

Key Findings and Recommendations from Porticus’ 2024 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

In February and March of 2024, the Center for Effective Philanthropy (CEP) conducted its third survey of Porticus’ grantees¹, achieving a 59 percent response rate. The memo below outlines the key findings and recommendations from Porticus’ Grantee Perception Report (GPR). Grantee perceptions should be interpreted in light of Porticus’ context, goals, and strategy.

Notably, in 2024, across several report themes, including aspects of processes, contextual understanding, and funder-grantee relationships, Porticus grantees’ ratings are higher than all of its past grantee surveys.

This memo accompanies the comprehensive survey results found in Porticus’ interactive online report at <https://cep.surveyresults.org> and in the downloadable online materials. Porticus’ full report also contains more information about survey analysis, methodology, and differences across Porticus’ subgroups.²

Stellar – and Improved - Perceptions of Staff Interactions & Contextual Understanding

- ▶ Grantees indicate deeper partnerships with Porticus staff than in the past. Porticus receives exceptionally positive ratings, now in the top quarter of CEP’s dataset (and significantly higher than in 2020), for grantees’ comfort approaching it if a problem arises and Porticus’ exhibition of trust in grantees’ staff.
 - Grantees also provide significantly more positive ratings than in 2020, which now place Porticus alongside the typical funder, for staff responsiveness – a top predictor of funder-grantee relationships in CEP’s broad research.
- ▶ In written comments, grantees praise their interactions with Porticus - more so than in Porticus’ past grantee perception surveys. In 2024, grantees describe staff as “empathetic,” “collaborative,” “very supportive,” “highly responsive,” and as practicing trust-based philanthropy.
- ▶ Relatedly, on a custom series of statements, grantees provide extremely strong agreement, with average ratings of at least 6.13 on a seven-point scale, that they feel comfortable being candid in sharing their organizational successes and difficulties in their Learning conversations with staff and that Porticus staff demonstrate commitment to participatory practices.
- ▶ In 2020, the top grantee suggestion category related to interactions with Porticus staff, with the majority asking for more frequent contact, including via site visits. Now, in 2024, the proportions of grantees who connect with their primary Porticus contact at least every few months and who had a site visit are larger than typical (at 92 percent and 62 percent of Porticus grantees, respectively).
 - Grantees experiencing either of these engagement patterns provide significantly more positive ratings across many measures, including aspects of impact, contextual understanding, communications, interactions, and processes.

¹ The survey population included all Porticus, Porticus Light, and Good Energies Foundation grantees who received grants of above \$10K between 2021 and 2023.

² Throughout this summary, Porticus’ 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 it is rated between those thresholds. Ratings described as “significantly” higher or lower reflect statistically significant differences at a P-value less than or equal to .1.

- ▶ CEP’s field-wide research finds that perceptions of contextual understanding are a top predictor of both perceptions of funder-grantee relationships and overall impact. Broadly, grantees perceive Porticus to have a more fulsome understanding of aspects of their work contexts than in the past, representing steady increases since 2017.
 - Across all understanding measures, Porticus is now rated in the top 40 percent of CEP’s dataset. Grantees’ ratings are also significantly higher than in 2020, and now above typical, for Porticus’ understanding of the socio-cultural factors affecting their work and its awareness of their organizational challenges.



“Porticus has been the ideal donor.... Their personnel have connected with us on a human level, and worked with us to overcome obstacles, prioritising the support we need to have [for] an impact as an organisation. They have shown that they value us as partners, and that they also want to learn from us.... They have visited our projects and partners in person..., encouraging us all with their interest and support.”



“.... Porticus representatives have felt like good partners who care about the work that is being done. They made me feel that they do not just send a check, but they walk with us in this mission and care. They are approachable and great to work with.”

Sustained Improvements in Perceptions of Impact, with Suggestions for Amplification

- ▶ Porticus continues to be rated typically for its impact on grantees’ fields of work and on their organisations.
 - Of note, perceptions of Porticus’ thought leadership have increased by a statistically significant margin since 2020 and now place Porticus in the top 40 percent of CEP’s dataset.

Grantmaking Characteristics

- ▶ CEP’s broad research finds that grantmaking characteristics are related to perceptions of impact, with large, multi-year, and/or unrestricted grants associated with stronger perceptions of impact.
- ▶ As in 2020, Porticus continues to provide typically sized grants - \$158K USD on average - while funding smaller than typical organisations, with the median grantee reporting an annual operating budget of \$800K USD. Thus, Porticus’ funding continues to represent a large proportion of grantees’ budgets – 11 percent versus four percent at the typical funder.
- ▶ Of note, the proportion of Porticus grantees that report receiving a multi-year, unrestricted grant has doubled since 2020, reaching 10 percent. This now places Porticus in line with the typical funder in CEP’s overall dataset.
 - Grantees who receive a multi-year, unrestricted grant rate significantly higher for Porticus’ impact on their fields and organisations and aspects of its contextual understanding.
- ▶ In open-ended comments, grantees indicate an opportunity to build on these changes further. A fifth of their suggestions— the top category — relate to grantmaking characteristics, with grantees most often asking for longer and/or unrestricted grants, given the scale of issues Porticus seeks to address.
 - As one grantee writes, “The changes we and Porticus want to see in our field of action require paradigm shifts that will take time to materialize. Projecting longer-term support would be a welcome improvement.”

- ▶ CEP’s broad research also finds that the provision of support beyond the grant check is associated with perceptions of impact. Over 70 percent of grantees, a larger than typical proportion, report receiving beyond the grant assistance from Porticus. These grantees rate Porticus significantly higher across most report themes.
- ▶ Yet, grantee feedback indicates an opportunity to improve these offered supports. While grantees rate Porticus in line with typical for the extent to which its non-monetary support both met and strengthened an important organisational/programme need, they agree less strongly than is typical that Porticus’ assistance beyond the grant was a worthwhile use of their time and that Porticus would be open to feedback about its non-monetary assistance.



“It would be interesting if Porticus would consider (even more) the possibility of providing core funding or unrestricted funding to organizations. This would reduce our administration and costs and allow organizations to focus on delivering results. Especially for organizations that have received multiple grants - so there is a certain trust base - this could be considered an option.”

Valuable, Strengthened Administrative Processes

- ▶ Grantee feedback highlights increasingly high-quality administrative processes. Grantees describe Porticus’ application process as “clear” and “streamlined,” characterized by “supportive” and “helpful” staff guidance throughout the process.
- ▶ In fact, Porticus is now rated in the top 10 percent of CEP’s comparative dataset for the helpfulness of its selection process in strengthening the grant-funded work, representing a significant increase since 2020 (one of its largest increases by magnitude).
- ▶ Over 80 percent of grantees, a larger than typical proportion that has steadily increased since 2017, report having a prospective discussion with a Porticus staff member about assessing the funded work during the application or grant period. Notably, these grantees provide significantly higher ratings on nearly *all* report measures.

Reporting and Evaluation Processes

- ▶ Grantee feedback indicates that the reporting process continues to be very helpful, and, across most related measures, ratings have significantly improved since 2020, including perceptions of its relevance to the funded work and adaptability to their circumstances. These improvements now place Porticus similar to or higher than the typical funder.
 - However, while grantees also provide significantly more positive ratings for the straightforwardness of Porticus’ reporting process, these remain lower than typical.
- ▶ Over 40 percent of grantees, a larger than typical proportion, indicate participating in an evaluation process, and they rate Porticus in the top quarter of CEP’s dataset for the extent to which it incorporated their input and resulted in changes to the funded work.
 - Yet, on a custom question, grantees indicate only moderate agreement (providing an average rating of a 5.64 on seven-point scale) that Porticus-supported MEL efforts have been beneficial to their work.

Time Spent on Processes

- ▶ Porticus' processes continue to be much more time-intensive than those at many funders. In an identical result to 2020, grantees, at the median, spend 60 hours on Porticus' process requirements over their grant lifetime (more time than for nearly 85 percent of funders in CEP's dataset)
- ▶ A smaller theme in grantees' suggestions (comprising roughly 10 percent of suggestions) relates to its administrative processes, with grantees most frequently asking for more streamlining and flexibility.



"Preparing the application...was a valuable experience. Our grant supervisor spent a lot of time and effort helping to put the idea of the program into [a] concise and clearly structured grant application which was [of] great benefit for me."



"Grant application forms and reporting forms could be streamlined and modernised to make them more accessible and straightforward for grantees."

Opportunity to Build on Improvements in Communications

- ▶ While grantees hold more positive perceptions of aspects of Porticus' communications about its strategy than in the past, their feedback also indicates room for further growth.
- ▶ Porticus is now rated in line with the typical funder for several communications measures, including the clarity of its communications about its goals and strategy and grantees' understanding of how their grant fits into Porticus' broader efforts, with the latter representing a significant improvement since 2020.
- ▶ Grantees' ratings for the consistency of Porticus' communications resources have also significantly improved, yet they remain in the bottom 30 percent of CEP's dataset.
- ▶ The second highest category of grantees' suggestions (representing nearly a fifth of suggestions) relates to Porticus' communications. The majority of grantees' suggestions indicate a strong desire to learn more about Porticus' goals and strategies, both currently and in the future, and how their work fits in.
 - These grantees make comments like, "Porticus could do better in expressing its theory of change," while requesting "a more strategic approach toward understanding how all the funded organizations come together towards a common impact."
- ▶ Grantee feedback also indicates Porticus could do more to integrate its commitment to gender equity and social inclusion (GESI) in a tangible way to grantees, including in its interactions with grantees.
- ▶ Though grantees agree as strongly as is typical that Porticus demonstrates an explicit commitment to GESI in its work, they indicate the ways in which Porticus' communicates this operationally could be improved.
 - Porticus is rated in the bottom quarter of CEP's dataset for grantees' agreement that it has clearly communicated what GESI means for its work.
 - Further, on a custom series of statements, grantees agree least strongly – with an average rating of 5.72 on a 7-point scale – that Porticus staff exhibit and apply knowledge on GESI in their work with grantees.



“Porticus operates on different continents, and I find it difficult to understand the reasons, the strategies, and how the different actions come together and result in significant changes in the communities affected.”

CEP Recommendations

Based on Porticus’ grantee feedback, CEP recommends that it consider the following in order to build on its strengths and address potential areas for improvement:

- ▶ Reflect on and celebrate the historical highs across a number of report measures, including grantees’ perceptions of Porticus’ understanding of the contexts in which they work, the quality of their interactions, and the helpfulness of Porticus’ administrative processes. Spend time identifying the decisions, values, and approaches contributing to these results, and continue reinforcing these strengths.
- ▶ To further build on stable perceptions of Porticus’ impact on grantees’ fields and organisations, seek opportunities to:
 - provide a larger proportion of grantees with highly valuable, multi-year support.
 - provide more tailored and specific forms of beyond the grant assistance that *grantees* find valuable and respectful of their time, and ensure grantees are aware of how Porticus solicits and uses their feedback regarding this assistance.
- ▶ Similar to CEP’s 2020 recommendation, seek opportunities to further streamline Porticus’ processes. In this, reflect on ways to further clarify the reporting process for grantees and reflect on grantees’ most-frequently mentioned suggestions for further simplifying processes.
- ▶ Consider ways to further build on the improvements in perceptions of Porticus’ communications, including by assessing the consistency of Porticus’ communications across written and interpersonal resources about its overall goals and strategy, and how different programmes and regions align. Ensure content is well-aligned across resources.

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