their work with us and an excessive attention to detail that did not always seem relevant to us.”



“Special attention to education leaders in the local municipality, in particular to the heads of the education departments.”

Perceptions of Field Impact

- ▶ In a custom question, respondents continue to provide strong ratings for the Foundation’s impact on the teaching of mathematics and science in Israeli high schools. 89% rate the Foundation as having a strong positive impact (rating a 5 or more on a 1-7 scale).
- ▶ However, grantees and partners continue to rate Trump’s impact on and understanding of their fields lower than the typical funder in CEP’s dataset, similar to 2016 and 2014.
 - Importantly, grantees rate the Foundation’s impact on their fields of work significantly more positively than the Foundation’s non-grantee partners. Additionally, non-grantee partners rate Foundation’s impact on and understanding of their fields of work significantly less positively than they did in 2016.
- ▶ Perhaps relatedly, grantee ratings for the extent to which they believe Trump understands the needs of their intended beneficiaries have significantly declined since 2016, and are now in the bottom 10 percent of CEP’s dataset.
 - Furthermore, grantee ratings for the extent to which the Foundation’s funding priorities reflect a deep understanding of their intended beneficiaries’ needs are trending down since 2016.

- ▶ Nevertheless, the Foundation continues to receive very positive ratings for the extent to which it affected public policy in respondents' fields, in the top quarter of CEP's dataset. Regarding perceptions of the extent to which Trump has advanced the state of knowledge in respondents' fields, however, ratings are now in the bottom 30 percent of CEP's dataset.
 - Here, again, grantees rate Trump's effect on public policy significantly higher than non-grantee partners. Additionally, non-grantees partners' ratings have significantly declined from 2016 for this measure, and their ratings trend down from 2016 for Trump's advancement of knowledge in their fields.
- ▶ Virtually all of the Foundation's grantees and non-grantee partners think that the Foundation's ultimate goal – to help halt the decline in the number of high school students studying advanced Physics and Mathematics, to reverse the negative trend, and to increase graduation rates significantly in ten years – is feasible.
 - When asked to share their perspectives on whether the Foundation should add a new goal – helping Israel become one of the top 15 countries in the world in education – respondents overwhelmingly agree that is a worthy goal (99% rating a 5 or above on a 7-point scale), and report strong agreement that it is achievable (83% rating a 5 or above), and that the Foundation is positioned to help achieve this goal (84% rating a 5 or above).
- ▶ Grantees' ratings for the field-related measures differ somewhat by Grant Approval Date:
 - Ratings from the Foundation's New grantees trend higher on some report measures, including the Foundation's advancement of knowledge in their fields and understanding of their fields of work and intended beneficiaries' needs, when compared to those of the Foundation's Old and Old/New grantees.



"It is clear that the Foundation has vast impact. The type and variety of organizations that cooperate with the Foundation [are] quite wide. The Foundation works at all levels, and that is what makes its impact so broad."



"The Foundation has extensive impact on processes of national policy in mathematics and physics."



"There is a sense of a "golden age" in math teaching, both in terms of funding programs and in terms of networking and knowledge. The emphasis on junior high schools, in addition to high schools, is important, as well as on scientific subjects in addition to mathematics."



"Positively impacts the math teaching community...significant role bringing the importance of math studies into the public awareness."



"The Foundation's goals were instrumental in developing a culture of excellence in schools, especially in the study of mathematics and physics."

Impact on Partners' Organizations and Non-Monetary Assistance

A key finding from CEP's 2017 research report, *A Date Certain: Lessons from Limited Life Foundations*, is that most leaders of limited life foundations emphasized wanting to leave grantees in a strong position to continue their work after the foundation has closed its doors. They view the success of grantees as a vital part of their legacy and placed a high priority on ensuring grantees' sustainability. These limited life foundations seek to contribute to grantees' sustainability in a variety of ways, including by providing flexible or longer-term grants, targeting organizational capacity, or narrowing grantmaking to fewer grantees.⁴ Another finding from this report is that most leaders of limited life sought to leave grantees in a strong position to continue their work after the foundation has closed its doors.

When it comes to grantee and partner perceptions about how Trump strengthens their work, however, ratings are lower than typical and lower than 2016 on a number of measures.

- ▶ Ratings for the Foundation's impact on respondent organizations have significantly declined since 2016, are now similar to the Foundation's 2014 results, and continue to be in the bottom 5 percent of CEP's overall dataset.
 - Importantly, grantees rate the Foundation's impact on their organizations significantly more positively than the Foundation's non-grantee partners, though their ratings trend downward when compared to 2016 grantees' ratings. Non-grantee partners rate Trump's impact on their organizations significantly lower than in 2016.
- ▶ Grantees rate the Foundation similarly to 2016 for its awareness of their organizational challenges, though in the bottom quarter of CEP's overall dataset. However, grantees' ratings for the extent to which the Foundation understands their organizational strategies and goals trend lower than in 2016, and are in now in the bottom 10 percent of CEP's overall dataset⁵.
 - As in the past, grantees that rate the Foundation a 6 or 7 for the extent to which it understands their organization's goals and strategies rate the Foundation significantly more positively on most survey measures including for its impact on their organizations and organizational sustainability.
- ▶ Perhaps relatedly, ratings for Trump's impact on grantees' organizational sustainability are significantly lower than in 2016, though similar to Trump's ratings in 2014, in the bottom five percent of CEP's dataset.

Grantmaking Characteristics

One way funders can strengthen grantee organizations is through their grantmaking characteristics. The Foundation's grantmaking characteristics continue to be distinct compared to the typical funder in CEP's dataset.

- ▶ The Foundation continues to make a significant investment in grantees' organizations, with larger and longer grants than typical. In fact, grant length has significantly increased since 2016.

⁴ http://research.cep.org/a-date-certain-lessons-from-limited-life-foundations?hs_preview=tQaOuQVr-4953578564

⁵ This question was asked only of grantees in 2014 and 2018, but of both grantees and non-grantee partners in 2016.

- Grantees who have grants of 1,000,000 NIS and above (strategic grants) rate significantly higher on a few key report measures, including Trump's impact on their organizations.
- ▶ Of note, annual organizational budgets of grantees and partners are much larger than in the past. At the median, grantees report an annual organizational budget of \$8.0M compared to \$700,000 in 2016, and, at the median, non-grantee partners report an annual organizational budget of \$12.8M compared to \$4.9M in 2016. Thus, even with larger than typical grants, the Foundation now funds a smaller than typical proportion of grantees' annual organizational budgets, 1 percent compared to 4 percent at the median funder and 13 percent in 2016.
 - Respondents reporting annual organizational budgets of less than \$5M rate significantly higher on a few report measures, including the Foundation's impact on their fields of work compared to those with budgets of \$5M or higher.
- ▶ The Foundation has a higher than typical proportion of first-time grantees, though fewer than in past years. Additionally, the proportion of respondents who report previously being declined funding from the Foundation is double that of the 2016 proportion, trending higher than the typical funder.
 - As is consistent with CEP's field-wide research, these respondents rate significantly lower on a few key report measures, including Trump's impact on their organizational sustainability, when compared to grantees who have not been declined funding before.

Non-Monetary Assistance

Another way funders can strengthen grantee organizations is through the provision of supports beyond the grant.

- ▶ As in the past, Trump continues to provide a much larger than typical proportion of its grantees with intensive (field-focused or comprehensive) forms of non-monetary assistance⁶.
 - Over 30 percent of grantees report receiving these intensive supports beyond the grant, and they rate significantly more positively on some key measures, including Trump's openness to their ideas and the clarity of the Foundation's communications.
- ▶ Notably, half of the grantees who report receiving support beyond the grant, a larger proportion than in the past, report attending seminars/forums/convenings provided by Trump.
- ▶ Relatedly, over 70 percent of respondents, a higher proportion than in 2016 and similar to that of 2014, would like to see more efforts from the Foundation to convene partners and grantees. This proportion is driven by a strong interest from non-grantee partners.
 - As in 2016, respondents express strongest interest in small group meetings focused on particular topics, enrichment events with experts, and general knowledge-sharing events.

⁶ For more information, please refer to Appendix E: Non-Monetary Assistance.

Relationships with Grantees and Non-Grantee Partners

CEP's research finds that strong funder-grantee relationships – defined by high quality interactions and clear and consistent foundation communications – are critical to high-performing funders. Grantees who have strong relationships with their funders perceive those funders to have significantly greater impact on their organizations, communities, and fields.⁷

In comments, respondents describe staff as “high-caliber,” and “experienced,” and “open, supportive communication” based on “trust” and “respect.” They also report strong agreement that the Foundation displays “trusts them to carry out the work specified in the partnership,” and “respects their expertise in their areas of focus” in their relationships.

Nonetheless, ratings for some measures related to the Foundation's relationships with grantees and partners have significantly declined since 2016, and ratings for the overall summary of the overall strength of the funder-grantee relationship are now solidly typical, down from higher than typical⁸.

It is important to note that this decline is largely driven by a significant decline in non-grantee partners' ratings. Ratings from grantees on this summary measure of the overall strength of the funder-grantee relationship remain higher than typical, similar to 2016.

Interactions with Foundation Staff

- ▶ In the aggregate, across all measures related to the overall quality of the Foundation's interactions with grantees and non-grantee partners, the Foundation receives ratings in the bottom 30 percent of CEP's overall dataset; additionally, ratings for the Foundation's overall fairness of treatment have significantly decreased since 2016.
 - Importantly, however, there are substantial differences between grantees and non-grantee partners. Grantees continue to rate the Foundation similar to or higher than the typical funder across all measures related to the quality of their interactions with staff. However, non-grantee partners' ratings have significantly declined since 2016 for both their comfort approaching Trump if a problem arises and their fairness of treatment.
- ▶ As in the past, the quantity of interactions between the Foundation and its grantees and partners is associated with more positive perceptions. Forty-eight percent of respondents, a lower proportion than in 2016, report having contact with Trump monthly or more often.
 - These respondents with more frequent contact rate Trump significantly more positively on some key report measures, including the Foundation's impact on their fields, organizations, and organizational sustainability, and the clarity of the Foundation's communications.
- ▶ Of course, context matters. This has been a time of change for the Foundation with substantial staff changes, which comes through in comments. As one respondent states, “there were ups and downs in communications with staff, who were replaced several times. Therefore, the quality of the relationship depended on the contact person and not on the Foundation itself.”

⁷ For more information about CEP's research on the funder-grantee relationship, please refer to Appendix C

⁸ Please refer to Appendix C for more information on CEP's research regarding the components of funder-grantee relationships.

- However, it is worth noting that the proportion of respondents who report experiencing a recent contact change at the Foundation has significantly declined since 2016.

Communications

- ▶ The Foundation now receives ratings in the bottom 25 percent of CEP’s overall dataset for the consistency of information provided by different communications resources, both personal and written, that respondents used to learn about the Foundation.
 - On these measures, too, ratings from grantees are similar to 2016 and to the typical funder, while non-grantee partners’ ratings for this measure are trending down from 2016 and are lower than typical.
- ▶ Usage of various Trump communications resources has changed over time. While a similar proportion of respondents have individual communications with the Foundation compared to 2016, which they continue to find it the most helpful resource, the proportions of respondents using the Foundation’s funding guidelines and/or website are much lower than in 2016.

Top Predictors of Funder-Grantee Relationships

- ▶ CEP’s recent research finds that the strongest predictor of the strength of the funder-grantee relationship is a summary measure of understanding⁹, comprised of seven measures related to a funder’s understanding of grantees’ work, and funder transparency. More tangibly, CEP’s research finds that program officers who want to form strong relationships with grantees should focus on developing their understanding of grantee organizations and the context in which they work, and being transparent with grantees¹⁰.
 - Perceptions of Trump’s overall transparency, as noted above, are similar to 2016, in line with that of the typical funder. Notably, though, ratings from grantees have significantly improved from 2016 and are now in the top quarter of CEP’s dataset.
 - However, grantees rate the Foundation lower than typical for nearly every understanding measure, including understanding of grantees’ fields, organizations, context, and beneficiaries.



“There is great consideration from their side the moment a problem arises or whenever we have questions.”



“Excellent working relations, listening ears, openness, availability, sensitivity for the situation, and an ability to make the necessary changes in the course of the actions.”

⁹ Non-grantee partners’ ratings are not included in the overall understanding summary measure.

¹⁰ Please refer to Appendix D for more information regarding CEP’s recent research on the top predictors of strong funder-grantee relationships.

Grantee Perceptions of the Foundation's Processes¹¹

Overall, the Foundation's processes are less time-intensive than the past. Grantees continue to find the selection process to be high pressure, and not particularly helpful. Their perceptions are mixed regarding the reporting process, though somewhat more positive regarding the evaluation process. Certain touchpoints with Foundation staff and engagement during these processes are associated with more positive perceptions. And, as noted earlier, ratings from newer grantees trend higher on some aspects of the Foundation's processes.

Process Timing and Dollar Return

- ▶ Notably, compared to 2016, grantees spend significantly less time on required Foundation processes (70 hours at the median in 2018 compared to 80 hours at the median in 2016), driven by a large drop in time spent on the reporting/evaluation processes, and a smaller drop in time spent on the selection process.
- ▶ With larger grants and less administrative time spent on processes compared to 2016, grantees receive a much larger than typical, and larger than 2016, financial return per hour invested in Foundation processes. In other words, for every process hour, the Foundation's 2018 grantees receive \$4,700 on average, compared to a return of \$2,500 in 2016.

Selection Process

- ▶ As in 2016, grantees continue to experience the Foundation's selection process as time intensive, with substantial staff involvement in proposal development. With regard to the pressure grantees' experience to modify their organization's priorities in order to create grant proposals that are likely to receive Foundation funding, ratings are in the top 15 percent of CEP's dataset
- ▶ Ratings for the helpfulness of the selection process in strengthening grantees' organizations/grant-funded programs are trending lower than in the past, with the Foundation now receiving lower than typical ratings on this measure.

Reporting Process

- ▶ Grantee feedback suggests mixed experiences with Trump's reporting process.
- ▶ Notably, grantees rate the Foundation much higher than typical, in the top 15 percent of CEP's dataset, for the extent to which they found the process to be straightforward and appropriately aligned to their work. The Foundation also receives solidly typical ratings for the extent to which the process is relevant to grantees' work.
- ▶ However, the Foundation receives lower than typical ratings for both the extent to which grantees found the reporting process to be adaptable to fit their circumstances and a helpful opportunity for learning and reflection.
- ▶ Certain touchpoints with Foundation staff are associated with more positive grantee perceptions across a number of key measures.

¹¹ This section references data collected and analyzed from grantees only.

- Fifty-eight percent of grantees, a lower than typical proportion (and trending down over time), report exchanging ideas with the Foundation about how their organization would assess the results of the grant-funded work. These grantees rate a few key report measures, including Trump’s impact on their organizations and organizational sustainability, and the helpfulness of the reporting process, significantly higher when compared to those who do not report participating in this idea exchange.
- Seventy-four percent of grantees, a higher than typical proportion, report having had a substantive discussion with the Foundation about their submitted reports. These grantees rate the Foundation more positively on a few measures, including Trump’s understanding of their intended beneficiaries’ needs, the extent to which Trump actively works to strengthen its relationship with them and trusts them to carry out the work.

Evaluation Process

- ▶ Nearly 55 percent of grantees, a higher than typical proportion, report participating in an evaluation process separate from the reporting process.
 - Of these grantees, over 70 percent, a higher than typical proportion, report that evaluation staff at their organizations were primarily responsible for its execution (as opposed to an external evaluation chosen by their organizations or by the Foundation).
- ▶ The Foundation receives ratings similar to those of the typical funder for both the extent to which grantees feel their evaluations incorporated input from their organizations in their design and resulted in grantees’ organizations making changes to evaluated work.
- ▶ However, grantees rate the Foundation lower than typical for the extent to which they feel their evaluations generated information that would be useful for other organizations.



“The grant approval stages are somewhat cumbersome and sometimes the conveyed messages are not consistent.”



“In some cases, a more flexible approach to the organization’s requests could have contributed to more efficient work.”

CEP's Recommendations

- ▶ Particularly as the Foundation looks ahead to its final years, reflect on intentions with respect to ensuring the sustainability of the grant-funded work, and consider ways Trump can help **support the future sustainability of the grant-funded work**. Specifically:
 - **Demonstrate greater openness to ideas** from grantees and partners about Trump's strategy, particularly their perspectives on sustaining the grant-funded work.
 - Deepen and demonstrate **greater understanding of grantees' organizational challenges, the context in which they work, and the needs of their beneficiaries**.
 - In light of open-ended comments, **communicate with partners about the Foundation's sunseting process**, including conversations about the work post-sunset.
- ▶ **Consider where subgroup differences – particularly newer, emergent differences between grantees and non-grantee partners – reflect intentional variations in context and strategy** and whether more relative internal strengths in grantees' eyes can be incorporated more broadly across Trump's work with non-grantee partners.
- ▶ As a strategy to **maintain strong relationships with grantees and build more effective relationships with partners**, assess the ways in which Trump interacts and communicates with its partners. More specifically:
 - Work with staff to develop **clear and concrete expectations for interactions – particularly responsiveness – between staff and partners**.
 - Seek to be **increasingly approachable** and, as noted above, open to ideas from partners.
 - Ensure **more consistent communications**.
 - Ensure that **interactions with partners can be opportunities for staff to develop and deepen their understanding of partners' work**, as well as demonstrate this knowledge back to partners.
- ▶ Building on the valuable provision of non-monetary assistance, consider the **role of and possibilities for expanding these supports**, particularly given interest in more convenings.
- ▶ With regard to **processes**:
 - Consider how the selection process, in addition to providing information needed for Trump decision-making, can be a **tool for strengthening grantee organizations/programs**.
 - Given its association with more positive perceptions, consider **substantive touch points in the reporting and evaluation processes**, particularly substantive discussions about grantees' reports and conversations about how they will assess the grant-funded work.
 - Consider how the reporting and evaluation processes can **generate more learning and reflection** in service of strengthening the field in which the Foundation works and sharing knowledge.

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Appendix A: Methodology

CEP surveyed grantees and non-grantee partners of the Trump Foundation in May and June of 2018. CEP received 83 responses for an overall 56 percent response rate. CEP received 51 responses from grantees for an overall 65 percent response rate from grantees, and 32 responses from non-grantee partners for an overall 46 percent response rate from non-grantee partners. Grantee response rates are in line with typical response rates, and partner response rates are higher than typical.

This is the third GPR for the Foundation. CEP previously surveyed the Foundation's grantees and non-grantee partners in 2016 and 2014.

Throughout this report, Trump Foundation's survey results are compared to CEP's broader dataset of more than 40,000 grantee responses built up over more than a decade of grantee surveys of approximately 300 funders. Funder results are displayed relative to other funders who have used the GPR, and, with this comparative data, results are frequently compared to the "median" or "typical" funder rated at the 50th percentile. Grantee ratings for the Foundation are described as "higher than typical" when they fall above the 65th percentile, and "lower than typical" when they fall below the 35th percentile. As the Foundation considers its comparative results, it is important to note that, across foundations, grantee ratings do not differ by foundation size, grant size, grant type, or program area. In other words, these factors are not predictive of grantee ratings.

CEP compares past ratings to current ratings, testing for statistically significant differences. The use of the term "significant" in this memo denotes a statistically significant change. CEP uses a 90 percent confidence interval for significance testing. CEP uses the word "trending" when the data shows a pattern over time (from one GPR to the next) with a mean difference of at least .30 in a given direction, but when that pattern is not statistically significant.

Appendix B: Statistically Significant Changes Over Time

Significant Differences Between 2018 & 2016 - Overall

- ▶ In 2018, a significantly smaller proportion of grantees and non-grantee partners report having had a change in primary contact than in 2016.
- ▶ Grantees and non-grantee partners rate the Foundation significantly less positively than in 2016 for the following measures:
 - The Foundation's impact on their organizations
 - Their fairness of the Foundation's treatment
 - The extent to which the Foundation works with them to determine a shared vision for success in their relationships
 - The extent to which the Foundation trusts them to carry out the work specified in the partnership in their relationships

Significant Differences Between 2018 & 2016 – Grantees Only

- ▶ In 2018, grantees report receiving significantly longer grants than in 2016, and accordingly, report receiving a significantly larger financial return per hour invested in the Foundation's processes.
- ▶ In 2018, a significantly smaller proportion of grantees report having had a change in primary contact than in 2016.
- ▶ Grantees rate the Foundation significantly more positively than grantees in 2016 for the following measures:
 - The Foundation's impact on their local communities
 - The Foundation's overall transparency
- ▶ Grantees rate the Foundation significantly less positively than grantees in 2016 for the following measures:
 - The Foundation's understanding of their intended beneficiaries' needs
 - The Foundation's impact on their organizational sustainability
 - The extent to which the Foundation works with them to determine a shared vision for success in their relationships

Significant Differences Between 2018 & 2016 – Non-grantee Partners Only

- ▶ Non-grantee partners rate the Foundation significantly less positively than non-grantee partners in 2016 for the following measures:
 - The Foundation's impact on and understanding of the fields of work
 - The Foundation's impact on and understanding of their local communities
 - The Foundation's effect on public policy in their fields of work
 - The Foundation's understanding of the contextual factors affecting their work
 - The Foundation's impact on their organizations

- The overall relationships summary measure, the fairness of the Foundation’s treatment, and their comfort approaching the Foundation should a problem arise
- The Foundation’s openness to their ideas
- The extent to which the Foundation works with them to determine a shared vision for success in their relationships
- The extent to which the Foundation trusts them to carry out the work specified in the partnership in their relationships
- The extent to which the Foundation respects their expertise in their areas of focus in their relationships

Significant Differences Between 2018 & 2014 – Overall

- ▶ Grantees and non-grantee partners rate the Foundation significantly more positively than grantees and non-grantee partners in 2014 for the following measures:
 - The Foundation’s effect on public policy in their fields
 - The Foundation’s overall transparency
- ▶ Grantees and non-grantee partners rate the Foundation significantly less positively than grantees and non-grantee partners in 2014 for the following measures:
 - Their comfort approaching the Foundation should a problem arise
 - The Foundation’s understanding of the contextual factors affecting their work

Significant Differences Between 2018 & 2014 – Grantees Only

- ▶ In 2018, grantees report receiving significantly longer grants than in 2014
- ▶ Grantees rate the Foundation significantly more positively than grantees in 2014 for the following measures:
 - The Foundation’s impact on their fields
 - The Foundation’s effect on public policy in their fields
 - The Foundation’s overall transparency
- ▶ Grantees rate the Foundation significantly less positively than grantees in 2014 for the following measures:
 - Their overall relationships summary measure, the fairness of the Foundation’s treatment, the Foundation’s approachability, and the responsiveness of Trump staff
- ▶ Grantees report experiencing as significantly higher level of pressure to create a proposal that was likely to receive Foundation funding than did grantees in 2014

Significant Differences Between 2018 & 2014 – Non-grantee Partners Only

- ▶ In 2018, a significantly smaller proportion of non-grantee partners report having had a change in primary contact than in 2014.
- ▶ Non-grantee partners rate the Foundation significantly less positively than non-grantee 2014 for the following measures:
 - The Foundation’s understanding of their fields of work

Appendix C: Funder-Grantee Relationships

Funder-Grantee Relationships Factor

Through our broader research, CEP has identified five statistically related survey items that illustrate a larger construct of relationships (visualized below). This relationships construct is one of the strongest predictors of the extent to which grantees perceive their funder's impact on their organizations, and is highly related to grantees' perceptions of their funders' impact on their local communities and fields of work

For more information about CEP's research and recommendations regarding funder-grantee relationships, please refer to CEP's research report [Relationships Matter: Program Officers, Grantees, and the Keys to Success.](#)

WHAT IS A FUNDER-GRANTEE RELATIONSHIP?



INTERACTIONS

- **Fairness** of treatment by foundation
- **Comfort approaching** foundation if a problem arises
- **Responsiveness** of foundation staff



COMMUNICATIONS

- **Clarity of communication** of foundation's goals and strategy
- **Consistency of information** provided by different communications



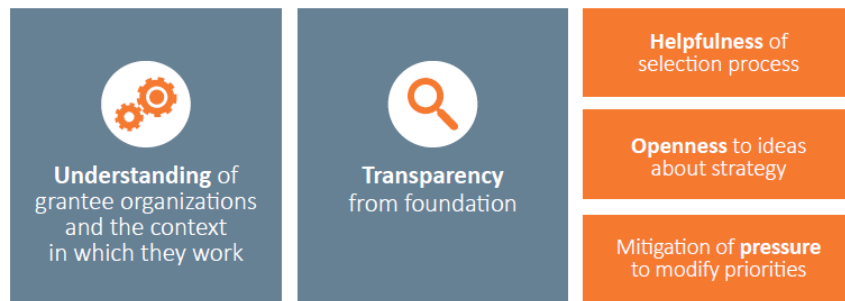
Appendix D: Top Predictors of Funder-Grantee Relationships

CEP’s broader research of 20,000 grantees of over 85 foundations showcases two important associations with strong funder-grantee relationships. Firstly, program officers hold the keys to strong funder-grantee relationships. On many responses to questions in the GPR, variation in results is explained more by variation in grantees’ primary contact than by variation in grantees’ foundation. Secondly, program officers who want to form strong funder-grantee relationships should focus on developing their understanding of grantee organizations and the contexts in which they work and being transparent with grantees. From the grantee perspective, these are the two most powerful elements that contribute to a strong funder-grantee relationship. Less powerful, but still important to forming strong funder-grantee relationships, are the experiences they have during the selection process and how open they find funders to be to their ideas about the foundation’s strategy.

For more information about CEP’s research and recommendations regarding funder-grantee relationships, please refer to CEP’s research report [Relationships Matter: Program Officers, Grantees, and the Keys to Success](#).

WHAT PREDICTS THE STRENGTH OF A FUNDER-GRANTEE RELATIONSHIP?

PREDICTORS OF RELATIONSHIPS



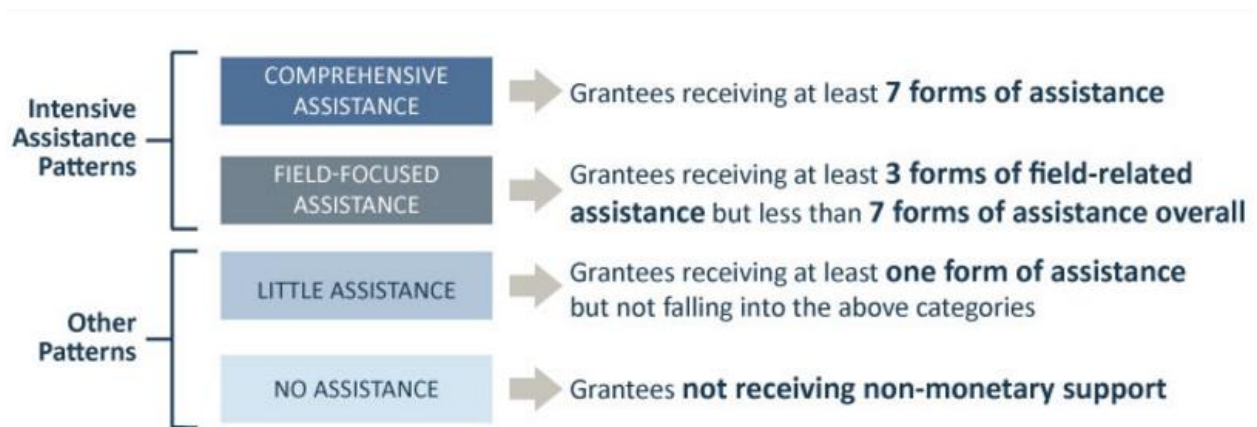
ASPECTS OF FOUNDATIONS’ UNDERSTANDING OF GRANTEE ORGANIZATIONS AND THE CONTEXT IN WHICH THEY WORK

Aspects of Understanding
Foundations’ understanding of grantee organizations’ strategy and goals
Foundations’ awareness of grantee organizations’ challenges
Foundations’ understanding of the fields in which grantees work
Foundations’ understanding of grantees’ local communities
Foundations’ understanding of the social, cultural, or socioeconomic factors that affect grantees’ work
Foundations’ understanding of intended beneficiaries’ needs
Extent to which foundations’ funding priorities reflect a deep understanding of grantees’ intended beneficiaries’ needs

Appendix E: Non-Monetary Assistance

The grantee survey asks grantees to indicate what types of non-monetary assistance (listed below) they received from the Trump Foundation in association with the funding from their grant. CEP then categorized grantees' responses into one of four categories outlined below and described in more detail in CEP's research report, [More Than Money: Making a Difference with Assistance Beyond the Grant](#).

<u>Management Assistance</u>	<u>Field-Related Assistance</u>	<u>Other Assistance</u>
General management advice	Encouraged/facilitated collaboration	Board development/governance assistance
Strategic planning advice	Insight and advice on your field	Information technology assistance
Financial planning/accounting	Introductions to leaders in field	Communications/marketing/publicity assistance
Development of performance measures	Provided research or best practices	Use of Foundation facilities
	Provided seminars/forums/convenings	Staff/management training



Appendix F: Top & Bottom 5 Comparative Ratings¹²

Top 5 Comparative Ratings	
Rank	Measure
1	“How clearly has the Foundation communicated its goals and strategy to you?” (1 = Not at all clearly, 7 = Extremely clearly)
2	“How involved was Foundation staff in the development of your grant proposal?” (1 = No involvement, 7 = Substantial involvement)*
3	“To what extent was the Foundation’s reporting process straightforward?” (1 = Not at all, 7 = To a great extent)*
4	Average Grant Length*
5	Median Grant Size*
Bottom 5 Comparative Ratings	
Rank	Measure
1	“Overall, how would you rate the Foundation’s impact on your organization?” (1 = No impact, 7 = Significant positive impact)
2	“How much, if at all, did the Foundation improve your ability to sustain the work funded by this grant in the future?” (1 = Did not improve ability at all, 7 = Substantially improved ability)*
3	“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)*
4	“To what extent is the Foundation open to ideas from grantees/partners about its strategy?” (1 = Not at all, 7 = To a great extent)
5	“How well does the Foundation understand the social, cultural, or socioeconomic factors that affect your work?” (1 = Limited understanding, 7 = Thorough understanding)

¹² An asterisk (*) indicates that this question was only asked of the Foundation’s grantees.