

Key Findings and Recommendations from the Weitz Family Foundation 2025 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

In January and February 2025, the Center for Effective Philanthropy conducted a survey of the Weitz Family Foundation’s (“WFF’s” or “the Foundation’s”) grantees. This memo outlines CEP’s summary of strengths, opportunities, and recommendations for this Grantee Perception Report (GPR). Grantee perceptions should be interpreted in light of the Foundation’s goals, strategy, and context.

This memo accompanies the comprehensive survey results from 113 respondents (a 76 percent response rate) found in the Foundation’s interactive online report at <https://cep.surveymresults.org> and in the downloadable online materials, including grantees’ written comments. The full report also contains more information about survey analysis and methodology.¹

Overview

The Weitz Family Foundation’s 2025 Grantee Perception Report contains positive ratings across many key measures of the survey, including those related to the Foundation’s impact, its approach to relationship building with grantees, and its processes. Overall, this feedback paints a picture of a funder that, in the words of its grantees, is a “pillar of the community” with a “transformative impact” whose “influence extends beyond the grant itself by fostering a culture of collaboration and innovation” in the Omaha region. What’s more, in both quantitative and qualitative data, grantees highlight an organizational “humility that belies a deeply human understanding and approach” to grantees’ work.

Still, there are also a handful of specific dimensions where these GPR results indicate potential areas for improvement, particularly related to the Foundation demonstrating an even deeper sense of understanding of grantees and their context; further improving on WFF’s non-monetary provision and REDI initiatives; enhancing the Foundation’s communications, particularly around its funding strategies; and amplifying already-helpful processes by prioritizing assessment-focused discussions with grantees.

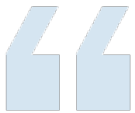
Strong Perceptions of Impact on Grantees’ Organizations, Communities, and Fields

- ▶ WFF grantees provide ratings that are higher than those of most other funders in CEP’s dataset regarding WFF’s impact on their organizations and local communities – at the 92nd and 95th percentiles, respectively. On a measure related to the Foundation’s impact on grantees’ fields, WFF is rated among the top 20 percent of funders and well above the typical funder in its smaller custom cohort of peers (selected by the Foundation). When asked to what extent WFF has affected public policy in their fields, grantee scores place the Foundation close to the top third of funders.

¹ Throughout this summary, 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 “significantly” higher or lower reflect statistically significant differences at a P-value less than or equal to 0.1.

- ▶ Perceptions related to a funder’s impact are often highly correlated with those related to a funder’s understanding of grantees and their context. In the case of WFF, grantees feel more strongly on a comparative basis that the Foundation has a thorough understanding of grantees’ strategy and goals. Grantees view WFF less positively – albeit similar to ratings of the typical funder – for its understanding of grantee’s contextual factors: the challenges their organizations are facing, as well as the social, cultural, or socioeconomic factors that affect grantees’ work. Finally, the Foundation is rated among the bottom third of funders for its understanding of grantees’ fields.
 - Of note, compared to their counterparts, grantees receiving multi-year support from WFF provide significantly higher ratings on all four measures from the GPR survey related to understanding.

CEP Recommendation: While celebrating grantees’ positive perceptions related to the Foundation’s impact, WFF might benefit from additional reflection on how this impact might be further amplified, specifically by developing an even *deeper understanding of grantees and their context*, a goal that is especially relevant given the Foundation’s focus on trust-based practices, as well as the current operating environment for nonprofits. Across its portfolio, WFF might consider how staff actively *demonstrate* an understanding of grantees – perhaps via certain communication patterns or resources – with special attention paid to those partners with shorter grants.



“[WFF] is a force for positive change in the community [specifically] in the areas of creating equitable spaces and supporting organizations that prioritize equity, diversity, and access. These are all priorities that we share with [the Foundation] and are integral to our mission.”

Well-Received Assistance Beyond the Grant and REDI, Opportunities to Finetune

- ▶ Compared to all but one-fifth of funders in CEP’s dataset, WFF provides a larger proportion of its grantees with assistance beyond the grant. Of the 77 percent of WFF grantees who report receiving some kind of non-monetary support, the most frequently-provided resources include advocacy support, field-building assistance, and capacity building assistance.
 - Grantees who indicate receiving non-monetary support provide ratings that are higher on a number of key dimensions, including the degree to which the Foundation advances knowledge in grantees’ fields, as well as WFF’s understanding of grantees and their context.
 - WFF is rated higher than the typical funder on a question related to whether assistance beyond the grant was a worthwhile use of grantees’ time (as exemplified by one grantee who writes that the additional assistance they received “is a game-changer for nonprofit organizations like ours”). And, in what’s perhaps reflective of the collaborative nature of this approach, WFF is rated at the 87th percentile for whether the Foundation would be open to feedback from grantees about this non-monetary support.
 - Still, at least relative to other funders, WFF is viewed less positively on a question measuring whether assistance beyond the grant *met an important need for grantees and/or their program*. Interestingly, grantees who receive multi-year, general operating support and grantees who receive larger grants (\$100K+) rate significantly higher than their counterparts on this question.

- ▶ WFF receives ratings in the top ten percent of all funders for its communication of and explicit commitment to racial equity, diversity, and inclusion (REDI).
 - In their comments, a number of grantees describe how the Foundation’s REDI work is infused into its impact, processes, and identity. “The Foundation cares deeply about [REDI,] and that is felt throughout the non-profit landscape,” writes one grantee. Another grantee comments, “WFF is a leader in [REDI] efforts. We are grateful for their tireless effort in promoting equity for all in our community. It is certainly much needed – especially now.”
 - Despite these positive perceptions, 12 percent of written suggestions relate to REDI and representation. More specifically, in their comments, grantees remark on how REDI requirements “put some pressure on organizations to check [particular] boxes to get funding” or that smaller organizations may not be able to “keep up with [WFF’s] expectations on [REDI] for small teams when people are already overworked.

CEP Recommendation: Knowing that the Foundation’s approach to non-monetary support and REDI are viewed as keys strengths, pursue follow-on conversations with grantees – and as a result consider modifying the Foundation’s communications and grants processes – to ensure that the impact of these resources and initiatives evolve in ways that mutually enhance impact for both WFF and its grantees.

- For example, are there ways for the Foundation to modify existing supports beyond the grant check so that they are even more timely and responsive to grantees’ unique needs? And might there be an effect on how this non-monetary support is paired with a grant – specifically longer, larger, and unrestricted grants – that makes an organization more likely to view these offerings positively?
- Similarly, from a capacity perspective, are there opportunities for WFF to support grantees in investing in equity-centered goals and processes over the long term, particularly smaller organizations?



“The thing that sets WFF above and beyond other foundations in my experience is the initiative to provide assistance beyond funding.”

Positive Grantee Relationships with Opportunities to Improve Certain Communications

- ▶ Grantees generally hold WFF staff in high regard, describing them as “good listeners,” “lovely,” and that “working with WFF staff was empowering and supporting.”
- ▶ Site visits during the application process appear to be a key touchpoint: 87 percent of WFF grantees report receiving one compared to 47 percent at the average funder. In their written comments, grantees write that they are “appreciative of the site visit” and that “the site visit process was easy and effective.”
- ▶ When asked how comfortable they are approaching the Foundation should a problem arise, WFF grantees provide ratings near the top ten percent of all funders in CEP’s dataset. “I never feel like there’s an ‘I gotcha’ moment,” writes one grantee. “They truly seem invested in making sure their grantees are successful.” On another measure capturing how responsive grantees find staff, the Foundation is rated close to the top fourth of funders.

- In contrast, although by no means negative, ratings are less positive on a comparative basis for whether WFF exhibits trust in grantee staff, the degree of candor expressed by the Foundation, and whether WFF staff exhibit compassion. Scores on all three measure fall close to the typical funder in CEP's dataset.
- ▶ On measures related to Foundation-level communications – including the clarity of WFF's communication related to its own goals and strategy, the consistency of communications, and the transparency of communications – the Foundation receives ratings in the top 10 percent of all funders, with scores ranging from 6.24 to 6.38.
 - However, on a series of custom questions related to the Foundation's funding strategy-specific communications, perceptions were less positive on an absolute basis, ranging from 5.70 to 5.80. Grantees agree less strongly that WFF is transparent about when and how funding strategies are shifting and how these shifts might affect their organization's work, or how the Foundation makes funding decisions that affect grantee organizations and WFF's areas of giving. As a result, grantees also agree less strongly that they would feel comfortable speaking about the Foundation's funding priorities to colleagues and other potential grantees in their fields and community.

WFF's Role in Supporting Burnout and Mental Health

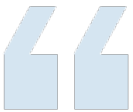
- ▶ WFF asked an additional set of custom questions related to burnout and mental health among grantee organizations. These questions yield mixed results both in terms of the extent to which grantees indicate that burnout is affecting their organizations and the role that WFF should have in supporting mental health among their grantees.
- ▶ In one custom question, grantees rated the extent to which burnout is affecting their organization's leadership, staff, overall morale, retention, and staff attendance. These ratings all hover near a 3.0 or 4.0 (on a 1-to-7 scale), which may seem to indicate that burnout does not have a meaningful presence within grantee organizations.
 - But looking more closely, ratings were more disparate regarding burnout's effects on leadership, staff, and morale: 40 to 50 percent of respondents provide ratings of at least a 5.0 on each of these measures, indicating that a sizeable portion of grantees are experiencing negative effects in these areas due to burnout.
- ▶ On a second question asking grantees to indicate which tools, practices, and policies their organizations already use to support mental health and staff well-being, the most common practices cited were flexible work hours, individual check-ins, and mental health days (each selected by at least two-thirds of grantees).
 - The least commonly selected items were fully paid healthcare coverage, sabbaticals, wellness stipends, organization-sponsored counseling/therapy, and subscriptions to mobile wellness services, which were each selected by less than 20 percent of respondents.
- ▶ In an additional open-ended question, WFF also asked about what role, if any, the Foundation should have in supporting the mental health and well-being of grantee organizations' staff. Most responses (68 percent) focused on providing additional resources like workshops or access to mental health practitioners, and/or additional funding to cover employee benefits.
 - Interestingly, 11 grantees indicate in their response that WFF does not have a responsibility to address burnout and/or mental health within grantee organizations. For example, one grantee expresses that "[this] should rest with the individual organizations." Said another grantee, "[The] issue is systemic. I'm not sure how WFF alone can play a role."

CEP Recommendation: In the same vein as CEP’s recommendation to demonstrate an even deeper understanding of grantees and their context, there may be an opportunity to strengthen the Foundation’s relationships with grantees. While its approachability and responsiveness are already viewed as strengths, the Foundation might more proactively exhibit a sense of trust, compassion, and respect via channels that already exist, including site visits.

Additionally, per grantees’ comments about resources that WFF might provide to support mental health and combat burnout, non-monetary offerings might provide another avenue to catalyze deeper relationships with grantees more consistently. Finally, explicit follow-on conversations about shifts in WFF’s funding strategy may also help burnish the Foundation’s relationships with its grantees, particularly in helping to develop a greater mutual understanding about WFF’s shared impact with its partners.



“Every member of the WFF staff is exceptionally warm and committed to ensuring our success and an effective application/implementation process. We have been beyond satisfied with the dedication and support of staff.”



“During check-ins or at any time during the grant period, it would be great to hear updates about the Foundation’s strategy, why we were chosen as a grantee, and a reflection on why they think our work complements the Foundation’s strategy and mission.”

Strong Perceptions of Grants Processes and Grantmaking Characteristics

- ▶ WFF grantees experience the Foundation’s grants processes very positively. On nearly all related measures – including the helpfulness of the application process, the clarity and transparency of application process requirements, and the relevancy and adaptability of the reporting process – WFF is rated more positively than the most other funders.
 - Written comments affirm that WFF staff’s willingness to go out of their way to support grantees during the grants process is a key strength. “The team are very helpful and respond quickly to any questions,” describes one grantee. “They refine the application process, and then hold events to walk us through each step.” And as another grantee writes, “The Foundation [is] always willing to take a call [from] grantees who have questions about the proposals being submitted [and] in-person meetings aren’t stressful. The Weitz team doesn’t come in and ‘mansplain’ things to you about your program.... They’re thoughtful and will give direct feedback.”
- ▶ Compared to those of most other funders in CEP’s dataset, the Foundation’s processes are viewed as relatively less burdensome. At the median, the typical WFF grantee reports spending 10 hours on the Foundation’s application process compared to 16 hours at the typical funder; and two hours on the reporting and evaluation process compared to six hours at the typical funder. (The latter figure is among the lowest in CEP’s dataset.)
 - Still, given that WFF grants tend to be smaller than most other funders – \$60K at the median compared to \$127K at the typical funder – grantees’ dollar return (i.e., the median grant dollars awarded per process hour spent) places the Foundation at the 56th percentile.

- ▶ Of note: whether grantees report proactively exchanging ideas with Foundation staff on how their work would be assessed marks a key difference across a number of key dimensions. Just about half of WFF grantees indicate having this conversation (compared to 68 percent of grantees at the typical funder).
 - Grantees who report having had this conversation rate significantly higher, not only on all facets related to the reporting process, but also on measures related to the Foundation’s impact on grantee organizations, understanding of grantees and their context, and most areas related to the Foundation’s communications and approach to relationship-building.



“WFF has one of my favorite reporting processes of our grantors. Having a face-to-face interview about our progress feels much more authentic and allows for a greater understanding between the grantor and grantee.”

Grantmaking Characteristics

- ▶ As cited above, although WFF’s median grant size of \$60K is smaller than that of the typical funder in CEP’s dataset, this figure is similar to the median grant size of the typical peer funder in its custom cohort (\$67.5K). Additionally, the median budget of WFF-funded organizations is \$1M, nearly 30 percent lower than that of the typical peer funder (approximately \$1.4M). Subsequently, at the median, the Foundation funds a larger proportion of its grantees’ annual budgets (5 percent) compared to WFF’s typical peer funder (4 percent).
- ▶ The proportion of WFF grantees receiving unrestricted support emerges as a unique grantmaking characteristic: 86 percent at the Foundation compared to 25 percent at the typical funder. This figure places WFF among the top one percent of all funders in CEP’s dataset. Relatedly, nearly half of WFF grantees receive multi-year unrestricted support, placing the Foundation among the top seven percent of all funders.
 - Interestingly, however, grantees receiving *restricted* funding provide significantly higher ratings than those receiving unrestricted funding across multiple dimensions relating to impact, understanding, relationship building, and aspects of WFF’s application process. These grantees are also more likely to agree that the Foundation has been transparent about funding decisions and about shifts in its funding strategies.
- ▶ As context, the Weitz Family Foundation also has a relatively small program staff compared to most other funders in CEP’s dataset, with five program full-time employees (FTE) compared to 10 at the typical peer funder and 19 at the overall median. As such, the caseload of WFF staff is also comparatively higher (55 applications and 46 active grants per FTE compared to 20 and 30 at the typical funder, respectively).



“Providing operating support at a large scale has allowed organizations the flexibility to use funds in ways that will make the biggest difference, which has had a huge impact in the number of organizations engaging in a wide range of strategies to benefit their communities.”

CEP Recommendation: While celebrating how well-received WFF's grants processes are – both in terms of the time demanded and the flexible and helpful nature of these processes in the eyes of grantees – explore ways to prioritize discussing how funded work will be assessed upfront, knowing how valuable these conversations are for grantees across their entire experience with the Foundation.

As an overlay to all of CEP's recommendations – as well as any changes the Foundation might adopt moving forward – consider WFF staff capacity in deciding what sorts of improvements are higher priority versus what might be tackled at a future date.

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