

Key Findings and Recommendations from the William Penn Foundation 2025 Grantee and Applicant Perception Report

Prepared by the Center for Effective Philanthropy

In September and October of 2025, the Center for Effective Philanthropy (CEP) conducted a survey of recent grantees and declined applicants of the William Penn Foundation (referred to as “the Foundation” and “WPF”), achieving a 51% and 27% response rate, respectively.

The memo below outlines CEP’s summary of key strengths, opportunities, and recommendations and accompanies the comprehensive survey results in the Foundation’s interactive online report. The online report also includes respondents’ written comments and more information about survey analysis and methodology.¹

Overview

The Center for Effective Philanthropy is pleased to share the findings from the William Penn Foundation’s 2025 Grantee and Applicant Perception Report (GPR/APR). This is the Foundation’s sixth GPR and first APR. In the context of WPF’s recent strategy review and updated grant processes, these results serve as an important baseline of grantee and applicant experiences for the future.

Key findings include:

- ▶ Significant improvements in grantee ratings across many measures since 2022, particularly among post-strategy review grantees.
- ▶ Positive perceptions among declined applicants across measures of impact, understanding, staff interactions, and communications.
- ▶ Opportunities to continue sharing information about the Foundation’s current priorities, to further refine, clarify, and streamline its application and RFP processes, and to support grantees’ organizations with more flexible forms of funding.

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¹ Throughout this memo, the Foundation’s ratings are defined as higher than typical when it is rated above the 65th percentile in CEP’s overall dataset, lower than typical when it is rated below the 35th percentile, and typical when ratings fall in between those thresholds. Ratings described as “trending” higher or lower reflect a 0.3-point difference larger or smaller than the overall rating.

Highly Positive Perceptions of the Foundation's Impact

Strong Community and Field Impact

Grantees and applicants view WPF as having a strong impact on their communities and fields. Grantee ratings place the Foundation in the top 30 percent of funders in CEP's dataset on these measures; declined applicants rate WPF in the top 10 percent. What's more, grantees' perceptions of the Foundation's impact on their communities have significantly increased since 2022 (below).

- ▶ As in previous years, most grantees and applicants view the Foundation's current role in the region, besides providing funding, as "bringing investments into the region" and "providing civic leadership."
- ▶ In their written comments, they speak highly of WPF's work in the community, with one grantee writing, "It is not often you find a significant funder AND a connector, and I think the William Penn Foundation is filling that gap."

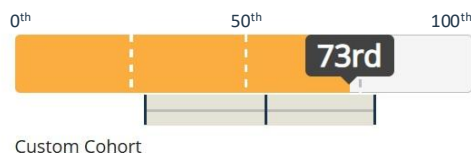
Grantee Rating: Overall, how would you rate the Foundation's impact on your local community?

1 = No impact, 7 = Significant positive impact

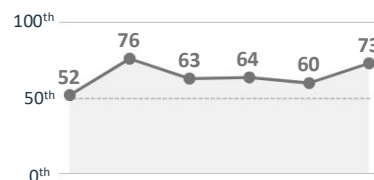
2025 Average
Rating

6.15

2025 Percentile Rank



Change over Time in
Percentile Rank



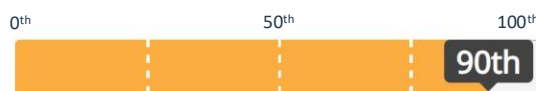
Applicant Rating: Overall, how would you rate the Foundation's impact on your local community?

1 = No impact, 7 = Significant positive impact

2025 Average
Rating

5.15

2025 Percentile Rank



Change over Time in
Percentile Rank

N/A

Valued Commitment to Diversity, Equity, and Inclusion

- ▶ Grantee ratings for WPF's demonstration of its commitment to DEI and its communications about its DEI commitments have significantly improved and are now in line with the typical funder in CEP's dataset.
- ▶ Declined applicants rate WPF above typical for its demonstrated commitment to DEI.



"WPF doubling down on its commitment to racial equity during a time it is frequently under attack at multiple levels of government is admirable. While federal funding now feels extremely volatile, funders like WPF allow us to remain firm in our values and mission and vision." - Grantee

Sustained High Impact on Grantees' Organizations, With Requests for More Flexible Support

Grantees continue to rate WPF's impact on their organizations highly, placing WPF in the top 20 percent of funders in CEP's dataset and near the top of its peer cohort.

- ▶ The Foundation continues to provide longer and larger grants compared to the median funder. However, only 10 percent of grantees – and 5 percent of post-strategy review grantees – report receiving unrestricted funding, placing the Foundation at the bottom of its peer cohort on this measure.
- ▶ Nearly a quarter of grantees' suggestions include requests for more flexible funding, particularly in this point in time. Grantees note that, "There are many foundations who are willing to fund projects, but these projects are often not going to be fully sustainable after grant funding ends" and "The Foundation has pulled back from operating support in the past year....Gen Op support is critical and the Foundation is one of the very few funders in our area that provides this."

Opportunities for Additional Beyond-the-Grant Supports

A notable way in which funders can support grantee organizations is by providing assistance beyond the grant. Fifty-two percent of WPF grantees report receiving such assistance, a smaller than typical proportion. Grantees most commonly indicate receiving field-building assistance (33 percent) and program-related assistance (21 percent).

- ▶ Grantee ratings are lower than typical for their perception that the support they received met an important need for their organization and/or program, and that the Foundation's assistance beyond the grant was a worthwhile use of grantees' time.
- ▶ In their comments, grantees indicate an interest in the Foundation further facilitating convening and network opportunities.



"As one of - if not the most - significant private funder in Philadelphia, WPF plays a critical role within the nonprofit community and takes a strong leadership role in a range of civic and community initiatives...Because they are among a very small group of funders providing six figure grants in the region, their support can play a transformational role for organizations that receive funding." - Grantee



"The Foundation plays an important role in supporting organizations like ours by providing not only funding but also opportunities for collaboration and shared learning.... Beyond the grant, the Foundation helps strengthen our field by fostering connections among grantees and encouraging innovation in practices that benefit children and families." - Grantee

Clear and Transparent Communications with Opportunity for Greater Proactivity

Ratings from both grantees and declined applicants suggest WPF has clearly and effectively messaged its new strategy to its partners. The Foundation receives its highest rating ever for grantees' perception of the clarity with which it has communicated its goals and strategy, with post-strategy review grantees rating in the top 5 percent of CEP's dataset for this measure.

- ▶ Grantees understand the way in which their funded work fits into the Foundation’s broader efforts – rating higher than typical – and find the Foundation’s communications consistent and transparent. Ratings have significantly increased across all of these measures.
- ▶ Similarly, declined applicants rate WPF in the top 30 percent of CEP’s dataset for the clarity and transparency of the Foundation’s communications.
- ▶ Nonetheless, some grantees and applicants describe concerns about the rollout of the Foundation’s strategic changes, requesting more proactive communication. One grantee writes, “When the Foundation makes changes to funding priorities or eligibility, it would be helpful to communicate those shifts clearly and directly with grantees.”

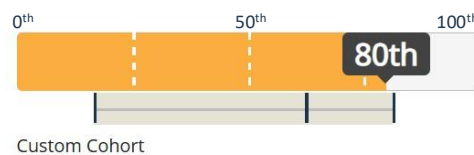
Grantee Rating: How clearly has the Foundation communicated its goals and strategy to you?

1 = Not at all clearly, 7 = Extremely clearly

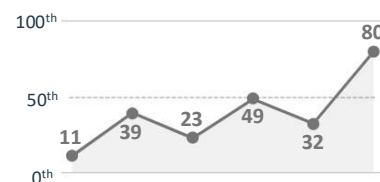
2025 Average
Rating

6.09

2025 Percentile Rank



Change over Time in
Percentile Rank



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“The changes they made to the RFP process and communicating their selection criteria between the time we applied for the Creative Communities grant and the 2025 Arts and Culture grant were very welcome. There is much more clarity now.” - Grantee

“

“I would recommend that the Foundation pursue a meeting with community organizations in Philadelphia, both those they’ve funded and those they have not, to get a picture of how they see the biggest threats in the next period.” – Applicant

Positive Relationships and Staff Interactions

Both grantees and declined applicants rate the Foundation in line with the typical funders in CEP’s datasets for measures related to their interactions and relationships with Foundation staff.

- ▶ Grantees rate Foundation staff’s responsiveness significantly more positively than in 2022. In their written comments, they describe staff as, “always accessible. They have a lot of expertise and a broad range of experience and help us to think about our work in new ways.”
- ▶ Analysis of grantees’ ratings and written comments indicate that more frequent touchpoints with the WPF team contribute to more positive perceptions of grantees’ relationship with the Foundation. Grantees who have contact with the Foundation every few months or more often provide significantly higher ratings across almost all measures of the report.
- ▶ Declined applicants rate the responsiveness of WPF in the top quarter of CEP’s dataset, and in the top third for how fairly they feel treated.

Grantee Rating: Overall, how responsive was Foundation staff?

1 = Not at all responsive, 7 = Extremely responsive

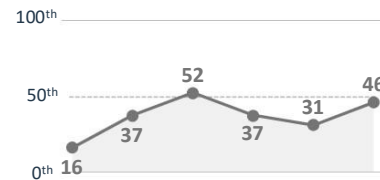
2025 Average
Rating

6.41

2025 Percentile Rank



Change over Time in
Percentile Rank



Positive Experiences with Site Visits

A significantly larger proportion of grantees report receiving a site visit in 2025 compared to 2022.

- ▶ Grantees find these experiences valuable; as one writes, “Site visits are helpful. 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.”
- ▶ All applicants who responded to the survey and grantees who reported receiving a site visit were asked a series of questions regarding their experience with receiving a site visit as part of the application process. Both grantees and applicants agree that preparing for the site visits consumed an appropriate amount of time, given the grant amount. Grantees agree that the site visit allowed their organization to effectively explain their work and impact; in contrast, applicant ratings are lower for this measure.

Proportion of Grantees Reporting Receiving Virtual or In-Person Site Visits

2022 Grantee	2025 Grantee	Significant Statistical Differences
45%	61%*	Grantees who received a virtual or in-person site visit have significantly more positive perceptions across most measures of the survey, and experience significantly less pressure to modify their priorities in order to receive a WPF grant.

* Significant increase compared to 2022

Understanding of Organizational Contexts

Grantees and declined applicants rate the Foundation in line with the typical funder for its understanding of their organizations’ goals and strategies, challenges, fields, and contexts.

- ▶ Grantee ratings have improved significantly since 2022 regarding WPF’s understanding of organizational challenges and relevant social, cultural, and socioeconomic factors, especially among post-strategy review grantees.

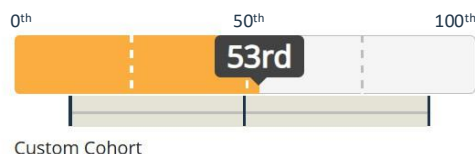
How aware is the Foundation of the challenges that your organization is facing?

1 = Not at all aware, 7 = Extremely aware

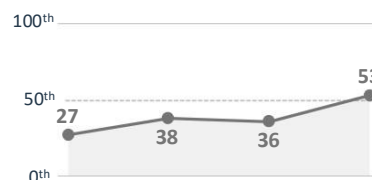
2025 Average
Rating

5.39

2025 Percentile Rank



Change over Time in
Percentile Rank



“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.” - Grantee



“The quality of the processes such as the grant application were above average. The interactions I had with grant officers were very helpful. I was told why my grant proposal was denied and encouraged to apply for the next cycle of grants.”
– Applicant

Clear Processes and Improved Reporting, Potential to Refine RFP Process

Grantees and applicants indicate that the Foundation is clear about its selection process requirements and timelines, as well as the criteria used to decide whether a proposal would be funded or declined. However, ratings for the helpfulness of the process remain lower than typical among grantees, and both grantees and applicants report experiencing more pressure than typical to modify their organization’s priorities in order to create a grant proposal that was likely to receive funding (below).

Improvements to Reporting

- ▶ Grantees rate all aspects of the reporting process more positively in 2025 than in 2022, now rating WPF’s reporting process in line with that of the typical funder for the extent to which it was helpful, straightforward, and relevant.
- ▶ Still, grantees describe mixed perceptions of WPF’s reporting requirements in their written comments. One grantee writes, “Reporting was not cumbersome and allowed for more reflection than just fulfilling yet another requirement” while another notes, “developing and reporting on the results, milestones and activities (RMAs) was extremely time-consuming and deleterious to the work the grant was intended to fund.”

Opportunities for Refining the RFP Process

Grantees and declined applicants were asked a series of WPF-specific questions about the Foundation’s RFP process and webinar. While grantees and applicants both found WPF’s RFP easy to understand, they provided lower ratings for their understanding of the criteria used to review proposals and for the extent to which the amount of time they had to respond to the RFP was sufficient.



“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.”

– **Grantee**



“While it is admirable that the Foundation is honing its focus areas to increase measurable results, some of the RFPs that have come out have been so specific that it almost feels as though they have created a specific program.”

– **Applicant**

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

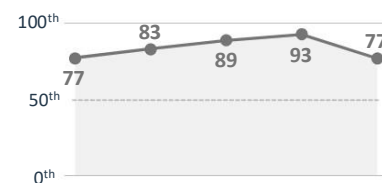
2025 Average Rating

2.42

2025 Percentile Rank



Change over Time in Percentile Rank



Declined Applicants’ Experiences with Selection Process

Closer alignment on declined applicants’ experiences with the Foundation’s selection process can ensure that they have the information and feedback necessary to navigate the Foundation’s processes.

- ▶ **Staff support:** Half of declined applicants report having contact with Foundation staff prior to applying, compared to 85 percent of grantees. Applicants also provide lower ratings for the ease with which they could access program staff and for the helpfulness of the support offered by program staff during the application process. Moreover, though their perceptions are in line with the typical funder for Foundation staff’s accessibility to applicants, some applicants express concerns that “without an established relationship with WPF, I sensed our chances of receiving funding were low.”
- ▶ **Reasons for funding:** Most applicants decided to apply to the Foundation for funding because they “read the funding guidelines and thought their proposal fit.” When declined, applicants most often received the reason, “Doesn’t fit Foundation priorities/guidelines, with explanation as to why” (36 percent), followed by “Not enough funds/too many good proposals” (23 percent).
- ▶ **Reapplying:** Over 90 percent of applicants intend to reapply to the Foundation, but almost half report that they received no guidance from WPF about whether they should consider applying for funding from the Foundation again.

- ▶ **Application feedback:** Nearly 80 percent of applicants report requesting feedback from the Foundation and receiving it, a higher than typical proportion. Applicant ratings are typical for the helpfulness of the feedback and advice received in strengthening future proposals to WPF.

Applicants with Intent to Reapply

Total proportion	Would consider applying for a <u>similar</u> project	Would consider applying for a <u>different</u> project
92%	55%	37%



“I found the process, on the whole, to be fairly disappointing with respect to communication. I would have liked a little more feedback about how our proposal was misaligned. That or a little more information about exactly what the program would consider funding.” – Applicant



“The feedback we received on why we were not funded was in direct conflict with the types of projects that were actually funded in that cohort. This was a very disappointing and frustrating process.” – Applicant

Organizational Contexts

WPF grantees are generally slightly larger than those of the typical funder, with median annual operating budgets of \$2.9M, compared to \$1.7M at the typical funder in CEP’s dataset.

In contrast, declined applicants’ organizations are smaller, with median operating budgets of \$1.0M, though similarly sized compared to applicants at the typical funder in CEP’s dataset. Their typical grant request is \$200K – larger than the median grant request at the typical funder.

Effects of the Policy and Funding Environment

Grantees and applicants were asked a series of questions regarding their experiences specific to the political and funding context in 2025. These questions centered on their organizations’ funding sources, recent reductions in funding, and organizational challenges related to changes in the policy or political environment.

- ▶ **Grantees’ funding sources:** Large proportions of WPF grantees report receiving funding from the federal government (54 percent) or state/local governments (73 percent). Many are braced for reductions in funding: over half have experienced or anticipate experiencing reductions in funding from federal government, state/local governments, and/or private funders or donors.
- ▶ **Applicants’ funding sources:** Over three quarters of applicants report receiving state/local funding, and just under half report receiving federal funding. Around 60 percent of applicants report experiencing or anticipate experiencing reductions in funding.

- ▶ **Organizational concerns:** Substantial proportions of grantees and declined applicants (65% and 60%, respectively) share that they have experienced concerns about the well-being and safety of those that their organizations are seeking to help, and nearly half (44% of grantees and 43% of declined applicants) have faced pressure to meaningfully reframe how they publicly describe their work.



“Recently the Foundation announced grants to outstanding organizations across sectors that are being impacted by shifts or diminishments in federal funding. This meaningful, responsive kind of philanthropy is so needed and admirable.” – Grantee



“We are finding that securing funding from foundations is getting harder all the time. With the cutting of federal funds, more organizations are seeking out private foundations which makes it harder for the rest of us to receive funds.” – Applicant

CEP Recommendations

Based on grantee and declined applicant feedback, CEP recommends that the William Penn Foundation consider the following to build on its strengths and address potential opportunities for improvement:

- ▶ Celebrate improvements in perceptions of WPF’s external impact and partner relationships, particularly in light of the Foundation’s changed approaches over the past few years.
- ▶ To further strengthen grantees’ work:
 - Reflect on grantees’ feedback about the importance of unrestricted operating support, particularly in a challenging funding environment.
 - Consider how the Foundation can further align its assistance beyond the grant offerings with grantee needs, perhaps by using existing touchpoints with grantees to develop a shared understanding of what forms of assistance would be most beneficial for grantee organizations.
- ▶ Work together to identify potential gaps in communications about the Foundation’s new strategy to help them develop a deeper understanding of alignment and fit – especially for organizations whose work may no longer fit into the Foundation’s current set of priorities.
- ▶ Consider opportunities to further streamline aspects of the Foundation’s grant process. Reflect on how the new RFP process is shaping grantee and applicant experiences, and where the process could be further refined to achieve the Foundation’s goals.