

GRANTEE AND APPLICANT PERCEPTION REPORT

Summary of Findings Prepared for
The William Penn Foundation
April 2026



THE CENTER FOR
EFFECTIVE PHILANTHROPY

About CEP

CEP provides data, feedback, programs, and insights to help individual and institutional donors improve their effectiveness.

We do this work because we believe effective donors, working collaboratively and thoughtfully, can profoundly contribute to creating a better and more just world.



ASSESSMENTS



RESEARCH



PROGRAMMING



ADVISORY SERVICES



YOUTHTRUTH



LEARNING INSTITUTE

Agenda

Introduction to CEP

➤ Methodology

Summary of Survey Findings

- Grantmaking Processes
- The Foundation's Communications
- Staff-Grantee Relationships
- Perceptions of Impact

Discussion



Survey Methodology



Survey Fielded:
September –
October 2025



Grantees: 450 Responses (51%)

Declined Applicants: 146 Responses (27%)

Strategy Review

Program Area

Grantee
Characteristics

Respondent
Demographics

Previous Surveys	2022	423 Grantees surveyed 58% Response rate
	2019	
	2016	
	2007	
	2003	

Benchmarking



Grantee Dataset

More than 60,000 **grantee responses** from over 350 funders

Peer Funder Cohort

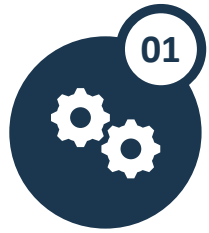
Barr Foundation	Ewing Marion Kauffman Foundation
Harry and Jeanette Weinberg Foundation	John D. and Catherine T. MacArthur Foundation
Houston Endowment	The Duke Endowment
The Heinz Endowment	The James Irvine Foundation
The Kresge Foundation	The McKnight Foundation
The William Penn Foundation	

Declined
Applicant
Feedback

Overall Applicant Dataset:

More than 5,000 **applicant responses** from over 50 funders

Summary of Key Findings



Evolving Views of Processes



Clear Communications



Valued Staff Relationships



Improved Perceptions of Impact

Questions: Survey Methodology

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GRANT PROCESSES

“The recent move to RFP-style grant opportunities **opens the door wide in terms of who feels welcome to apply**; however, it **can be limiting** for potential grantees who see the potential for their work to address more than one outcome, simultaneously.”

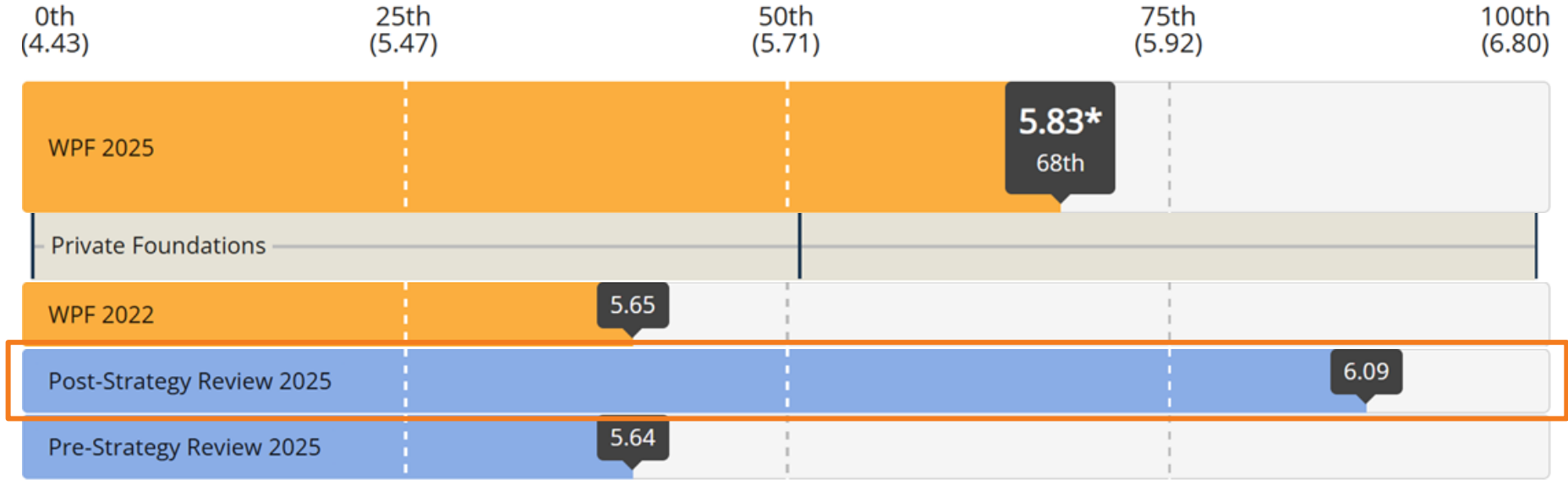
“The new grant application process is **streamlined and much more efficient** for applicants. While the funding priorities have shifted, there are many opportunities for funding through WPF that may not have existed before. While some organizations may not exist within WPF’s funding priorities anymore due to these shifts, **it seems like the Foundation is focusing its efforts on the most vulnerable in our community**, which is a great improvement for the city of Philadelphia.”

“There is **value in continuing to provide clarity on how proposals are reviewed and what criteria are weighed most heavily**. More explicit feedback on unsuccessful proposals is especially helpful for learning and improvement, as it allows us to refine our approach for future opportunities.”

Selection and RFP Process

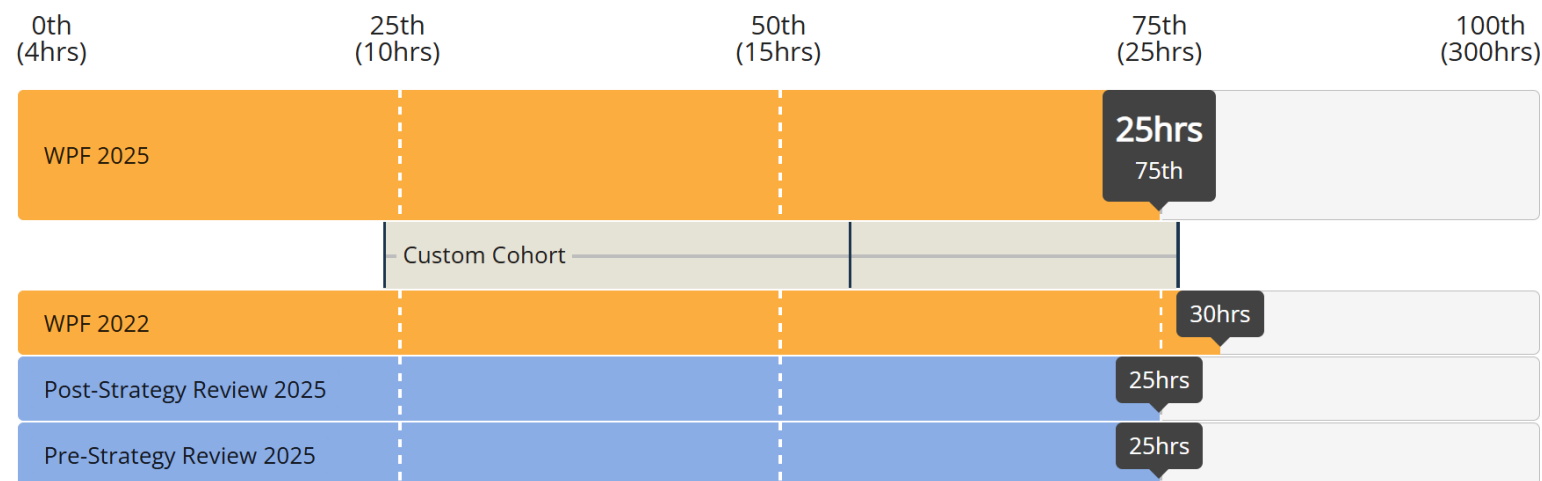
“To what extent was the Foundation clear and transparent about the criteria used to decide whether a proposal would be funded or declined?”

1 = Not at all 7 = To a great extent



Improvements to Time Spent on Processes

Median Hours Spent on Proposal and Selection Process



“I know the open RFP process is meant to encourage creative ideas unconstrained by the Foundation’s prior funding or thinking, but it’s tough to invest the time needed to create an application without knowing the likelihood of funding - I think a much-shorter LOI phase could be helpful perhaps.”

“The Foundation clearly made great effort to streamline the application and reporting process so as to be less burdensome on grantees. Whenever I had questions about the new application or reporting process, I received a quick response. The Foundation’s communication throughout the process was clear and the portal is very user friendly.”

Declined Applicants: Desire for More Streamlined Processes

Time Spent on Proposal and Selection

20 hrs

WPF declined
applicants

vs.

16 hrs

Median funder's
applicants



Top suggestion for the
Foundation:
**Reduce Application Process
Complexity and Burden**



“Asking for less information, or extending the window to work on the document. This process created a false sense of urgency and forced our organization to stop doing important work and instead focus on this grant.”



“How are smaller grassroots, organizations - and many POC-led organizations are smaller / less resourced - supposed to fill out your massive proposals? Most nonprofits these days are extremely understaffed and many don't have even one development person.”

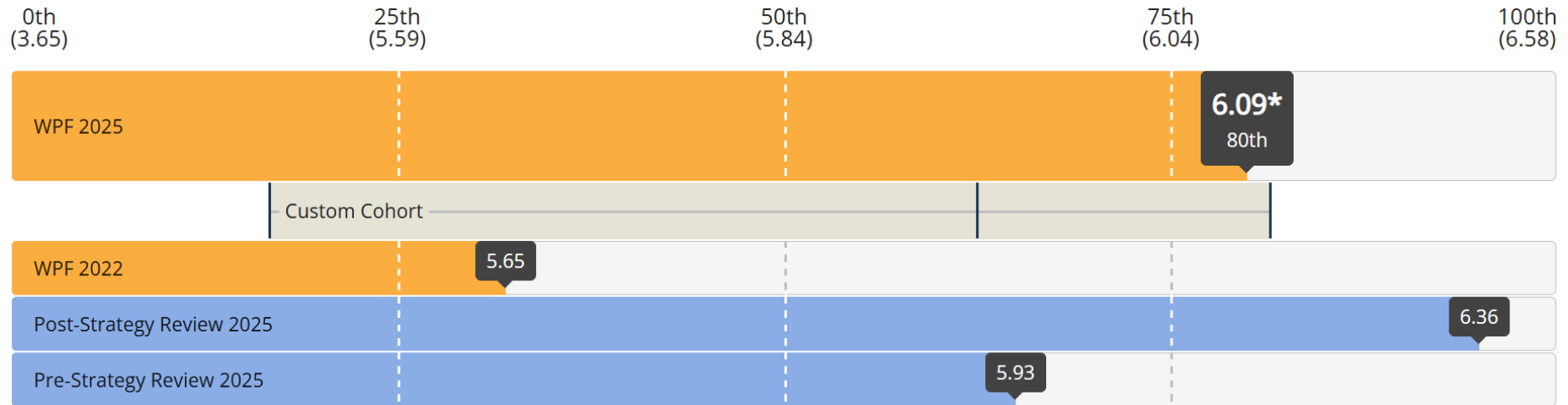
COMMUNICATIONS

Clarity of Communications

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

1 = Not at all clearly

7 = Extremely clearly

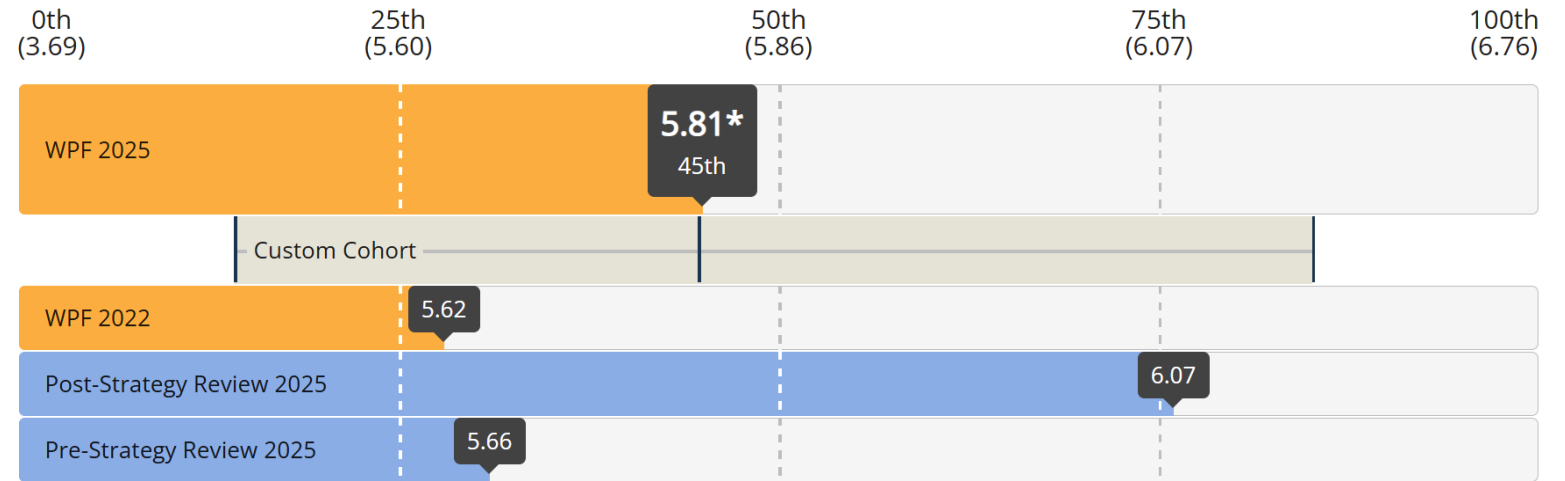


Greater Transparency

Overall, how transparent is the Foundation with your organization?

1 = Not at all transparent

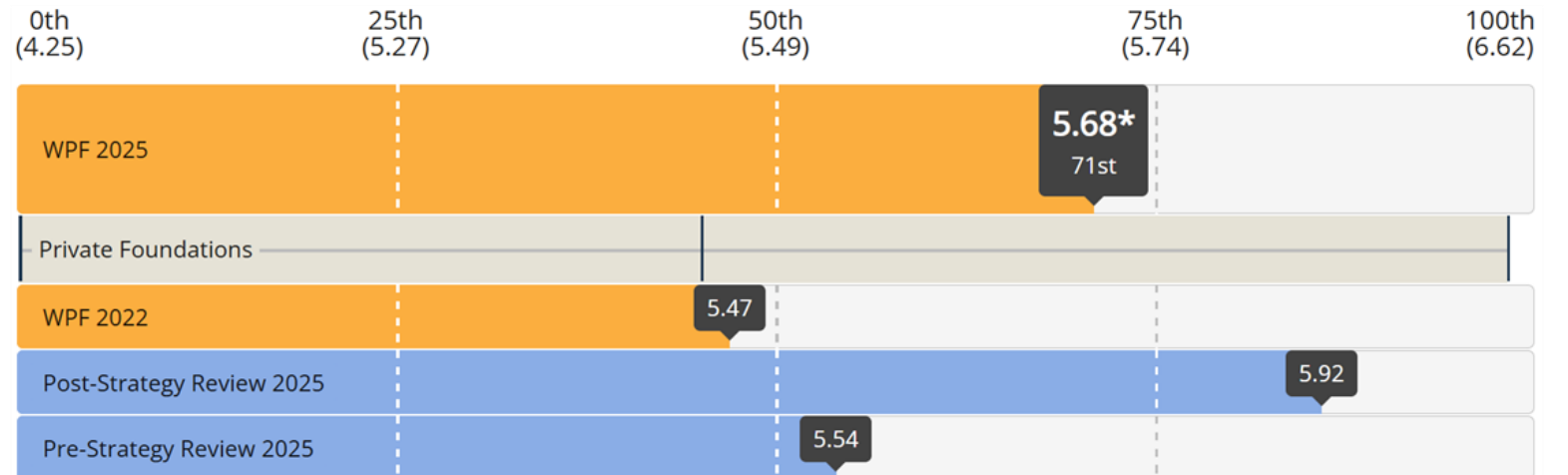
7 = Extremely transparent



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

1 = Limited understanding

7 = Thorough understanding



“All **interactions and communications** with the Foundation, from emails and phone calls with my grant officer to newsletters and webinars, have been **extremely positive, helpful, clear and consistent**. I greatly appreciate the thoughtful application process that includes **many touchpoints with a program officer to provide guidance and feedback** to help develop a successful proposal.”

“When the Foundation makes changes to funding priorities or eligibility, it would be helpful to **communicate those shifts clearly and directly with grantees**. In one instance, our organization spent significant staff time preparing an application for a funding stream we later learned we were no longer eligible for.”

“I felt there was a **consistent message and approach throughout the process**. Staff were very proactive to make sure I understood the foundation's priorities, guidelines, procedures and timeline.”

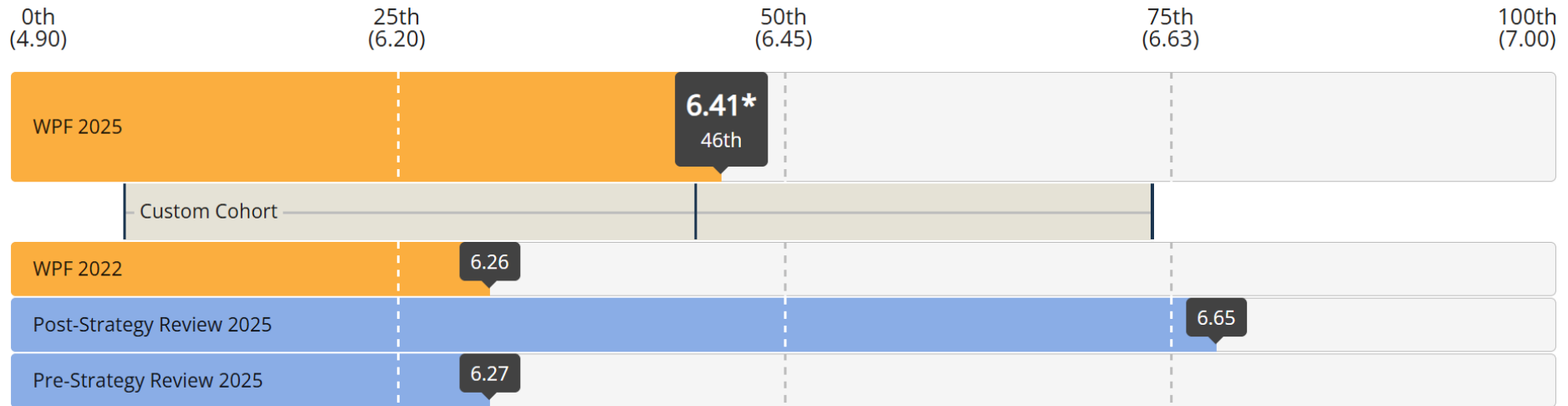
FUNDER-GRANTEE RELATIONSHIPS

Responsiveness

“Overall, how responsive was Foundation staff?”

1 = Not at all responsive

7 = Extremely responsive

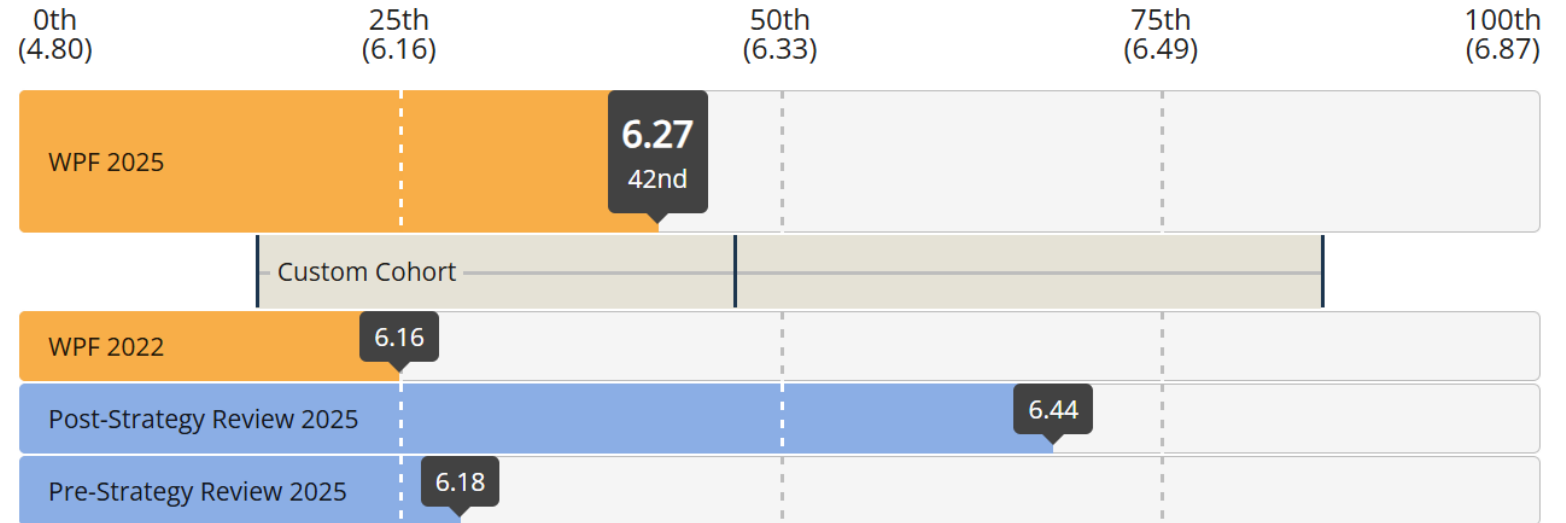


“The William Penn team is exceptional in its approach to philanthropy: Crystal clear in its goals and process, transparent in its decision making, open to conversation and learning, pushes our thinking as colleagues, provides helpful guidance, and approaches the work together with humility. We are truly grateful for their partnership.”

Approachable and Trust-Based

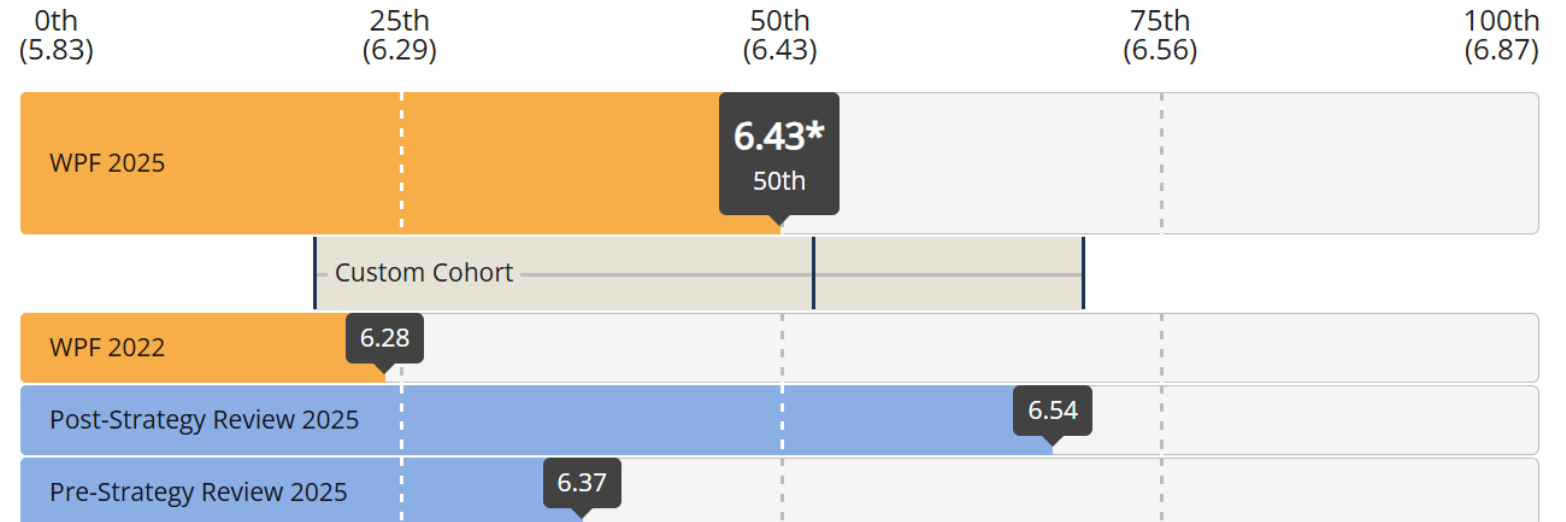
How comfortable do you feel approaching the Foundation if a problem arises?

*1 = Not at all comfortable
7 = Extremely comfortable*



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*



Patterns of Interaction and Touchpoints



Contact monthly or more often

26% of post-review WPF grantees
23% at the typical funder



Received a site visit

78% of post-review WPF grantees
46% at the typical funder

Grantees who interact with the Foundation more frequently rate **significantly higher** across nearly every measure of the survey

Grantees strongly agree:

- The site visit allowed their organization to effectively explain their work and impact
- Foundation staff clearly communicated the purpose and goals of the site visit
- Preparing for the site visits consumed an appropriate amount of time given the grant amount



“We feel honored that WPF staff take the time to come out, see us, get a feel for our context, meet our staff, and build a relationship. This makes us feel more comfortable reaching out to them throughout the grant cycle.”



“The site visits are an excellent idea -- admittedly a lot of work for the program officers but it was really helpful and enjoyable to show off the projects we seek funding for and the partners we work with.”

Application Experience

	William Penn Foundation	Typical Funder in CEP Dataset
Had contact with staff prior to applying	51%	48%
Requested feedback and received it	79%	66%
Encouraged to apply in the future	49%	35%
Intend to reapply	92%	88%



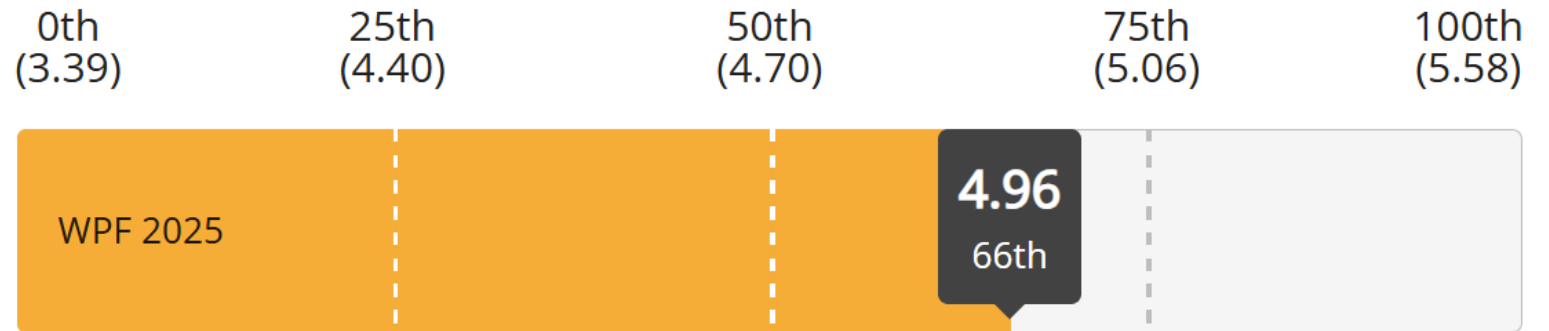
“The foundation staff have been as helpful as they are permitted to be. The RFP process has been mysterious; it seems there is not much rhyme or reason to the proposals being rejected. Questions do not receive answers that help applicants refine their proposals to meet overall objectives. The staff have been responsive, kind, and generous.”

Views of Fairness and Access

“Overall, how fairly did the Foundation treat you?”

1 = Not at all fairly

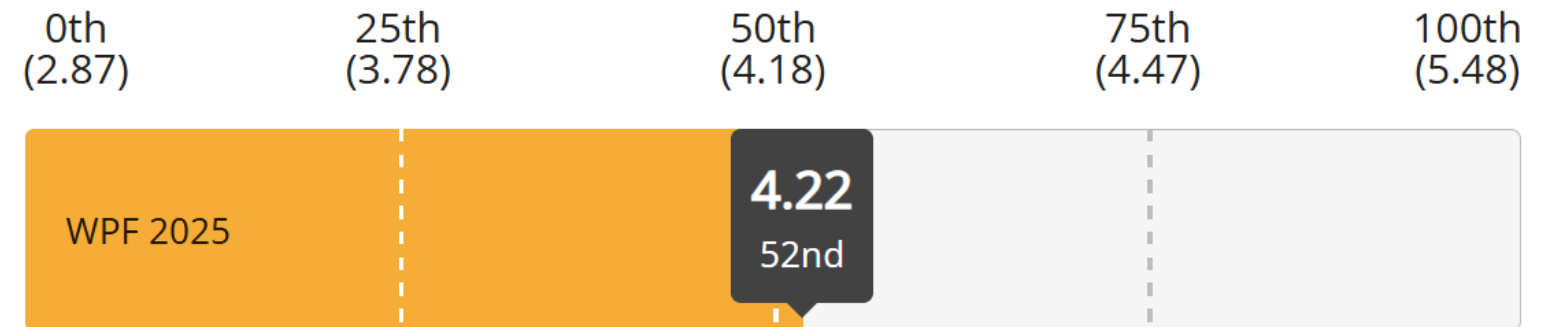
7 = Extremely fairly



“How accessible do you believe the Foundation is to applicants?”

1 = Some organizations are favored over others

7 = Everyone has equal access



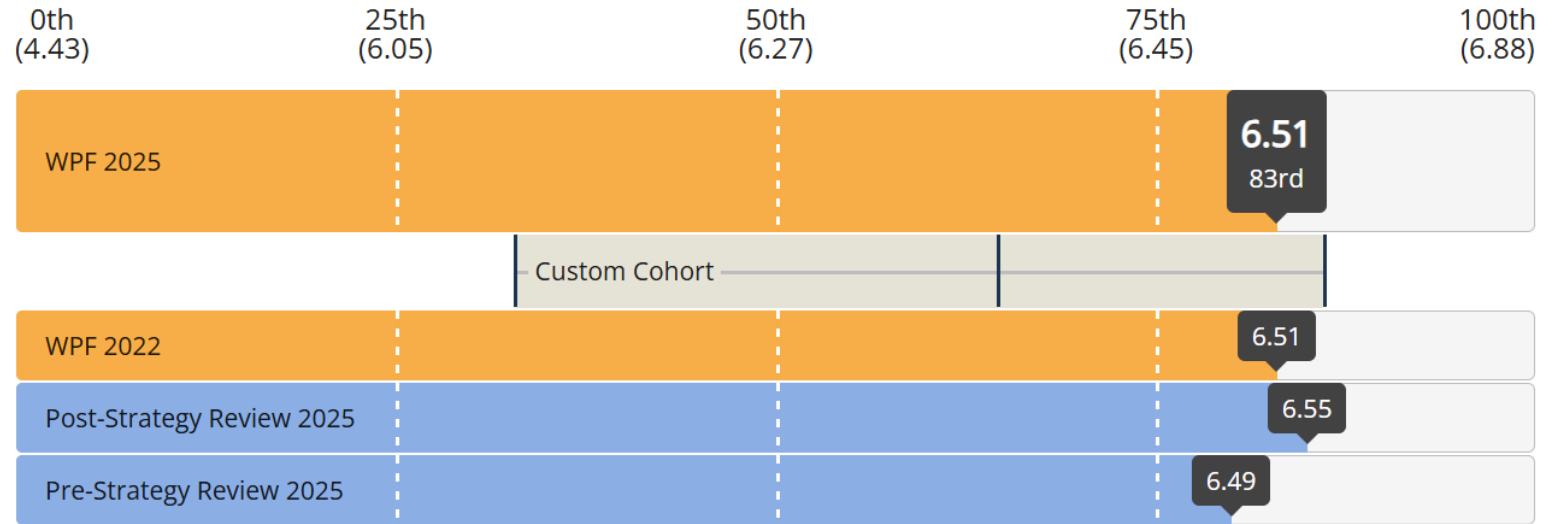
ORGANIZATIONAL IMPACT

Strong Impact on and Understanding of Grantees' Organizations

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

1 = No impact

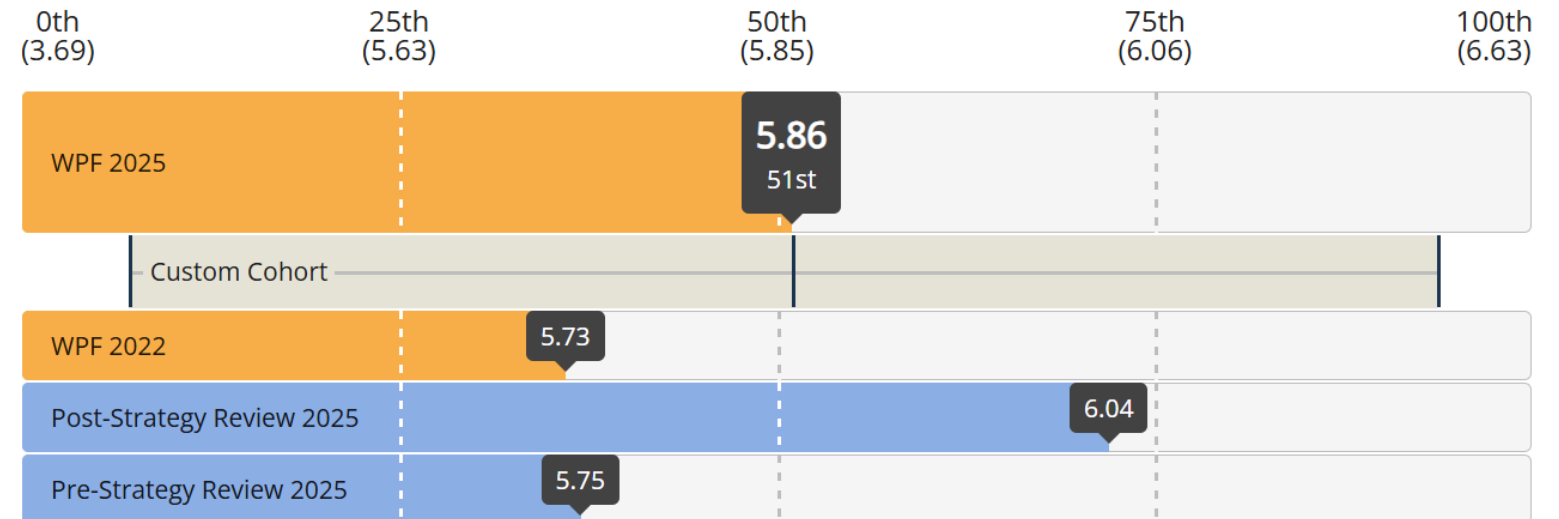
7 = Significant positive impact



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

1 = Limited understanding

7 = Thorough understanding



Valuable Assistance Beyond the Grant

59%

of the Foundation's post-strategy review grantees receive assistance beyond the grant vs. 64% of grantees at the typical funder

Grantees who received assistance beyond the grant rate **significantly higher** across many measures in the report, including the Foundation's impact on their organizations, and aspects of funder-grantee relationships and communications.

Helpful Learning Communities

Grantees most strongly agree:

- Their Learning Community can help the Foundation shape some of its grantmaking in the future
- They look forward to participating in meetings of their Learning Community in the future
- They have learned about other organizations doing related work



"We have greatly enjoyed participating in the learning community associated with this grant and have created rich partnerships with other recipients."



"The learning community meetings have also been valuable, offering both useful content to spark meaningful discussion and opportunities to learn from the experiences of peer organizations."

Grantmaking Characteristics

	WPF 2025	Post-Strategy Review 2025	WPF 2022	Median Funder
Median Grant Size	\$314K	\$273K	\$325K	\$125K
Median Grant Length	2.5yrs	2.2yrs	2.6yrs	2.2yrs
% Multi-year Support	79%	76%	81%	55%
% Unrestricted Support	10%	5%	19%	27%
Median Organization Budget	\$2.9M	\$2.9M	\$2.0M	\$1.7M



Grantees' most common suggestion for the Foundation:
More flexible grant structures



“Provide more trust-based philanthropy grants for operating and other expenses rather than just program specific funding... these projects are often not going to be fully sustainable after grant funding ends.”

Concerns about Accessibility

Median Annual Operating Budget

\$2.9M vs. **\$1.0M**
Funded grantees Declined applicants



Top suggestion for the
Foundation:
**Reduce Barriers for Smaller
and Emerging Organizations**

“This funder still feels out of reach for smaller, less resourced organizations. When we hear that we were not funded because we have less of a track record...compared to other applicants, when this proposal would help with strengthening our track record, it leaves us wondering how we would ever break into the grantee pool.”

“Broader spectrum of funds for smaller grass roots programs delivering services to communities in need - small projects can have a big impact.”

Questions: Processes, Communications, and Interactions

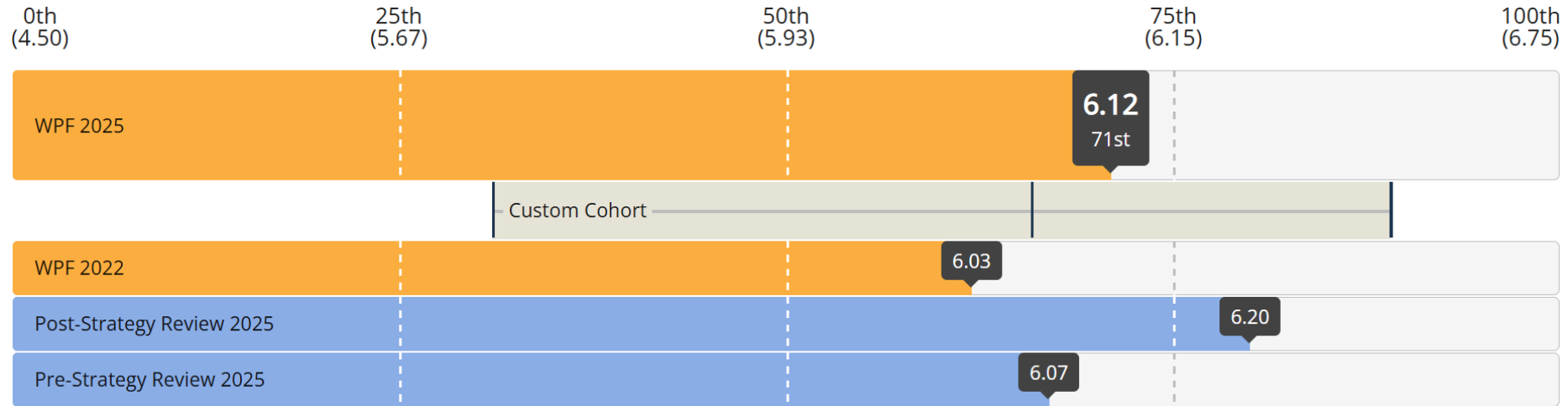
FIELD AND COMMUNITY IMPACT

The Foundation's Impact on Grantees' Fields

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

1 = No impact

7 = Significant positive impact



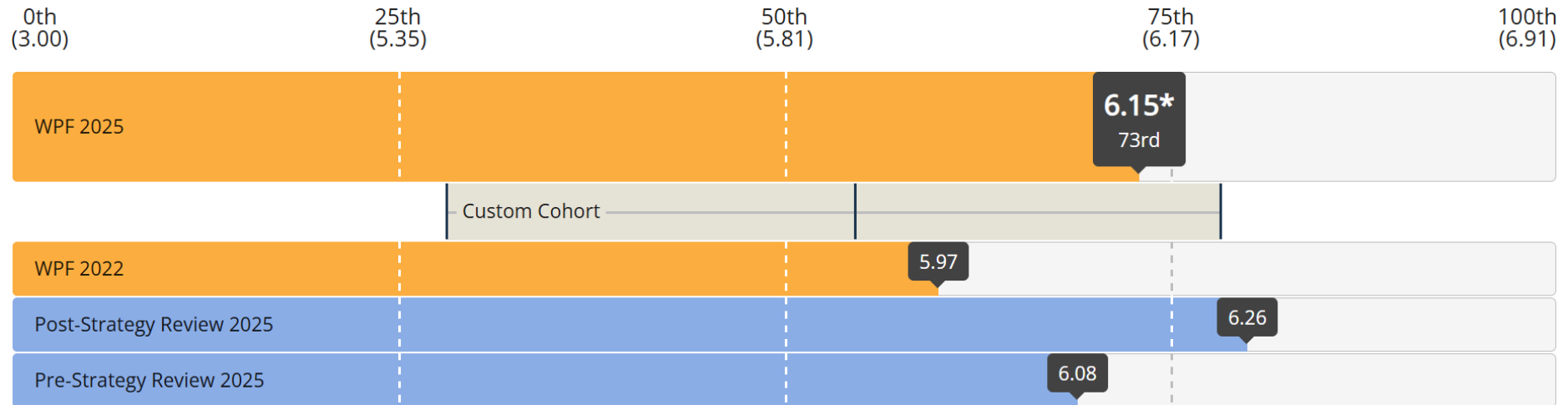
“WPF has historically and significantly invested in both system change efforts and direct programmatic support in ways that have 'moved the needle' and improved lives - in Philadelphia and beyond.”

The Foundation's Impact on Grantees' Communities

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

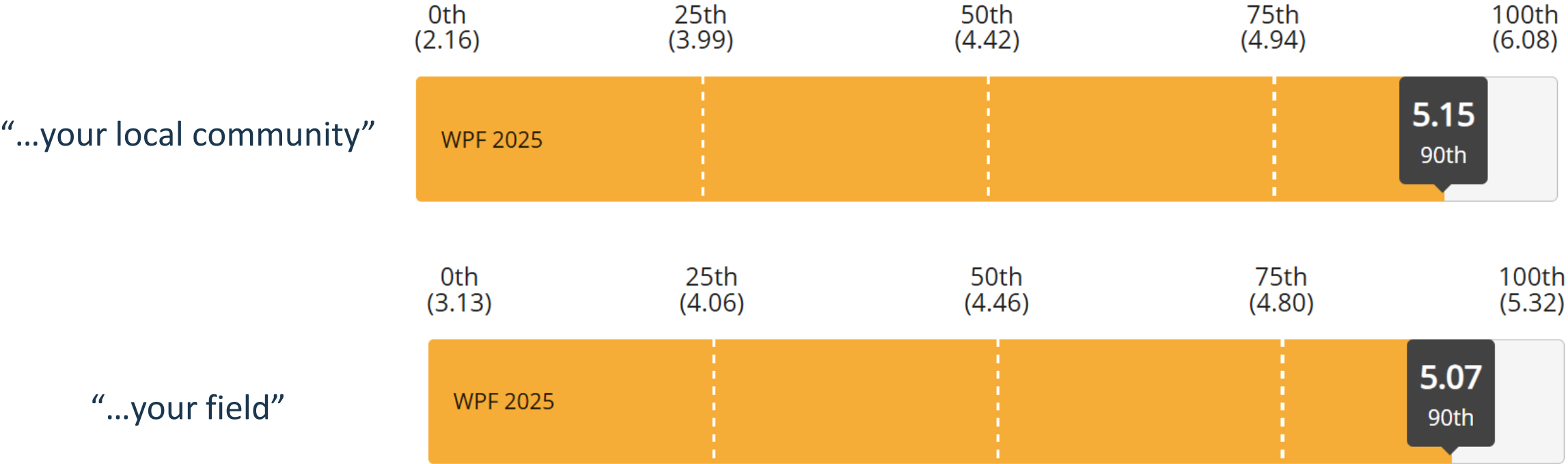
1 = No impact

7 = Significant positive impact



Declined Applicants: Strong Perceptions of the Foundation’s Impact

“Overall, how would you rate the Foundation’s impact on ... ?”
1 = No impact; 7 = Significant positive impact



Declined Applicants: Reasons for Applying

	William Penn Foundation	Typical Funder in CEP Dataset
Read the funding guidelines and thought my proposal fit	81%	73%
Responded to a call for proposals or other solicitation	68%	40%
Attended Foundation informational event (webinar, workshop, etc.)	66%	12%
Is a major local funder, so seemed like a logical place to seek funding	59%	38%
Is a major funder in my field, so seemed like a logical place to seek funding	40%	31%

Regional Leadership

Grantees' view of the Foundation's role in the region, besides providing funding



Bringing investments into the region

64% (2025)
60% (2020)



Providing civic leadership

55% (2025)
45% (2020)



Informing policy

33% (2025)
40% (2020)



Hosting convenings

33% (2025)
26% (2020)



“WPF plays a critical role within the nonprofit community and takes a strong leadership role in a range of civic and community initiatives....

Their willingness and interest in partnering and aligning with other funders and government ...not only brings substantial financial resources to the table, but also helps to bring legitimacy and can be a key leverage point for galvanizing other funding partners.”

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➤ Discussion



Questions and Discussion



Thank You