

# Georgia Grantmakers Alliance Participant Survey Report

July, 2017

Advantage Consulting, LLC

## Profile of Respondents: 91 Responses

### 1. Position in Organization

CEOs, Staff, and Trustees had very similar representation and were the main respondents to the survey.

What is your position with the grantmaking organization? (check all that apply)		
Answer Options	Response Percent	Response Count
Trustee	30.8%	28
Founder	8.8%	8
Chief Executive Officer	33.0%	30
Other Staff	31.9%	29
Other (please specify)	12.1%	11
<i>answered question</i>		<b>91</b>

Other: Exec Director, Director, consultant, committee member, Associate Director, Community Affairs Director, Senior Program Officer, Secretary

### 2. How Long in Current Role

Most of the respondents have been in their current role for more than 6 years.

How long have you been in this role? (select one)		
Answer Options	Response Percent	Response Count
Less than 1 year	9.9%	9
1-5 years	20.9%	19
6-10 years	28.6%	26
More than 10 years	40.7%	37
<i>answered question</i>		<b>91</b>

Trustees reported they had been in their roles longer than Foundation staff (50%, more than 10 years).

### 3. How Long in Philanthropy

Most of the respondents have been in philanthropy for more than 11 years.

<b>How long have you been a philanthropist or associated with grantmaking in total (in addition to your current role)? (select one)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Less than 3 years	5.6%	5
3 -10 years	24.4%	22
11-20 years	35.6%	32
More than 20 years	34.4%	31
<b>answered question</b>		<b>90</b>

Trustees reported they had been in philanthropy longer than Foundation staff (60%, more than 20 years)

### 4. Type of Foundation

Over half of the respondents were from Family Foundations. Independent Foundations (20.2%), Community Foundations (13.5%), and Corporate Foundations (10.1%) were the other major respondents.

<b>What type of Foundation is your grantmaking organization? (select one)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Family Foundation (funds are derived from members of a single family)	51.7%	46
Community Foundation (public charities that are dedicated to improving the lives of people in a defined local geographic area)	13.5%	12
Independent Foundation (foundations not governed by the benefactor, the benefactor's family or a corporation)	20.2%	18
Corporate Foundation (governed by a corporation)	10.1%	9
Supporting Foundation (charities that carry out their exempt purposes by supporting other exempt organizations, usually other public charities)	2.2%	2
Other (please specify)	2.2%	2
<b>answered question</b>		<b>89</b>
<b>skipped question</b>		<b>2</b>

Other: Not a foundation – a law firm giving program; No formal foundation

Trustees were more likely to report they were with a Family Foundation than Foundation staff.

5. Foundation Location

The vast majority of foundations were located in Atlanta and the remaining were spread throughout the rest of the state.

<b>Where is your Foundation located?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Metro Atlanta	70.3%	64
Central Georgia	6.6%	6
Northwest Georgia	3.3%	3
Northeast Georgia	3.3%	3
Southwest Georgia	5.5%	5
Georgia Coast	5.5%	5
Outside of Georgia	2.2%	2
Other (please specify)	3.3%	3
<b><i>answered question</i></b>		<b>91</b>

Other: Atlanta/Maine/Kentucky; N/A; More than one state

Trustees were more likely to report they were from a Foundation outside Metro Atlanta (46%)

6. Grants Awarded in 2016

Half of the total grant amounts ranged between \$1-\$10 million dollars. A significant percentage (18.9%) was more than \$10 million dollars.

<b>What was the approximate total amount of grants your organization awarded in 2016?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Less than \$50K	2.2%	2
\$50K-\$199K	9.9%	9
\$200K-\$1M	18.7%	17
\$1M-\$10M	49.5%	45
More than \$10M	19.8%	18
<b><i>answered question</i></b>		<b>91</b>

7. Number of Paid Staff

Most funders reported they have 2 or more staff members and a significant percentage (22.2%) have no staff at all.

How many paid staff is employed by your organization?		
Answer Options	Response Percent	Response Count
None	22.2%	20
1	14.4%	13
2-3	37.8%	34
4-10	11.1%	10
More than 10	14.4%	13
<b>answered question</b>		<b>90</b>
<b>skipped question</b>		<b>1</b>

Trustees were more likely to report that their Foundation had no staff (46%). Foundations outside of Metro Atlanta were more likely to report fewer staff.

8. Rating of GGA Activities and Resources

Annual Meetings and Policy Updates had the most participation by respondents. From those who participated, Annual meetings, Lunch & Learns, and the Policy Update emails were rated mostly as ‘Good’ or ‘Excellent’. The Georgia Grantmaking Survey Report and “Site Visits” had much less participation so, consequently, had much lower ratings, especially the “Site Visits”.

	I have not participated or used this resource –	Poor	Fair	Good	Excellent	Total	Weighted Average –
–	25.3%	0%	0%	38.5%	36.3%	–	–
Annual Meeting	23	0	0	35	33	91	2.60
–	36.3%	0%	0%	39.6%	24.2%	–	–
Lunch & Learns	33	0	0	36	22	91	2.15
–	27%	0%	2.3%	47.2%	23.6%	–	–
Policy Updates (emails)	24	0	2	42	21	89	2.40
–	47.25%	0%	2.2%	37.4%	13.2%	–	–
Georgia Grantmaking Survey Report	43	0	2	34	12	91	1.69
–	84.62%	0%	0%	7.7%	7.7%	–	–
"Site Visits"	77	0	0	7	7	91	0.54

Trustees were more likely to report that they had attended the annual meeting and were less likely to report attending Lunch and Learns, reading policy updates or participating in/using the Georgia Grantmaking Survey.

Respondents from outside of Metro Atlanta were less likely to be actively involved in GGA activities.

**9. How Long Involved with GGA**

The vast majority of respondents have been involved with GGA for more than a year. A significant percentage (38.5%) has been involved for 4 or more years.

<b>How long have you been involved with Georgia Grantmakers Alliance (GGA)?</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
I am not involved with GGA	17.6%	16
Less than 1 year	6.6%	6
1-3 years	37.4%	34
4 or more years	38.5%	35
<b>answered question</b>		<b>91</b>

Respondents from outside of Metro Atlanta were less likely to be actively involved in GGA activities

**10. Entities Providing Support to Strengthen Connections to Grantmakers**

SECF, GGA and the Atlanta Foundations Forum provided the most engagement support to grantmakers. Local community foundations also provided support in building connections among grantmakers.

<b>Which of the following entities provide you support in strengthening your connections to other Georgia grantmakers? (check all that apply)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Georgia Grantmakers Alliance	73.3%	66
Southeastern Council of Foundations	78.9%	71
Atlanta Foundations Forum	61.1%	55
Atlanta Corporate Donors	12.2%	11
My local Community Foundation	46.7%	42
Other (please specify)	14.4%	13
<b>answered question</b>		<b>90</b>
<b>skipped question</b>		<b>1</b>

Others:

- Atlanta Education Collaborative (4)
- Exponent Philanthropy (2)
- NCFP (2)
- Philanthropy Roundtable (2)
- Atlanta Social Impact Collaborative (2)
- Philanthropic Collaborative for a Healthy GA
- Atlanta Women's Foundation
- Early Education Funders group (led by GEEARS)
- EGA
- GCIR
- FCCP
- Philanthropic Leadership Circle
- Stewards of the Georgia Coast Collaborative

Trustees and those outside of Metro Atlanta were more likely to report their local Community Foundation as a key source for strengthening connections to grantmakers. Those outside of Metro Atlanta also identified GGA as their source of strengthening connections more frequently than SECF (66.7% compared to 62.5%)

**11. Need to Build Connections with other Georgia Grantmakers**

More than half of the grantmakers who responded feel completely satisfied with the resources available to build connections with other grantmakers. However, 40% were only somewhat satisfied.

Please select the statement that best describes you.		
Answer Options	Response Percent	Response Count
My need to build connections with other Georgia grantmakers is <b>completely satisfied</b> by what I have available to me today.	53.8%	49
My need to build connections with other Georgia grantmakers is <b>somewhat satisfied</b> by what I have available to me today.	40.7%	37
My need to build connections with other Georgia grantmakers is <b>not satisfied</b> by what I have available to me today.	5.5%	5
<b>answered question</b>		<b>91</b>

Trustees were more likely to report that their need to build connections was completely satisfied (68%). Respondents from outside Metro Atlanta were also more likely to report their need to build connections was completely satisfied (62%).

**12. Entities Providing Useful Information about Georgia Issues, Public Policy and Grantmaking**

GGA, SECF, Voices for Georgia’s Children, GBPI, and the Georgia Partnership for Excellence in Education seem to be providing the most useful information about Georgia issues and connections to policy.

Which entities provide you with useful information about Georgia issues and help you understand the issue's connections to public policy and grantmaking? (check all that apply)		
Answer Options	Response Percent	Response Count
Georgia Grantmakers Alliance	74.7%	59
Southeastern Council of Foundations	59.5%	47
Georgia Public Policy Foundation	19.0%	15
Voices for Georgia's Children	45.6%	36
Georgians for a Healthy Future	16.5%	13
Georgia Budget & Policy Institute	46.8%	37
Georgia Partnership for Excellence in Education	50.6%	40

Others:

- GEEARS (2)
- Local Community Foundation (2)
- Georgia Family Connection Partnership (2)
- Foundations Forum
- Georgia Health News
- Georgia Chamber
- Public Policy Foundation
- Independent Sector
- PolicyLink
- GCIR
- FCAA
- Education Funders Collaborative

Trustees were more likely to report SECF as a source of policy information (84%). Respondents from outside of Metro Atlanta were more likely to report GGA as a source of policy information as compared to SECF (55.6% compared to 50%).

**13. Exploring Georgia Issues/Public Policy and Implications for Grantmaking**

More than half of those responding reported they were somewhat satisfied with the resources available to help them explore issues and understand their connections to public policy. Nearly all of the remaining respondents were completely satisfied.

Please select the statement that best describes you.		
Answer Options	Response Percent	Response Count
My need to explore Georgia issues and understand their connections to public policy as well as their implications for grantmaking is <b>completely satisfied</b> by what I have available to me today.	45.1%	41
My need to explore Georgia issues and understand their connections to public policy as well as their implications for grantmaking is <b>somewhat satisfied</b> by what I have available to me today.	51.6%	47
My need to explore Georgia issues and understand their connections to public policy as well as their implications for grantmaking is <b>not satisfied</b> by what I have available to me today.	3.3%	3
<i>answered question</i>		<b>91</b>

Trustees were more likely to report their need to explore issues and understand their connections to public policy were completely satisfied (68%). Additionally, the majority of those responding from outside of Metro Atlanta reported that their needs were completely satisfied (62.5%).

**14. Barriers to Participating in GGA Activities**

Lack of capacity, location of events, and lack of new/relevant information seem to be main barriers to participating in GGA activities.

**When it comes to participating in Georgia Grantmakers Alliance activities, please rate the following potential barriers that might impact your interest and/or ability to be involved**

	Not Applicable	No Barrier	Limited Barrier	Moderate Barrier	Significant Barrier	Total	Weighted Average
–	–	–	–	–	–	–	–
–	11.1%	38.9%	23.3%	17.8%	8.9%	90	0.86
The lack of my Foundation's capacity (e.g. no or few staff)	10	35	21	16	8	90	0.86
–	2.2%	30.0%	32.2%	24.4%	11.1%	90	1.14
The location of events	2	27	29	22	10	90	1.14
–	11.2%	42.7%	23.6%	14.6%	7.9%	89	0.76
The lack of new and relevant information	10	38	21	13	7	89	0.76
–	10.0%	68.9%	14.4%	4.4%	2.2%	90	0.30
Presentations at events not being easy to understand	9	62	13	4	2	90	0.30
–	5.6%	75.6%	7.8%	8.9%	2.2%	90	0.32
Feeling uncomfortable about interacting with other organizations that are very different in terms of size, mission, etc.	5	68	7	8	2	90	0.32
–	10.0%	66.7%	16.7%	5.6%	1.1%	90	0.31
Feeling reluctant to get involved in understanding “public policy”	9	60	15	5	1	90	0.31
–	11.1%	65.6%	16.7%	5.6%	1.1%	90	0.31
Not having a good understanding of how policy issues impact my work as a grantmaker	10	59	15	5	1	90	0.31
–	11.1%	68.9%	13.3%	5.6%	1.1%	90	0.28
Perceiving that other grantmaker	10	62	12	5	1	90	0.28



	Not Applicable	No Barrier	Limited Barrier	Moderate Barrier	Significant Barrier	Total	Weighted Average
associations and groups are more helpful	-	-	-	-	-	-	-
Preferring to purchase customized services/consultants in order to obtain the information needed	33.3% 30	54.4% 49	8.9% 8	3.3% 3	0.0% 0	90	0.16
Not having a good understanding of how a grantmaking association can genuinely help my organization	12.2% 11	61.1% 55	20.0% 18	5.6% 5	1.1% 1	90	0.34

Others:

- Little international focus
- Not all the topics are related to the focus of my organization. For example, our organization focuses on health and many of the topics focus on education.
- Time: Lack of time as well as schedule does not work for those outside the philanthropic field
- Grantmaking focus is unique so issues do not get covered by GGA activities
- Cost of events
- Crowded marketplace: Several options for accessing policy related info

Trustees were more likely to report barriers such as location of events, lack of relevant information, presentations not being easy to understand, and not having a good understanding of how a grantmaking association can help them. Respondents from outside Metro Atlanta were more likely to report all items in the survey as a barriers compared to those from Metro Atlanta EXCEPT perceiving that other grantmaking associations and groups are more helpful and preferring to purchase customized services.

**15. Roles and Functions of State Associations and Importance of GGA Performing This Function**

Respondents were most likely to report the following activities as “very important:”

- Issue-specific annual meetings
- Periodic lunch & learns
- Opportunities to learn from other Georgia funders about their grantmaking strategies
- Networking opportunities for Trustees

Respondents were most likely to report site visits as “somewhat important” and networking opportunities for second-generation trustees as “not important.”

Listed below are various roles and functions performed by other statewide associations of grantmakers. Please indicate, for each activity, how important it is to you that Georgia Grantmaking Alliance perform this function

	Not Important	Somewhat Important	Very Important	I don't know	Total	Weighted Average
Issue-specific annual meetings of private grantmakers	11.2% 10	25.8% 23	59.6% 53	3.4% 3	89	2.42
Periodic “lunch and learn” gatherings specific to a current issue and/or pending state legislation relevant to grantmakers	7.9% 7	29.2% 26	59.6% 53	3.4% 3	89	2.45
Site visits that showcase how a local grantmaker is impacting on an important community issue	18.0% 16	41.6% 37	32.6% 29	7.9% 7	89	1.99
Opportunities to learn from other Georgia funders about their grantmaking strategies	6.8% 6	26.1% 23	62.5% 55	4.6% 4	88	2.47
Networking opportunities for trustees of Georgia foundations	19.1% 17	33.7% 30	44.9% 40	2.3% 2	89	2.21
Networking opportunities for second-generation trustees of Georgia family	34.8% 31	28.1% 25	29.2% 26	7.9% 7	89	1.79

	Not Important	Somewhat Important	Very Important	I don't know	Total	Weighted Average
–	–	–	–	–	–	–
foundations						

Trustees were more likely to report “networking opportunities for second generation trustees as “very important” (37%). Respondents from outside of Metro Atlanta were more likely to select “I don’t know” as a response. Additionally, they viewed opportunities to learn from other Georgia funders about their grantmaking strategies and networking opportunities for trustees of Georgia Foundations as “very important” more often than did those from Metro Atlanta.

**16. Policy Roles and Functions of State Associations and Importance of GGA to Perform This Function**

Respondents were most likely to report the following activities as “very important:”

- Non-partisan analysis of state policies (current &/or proposed) that impact on issues facing Georgia
- Non-partisan analysis of the impact of state policies (current &/or proposed) on the nonprofit organizations that you fund
- Issue-specific meetings that include public officials and nonprofit leaders as well as private grantmakers
- Opportunities to connect to other private grantmakers to impact state policy relevant to your foundation
- Non-partisan analysis of potential philanthropic strategies to impact on issues facing Georgia

Respondents were most likely to report periodic webinars and opportunities to meet with and learn from state policy makers as “somewhat important.”

	Not Important	Somewhat Important	Very Important	I don't know	Total	Weighted Average
–	–	–	–	–	–	–
–	12.4%	37.1%	47.2%	3.4%	89	2.28
Non-partisan analysis of state policies (current &/or proposed) that impact on issues facing Georgia	11	33	42	3	89	2.28
–	14.4%	27.8%	55.6%	2.2%	90	2.37
Non-partisan analysis of the impact of state policies (current &/or proposed) on the nonprofit organizations that you fund	13	25	50	2	90	2.37
–	17.8%	22.2%	53.3%	6.7%	90	2.22
Issue-specific meetings that include public officials and nonprofit leaders as well as private grantmakers	16	20	48	6	90	2.22

	Not Important	Somewhat Important	Very Important	I don't know	Total	Weighted Average
–	–	–	–	–	–	–
–	22.2%	44.4%	28.9%	4.4%	–	–
Periodic webinars specific to a current issue and/or pending state legislation relevant to grantmakers	20	40	26	4	90	1.98
–	21.1%	37.8%	35.6%	5.6%	–	–
Opportunities to meet with and learn from state policy makers (Governor, legislators, departmental commissioners, etc.)	19	34	32	5	90	2.03
–	23.3%	28.9%	42.2%	5.6%	–	–
Opportunities to connect to other private grantmakers to impact state policy relevant to your foundation	21	26	38	5	90	2.08
–	17.8%	28.9%	50.0%	3.3%	–	–
Non-partisan analysis of potential philanthropic strategies to impact on issues facing Georgia	16	26	45	3	90	2.26

Trustees, in general, had a lower level of perception of importance around GGA and its policy functions. They were more likely to report that “opportunities to connect to other private grantmakers to impact state policy relevant to your foundation” was “not important.” Respondents from outside of Metro Atlanta were more likely to select “not important” or “somewhat important” on all choices except for “opportunities to meet with and learn from state policy makers” and “opportunities to connect to other private grantmakers to impact state policy relevant to your foundation.” For these two functions, respondents identified them as “very important” more often than did those from Metro Atlanta.

#### 17. Potential Support for Funding Models

Respondents were most likely to indicate “Some Support” for event fees and “Little/Very Limited Support” for annual GGA membership dues.

Respondents were most likely to indicate “No Support” for the following opportunities:

- Program-related grants (policy briefings, lunch and learn sessions)
- General operating grants

**In order for Georgia Grantmakers Alliance to sustain and grow its support to members, the leadership is exploring a variety of different funding models. Assuming GGA established a reasonable/appropriate amount for each of the following; please rate your potential level of support:**

	No Support –	Little/ Very Limited Support –	Some Support –	Significant Support –	Total –	Weighted Average –
Annual GGA membership dues	20.2% 18	25.8% 23	42.7% 38	11.2% 10	89	3.22
Program-related grants (policy briefings, lunch and learn sessions)	37.1% 33	31.5% 28	24.7% 22	6.7% 6	89	2.88
General operating grants	58.4% 52	21.4% 19	15.7% 14	4.5% 4	89	2.57
Event fees	8.0% 7	18.2% 16	53.4% 47	20.5% 18	88	3.45

Trustees, in general, reported less support for GGA funding. They were slightly more supportive of events fees than Foundation staff. Respondents from outside of Metro Atlanta were more supportive of membership dues and general operating grants and slightly less supportive of event fees as compared to those from Metro Atlanta.

Other:

- Can general operating be included in annual fee? What is included in it?
- Reasonable fees for each of these should not be an issue overall, i don't think.
- Already part of six groups so need to keep that capped. I cannot support a new group.

#### 18. Most Significant Benefit from GGA

**What has been the most significant benefit you have received from being involved with Georgia Grantmakers Alliance?**

1. Networking – 33
2. Policy issues education and opportunities/challenges – 22
3. Annual meetings – 4
4. New to GGA or Not enough opportunity to participate – 3
4. Lunch and Learns – 3

## 19. Dues-Paying Membership in Grantmaking Associations

**I am (or my grantmaking organization is) a "dues-paying" member of the following grantmaking associations. (please provide the name of the association)**

Number of times each association was mentioned

- |   |   |
|---|---|
| 1. SECF – 64                                    | 7. Exponent Philanthropy – 3                    |
| 2. National Center for Family Philanthropy – 13 | 8. Philanthropy Roundtable – 3                  |
| 3. GGA – 4                                      | 9. Independent Sector – 3                       |
| 4. PEAK Grantmaking – 4                         | 10. Community Foundation of Greater Atlanta – 2 |
| 5. Atlanta Corporate Donors Group – 4           | 11. Grantmakers for Effective Organizations – 2 |
| 6. Council on Foundations – 3                   |   |

Others: Georgia Center for Nonprofits, Neighborhood Funders Group, Grantmakers Concerned about Immigrants and Refugees, Funders Concerned about AIDS, Community Foundation Awareness Initiative, ASF, Grantmakers for Southern Progress, Grantmakers in Health, Philanthropic Leadership Circle, GIH, GEO, Grant Managers Network (PATH), Exponent, FCCP, EGA, International Education Funders Group, Community Foundation Opportunity Network

## 20. Duplication of Services by GGA

**Georgia Grantmakers Alliance is committed to not unnecessarily duplicating what other membership organizations provide. Please describe any programs, services or activities that GGA offers that you feel somehow unnecessarily duplicates those of other membership groups or associations.**

There were 27 responses to the question and the following themes emerged:

- No duplication (12): as long as they are relevant to our work
- Confusion about event host (5): which association is hosting/facilitating events, particularly between SECF and GGA
- State policy analysis (5): support other organizations already doing Georgia policy analysis

## 21. Anything Else to Share

### **Is there anything else you would like to share with GGA?**

There were 28 responses to the question and the following themes emerged (in rank order):  
Several comments were expressing gratitude to the volunteer leadership of GGA. Others include:

- Are there resources for new staff?
- Would like to see more opportunities for trustees/directors to attend meetings
- Maintain and grow relationship with SECF and clarify roles between it and GGA
- Atlanta location not always convenient
- Want to hear from thought leaders on topics
- Create an annual GGA work plan with a focused and manageable set of activities