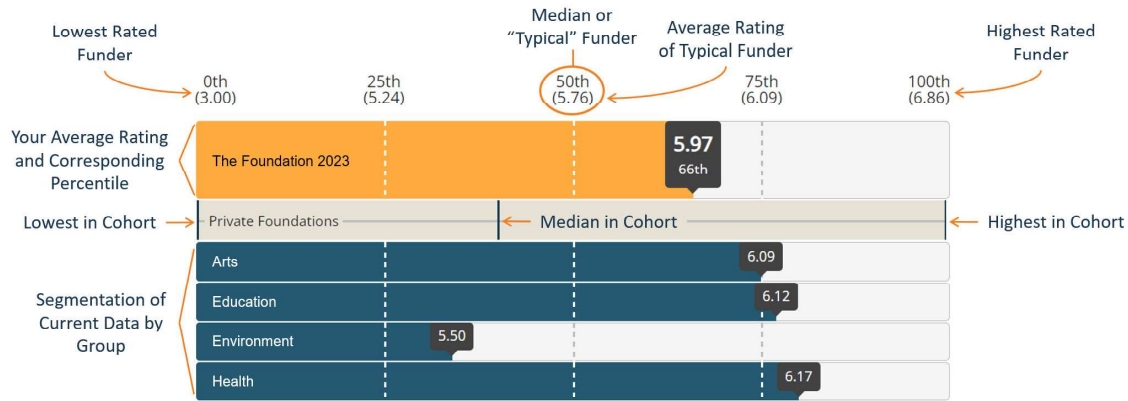


Guide to the Grantee Perception Report



Rating Scale

- ▶ Most questions in the grantee survey are asked on a 1-7 rating scale, where 7 most often reflects the positive end of the range.
 - Given the power dynamic between funders and grantees, and the intrinsically positive perceptions of organizations that have received funding, you may notice that average ratings cluster towards the higher end of the scale.

Comparison to CEP’s Dataset

- ▶ Throughout the GPR, “typical” grantee ratings are defined as ratings between the 35th and 65th percentiles in CEP’s overall comparative dataset of over 350 other funders. Ratings at or above the 65th percentile are defined as “higher than typical,” while ratings at or below the 35th percentile are defined as “lower than typical.” These thresholds were selected based on CEP’s analysis of where meaningful differences most commonly occur across funders.
- ▶ In addition to the overall dataset, bi3 selected a custom cohort of 16 other funders as a closer comparison group.

What the GPR is and is not

- ▶ The GPR represents a snapshot of grantees’ perceptions at a particular moment in time on several themes, including bi3’s overall impact on and understanding of grantees’ fields, local communities, and organizations; perceptions of bi3’s grantmaking and assistance beyond the grant; funder-grantee relationships; grant processes; and commitment to diversity, equity, inclusion, and accessibility.
- ▶ This is one learning tool to get a better understanding of grantees’ perceptions and is not an evaluative tool. It should be considered one input to a larger set of feedback, reflection, and learning tools you’re using to guide decision making at bi3.

bi3 2025 Grantee Perception Report

Prepared by the Center for Effective Philanthropy



**Survey Fielded in
October and November
2025**



**29
Grantee Responses**



**63%
Response Rate**

Overview

The Center for Effective Philanthropy is pleased to share the results of bi3’s first Grantee Perception Report (“GPR”).

- ▶ Grantees view bi3 very favorably. On nearly all measures bi3 receives ratings that are in line with or higher than the typical¹ funder in CEP’s dataset and often more positively than its peer cohort of high performing funders.
- ▶ Key strengths highlighted in grantees’ feedback include bi3’s impact on and understanding of grantees’ fields and local communities, as well as its communications and relationships with grantees.
 - As one grantee states, “bi3 is a major influencer in philanthropic spaces and in community driven work. As a funder, they have a tremendous impact on regional funders and are seen as a model and leader for trust-based philanthropy. They also provide deep investment in organizations they support.”
- ▶ Some opportunities for improvement include adjusting aspects of grantmaking processes and requirements for the size of the grant.
- ▶ Key findings are described in more detail on the following pages. Comprehensive survey results and information about survey methodology are available in bi3’s interactive online report.

Key Strengths of bi3

bi3 receives higher than typical ratings from grantees on most measures throughout the report including measures related to relationships, understanding, and impact.

Meaningful Relationships

- ▶ Grantees’ feedback highlights staff relationships with grantees as an exceptional strength. Bi3’s trust-based approach is valued by grantees, as they rate bi3 in the top 10 percent of CEP’s dataset for nearly all measures related to relationships, often even more positively.
- ▶ Grantees rate the clarity of bi3’s communications of its goals and strategy in the top quarter of CEP’s dataset and its overall transparency in the top ten percent.

¹ Throughout this summary, ratings are defined as higher than typical when average ratings are above the 65th percentile in CEP’s overall dataset, lower than typical when average ratings are below the 35th percentile, and typical when ratings fall between those thresholds.

- ▶ Relationships are strengthened by frequent touchpoints: 90 percent of grantees report being in touch with their primary contact at least once every few months, and 66 percent report having had a site visit (in person or virtual) at some point during their grant.



“Our organization has been blessed to receive funding from innumerable funders over the years, and none of the experiences have been as pleasant, thorough, consistent, intense, and beautiful as the process with bi3...”



“bi3 has been excellent to work with...They make sure expectations are clear, provide helpful feedback, and follow through on commitments. Overall, bi3’s approach builds trust, keeps projects moving smoothly, and makes collaboration both efficient and productive.”

Deep Understanding of Grantees’ Work and Contexts

- ▶ Ratings are even more positive for all measures related to bi3’s understanding of grantees’ work and contexts: their understanding of grantees’ organizations’ strategy and goals, the challenges facing their organizations, and the social, cultural, or socioeconomic factors that affect their work placing bi3 in the top ten percent of CEP’s overall dataset for nearly all of these measures.
- ▶ Further, grantees feel that the understanding is mutual. When asked to what extent they understand how their funded work fits into bi3’s broader efforts, grantees provide ratings in the top 3 percent of CEP’s overall dataset and towards the top of its smaller customized cohort.

Strong Impact on Grantees’ Fields and Communities.

- ▶ Grantees provide typical or higher ratings for bi3’s impact on grantees’ fields and local communities.
 - Grantees also provide higher than typical ratings for bi3’s effect on public policy as well as the extent to which it advances the state of knowledge in their fields.

Recommendation: Celebrate strong grantee perceptions across many measures. Reflect on the values, approaches, and practices that may have contributed to grantees’ positive experiences and codify and maintain these practices going forward.



“bi3 has been intentional about educating themselves and having a deep understanding of this work from many different lenses. Since they have done the work to learn the spaces to be in and then show up and bring value, they have advanced the work not just within our region, but the state and beyond.”



“Beyond the specific grant support we received, bi3’s influence extends far deeper— shaping the way we think, collaborate, and act as change agents within our community. Their focus on health equity and innovation has redefined what’s possible for organizations like ours...”

Opportunities to Build on Current Practices for Greater Impact

While grantees provide higher than typical ratings throughout most of the report, their feedback also highlights several opportunities to further improve their experiences.

Support During a Challenging Policy Environment

The current moment has been challenging for many nonprofit organizations, including many grantees of the bi3. Bi3's grantees report experiencing funding cuts, operational challenges, and risks: both to their organizations and to the people and communities they serve. The strong relationships and deep understanding that underpin bi3's work with its grantees may enable it to further support them through these challenges.

- ▶ About half of bi3 grantees report reduced funding from the U.S. federal government or local government because of changes in the policy environment and many have already experienced considerable impacts on their work.
- ▶ Over half of grantees have reported experiencing increased demand for their services and experiencing pressure to meaningfully reframe how they publicly describe their work, and over three-quarters have experienced concerns about the well-being and safety of those that their organization seeks to help.
- ▶ Over a quarter of grantees have also had to expend significant capacity on contingency budgets, planning and/or legal consulting, as well as had to adjust budgets and financial plans due impacts of payment timing and reliability.

Recommendation: Consider ways bi3 can provide consistency and clarity to grantees as they navigate uncertainty and challenge, and if possible, further funding opportunities or connections.

Grantmaking and Beyond the Grant Support

The size of the grants provided by bi3 is similar to that of the typical funder (175K compared to 125K), and slightly larger than the median of its smaller cohort of peers. bi3's grants also look similar to the typical funder both in terms of their length and purpose, with over half of grantees reporting receiving multi-year support, and about a quarter of grantees receiving unrestricted support.

- ▶ Over three-quarters of grantees report receiving at least one form of beyond the grant assistance from bi3. The most common supports were field-building assistance and program-related assistance, and when asked if these supports met an important need for their organizations and/or programs, was a worthwhile use of time and if bi3 would be open to feedback, grantees provide ratings in the top twenty percent of CEP's dataset and towards the top quarter of its smaller peer cohort.

Even so, one of bi3's lowest comparative ratings is for its impact on grantees' organizations, with grantees providing ratings in the bottom quarter of CEP's dataset and towards the low end of its customized cohort. This indicates that there is room for increasing the positive impact that bi3 has on its grantees, through furthering its grantmaking and support beyond the grant.

Recommendation: With its most aligned grantees, consider longer and less restricted grant structures that support broader organizational needs.

Streamlined and Concise Grantmaking Processes

Grantees' ratings are very positive – often in the top 10 percent of CEP's dataset – for most measures related to both application and reporting. Similarly, in questions specific to bi3, grantees provide high ratings regarding how supported they felt when going through the different phases of the grant process. One area that suggests some potential for improvement, however, is that grantees provide one of bi3's comparatively lower ratings for the extent to which the selection process was an appropriate level of effort given the funding received (although this is still a typical rating and above a 6 on an absolute scale).

Recommendation: Continue fine-tuning elements of bi3's grant processes, consider right-sizing requirements to the amount of the grant provided.