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PHILANTHROPY

## Key Findings and Recommendations from the Charles & Margery Barancik Foundation 2025 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

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*In September and October 2025, the Center for Effective Philanthropy conducted a survey of the Charles & Margery Barancik Foundation’s (referred to as “the Foundation” and “Barancik”) grantees, receiving 77 responses for a 79 percent response rate. This memo outlines CEP’s summary of the Foundation’s key strengths, opportunities, and recommendations. Grantee perceptions should be interpreted in light of the Charles & Margery Barancik Foundation’s particular context, goals, and strategies.*

*This memo accompanies the comprehensive survey results in the Foundation’s interactive online report. The Foundation’s full report also contains more information about analysis and methodology.<sup>1</sup>*

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### Overview

The Center for Effective Philanthropy (CEP) is pleased to share the findings from the Charles & Margery Barancik Foundation’s second Grantee Perception Report (GPR). The Foundation’s 2025 grantee survey is a timely opportunity to understand grantee experience during a moment of change.

- ▶ In 2025, feedback continues to be overwhelmingly positive and highlights the impactful, collaborative relationships that Barancik has developed with its grantees. Grantee ratings place the Foundation above the typical funder in CEP’s comparative dataset on nearly all survey measures.
- ▶ When asked how Barancik could improve as a funder, grantees most often write about a desire for greater flexibility of funding and increased multi-year support. Grantees also ask for deeper engagement beyond the grant and more touchpoints with Barancik staff.

### Stellar Impact on and Understanding of Grantees’ Fields and Community

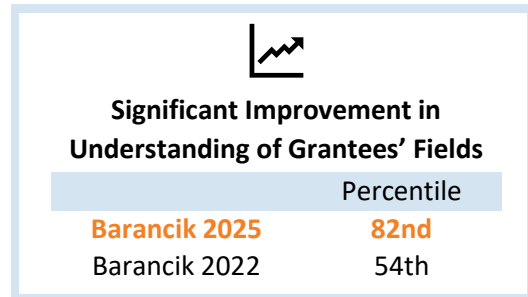
- ▶ Grantees strongly agree that the Foundation creates a ripple effect of meaningful difference through compassion, trust and strategic investments (average rating of 6.82), and ratings for Barancik’s impact on their fields and communities are at the 100th percentile of CEP’s

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<sup>1</sup> Throughout this summary, the Foundation’s ratings are defined as higher than typical when average ratings are above the 65<sup>th</sup> percentile in CEP’s overall dataset, lower than typical when average ratings are below the 35<sup>th</sup> percentile, and typical when ratings fall between those thresholds. Ratings described as “significantly” higher or lower reflect statistically significant differences at a P-value less than or equal to .1.

comparative dataset. In their written comments, grantees often described the Foundation’s integral work, with one grantee sharing, “[The Foundation’s] support not only elevates our credibility and affirms the value of our mission, but also fosters collaboration, innovation, and resilience across the community.”

- Ratings are also higher than typical for the extent to which the Foundation has advanced the state of knowledge in grantees’ fields, and typical for the Foundation’s effect on public policy.
- ▶ Perceptions of Barancik’s understanding of grantees’ fields and the needs the people and communities grantees serve have significantly improved since 2022 and are now higher than typical. Grantees provide similarly positive ratings for the Foundation’s understanding of the contextual factors that affect their work.



*“In our community, [the Foundation sets] a powerful example of leadership, vision, and commitment to addressing complex social challenges....By prioritizing systemic solutions and encouraging partnerships, the Foundation helps shape a stronger, more compassionate community...”*

### Recommendation

Celebrate grantees’ positive experiences across aspects of the Foundation’s impact on their fields and communities. Identify what strategies and practices have contributed to improved understanding of grantees’ fields and contexts, and work to maintain those over time.

### Effects of the Current Policy Context

- ▶ A smaller than typical proportion of Barancik grantees report receiving state or local funding (52 percent) and federal funding (25 percent). Most of these grantees report that less than 25 percent of their organization’s revenue is derived from these funding sources.
- ▶ Barancik grantees are evenly split in experiencing a reduction in funding from private funders or donors due to changes in the political and policy environment in 2025. Forty-four percent of grantees experienced or anticipate experiencing such a reduction, while 42 percent have not experienced this and do not anticipate experiencing this.
- ▶ Grantees see the current policy context posing more risk for those they serve than for their organization’s continued operation. Grantees most commonly report experiencing:
  - Increased demand for their services (57 percent),
  - Concerns about the well-being and safety of those that their organization is seeking to help (57 percent), and
  - Pressure to meaningfully reframe how they publicly describe their work (35 percent).

## Transformational Impact on Grantee Organizations, Including Beyond the Grant

- ▶ Grantees report that Barancik has significant positive impact on their organizations. Ratings are exceptionally positive and at the top of the Foundation’s peer cohort for Barancik’s understanding of grantees’ strategy and goals, and for its awareness of the challenges faced by grantee organizations.
  - In response to a Barancik-specific question, grantees indicate strong agreement that the Foundation’s work reflects its belief that strong nonprofits lead to better outcomes, and that it works hand-in-hand with partners to identify and advance the best solutions to drive positive change.
- ▶ Barancik awards grants that are larger than typical, subsequently funding a larger than typical proportion of grantees’ organizational budget – 19 percent, compared to 4 percent at the typical funder.
  - For first-time grantees, which are generally smaller organizations, Barancik funds 26 percent of their organizational budget.
- ▶ While Barancik awards 63 percent of its grantees with multi-year funding, the actual grant lengths are shorter than typical, and a smaller than typical proportion of grantees report receiving unrestricted funding. In their suggestions for improvement, grantees continue to highlight that “more unrestricted support allows organizations...to focus on the core work that drives meaningful results,” and that, “longer term funding...would help organizations feel more stable and sustainable,” similar to their requests in 2022.

	Median Grantee Budget	Median Grant Size	Proportion of Multi-year Support	Proportion of Unrestricted Support
<b>Barancik 2025</b>	<b>\$1.3M</b>	<b>\$300K</b>	<b>63%</b>	<b>12%</b>
Barancik 2022	\$1.4M	\$230K	48%	14%
Median Funder	\$1.7M	\$125K	55%	27%

## Greater Provision of Beneficial Assistance Beyond the Grant

- ▶ Since 2022, the proportion of Barancik grantees who report receiving beyond the grant assistance has increased to 86 percent, reflecting the Foundation’s intentional work to provide grantees with this form of support.

### Beyond the Grant Assistance Most Often Received by Grantees



- ▶ Beyond the grant assistance makes a difference for Barancik grantees – they report that the support received meets an important need, was worthwhile use of their time, and that the

Foundation would be open to feedback about the assistance provided. Ratings for these measures are in the top ten percent of CEP’s comparative dataset.

- ▶ Barancik may have an opportunity to refine its offerings to align best with grantees’ needs. When asked what types of support or roles they would find most valuable for the Foundation to play in the future, over half of grantees selected fundraising and development capacity.
  - Forty-three percent of grantees selected organizational capacity building, emphasizing the importance of this form of support for Barancik grantees.



*“Expand multi-year and flexible funding opportunities to help organizations plan confidently, retain talented staff, and adapt quickly to emerging needs.”*

### Recommendation

Considering persistent feedback related to the length and type of the Foundation’s grants, consider whether this moment of transition is a good time to make adjustments, such as implementing longer-term grants and/or increasing the provision of unrestricted funding, that reflect changes in the Foundation’s annual giving and its role in supporting smaller grantee organizations.

Reflect on whether there are opportunities to refine Barancik’s beyond the grant offerings to align with grantee requests for additional fundraising and capacity building assistance. Determine whether any changes need to be made to the menu of options available to grantees.

## Strong Relationships and Touchpoints, Opportunity to Further Communicate the Foundation’s Strategy and Transition

- ▶ Barancik grantees deeply appreciate their relationships with staff. Ratings are among the highest in CEP’s dataset for grantees’ comfort approaching the Foundation and for the extent to which Barancik exhibits trust, candor, and compassion in its interactions with grantees.
  - In their written comments, grantees praise staff as “responsive,” “thoughtful and supportive,” and note that staff “made an effort to understand the nature of our work.”
- ▶ These strong relationships are built on frequent interactions and meaningful touchpoints. Nearly 70 percent of grantees report receiving a site visit from Barancik staff. One third of grantees have contact with their Grant Lead monthly or more often—a larger than typical proportion—and these grantees rate significantly higher across some measures related to understanding, relationships, and communications.



### Differences in experience by grantees’ relationship with the Foundation

Grantees who are inconsistently funded trend *lower* on many measures including relationships, communications, and organizational impact and understanding.

### Communication and Strategic Shifts

- ▶ Barancik receives ratings in the top 10 percent of CEP’s comparative dataset for the clarity with which it communicates its goals and strategy, the consistency of its information, its

transparency, and grantees' understanding of the way in which their work fits into the Foundation's broader efforts.

- Grantees agree that the Foundation has clearly communicated and demonstrated what diversity, equity, and inclusion means for its work, with ratings in the top 20 percent of CEP's comparative dataset.
- ▶ However, some grantees express uncertainty regarding the Foundation's strategy. Specifically, they request greater clarity regarding the possibility of future funding, and some mention that they would like "continued clear and proactive communication around priorities and process during [the leadership transition]." These sentiments are echoed in grantees' responses to a custom question asking what actions grantees would like to see the Foundation take to enhance its partnership with and support of grantee organizations as it changes leadership.
  - In addition, 20 percent of Barancik grantees report experiencing a contact change in the last six months. These grantees rate significantly lower than those who had a consistent contact on a few measures, including some aspects of relationships and understanding, suggesting an opportunity to refine practices in ensuring smooth relationship transitions.



*"[During this leadership transition] we would value continued emphasis on open communication and relationship-building. Regular opportunities for dialogue, whether through grantee roundtables, site visits, or check-in conversations, would be reassuring and strengthen our partnership with the Foundation."*

### Recommendation

Building upon existing strengths in the clarity, consistency, and transparency of Barancik's communications, pursue opportunities to provide grantees with up-to-date information regarding the Foundation's transitions. Ensure contact transitions are smooth and supported by structured handoffs.

## Right-Sized and Effective Grant Processes

- ▶ The Foundation's processes continue to be extremely streamlined, and grantees continue to receive a larger than typical monetary return for their time spent. At the median, grantees report spending 20 hours on Barancik's requirements over the course of the grant lifetime.
  - Grantees find the Foundation's application process to be helpful and an appropriate amount of effort, providing ratings near the top of the comparative dataset for both measures.
  - Ninety percent of grantees indicate that the support and communication received during the grant application process "felt just right."
- ▶ Since 2022, the proportion of grantees who indicate participating in a reporting and an evaluation process has nearly doubled. Grantees find the reporting process to be a helpful opportunity to reflect and learn, and consider it straightforward, adaptable, and relevant.



**Median grant dollars awarded  
per process hour spent**

**\$15.6K**

compared to **\$4.0K** at the  
median funder

- Eighty-seven percent of grantees report exchanging ideas regarding how their organization would assess the results of the work funded by their grant. While grantees indicate that their evaluation incorporated input from their organization in its design, ratings are lower than typical for the extent to which the evaluation resulted in their organization making changes to the work that was evaluated.



*“Rather than feeling like a rigid process to ‘get through,’ the application experience felt more like being guided by a trusted partner who was transparent, honest, and genuinely invested in helping us succeed. Their team not only outlined expectations with clarity but also provided helpful insights that strengthened our application.”*

### **Recommendation**

Continue the practices and process that have resulted in Barancik’s streamlined grantmaking processes. Reflect on how strategies used to develop effective application and reporting processes can be applied to strengthening the utility of the Foundation’s evaluation process.

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