

Introduction

We are pleased to provide you with your 2020 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 non-grantee 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.

Unless otherwise noted, this memo compares Trump grantee and non-grantee partner 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 2020 Results, Changes Over Time & Key Subgroup Differences

- Summary of 2020 Results
 - Though there are a few differences in grantees’ and non-grantees’ 2020 perceptions compared to the past (including more positive perceptions of the Foundation’s understanding of respondents’ fields of work, and a significantly higher proportion of grantees who report engaging in touchpoints as part of Foundation processes), on most measures, at the aggregate, respondents’ 2020 perceptions are similar to those of the Trump Foundation’s 2018, 2016, and 2014.
 - Overall, as in the past, across GPR measures, there is some variation across key survey dimensions. Though non-grantee partners and grantees continue to highlight clear strengths of the Foundation in both their comments and provide higher than typical ratings for a few measures, broadly, ratings are lower than those of the typical funder in CEP’s GPR dataset for most key GPR measures, and grantee and non-grantee partners’ most common qualitative suggestions mirror those from 2018.

- Notably, in 2020, there are less differences between grantee and non-grantee partners than there were in the 2018 survey, similar to the number of differences between these two groups in 2016 and 2014.
 - Respondents overwhelmingly agree with the Foundation's specific goal. In a custom question, 99 percent of respondents agree (rating a 5 or higher on a 7-point scale) that the Foundation's goal of raising the bar in secondary schools to ready every student for the challenge of studying mathematics and the sciences at a level of excellence is an important one.
- **Changes in Ratings by Respondent Type**
 - Grantees v. Non-grantee Partners - In 2020, there are little significant differences between grantees' and non-grantee partners' ratings, a change from in 2018 when perceptions differed across a number of measures between these two groups. In 2020, grantees offer significantly more positive perceptions of field impact than do non-grantee partners, although both continue to be lower than the typical funder in CEP's dataset.
- **Changes in Overall Foundation Ratings Over time**
 - 2020 v. 2018 - When comparing the Foundation's overall 2020 ratings to the overall 2018, ratings have significantly increased for the Foundation's understanding of respondent's fields of work and are now similar to those of the typical GPR funder.
- **Differences Over Time by Respondent Type – Grantees & Non-Grantee Partners**
 - Grantees' Ratings: 2020 vs. 2018: There are some differences between grantees' ratings in 2020 and 2018.
 - The Foundation's 2020 grantees provide significantly *more* positive ratings than the 2018 grantees for the extent to which the evaluation process generates useful information and a significantly larger proportion of 2020 grantees report engaging in Foundation touchpoints throughout the Foundation's reporting/evaluation processes compared to 2018.
 - Ratings from 2020 grantees are significantly *less* positive for the Foundation's transparency and the overall strength of their relationships with the Foundation than in 2018; and, 2020 grantees also report experiencing more pressure to modify their organizational priorities during the selection process and, at the median, receive significantly shorter grants than in 2018.
 - Non-Grantee Partners' Ratings: 2020 vs. 2018: The Foundation's 2020 non-grantee partners provide significantly more positive ratings than the 2018 non-grantee partners for the Foundation's understanding of their local communities and the Foundation's openness to ideas about its strategy from non-grantee partners.
- **Differences in 2020 Perceptions by Grantee Segmentation**
 - Grant Strategy: When analyzing grantee responses by Strategy, though there are differences, no grant strategy (AT, HOS, OE, or SPM) consistently rates higher or lower than others.

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

The Trump Foundation is currently in the secondary phase of its roadmap to strengthen the base of excellence in mathematics and science, and now focused on middle schools in addition to high schools. Nearly all respondents feel that the Foundation's goal is important, and the majority agree with the success indicator. In the words of one respondent, "the Foundation is focused on math education in middle school and high school. It has an impact in that specific area."

Yet, as in the Foundation's 2018 and 2016 GPRs, grantees and non-grantee partners indicate they think about their specific work more broadly than the Foundation's goals, and ratings continue to be lower than typical for the Foundation's field impact and aspects of the Foundation's contextual understanding. As in the past, the top theme in respondents' comments request expanding the Foundation's orientation and strategy. As one respondent notes, "From my experience, the processes are professional. However, sometimes I have a feeling that you do not know the DNA of the school and the proposals are not in line with the limitations of the educational institution."

Perceptions of the Foundation's Goal & Field Impact

- ▶ On a custom question, both the Foundation's grantees and non-grantee partners strongly agree that the Foundation's ultimate goal – to raise the bar in secondary schools, to ready every student for the challenge of studying mathematics and the sciences at a level of excellence – is important. Nearly all respondents, 99 percent, rate their agreement with this goal a 5 or higher on a 7-point scale.
- ▶ When respondents were asked if they identify with both the goal and its success indicator – within a decade Israel will become one of the top 15 countries in the world in mathematics, per Pisa's international rankings – nearly two-thirds of respondents indicate they identify with both, while another quarter of respondents report that they agree with the goal only.
 - Notably, a larger proportion of non-grantee partners (76 percent) compared to grantees (56 partners) indicate agreement with *both* the goal and success indicator; further, the proportion of grantees who indicate agreement with *only* the goal is more than twice that of non-grantee partners (35 percent of grantees versus 12 percent of non-grantee partners).
- ▶ Yet, as in 2018, and 2016, the top suggestion category, from just under half of both grantees and non-grantee partners request adjustments to Trump's broad strategy and orientation. In a similar finding to 2018, respondents most often ask for an expanded focus beyond math and science in middle and high schools – i.e., more focus on greater community needs and initiatives created by "people on the ground," expanding the types of organizations funded beyond those serving middle and high-schoolers in math and science, or more research about online learning.



"Around the grant objectives, that is, increasing the number of students taking 5-units of math, the impact was positive and very significant. The Foundation cultivated a strategic, target-oriented, budget-founded plan, and implemented it effectively, achieving the goals set."



"Math teaching in middle schools has been neglected relative to that in high schools, also by the Trump Foundation. We need to keep advancing this issue and further examine the effectiveness of math teaching in elementary schools in order to promote all students and not just those taking 5 units of math."



“The Foundation influences the government, decision-makers and experts in education, on matters of excellence in math and science education.”



“The Foundation can be more open to innovative ideas and to the needs of the community. Sometimes the focus of the Foundation becomes all too narrow.”



“Expand your support to the innovation ecosystem in order to bring schools closer to the real world and to the skills of the 21st century, beyond the importance of the disciplines of mathematics and physics.”

Field Impact

- ▶ Notably, respondents’ ratings for the extent to which they believe the Foundation understands their field of work have significantly improved since 2018 and are now similar to typical.
- ▶ The Foundation also continues to be a leader in CEP’s dataset for the extent to which respondents believe it has affected public policy in their fields, with an average rating in the top 20 percent of CEP’s dataset. Additionally, ratings for the extent to which the Foundation has advanced the state of knowledge in respondents’ fields are higher than in 2016 and are now within the range of the typical funder.
 - Notably, non-grantee partners’ ratings for the extent to which the Foundation has affected public policy are trending higher compared to 2016, though they remain lower than grantees’ perceptions.
- ▶ Yet, grantees’ and non-grantee partners’ ratings for the Foundation’s impact of their fields of work are virtually unchanged since 2014 and remain in the bottom 5 percent of CEP’s dataset.
 - As in 2018, grantees rate the Foundation’s impact on their fields of work significantly more positively than non-grantee partners.
- ▶ Furthermore, grantees’ ratings for the extent to which they feel the Foundation understands their intended beneficiaries’ needs and reflects these needs in its funding priorities are similar to 2018, remaining in the bottom 10 percent of CEP’s dataset.



“The Foundation has justifiably gained a great reputation in the field of cultivating excellence in math and science, both as a think-tank and on the ground. The Foundation has a long-lasting impact on decision-makers at all levels in this field.”



“The Trump Foundation is a pioneer and a leading player in the public debate on math education in Israel. It devotes a great deal of time and resources, encourages the creation of collaborative efforts and promotes the professional development of math teachers.”



“The day-to-day work with the Foundation has always been effective and advancing. Considering all the questions asked..., the Foundation can be rated as having a significant and positive impact. At the same time, however, there are a number of things that can be improved. More than once I have seen that there is not much flexibility in the Foundation’s answers to the unique needs of the local authority..., More often than not the Foundation demanded changes during the process, changes that prevented the completion of ongoing processes, which were therefore interrupted or halted.”



“During the grant period, the Foundation was very helpful and was at the helm, promoting the impact throughout the country in a significant and unprecedented way. However, it seems that it does not understand (or does not want to be a part of) the environment in which the program operates and does not help with the creation of the infrastructure needed for its survival.”

Impact on Organizations and Non-monetary Assistance

As in previous years, grantee and non-grantee partner perceptions about how Trump strengthens their organizations remain lower than typical.

- ▶ Ratings for the Foundation’s impact on respondent organizations continue to be in the bottom 5 percent of CEP’s overall dataset.
 - As in 2018, grantees’ ratings for the Foundation’s impact on their organizations trend higher than the Foundation’s non-grantee partners, though they remain near the bottom of CEP’s dataset. Importantly, non-grantee partners’ ratings for Trump’s organizational impact are trending higher than those of non-grantee partners in 2018, though they also remain in the bottom of CEP’s dataset.
- ▶ Grantees rate the Foundation similarly to 2018 for its awareness of their organizational challenges, though in the bottom quarter of CEP’s overall dataset. Their ratings for the Foundation’s understanding of their organizations’ strategy and goals, while still lower than typical, are trending higher than in 2018.
 - As in the past, grantees who 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 many survey measures including for its impact on their organizations.

Grantmaking Characteristics

- ▶ A funder’s grantmaking characteristics are often related to perceptions of its impact on grantees’ organizations. CEP’s research finds that larger, multi-year, and/or general operating support grants are associated with more positive perceptions of impact on grantees’ organizations.
- ▶ The Foundation continues to make a significant investment in grantees’ organizations, with larger and longer grants than typical. Nonetheless, at the aggregate, grant length has significantly declined in 2020, down to 2.8 years at the average from 3.2 years at the average in 2018.
- ▶ Notably, in 2020 annual organizational budgets of grantees are much smaller than in 2018, though they remain larger than in 2016 and 2014. At the median, grantees report an annual organizational budget of \$1.7M compared to \$8M in 2018 (compared to \$700K in 2016 and \$600K in 2014). Thus, in 2020, the proportion of grantees’ annual organizational budgets funded by the Foundation grant has increased compared to 2018 and is now similar to typical, 3 percent in 2020 compared to 4 percent at the median funder and 1 percent for the Foundation in 2018.
- ▶ About one third of grantees, a similar proportion to 2018, report receiving consistent funding from the Foundation. This proportion remains much lower than typical compared to the median funder (54 percent) and median cohort funder (52 percent).
 - As is consistent with CEP’s field-wide research, these respondents rate significantly higher on a several report measures, including Trump’s impact on their fields, communities and organizations.

- ▶ In grantees' suggestions for the Foundation, a sub-theme relates to the Foundation's grantmaking characteristics. Just over 15 percent of grantees' suggestions (the second most mentioned theme) request greater flexibility in grant execution. Grantees request that the Foundation "allow other courses of action in order to reach the goal" and "decide on a certain percentage of reasoned flexibility, as necessary, within the grant commitments."

Non-Monetary Support

- ▶ In CEP's broader research, intensive patterns of support beyond the grant check, in which grantees receive multiple types of non-monetary assistance, are associated with more positive perceptions of impact on grantees' organizations.
- ▶ 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 assistance¹ (33 percent of the Foundation's grantees report receiving intensive non-monetary supports in 2020 versus 17 percent at the median funder)
 - These grantees rate significantly more positively for the extent to which Trump is advancing knowledge in their fields, its impact on their local community, and the clarity of the Foundation's communications.
- ▶ As in 2018, grantees who report receiving non-monetary supports most often access collaboration support (55 percent), introductions to field leaders (45 percent), and seminars/forums/convenings (43 percent).
 - Markedly, nearly a third of the grantees who report receiving support beyond the grant, a larger proportion than in the past and at the typical funder, report receiving communications/marketing/publicity assistance from the Foundation.

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.²

In comments, many respondents describe staff as "very professional," "pleasant" and "always available." Some respondents also praise the Foundation's "excellent communication" and note it "communicates the messages and goals clearly."

Nonetheless, ratings for the overall strength of grantee and non-grantee relationships with the Foundation are now in the bottom quartile of CEP's overall dataset, compared with typically positive ratings at the overall Foundation level in 2018. This decline is driven primarily by a significant decline in grantees' perceptions, which are now in the bottom quartile of CEP's dataset.

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 quartile of CEP's overall dataset, which is similar to the Foundation's 2018 ratings for

¹ For more information, please refer to Appendix G: Non-Monetary Assistance.

² For more information about CEP's research on the funder-grantee relationship, please refer to Appendix F

these measures. There are a number of differences over time between non-grantee partners and grantees on these perceptions.

- In particular, non-grantee partners' ratings trend higher than in 2018 for both their comfort approaching Trump if a problem arises and their fairness of treatment, with the latter measure now similar to the typical funder.
 - Yet, grantees now rate the Foundation lower than typical across all interactions measures. In 2018, grantees rated Trump in the top quarter of the dataset for their comfort approaching it if a problem arises; in 2020, grantees rate Trump in the bottom 20 percent of CEP's dataset for this measure. Also, in 2020, grantees rate the Foundation in the bottom decile of CEP's dataset for their fairness of treatment, compared to grantees in 2018 who rated close to the 40th percentile for this measure.
- ▶ On a series of questions about the qualities of the Foundation during the course of the grant, while grantees provide higher than typical ratings for the extent to which Trump exhibits candor about its perspectives on their work, they provide ratings in the bottom quarter of CEP's dataset for the extents to which Trump exhibits respectful interaction, trust in their organization's staff, and compassion for those affected by their work.
- While a minority theme in comments, some grantees describe challenging experiences with the Foundation's rigidity or feeling a lack of trust from the Foundation. As one grantee says, "We feel that the Foundation is much more involved than was in the past, sometimes overly involved. The Foundation's staff, although they are interested in helping and improving things, sometimes get involved in many decisions, both small and big, and the funding is often used as leverage to bend our plans in the direction they want, in a way that does not always fall in line with our plan or does not meet our organization's needs and procedures."
- ▶ As in the past, the quantity of interactions between the Foundation and its grantees and non-grantee partners is associated with more positive perceptions. Fifty-three percent of respondents, a much larger proportion than typical, and higher than in 2018, report having contact with their primary Foundation contact monthly or more often.
- These respondents with more frequent contact rate Trump significantly more positively on some key report measures, including aspects of the Foundation's impact on and understanding of their fields and organizations, and for perceptions of the Foundation's responsiveness and transparency.

Communications

- ▶ As in previous years, respondents offer extremely positive ratings for the clarity with which the Foundation communicates its goals and strategies. In fact, at the overall Foundation level, respondents offer ratings that place the Foundation at the top of its custom cohort, and in the 10 percent of CEP's overall dataset for this measure.
- ▶ However, ratings for the consistency of information provided by the Foundation's different communications resources, both personal and written, are now in the bottom decile of CEP's overall dataset, representing a downward trend from 2018.
- For this measure, ratings from non-grantee partners are similar to 2018, while grantees' ratings are trending down from 2018 and are lower than typical.

Top Predictors of Relationships

- ▶ CEP's recent research finds that the strongest predictor of the strength of the funder-grantee relationship is a summary measure of understanding³, 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 grantees⁴.
 - Perceptions of Trump's overall understanding continue to be lower than typical at the aggregate, similar to 2018. Grantees rate the Foundation lower than typical for the majority of understanding measures, including understanding of grantees' socio-economic contexts, intended beneficiaries' needs, and organizational challenges.
 - Notably, in 2020 respondents' ratings for the Foundation's overall transparency are trending lower than in 2018 and are now lower than typical, driven by a significant decline in grantees' perceptions.



"The Foundation is very professional. It communicates the messages and goals clearly. They work in full cooperation with us. Working with them is pleasant and communications are open and constructive."



"The Foundation should give some breathing space. Micro-management prevents partners from deploying their unique capabilities. Sometimes there is a feeling that the Foundation expects the partners to be 'contractors' executing a very specific approach set by the Foundation. This expectation is not in line with the interests of partners wishing to generate new knowledge and original programs and who face a host of conflicting demands from their own organizations (such as producing research)."

Grantee Perceptions of the Foundation's Processes

Process Timing and Dollar Return

- ▶ Compared to 2018, grantees report spending more time on required Trump processes (81 hours at the median versus 70 hours in 2018), due to a large increase in time spent on the selection process, and a smaller increase in time spent on the reporting/evaluation processes.

Selection Process & Pressure

In 2020, grantees report spending much more time on Trump's selection process than in 2018, now spending more hours on the process than the grantees of over 90 percent of funders.

- ▶ In 2020, grantees' ratings for the helpfulness of the selection process in strengthening their organizations or grant-funded work trend higher compared to 2018. In 2020, Trump receives solidly typical ratings for this measure, with an average rating higher than 60 percent of funders.
- ▶ CEP's research has found that pressure experienced by grantees to modify their organization's priorities to receive funding is one of the key predictors of the strength of funder-grantee relationships: high pressure is associated with lower relationships ratings. In 2020, Trump

³ Non-grantee partners' ratings are not included in the overall understanding summary measure.

⁴ Please refer to Appendix F for more information regarding CEP's recent research on the top predictors of strong funder-grantee relationships.

grantees' ratings for pressure are higher than in any past survey, higher than any other funder in its custom cohort of peer funders, and higher than 99 percent of funders in CEP's dataset.

- In a similar finding to CEP's research, grantees who report receiving more pressure during the process (rating a 5 or higher on a 7-point scale) hold significantly less positive ratings on some survey measures, including all measures related to the Foundation's understanding of their contexts and most relationships measures.

Reporting Process

- ▶ Grantee feedback continues to suggest mixed experiences with Trump's reporting process.
- ▶ As in 2018, grantees continue to offer ratings in the top 15 percent of CEP's dataset for the extent to which they found the reporting process to be straightforward. The Foundation now also receives higher than typical ratings for the extent to which grantees feel the reporting process was relevant to their work.
- ▶ Though grantees' ratings are trending up from 2018 for the extent to which they feel the reporting process was a helpful opportunity for learning and reflection, they remain in the bottom 5 percent of CEP's dataset. Additionally, ratings are trending lower than in 2018 for the extent to which grantees feel the process was adaptable to their circumstances and are also now in the bottom 5 percent of CEP's dataset.
- ▶ Grantees indicate having more touchpoints with staff during Trump's processes when compared to the Foundation's past results. Both the proportion of grantees who report prospectively engaging in a discussion with Foundation staff about assessing the funded work and the proportion who indicate having a substantive discussion with staff about their submitted reports have significantly increased since 2016, and are now larger than typical.

Evaluation Process

- ▶ Slightly more than half of grantees, a similar proportion to 2018 which remains higher than typical, report participating in an evaluation process separate from the reporting process.
- ▶ Of these grantees, over two-thirds, a similar proportion to 2018 and one that is higher than typical, report that evaluation staff at their organizations were primarily responsible for the evaluation (as opposed to an external evaluator chosen by their organization or by Trump).
- ▶ In 2020, grantees offer significantly more positive perceptions for the extent to which their evaluation generated information that would be useful for other organizations. In 2018, grantees offered ratings for this measure that were in the bottom decile of CEP's overall dataset. In 2020, their ratings are typically positive.
- ▶ Similar to 2018, grantees offer higher than typical ratings for the extent to which their evaluation resulted in making changes to their work.
- ▶ However, ratings for the extent to which grantees feel the evaluation incorporated input from their organizations in its design are now lower than typical.



"Our communication with the Foundation is very pleasant and professional throughout the year, from the drafting of the proposal to realizing the plan, to the control and monitoring processes (the periodic reports). We trust the experience and knowledge we have accumulated, alongside clear guidelines that are in line with the Foundation's goals."



“The relationship with the Foundation was very good and professional. The process took too long. We were asked to be more precise, clarify and explain things over and over again. At some point we were treading water. Sometimes clarifications and specifics were required. Sometimes internal questions arose in the Foundation, that were unclear to us and that impacted the requests to introduce changes to the proposal.”

Impact of COVID-19

- ▶ CEP’s recent research finds that the impact of the COVID-19 pandemic on non-profit organizations has been devastating, particularly for those who provide direct services and serve historically disadvantaged communities.
- ▶ On a series of questions about barriers inhibiting grantees’ work as a result of the pandemic, two-thirds of grantees, indicate that the loss of revenue/budget challenges is or will be a significant barrier for their organization.
 - Over half of grantees also indicate that creating social distancing while carrying out programming and/or infrastructure costs to accommodate COVID-19 are or will be significant barriers.
- ▶ When asked their comfort level in communicating various issues related to the pandemic with the Foundation, the largest proportions of grantees and non-grantee partners (at least 70 percent each) report comfort in communicating about the evolving needs of their served populations and/or the evolving needs of their organizations with the Foundation.
- ▶ The smallest proportions of grantees indicate comfort in communicating about the implications of COVID-19 on their work with historically disadvantaged communities (63 percent) and/or the change in their relationship with the government (59 percent) with the Foundation.
- ▶ When asked for their suggestions of how Trump could best support them in managing the challenges created by the pandemic, grantees most often asked the Foundation to consider supporting the development of distance learning solutions, offering greater flexibility in grant requirements, and making investments in technology to facilitate students’ virtual study.⁵

Diversity, Equity and Inclusion (DEI)

- ▶ Overall, grantees agree that the Foundation is committed to combatting racism, and that its staff embody a strong commitment to the principles of diversity, equity and inclusion (close to 65 percent rating a 5 or higher on a 7-point scale). Grantees agree less strongly that the Foundation has clearly communicated what diversity, equity, and inclusion means for its work (just under 60 percent rating a 5 or higher on a 7-point scale) and demonstrates an explicit commitment to diversity, equity, and inclusion through their work (nearly 40 percent rating a 5 or higher on a 7-point scale).
- ▶ A quarter of grantees report that their grants were meant to benefit historically disadvantaged groups. These grantees rated higher for a few measures in the report, including for the Foundation’s impact on their fields, the extents to which the Foundation exhibits trust and candor about their work, and the extent to which both the Foundation and staff demonstrate an explicit commitment to the principles of diversity, equity and inclusion.

⁵ For more information on the Foundation’s COVID-related finding, please see Appendix D.

CEP Recommendations

- ▶ As the Foundation continues to implement its updated strategy, consider ways Trump can help support partners' impact at this challenging time, including by:
 - Offering grantees' more flexibility in grant execution as they seek to manage the impact of the pandemic.
 - Communicating proactively with grantees and non-grantee partners about the possibility of continued and/or future funding.
 - Reflecting on grantees' and non-grantee partners' suggestions for expanding the Foundation's strategy and/or greater flexibility in their grant execution.
- ▶ Taking the Foundation's strategy and staff capacity into account, explore opportunities to strengthen relationships with grantees and non-grantee partners by:
 - Seeking to be increasingly approachable and open to grantee and non-grantee partners' ideas.
 - Working with staff to develop clear and concrete expectations for interactions – particularly for responsiveness – between staff and partners.
 - Reviewing communication practices to identify where partners may experience less consistency in communication of the Foundation's strategy across all resources, particularly in communications of how the strategy has evolved and the potential for future funding.
 - Using existing touchpoints with grantees and non-grantee partners to deepen and demonstrate staff's understanding of partners' work, their contexts, and, where applicable, their beneficiaries' needs.
- ▶ With regards to processes:
 - Discuss whether the Foundation is comfortable with the comparatively high level of pressure grantees report experiencing to change their organizations' priorities during proposal development, given the potential adverse effects on its relationships.
 - Reflect on the Foundation's goals for its reporting process and determine whether there are opportunities to increase its adaptability to grantees' circumstances.
- ▶ Given grantees and non-grantee partners' open-ended feedback on the unprecedented impact of the COVID-19 pandemic, discuss whether the Foundation could support partners by:
 - Considering investments in the development of distance learning solutions or technology to help partners and students adapt to a virtual learning environment.

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Appendix A: Methodology

CEP surveyed grantees and non-grantee partners of the Trump Foundation in August and September of 2020. CEP received 82 responses for an overall 55 percent response rate. CEP received 49 responses from grantees for an overall 63 percent response rate from grantees, and 33 responses from non-grantee partners for an overall 47 percent response rate from non-grantee partners. Grantee response rates are in line with typical response rates, and non-grantee partner response rates are higher than typical.

This is the fourth GPR for the Foundation. CEP previously surveyed the Foundation's grantees and non-grantee partners in 2018, 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 2020 & 2018 – overall

- ▶ In 2020, grantees and non-grantee partners rate the Foundation significantly more positively than in 2018 for the Foundation's understanding of their fields of work.

Significant differences between 2020 & 2018 – grantees only

- ▶ In 2020, a significantly larger proportion of grantees report having:
 - A prospective discussion with the Foundation about assessing the results of the funded work when compared to 2018 grantees.
 - substantive discussion with the Foundation about their submitted reports when compared to 2018 grantees.
- ▶ Grantees rate the Foundation significantly more positively than grantees in 2018 for the extent to which they believe the evaluation process will generate information that will be useful to other organizations.
- ▶ Grantees rate the Foundation significantly less positively than grantees in 2018 for the following measures:
 - their overall relationships summary measure.
 - the Foundation's overall transparency.
- ▶ Grantees report experiencing as significantly higher level of pressure to create a proposal that was likely to receive Foundation funding than did grantees in 2018.
- ▶ Grantees report receiving significantly shorter grants than in 2018.

Significant differences between 2020 & 2018 – non-grantee partners only

- ▶ In 2020, non-grantee partners rate the Foundation significantly more positively than non-grantee partners in 2018 for the following measures:
 - The Foundation's understanding of their local communities.
 - The extent to which the Foundation is open to ideas from non-grantee partners.

Significant Differences Between 2020 & 2016 - Overall

- ▶ In 2020, 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 overall strength of their relationships with the Foundation.
 - Their fairness of the Foundation's treatment.
 - The consistency of information provided by the Foundation's communication resources.

Significant Differences Between 2020 & 2016 – Grantees Only

- ▶ In 2020, a significantly smaller proportion of grantees report having had a change in primary contact than in 2016.

- ▶ Grantees report spending significantly more time on the Foundation’s proposal and selection process than grantees in 2016. They also report receiving a significantly larger financial return per hour invested in the Foundation’s processes than grantees in 2016.
- ▶ Grantees report experiencing as significantly higher level of pressure to create a proposal that was likely to receive Foundation funding than did grantees in 2016.
- ▶ 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 overall strength of their relationships with the Foundation.
 - Their fairness of the Foundation’s treatment.
 - The consistency of information provided by the Foundation’s communication resources.

Significant Differences Between 2020 & 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 their fields of work.
 - The Foundation’s impact on their organizations.
 - The consistency of information provided by the Foundation’s communication resources.

Significant Differences Between 2020 & 2014 - Overall

- ▶ Grantees and non-grantee partners rate the Foundation significantly more positively than grantees and non-grantee partners in 2014 for the Foundation’s effect on public policy in their fields of work.
- ▶ 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 consistency of information provided by the Foundation’s communication resources.

Significant Differences Between 2020 & 2014 – Grantees Only

- ▶ Grantees report significantly larger organizational budgets compared to grantees in 2014.
- ▶ Grantees rate the Foundation significantly more positively than grantees in 2014 for the Foundation’s effect on public policy in their fields of work.
- ▶ 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.
- ▶ Grantees rate the Foundation significantly less positively than grantees in 2014 for the following measures:
 - The overall strength of their relationships with the Foundation.
 - Their fairness of the Foundation’s treatment.
 - Their comfort approaching the Foundation if a problem arises.

- The responsiveness of Foundation staff.
- The consistency of information provided by the Foundation's communication resources.

Significant Differences Between 2020 & 2014 – Non-grantee Partners Only

- ▶ In 2020, a significantly smaller proportion of non-grantee partners report having had a change in primary contact than in 2014.

Appendix C: Funder Support during COVID-19 Pandemic

In May 2020, CEP released a report on funder support during the COVID-19 pandemic. Based on a nationally representative survey of nonprofit leaders, the report shed light on which organizations face the toughest challenges, what is most needed from funders, and what differences in experience are emerging based on characteristics such as organization type. The data in this report also reveals what nonprofits have found to be most helpful from institutional foundations as well as what they need most in the current moment. To review the complete findings, please refer to CEP's research report [Funder Support During the COVID-19 Pandemic](#).

BIGGEST CHALLENGES FACING NONPROFIT LEADERS



SUPPORTING STAFF WELL-BEING

Balancing the anxiety and needs of staff and the enormous demands on our organization. I'm in my 60s and have been in leadership roles for 30+ years. It's never been this hard.



FINANCIAL SECURITY

Desperately trying to find funds to keep the nonprofit afloat and our staff employed.



DECISION MAKING IN THE MIDST OF UNCERTAINTY

Reacting positively to circumstances that change on a dime. Planning, reacting, planning again, and maintaining good communication in all directions while doing this.

WHAT NONPROFITS MOST NEED FROM FOUNDATIONS



PROVIDE UNRESTRICTED FUNDING

Most of all, **commitment of unrestricted dollars over a longer timeframe so that we can focus on our mission and not fundraising.**



PROVIDE MORE FUNDING

More investment. **Stop protecting endowments for the future - the future isn't going to matter for so many if they don't get the support they need now.**



REACH OUT TO NONPROFITS, ESPECIALLY TO PROVIDE TRANSPARENCY ABOUT HOW THE PANDEMIC WILL IMPACT FUTURE SUPPORT

We would like **more communication regarding future funding.**

Appendix D: Trump Foundation COVID-19 Pandemic Findings

As part of the Foundation's 2020 survey, CEP asked a series of questions to grantees about organizations' challenges arising from the COVID-19 pandemic, and what types of supports they felt would be the most helpful to receive from the Foundation. For more information on organizations' COVID-19-related feedback, please see the complete findings in the COVID-19 section of your [online report](#).

Most Significant Barriers	Currently Experiencing	Significant Barrier Expected in Future
Loss of revenue / budget challenges	29 percent	37 percent
Creating social distancing while carrying out programming	24 percent	31 percent
Ability to create social distancing in your physical space	21 percent	12 percent
Infrastructure costs	10 percent	41 percent
Maintaining staff levels	8 percent	39 percent
Cash flow problems	8 percent	29 percent

Grantee Suggestions for Support

When asked for their suggestions for how the Foundation could best support them in managing the challenges created by the pandemic, grantees most often asked for the following supports:

- ▶ Distance Learning (n = 10)
 - In their open-ended comments, grantees asked for supports in developing distance learning resources to help manage the shift to a virtual teaching environment. One grantee explained that, "In light of the difficulties caused by the COVID pandemic in fulfilling the students' learning and social needs under hybrid teaching conditions, the Foundation ought to fund gripping and meaningful programs that will offer the students a variety of forms of online supplementary education."
 - Another grantee described the need for distance learning resources that addressed "the need to foster mathematical and scientific thinking skills, independent study," as well as the development of "learning assignments...short online courses, videos, [and] connecting students for conversations with scientists and math professionals."
- ▶ Flexibility (n = 9)
 - The second most common theme among grantee suggestions for support was requests for greater flexibility from the Foundation during this uncertain time. In their comments, grantees described the unexpected impact the pandemic has had on their ability to deliver grant-related services, and asked for the Foundation to be flexible in "updating the expected outputs of the different projects," and with aspects of the grantmaking process, such as "budgeting," "deadlines" and "procedures and templates."
- ▶ Technology (n = 8)
 - Eight grantees highlighted the need for the Foundation to make investments in technological supports that would facilitate the shift to a virtual learning environment. Grantees suggested the Foundation could consider funding the purchase of both

hardware and software to help fill in technology gaps in the community. As one grantee noted, “According to data regarding the 2019/2020 academic year, about 40 percent of all the city’s students did not participate in activities of distance learning because they lacked essential resources. There is a critical need for assistance in providing such resources (laptops, tablets, and internet connection infrastructure) to students who cannot purchase them independently...”

▶ Funding (n = 6)

- Several grantees noted the level of uncertainty created by the pandemic and requested that the Foundation maintain their current level of funding or even increase it, in order to help organizations manage the costs of unexpected activities (such as shifting programs to a virtual environment) and the loss of other funding sources, such as from local government and/or the private sector.
- One grantee described the need for continued funding in light of the government’s response: “Due to the COVID crisis and the absence of an approved national budget, the Ministry of Education is failing to fund projects that have been proven as successful, such as teacher communities. If the Foundation could guarantee their continued operation, it would constitute a very important step for the teachers.”

Appendix E: 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



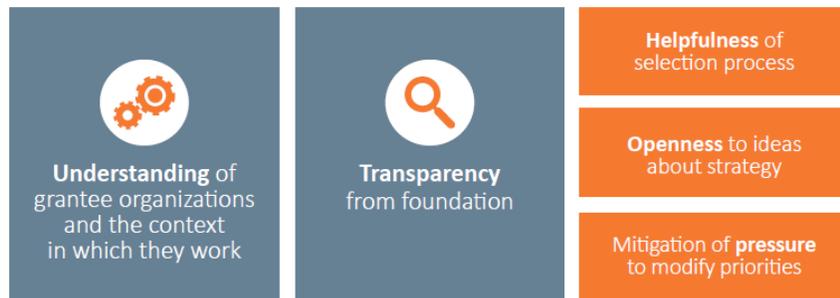
Appendix F: Top Predictors of Funder-Grantee Relationships

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



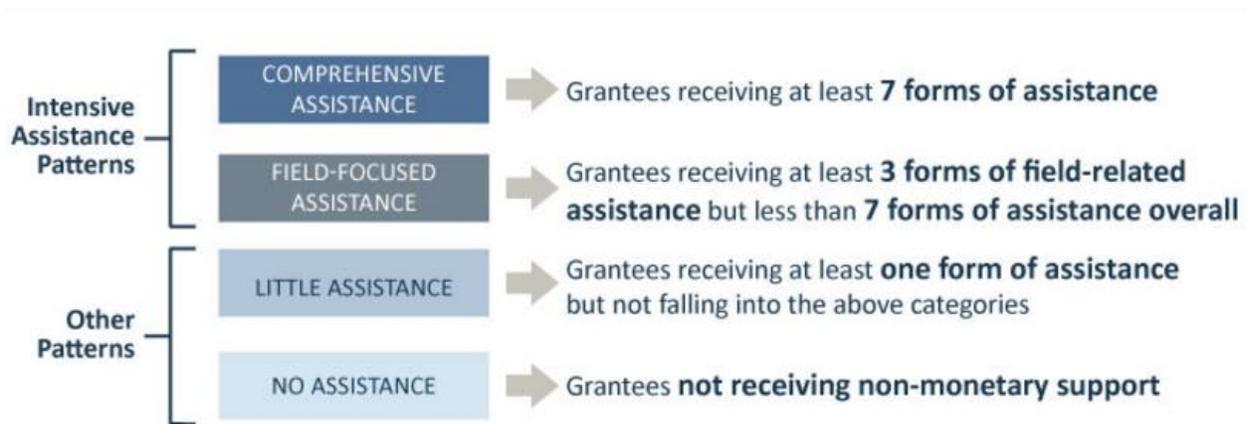
ASPECTS OF FOUNDATIONS’ UNDERSTANDING OF GRANTEE ORGANIZATIONS AND THE CONTEXT IN WHICH THEY WORK

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 G: 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
		Fundraising Support
		Diversity, equity, and inclusion assistance



Appendix H: Top & Bottom 5 Comparative Ratings⁶

Top 5 Comparative Ratings	
Rank	Measure
1	“At any point have you had a substantive discussion with the Foundation about the report(s) you or your colleagues submitted as part of the reporting process?”*
2	“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)*
3	“How clearly has the Foundation communicated its goals and strategy to you?” (1 = Not at all clearly, 7 = Extremely clearly)
4	Median Hours Spent on Proposal and Selection Process*
5	“To what extent was the Foundation’s reporting process straightforward?” (1 = Not at all, 7 = To a great extent)*
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	Proportion of Grantees Indicating Receiving Unrestricted Funding*
3	“To what extent was the Foundation's reporting process adaptable, if necessary, to fit your circumstances?” (1 = Not at all, 7 = To a great extent)*
4	“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)*
5	“Overall, how would you rate the Foundation’s impact on your field?” (1 = No impact, 7 = Significant positive impact)

⁶ An asterisk (*) indicates that this question was only asked of the Foundation’s grantees.