

**Critical Ecosystem Partnership Fund
43rd Meeting of the CEPF Donor Council
Virtual Meeting
Wednesday 9 October 2024
8:00 a.m. – 11:00 a.m. Eastern Daylight Time (EDT)
2:00 p.m. – 5:00 p.m. Brussels and Paris Time
9:00 p.m. – 12:00 a.m. (+1 day) Tokyo Time**

Results of the 2024 Grantee Perception Survey

Recommended Action Item:

The Donor Council is asked to comment on the results of the 2024 Grantee Perception Survey.

Background:

Since establishment in 2000, CEPF has continually strived to create a positive, flexible and efficient grant-making experience for the grantee. Efforts have been diverse and range from in-person technical and administrative support, to guidance material and improved grant management processes, procedures and policies for all phases of the project cycle from application through grant closure. Many of the improvements and changes in CEPF's practices are the results of feedback received via grantee meetings, in-person interactions and discussions held at midterm and final assessment workshops.

In 2018 CEPF conceived an initiative to collect grantee views in a comprehensive manner. Initiated as a means to enhance interactions with grantees and inform our efforts to improve CEPF's policies and procedures, the CEPF Grantee Perception Survey was launched in mid-2018 and administered to all grantees whose project came to a close in fiscal year 2018. The results of the survey were presented to the Donor Council in October 2019. At that meeting the Donor Council recommended that the survey be completed approximately every three years.

The survey contains 42 questions in five categories (application process, administration, technical supervision, capacity building and donor-grantee relationship), is anonymous, and is available in English, French, Spanish, Portuguese and Indonesian. The survey is administered at the close of each grant, large and small, and can be completed on computer as well as mobile phone.

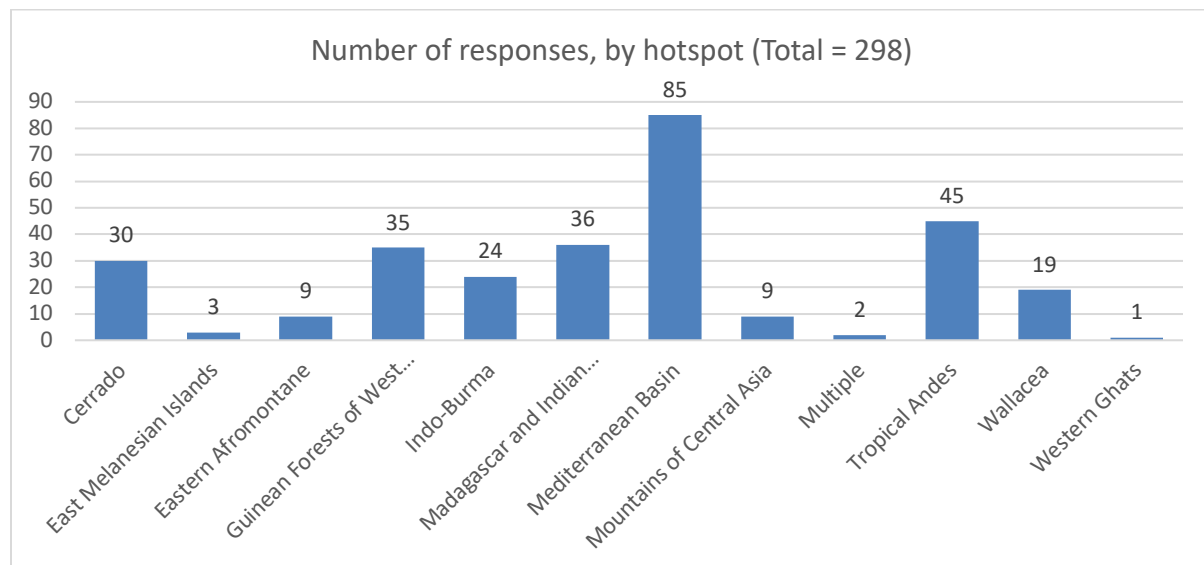
The current survey contains results of responses received during the period 1 July 2019 through 30 June 2024. The full report is attached as Annex A.

Survey Responses:

The survey covers a four-year period, from 1 July 2019 to 30 June 2024. All grantees whose grant closed during this period received a request to complete the survey. A total of 298 responses (36%) were received out of a possible 865, from 12 hotspots. Large grants, managed by the Secretariat, constituted 69% of the responses while small grants managed by a regional implementation team (RIT) constituted 31%. Responses by hotspot and size of grant are presented below.

Hotspot	# of large grants	# of small grants	Total # of grants
Cerrado	16	14	30
East Melanesian Islands	3		3
Eastern Afromontane	9		9
Guinean Forests of West Africa	20	15	35
Indo-Burma	24		24
Madagascar and Indian Ocean Islands	19	17	36
Mediterranean Basin	52	33	85
Mountains of Central Asia	9		9
Multiple	2		2
Tropical Andes	32	13	45
Wallacea	18	1	19
Western Ghats	1		1
TOTAL	205	93	298

Twelve hotspots are represented in the survey results. The number of responses received for each hotspot is not a reflection of the response rate because the investment period may not fall squarely within the period of the survey. Each portfolio is at a different stage of development—some at the start of grant-making with few projects completed, while others are at the end of the investment with most projects completed. The exception to this is the Mediterranean Basin, with 168 of 201 projects falling within the survey period, and 85 responses received, a laudable 50% response rate.



Results and Recommendations:

The survey is anonymous and therefore grantees are able to be candid in their comments and recommendations for all five of the categories of questions. Notably, CEPF and RIT staff received high praise for their commitment and competence. Grantees appreciated the visits, trainings and supervision, describing CEPF and RIT staff as partners rather than supervisors. An average rating of 6.5 out of 7 was received for overall grantee experience, up from 5.9 in 2019. Negative responses were few, but respondents were liberal in providing advice and suggestions for improvements. Topics and recommendations are provided below.

Application Process

- Provide increased monitoring of administrative and budgetary management.
- Reduce bureaucracy and delays in release of payments.
- For trainings, focus on the needs of each institution and use an analysis of the institution.
- Design capacity-building interventions linked to organizational needs assessment.
- Engage more inter-grantee relationships for learning experiences.
- Conduct a need assessment for grantee organizations so that the capacity building provided will be more appropriate.

Administration

- Additional visits to the project site would be appreciated.
- Increased monitoring of administrative and budgetary management would be helpful.
- At least two visits per year may improve monitoring.
- Visits could be supplemented with regular virtual check-ins, as frequently as every four months.
- Better communication is needed at the beginning of the project on how to do technical and financial reporting.
- The accompaniment of the RIT (for small grants) should be more for training and strengthening, and less so for supervision.
- CEPF encouraged the grantees in the same area to collaborate and exchange lessons learned, which was very helpful. This practice should be scaled up across CEPF.
- A financial procedure manual would be helpful.
- It would be useful to have a national coordinator to conduct close monitoring and field presence in parallel with project implementation.
- Field visits should include capacity building as an objective, especially in terms of reviewing project progress and helping to correct and improve.
- Establish clear expectations and guidelines for grant recipients.
- Conduct regular internal reviews to identify areas for improvement and ensure accountability.
- Provide clear instructions in local languages.
- Provide clear forms (and samples) that finance staff can understand.
- CEPF/RIT teams should consider how to avoid delays in payment releases, which can hinder the performance of the project team.

- At the contracting stage, there should be a workshop to guide grantees through the bureaucratic operations of foreign exchange, purchases, payments, notes and reports so that processes are understood from start to finish.
- Responses are sometimes slow— attention should be paid to improving response time.
- Improve processes for releasing funds because funds often arrive very late.
- Hold site visits closer to the start of the project rather than the end.

Technical Supervision

- Strengthen the space for the exchange of experiences and networks of alliances with other environmental organizations that have been carrying out similar work.
- More interaction with other hotspots and related projects and exchange of knowledge through international meetings (possible through physical attendance, Zoom or skype) is very important.
- Conduct periodic evaluations of the project in collaboration with the communities and the implementing organization. Such evaluations can guide where to adjust strategies according to the results obtained and the feedback received to ensure effectiveness and relevance.
- From the beginning of the project, define the impact indicators to which the project applies so that the final report can be more clearly documented.
- Conduct periodic check-in calls with the RIT on project progress.
- Ensure that feedback is always provided to grantees whenever there is a project supervision visit.

Capacity Building/Training:

- Capacity building should be done at the start of a project.
- More training is needed for the technical team executing the project.
- CEPF could facilitate networking events, peer learning sessions or collaborative platforms where all CEPF grantees across countries could share lessons learned or experiences.
- For large organizations, the strengthening actions did not apply specifically. Perhaps it would be useful to think about strengthening actions for conservation organizations that are larger and not so local. For small and local organizations, the capacity building is adequate.
- Increase the number and frequency of training events, and dedicate more sessions on environmental and social safeguards, gender and impacts evaluation.
- Prioritize more capacity building related to organizational development (internal structures).
- Provide regular training and professional development opportunities for staff and grant recipients.
- Build partnerships with other organizations and institutions to share knowledge and resources.
- Encourage staff and grant recipients to participate in relevant conferences, workshops and other events to stay up to date on best practices and emerging trends.
- Implement mentorship and coaching programs for staff and grant recipients.
- Offer tailored technical assistance and support to help organizations overcome specific capacity challenges.

- Encourage knowledge sharing and networking opportunities among staff, grant recipients and partners.
- Assess organizational performance (strengths and weaknesses).

Donor-Grantee Relationship:

- CEPF is a donor that works very closely with the implementers, which is very remarkable.
- It is better to have regular meetings between donors and grantees to get an overview of the conditions of grantees and also to properly convey new policies/regulations from donors.
- Our experience with CEPF was positive but it is one of our most rigid and inflexible funders. The application and reporting processes require too much detail.
- Consideration and flexibility are needed in dealing with unforeseen major or key activities and the related financial resources of the project or certain projects.
- Create more opportunities for exchange with the beneficiaries and don't wait for reporting periods to ask for discussions.
- To improve relations between us, we need to create a more efficient synergy of action for the common cause of combating global warming and support beneficiaries through capacity building.
- Responsiveness was excellent. Sites visit have helped us to build interaction and made us comfortable in approaching the Secretariat.
- Promoting and sharing more often social media posts on CEPF social media accounts regarding certain activities the grantee is implementing.
- The person in charge of communications has too much work and is not able to respond to all the members, all the requests.
- The RIT should agree internally on the content of the topics and other issues, because sometimes we hear different versions.
- Interaction between donor and beneficiary was good during this project. In terms of communication, perhaps it would be useful, where possible, for a local CEPF representative to be present at communication events likely to promote the project and its protagonists, including the donor.
- We believe that donor-beneficiary relationships have taken place within the framework of transparency and clear communication, participation and consultation, respect for autonomy, long-term commitment, evaluation and shared learning within a given cultural context. We encourage them to continue to expand these inclusive forms of communication and work.

CEPF is committed to continuing the survey, listening to grantees and reporting on results. Most important is that CEPF uses the survey to identify areas that need improvement. As with the 2019 survey, in 2024 issues have also been identified and will be a focus in the coming years.

Discussion Points

1. Does the Donor Council have any comment on the recommendations suggested by survey respondents?
2. Does the Donor Council see value in continuing the survey and reporting on a regular basis?
3. Are there any changes to the survey that the Donor Council would recommend?

CEPF Grantee Perception Survey Report September 2024

I. INTRODUCTION

The Critical Ecosystem Partnership Fund (CEPF) was established in 2000 as a mechanism to engage civil society in the conservation of critical ecosystems in the global biodiversity hotspots. CEPF is a joint initiative of l'Agence Française de Développement (AFD), Conservation International (CI), the European Union (EU), Fondation Hans Wilsdorf (FHW), the Global Environment Facility (GEF), the Government of Japan and the World Bank. It is also supported by several philanthropies. As one of the founding partners, CI administers the global program through a CEPF Secretariat.

CEPF provides grants and technical support to diverse civil society partners ranging from community groups to nongovernmental organizations to private sector entities. Since its creation, CEPF has supported more than 2,700 civil society partners in 112 countries and territories, awarding US\$302 million in grants.

Over the past two decades, CEPF has continually strived to create a positive, flexible and efficient grant-making experience for the grantee. Efforts have entailed improvement of grant management processes and procedures for all phases of the project cycle from application through grant closure.

While CEPF has solicited and received feedback from grantees about the CEPF experience over the years, only in 2018 did the fund launch a comprehensive effort to gather grantee perceptions via a survey administered at the close of each project. The goal of the initiative was to improve interactions with grantees and inform efforts to improve CEPF's policies and procedures. The first results were produced in September 2019 ([Grantee Perception Survey \(cepf.net\)](https://www.cepf.net/grantee-perception-survey)). This second report contains results of responses received during the period 1 July 2019 through 30 June 2024.

II. SURVEY DESCRIPTION

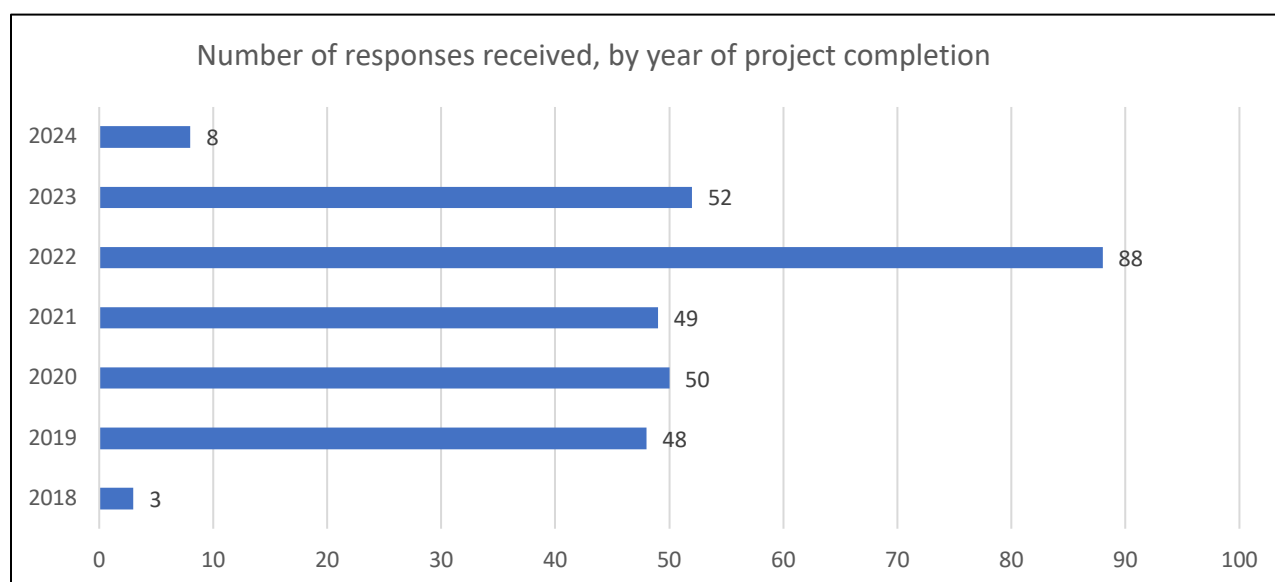
The CEPF Post-Project Grantee Survey is conducted through the use of Microsoft Forms. This program allows respondents to complete the survey on computer as well as mobile phone. The survey contains 42 questions in five categories (application process, administration, technical supervision, capacity building and donor-grantee relationship), is anonymous, and is available in English, French, Spanish, Portuguese and Indonesian. Grantees are instructed to consider each question as referring collectively to both the Secretariat and the regional implementation team (RIT), unless there is a specific reference to the Secretariat or to the RIT.

Grantees are requested to complete the survey at the end of their grant, and a link to the survey is included in the close out letter set to the grantee. Since the survey is anonymous, there is no way to know if a grantee has responded to the survey.

III. SURVEY RESPONSES

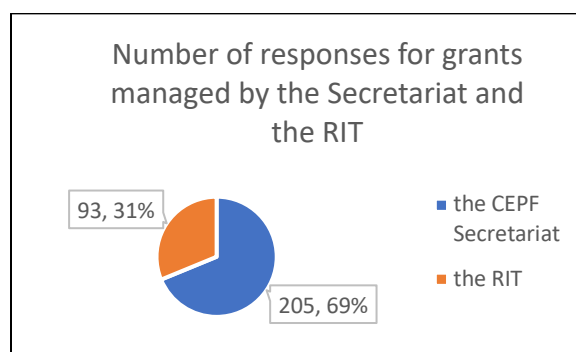
A total of 865 grants came to a close during the period 1 July 2019 and 30 June 2024, and all received a request to complete the survey. Grantees have two months to complete their final reports, at which time their grants can be closed and a close out letter sent with the request to complete the survey. Therefore, grantees with a project end date in May and June 2024 are not included in the total number of grantees likely to respond to the survey. As such, the total number of grantees that could have responded was 823. CEPF received a total of 298 responses, representing a response rate of 36%.

The chart below shows the number of responses received, by the year project the project ended.

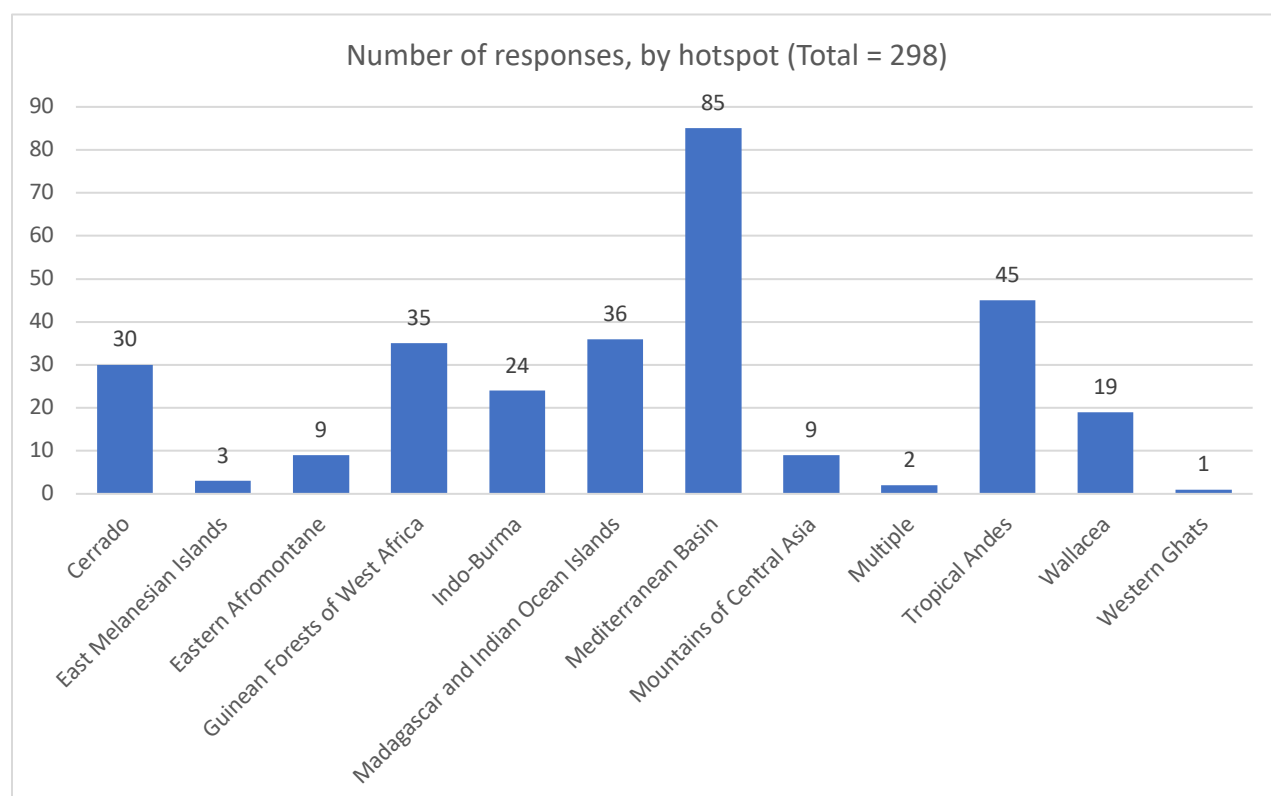


Note: Surveys for the three grants that ended in 2018 were not submitted until 2019.

Of the 298 responses received, 93 were for small grants managed by a RIT, and 205 were for large grants managed by the Secretariat. All grants administered by the RIT are small grants with awards of \$50,000 or less, or for some regions \$20,000 or less, depending on the small grant ceiling agreed upon by the Secretariat and the RIT.



Twelve hotspots are represented in the survey results. The number of responses received for each hotspot is not a reflection of the response rate because the investment period may not fall squarely within the period of the survey. Each portfolio is at a different stage of development—some at the start of grant-making with few grants completed, while others are at the end of the investment with most grants completed. The exception to this is the Mediterranean Basin, with 168 of 201 grants falling within the survey period, and 85 responses received, a laudable 50% response rate.



The table below illustrates the number of responses pertaining to small grants and large grants by hotspot. In this table, and throughout the report, graphics attributed to the Secretariat refer to grants administered/managed by the Secretariat. All of these are large grants. Graphics attributed to the RIT refer to grants administered by the RIT. All of these are small grants.

Hotspot	# of large grants	# of small grants	Total # of grants
Cerrado	16	14	30
East Melanesian Islands	3		3
Eastern Afromontane	9		9
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IV. RESULTS

Results are discussed by category, with a chart (where relevant) presenting the results for each question, followed by grantee observations and recommendations.

1. Application Process

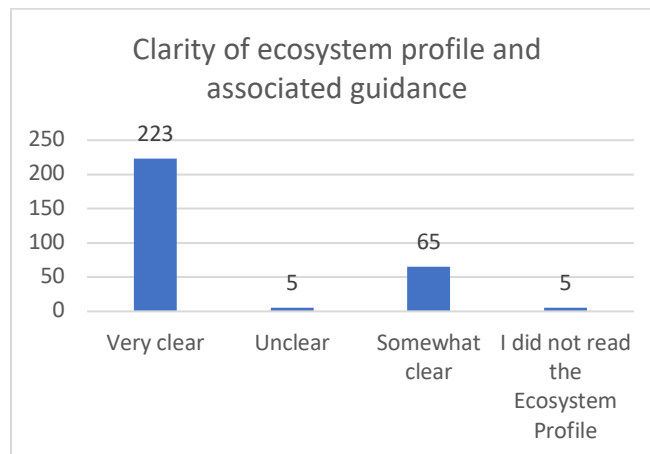
Grantees were asked seven questions in this section of the survey. The questions focused on the application process, covering CEPF’s presentation of information and guidance on the website, financial and programmatic support provided during the application process, and overall efficiency of the process.

In 2019, grantees were satisfied with the material on the website and the quality of support provided by both the Secretariat for large grants and the RIT for small grants. Few responses were received indicating lack of clear guidance or support, and CEPF measured favorably against other donors in terms of time required to receive a grant, and number of steps needed to complete the process. At the same time, grantees observed that the process to prepare proposals was often long and difficult, and that the electronic system had bugs. To this end, CEPF strived to streamline the process by developing a master class to support grantees in project design, and by working to make the application process more user-friendly with better guidance, removal of superfluous questions and clarification of areas of confusion.

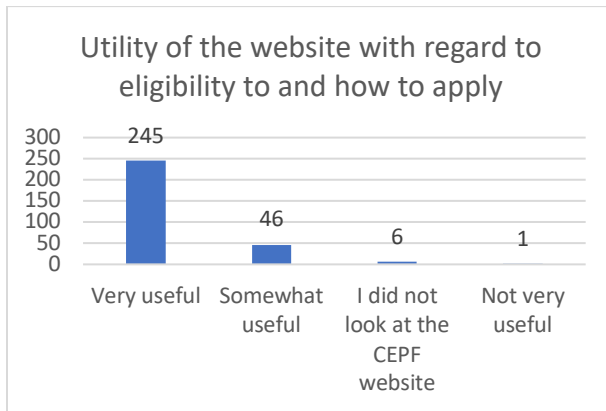
The **2024** results are presented below.

1a. Application process: How clear was the ecosystem profile and any guidance provided about how to use it?

Most respondents reported ecosystem profiles and guidance to be very clear or somewhat clear. Five respondents selecting "unclear" were from Cerrado, noting that since the profile is available in Portuguese, language was not a likely factor. A mix of respondents reported not reading the ecosystem profile.

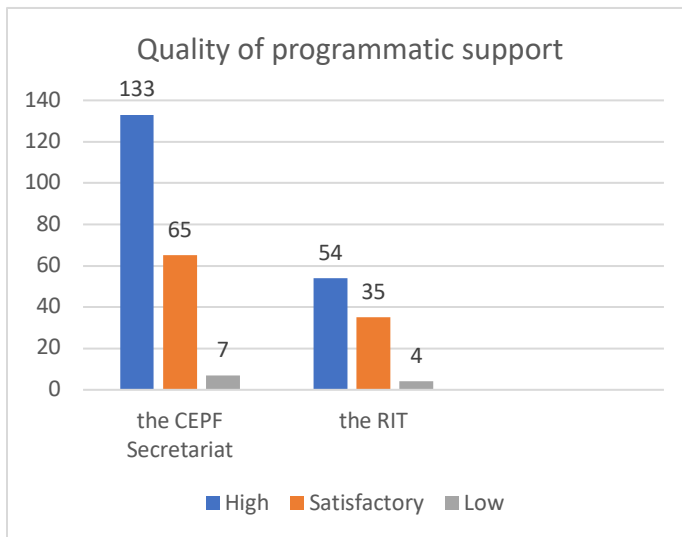


1b. Application process: How would you rate the information on www.cepf.net with regard to eligibility and how to apply for a grant?



Responses to this question were extremely favorable, with only one response from Cerrado indicating the website information was not useful and six respondents indicating they had not looked at the website. Those finding the website somewhat useful came from a range of hotspots.

1c. Application process: How would you rate the quality of programmatic support you received during the proposal design process?

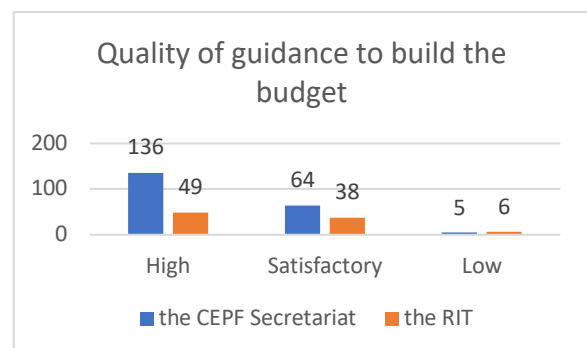


Both the RIT and the Secretariat were rated as providing high quality or satisfactory programmatic support. Numerous staff received positive comments on their competency and helpfulness.

At the same time, grantees were clear that they wanted more support because they found it to be very valuable in terms of understanding the system and understanding CEPF's terminology. It was mentioned that visits to the field would be helpful.

1d. Application process: How would you rate the quality of guidance provided to build your budget?

Both the Secretariat and the RIT received favorable ratings for the quality of support provided to build a budget. No specific comments were received about budget preparation.



1e. Application process: Did you use CEPF's electronic grants system, ConservationGrants, to submit your application?

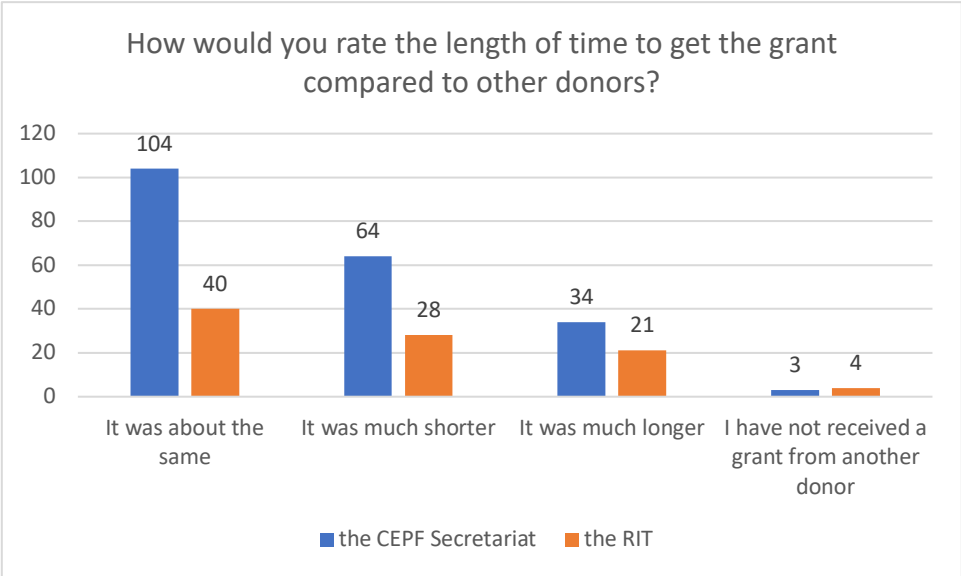
ConservationGrants is primarily used by large-grant recipients. It was used by 220 grantees out of a total of 298 survey responders. Note that some grantees have received both a large and a small grant, which explains why the number of grantees who report using ConservationGrants (220) is larger than the total number of large-grant recipients responding to the survey (205).

1f. Application process: ConservationGrants is only available in English, Spanish, French and Portuguese. How much did this choice of languages, or the lack of other languages, limit your ability to understand the application process?

This question pertained to ConservationGrants, which is only available in four languages. Of the 238 respondents indicating that they used ConservationGrants, 225 said that language was not an issue in understanding the application process. Thirteen grantees reported that ConservationGrants greatly limited or somewhat limited their ability to understand the process. Note that the figures do not correspond exactly with the previous question because eight grantees said that they did not use ConservationGrants in this question, but said that they did in the previous question.

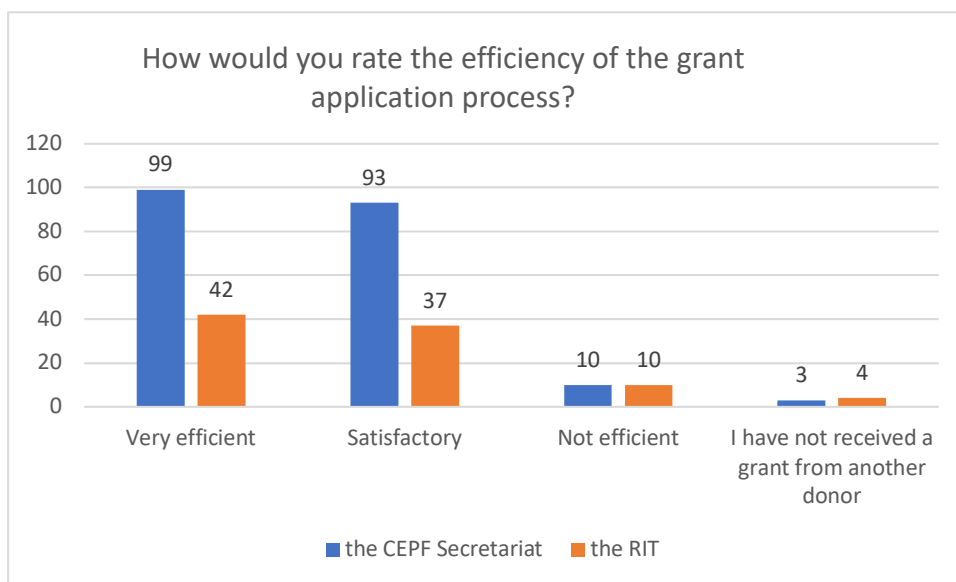
1g. Application process: In comparison with other donors, how would you rate the length of time it took to get your grant?

In general, respondents described CEPF's application system as efficient, although some expressed frustration at the length of the process and the quirks of the electronic system. Some pointed out that the character limit reduced the ability to describe the project, while others felt the process was redundant in places.



1h. Application process: In comparison with other donors, how would you rate the efficiency (number of steps, etc.) of the grant application process?

Most respondents described CEPF’s application process very efficient or satisfactory. Twenty recorded it as being "not efficient", and described it as time-consuming, bureaucratic and confusing. Some cited changing goalposts and the lack of clear timetables. Several noted that it took several years to receive an award, indicating this is far too long for a small amount of money.



1i. Please provide any recommendations for how CEPF can improve its grant application process.

Grantees were asked to provide additional comments and recommendations, and those received are listed below. These comments have been edited for clarity, and duplicate statements have been consolidated. Comments are provided for the reader’s information, in no particular order. Note that some of these observations may have come in prior to CEPF making upgrades to the system or developing the master class for applicants.

Recommendations:

- Provide increased monitoring of administrative and budgetary management.
- Reduce bureaucracy and delays in release of payments.
- For trainings, focus on the needs of each institution and use an analysis of the institution.
- Design capacity-building interventions linked to organizational needs assessment.
- Engage more inter-grantee relationships for learning experiences.
- Conduct a need assessment for grantee organizations so that the capacity building provided will be more appropriate.

2. Administration

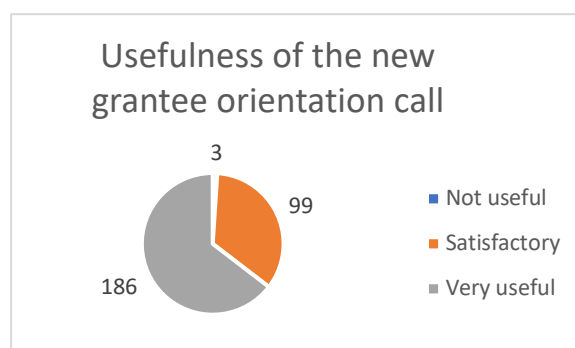
This section included six questions pertaining to the administrative elements of grant implementation such as orientation upon grant approval, guidance on financial reporting, procurement and financial procedures, utility of financial site visits and follow-up.

In 2019, the responses to all questions pointed to high satisfaction with the quality of administrative supervision, with comments pointing to competency of staff and quality of support. Some respondents did note that there was a need for financial training and financial site visits, and that scheduled meetings would be helpful. Grantees also complained about bureaucracy, too much reporting and too few site visits.

Since then, CEPF has strived to conduct regular visits, provide timely feedback, streamline paperwork and processes, and develop better guidance materials. While COVID 19 reduced the ability to hold face-to-face interactions, it provided the stimulus to develop guidance videos and means of virtual supervision.

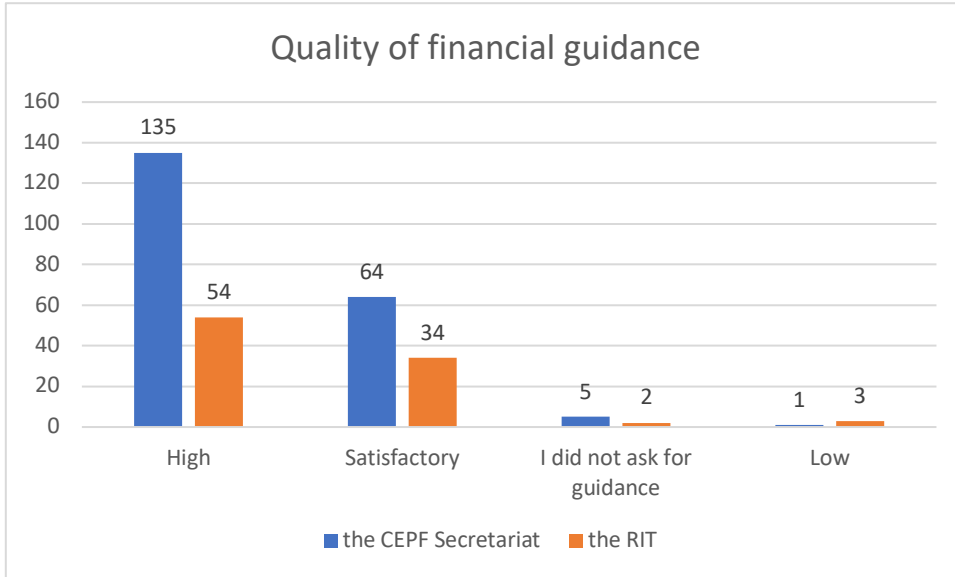
2a. Administration: How would you rate the usefulness of the new grantee orientation call?

The new grantee orientation call is a quarterly conference call that all large grantees are required to attend. The agenda includes introductions to reporting requirements, financial management, procurement, communications and a range of other information on CEPF policies and procedures. Calls are held in English, French, Spanish, Portuguese and Malagasy. A total of 288 of 298 grantees responded to this question, with only three stating that it was not useful; these were from the Topical Andes, Guinean Forests of West Africa and Wallacea.



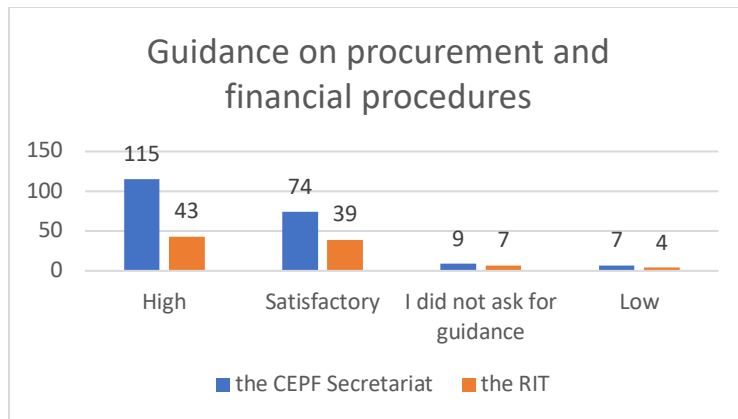
2b. Administration: How would you rate the quality of guidance provided for completing financial and detailed financial transaction reports?

A total of 96% of respondents indicated that the quality of financial guidance was either high or satisfactory. Guidance was much appreciated, and many respondents suggested that follow-up or additional visits would be welcome. Visits that included training were much appreciated.



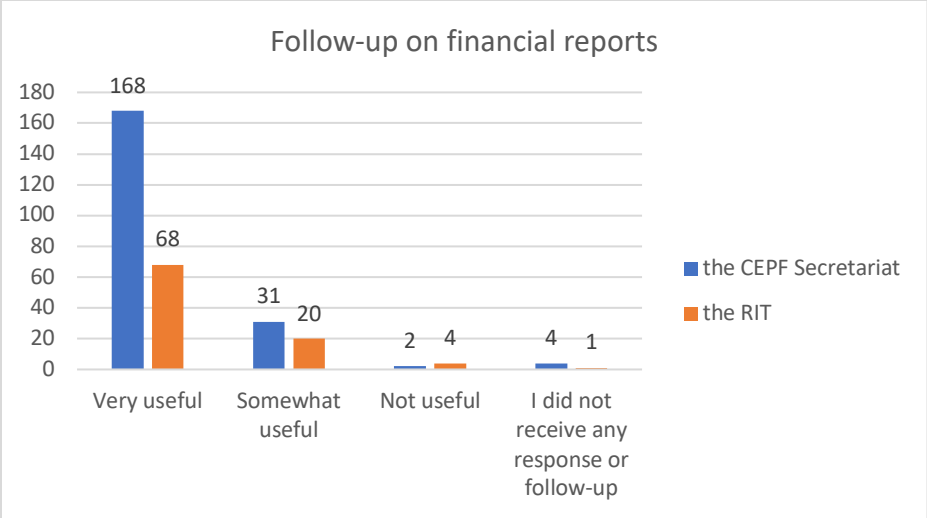
2c. Administration: How would you rate the quality of guidance provided on procurement and other financial procedures?

While 90% of respondents rated guidance on procurement and financial procedures as satisfactory or high, several comments were received about the need for more training in financial management and more frequent visits.



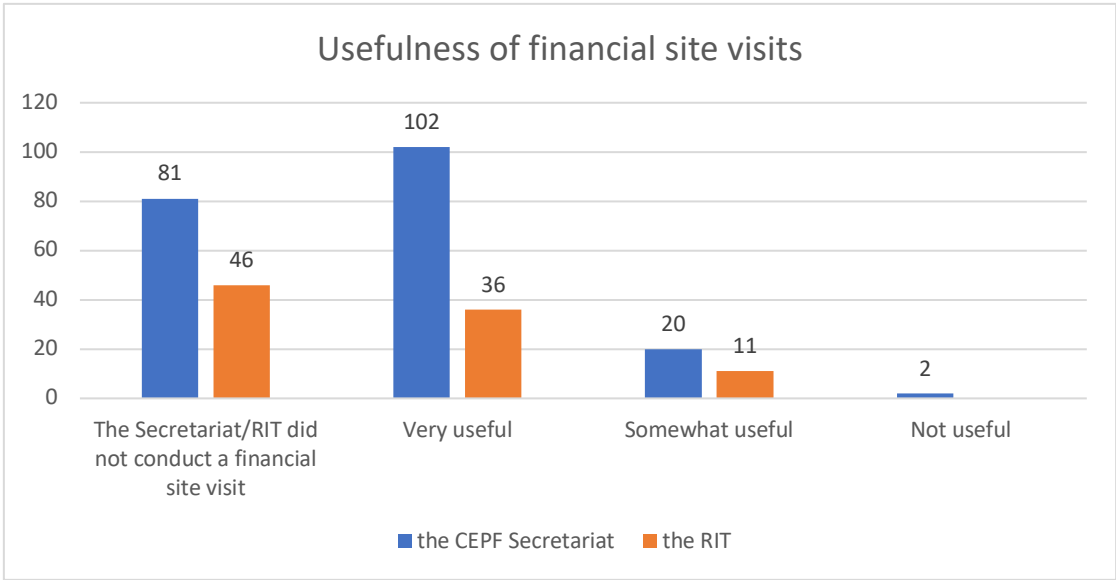
2d. Administration: How would you rate the response and follow-up to the financial reports that you submitted?

The vast majority (96%) of grantees rated follow-up on financial reports as somewhat or very useful.



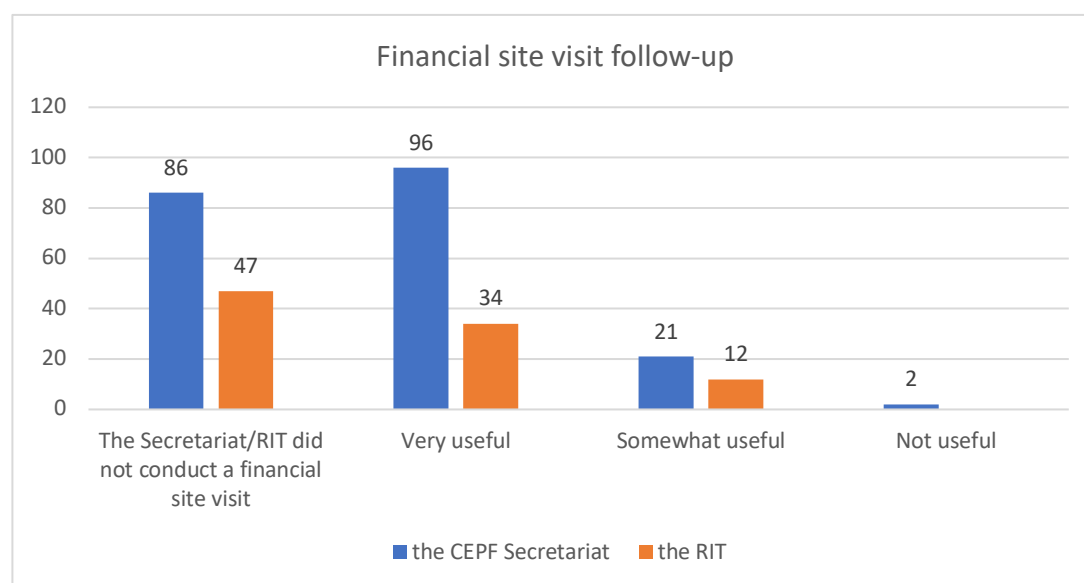
2e. Administration: If your project received a financial site visit, how would you rate the usefulness of the visit?

Site visits, when they took place, were found to be somewhat useful or very useful. In 2019, 31 of 83 respondents (37%) did not receive a financial site visit. In 2024, this figure rose to 42% with 127 grantees reporting that they were not visited, noting that the pandemic surely contributed to this statistic. While several grantees stated that more financial site visits would be welcome, it should be clarified that financial site visits are not scheduled for each and every grantee. CEPF visits a selection of grantees based on risk and amount of allocation.



2f. Administration: If your project received a financial site visit, how would you rate the follow-up that took place?

A total of 133 grantees (44%) reported that they did not receive a financial site visit (surprisingly five more than in the previous question, indicating that perhaps this survey is too long). 163 reported that the follow-up was very useful or somewhat useful. The pandemic was a factor that limited the ability of CEPF and RITs to conduct site visits.



2g. Please provide any recommendations for how CEPF can improve its administrative supervision.

Overall, respondents were satisfied with the financial guidance and site visits. They reported on the high quality of the staff, including their competence and professionalism. Site visits were appreciated, and many grantees voiced support for more frequent visits, including those with an element of training.

Recommendations:

- Additional visits to the project site would be appreciated.
- Increased monitoring of administrative and budgetary management would be helpful.
- At least two visits per year might improve monitoring.
- Visits could be supplemented with regular virtual check-ins, as frequently as every four months.
- Better communication is needed at the beginning of the project on how to do technical and financial reporting.
- The accompaniment of the RIT (for small grants) should be more for training and strengthening, and less for supervision.
- CEPF encouraged the grantees in the same area to collaborate and exchange lessons learned, which was very helpful. This practice should be scaled up across CEPF.

- A financial procedure manual would be helpful.
- It would be useful to have a national coordinator to conduct close monitoring and provide field presence in parallel with project implementation.
- Field visits should include capacity building as an objective, especially in terms of reviewing project progress and helping to correct and improve.
- Establish clear expectations and guidelines for grant recipients.
- Conduct regular internal reviews to identify areas for improvement and ensure accountability.
- Provide clear instructions in local languages.
- Provide clear forms (and samples) that finance staff can understand.
- CEPF/RIT teams should consider how to avoid delays in payment releases, which can hinder the performance of the project team.
- At the contracting stage, there should be a workshop to guide grantees through the bureaucratic operations of foreign exchange, purchases, payments, notes and reports so that processes are understood from start to finish.
- Responses are sometimes slow. Attention should be paid to improving timely responses.
- Improve processes for releasing funds, because funds often arrive very late.
- Hold site visits closer to the start of the project rather than the end.

3. Technical Supervision

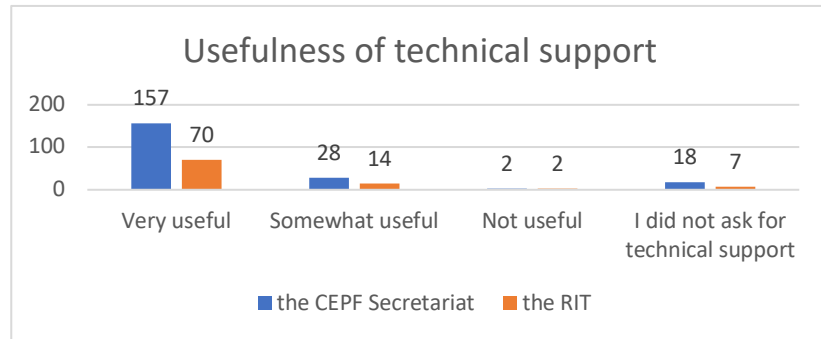
This section covered matters relating to technical supervision, including quality of support, usefulness of programmatic site visits and follow-up, and guidance provided on monitoring and evaluation, gender issues and safeguards.

In 2019, respondents were for the most part positive about technical support, site visits, guidance on technical reporting, monitoring and evaluation, and support for partnerships. But several areas for improvement were mentioned. Specifically, grantees reported that information/training for gender issues and safeguards could be improved. Additionally, while grantees generally found follow-up to site visits to be useful, 10% of grantees reported no follow-up, pointing to an area where CEPF could improve its practices.

Since then, respondents were overwhelmingly positive about the quality of technical support and site visits, with frequent mention of the competence of staff and their invaluable guidance. One area mentioned by several was the need for more support on monitoring and evaluation, particularly with regard to what (which portfolio and global indicators) should be monitored from the start of the project.

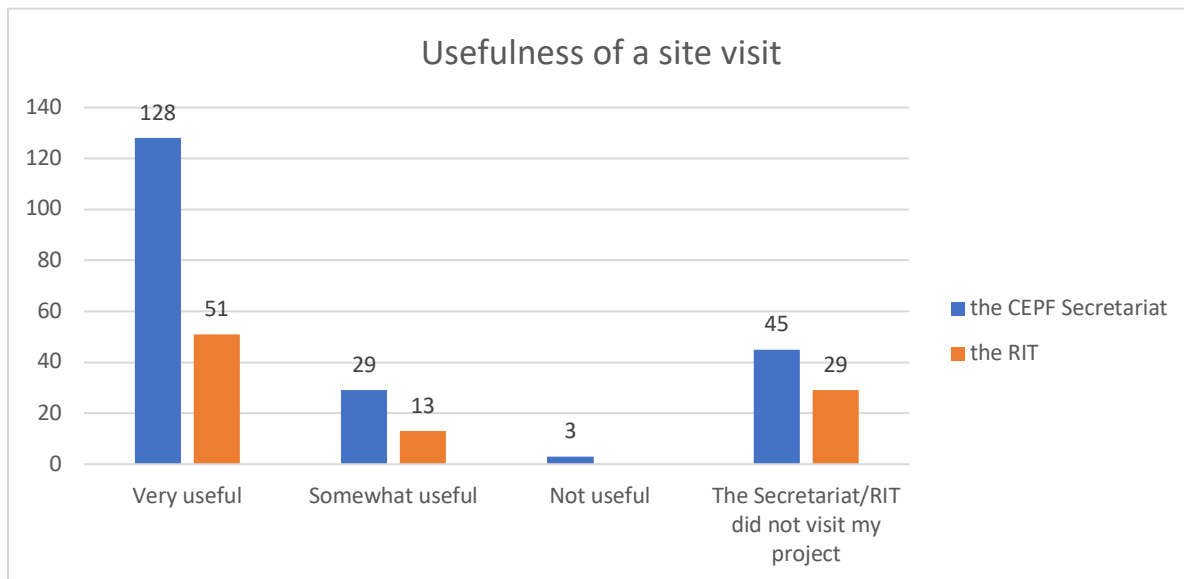
3a. Technical supervision: How would you rate the usefulness of CEPF's technical support during project implementation?

98.5% of survey respondents who either received or requested support praised the technical support they received during their projects but made the point that more is needed. Twenty-five grantees did not ask for technical support.



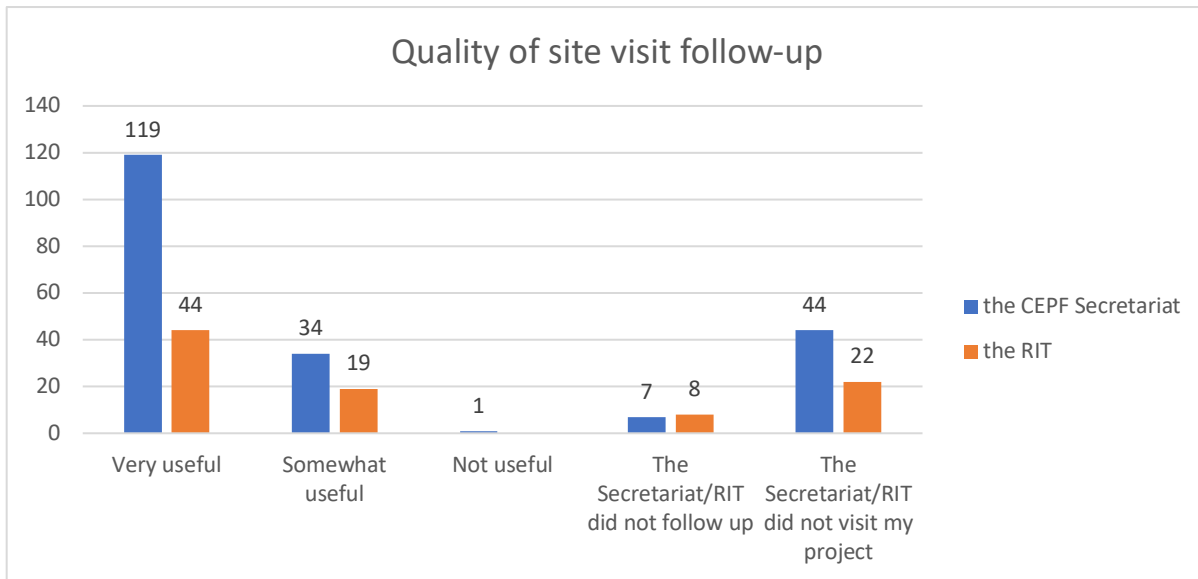
3b. Technical supervision: How would you rate the usefulness of a site visit by the Secretariat or RIT?

As with financial site visits, grantees appreciate programmatic site visits, with 98.5% of grantees who received a visit stating the visits were very useful or somewhat useful. Several comments were received stating that grantees regarded the visits as extremely valuable and helpful. A total of 25% did not receive a programmatic site visit, an improvement over the 2019 results when 31% did not receive a site visit.



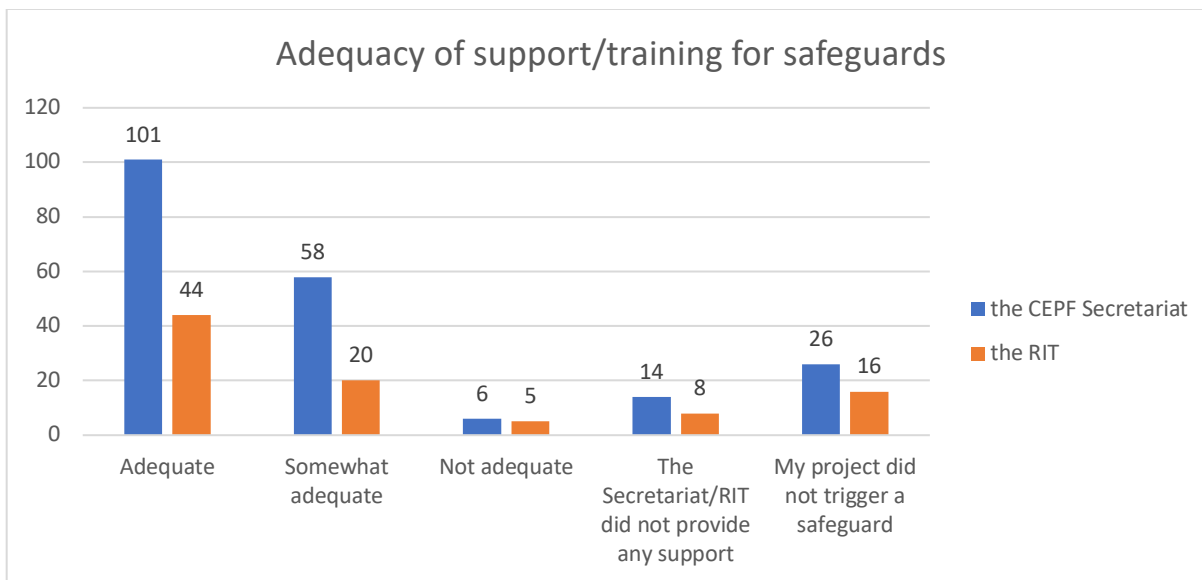
3c. Technical supervision: How would you rate the quality of follow-up after a site visit?

For the most part grantees were satisfied with the level of follow-up from site visits when they occurred, with one reporting the visit was not useful, and 15 (7%) reporting that they received no follow-up.



3d. Technical supervision: How adequate was the support/training provided for environmental and social safeguards?

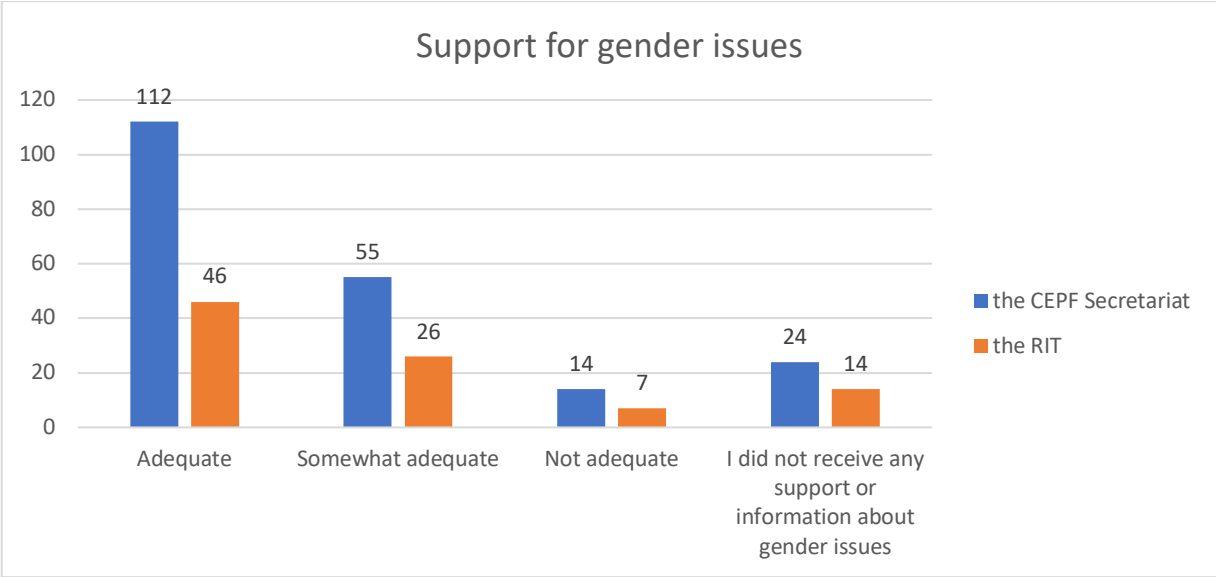
In 2019, respondents were interested in receiving more training on safeguards, leading CEPF to provide more guidance on the topic. As a result, the percentage reporting that support for safeguards was adequate or somewhat adequate rose from 68% to 87%.



3e. Technical supervision: How adequate was the support/information provided for gender issues?

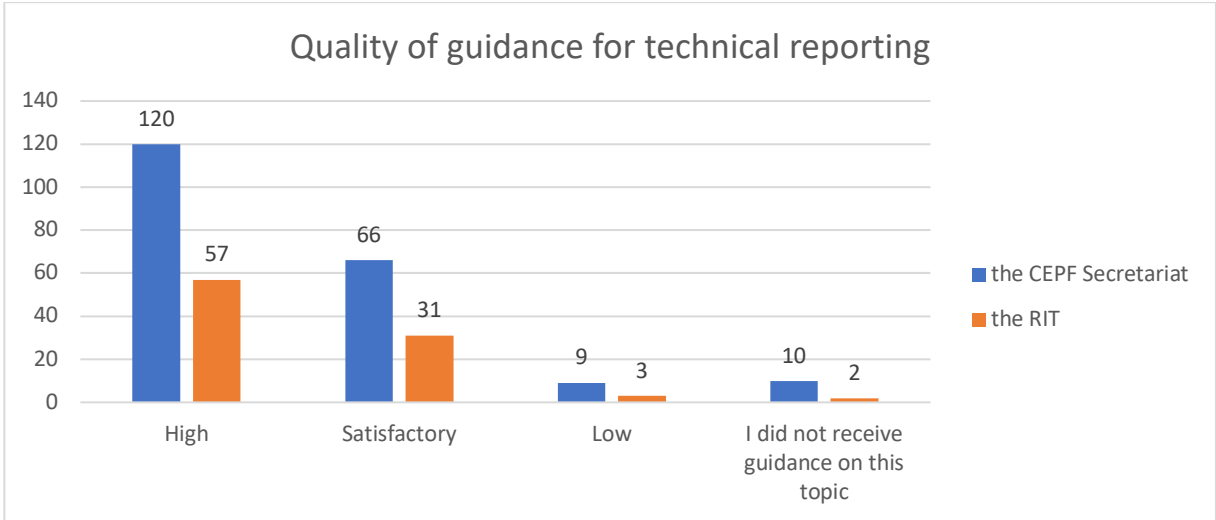
Comments in the 2019 survey revealed varied reviews of support for this topic. In the 2024 survey, 53% of respondents felt the support was adequate, up from 30%. At the same time, 12% said they did not receive any support or information about gender

issues. CEPF has in recent years put a lot of effort into its Gender Toolkit and training of the RITs in gender issues, so while some grantees have benefited from this emphasis, it is clear that more attention needs to be placed on ensuring that grantees know that materials and staff are available on gender issues.



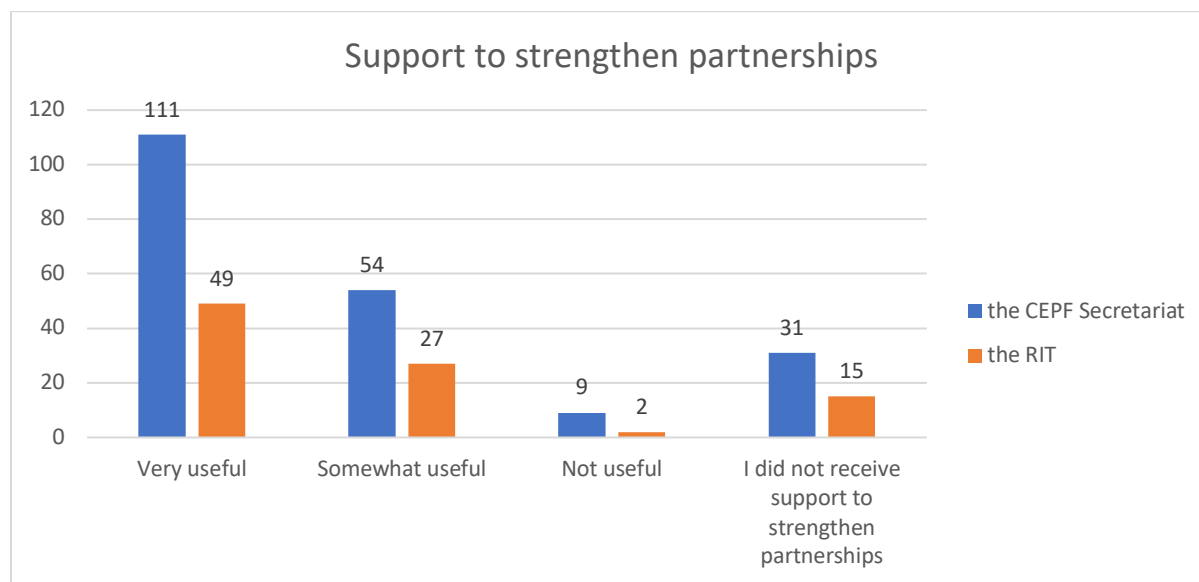
3f. Technical supervision: How would you rate the quality of guidance provided for preparing the project's programmatic reports (including progress reports, technical reports, CSTT, GTT, impact report and final completion report)?

Most respondents (92%) regarded guidance for reporting to be High or Satisfactory, and this was supported by comments stating that the technical support was valuable and high quality, due to the competence of Secretariat and RIT staff.



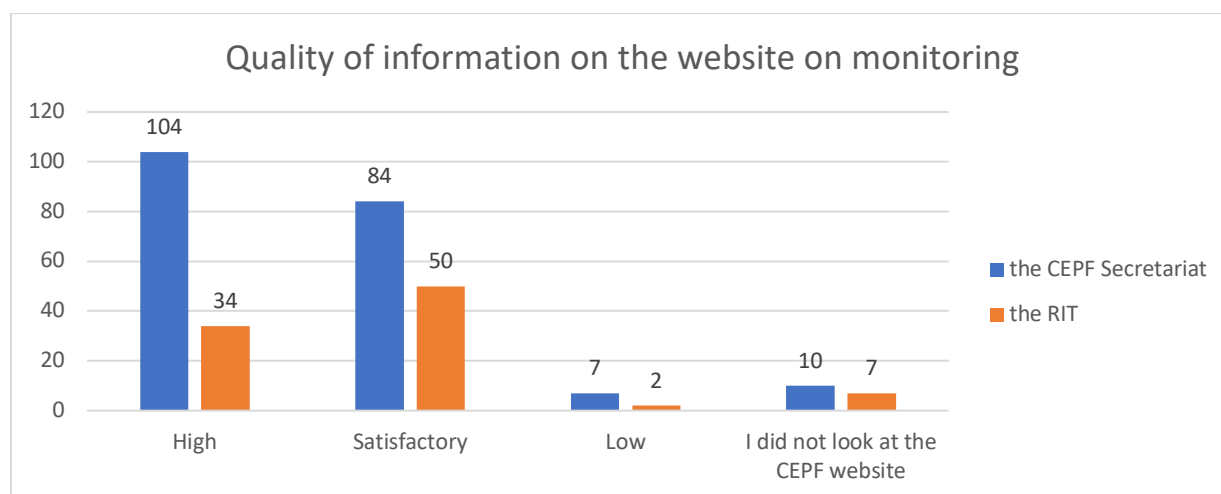
3g. Technical supervision: How would you rate the support you received to strengthen partnerships with other projects doing similar work?

Of those respondents receiving support to strengthen partnerships, 81% reported that it was very useful or somewhat useful. No comments were received specifically related to this topic.



3h. Technical supervision: How would you rate the quality of information on www.cepf.net with regard to impact and monitoring and evaluation?

Of those respondents that did look at the website, 97% found the quality of information to be high or satisfactory. This is not surprising, as much effort has gone into posting relevant documents and templates on the website for all aspects of monitoring and evaluation.



3i. Please provide any recommendations for how CEPF can improve its technical supervision.

Overall, grantees were very pleased with the quality of technical supervision and praised RIT and Secretariat staff on their performance. Several recommendations were provided.

Recommendations:

- Strengthen the space for the exchange of experiences and networks of alliances with other environmental organizations that have been carrying out similar work.
- More interaction with other hotspots and related projects and exchange of knowledge through international meetings (possibly through physical attendance, Zoom or skype) is very important.
- Conduct periodic evaluations of the project in collaboration with the communities and the implementing organization, which can guide where to adjust strategies according to the results obtained and the feedback received to ensure effectiveness and relevance.
- From the beginning of the project, define the impact indicators to which the project applies so that the final report can be more clearly documented.
- Conduct periodic check-in calls with the RIT on project progress.
- Ensure that feedback is always provided to grantees whenever there is a project supervision visit.

4. Capacity Building

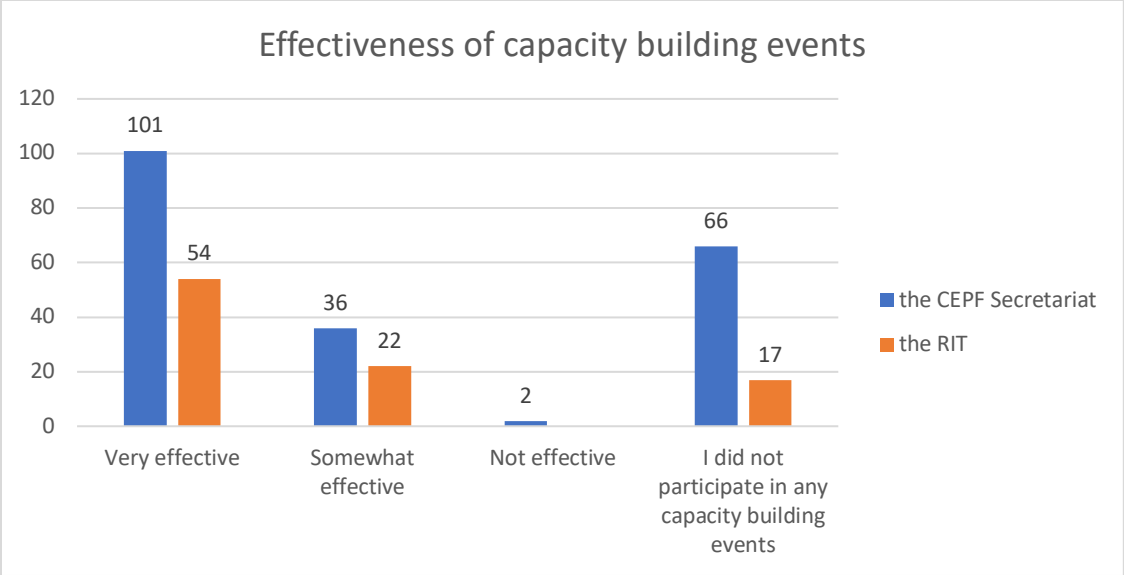
While this question might be perceived as duplicating some other parts of the survey, it is nevertheless valuable to determine number of people receiving capacity building and their general perceptions about its effectiveness.

4a. Capacity building: Did you receive any capacity building or training during your project?

Of the 298 respondents, 200 received some form of capacity building during their project while 98 did not.

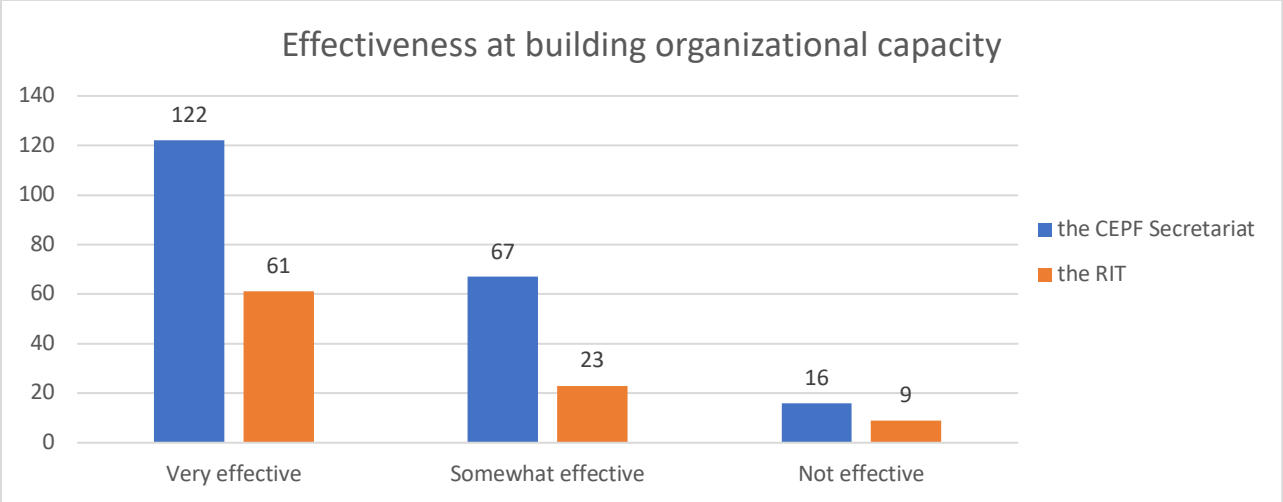
4b. Capacity building: If you participated in any capacity building workshops or events organized by CEPF or the RIT, how would you rate their effectiveness?

Of the 215 respondents who reported to have received some form of training, all except two reported these events to be very effective or somewhat effective. At the same time, suggestions and recommendations about the need for more capacity building events and efforts were numerous.



4c. Capacity building: How would you rate CEPF's efforts to build your organization's capacity?

As mentioned in the previous question, there is a continuing demand for capacity building from CEPF. What is delivered is regarded as effective, but there is always a desire for more.



4d. Please provide any recommendations for how CEPF can improve its capacity building.

Recommendations:

- Capacity building should be done at the start of a project.
- More training is needed for the technical team executing the project.

- CEPF could facilitate networking events, peer learning sessions or collaborative platforms where all CEPF grantees across countries could share lessons learned or experiences.
- For large organizations, the strengthening actions did not apply specifically. Perhaps it would be useful to think about strengthening actions for conservation organizations that are larger and not so local. For small and local organizations, the capacity building is adequate.
- Increase the number and frequency of training events, and dedicate more sessions to environmental and social safeguards, gender and impacts evaluation.
- Prioritize more capacity building related to organizational development (internal structures).
- Provide regular training and professional development opportunities for staff and grant recipients.
- Build partnerships with other organizations and institutions to share knowledge and resources.
- Encourage staff and grant recipients to participate in relevant conferences, workshops and other events to stay up to date on best practices and emerging trends.
- Implement mentorship and coaching programs for staff and grant recipients.
- Offer tailored technical assistance and support to help organizations overcome specific capacity challenges.
- Encourage knowledge sharing and networking opportunities among staff, grant recipients and partners.
- Assess organizational performance (strengths and weaknesses).
- Identify areas for organizational capacity building.
- Focus on ways to collaborate with other related projects earlier on in the project cycle.
- Intensive communication with the grantee and follow-up is needed.

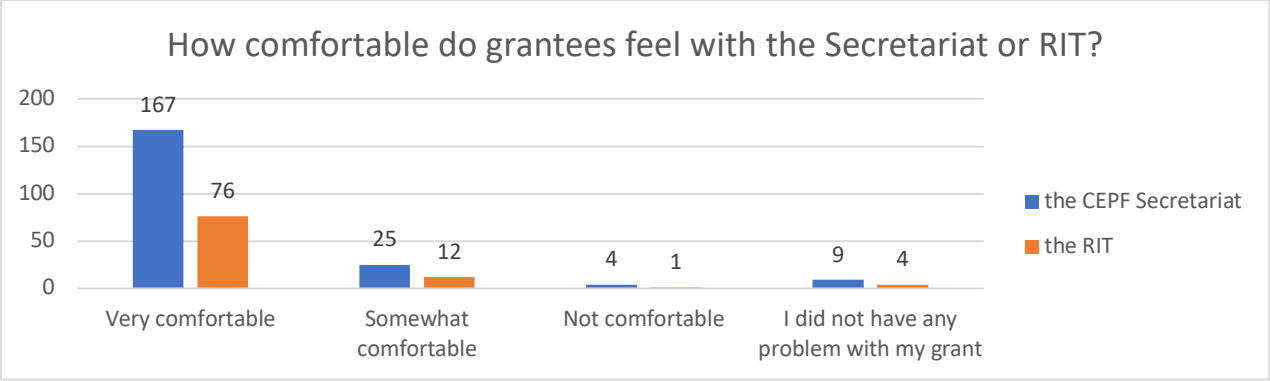
5. Donor-Grantee Relationship

This final section of the survey covered six questions pertaining to grantee comfort level in approaching CEPF about problems, responsiveness and consistency in the messaging, amount of time required to report to donors, impact of any changes in CEPF staffing, and support for communications activities.

Grantees report feeling very comfortable in talking to CEPF and regard CEPF as being responsive and consistent. Interaction about communications is rated as satisfactory. Overall, grantees praise CEPF for the quality of support and staff.

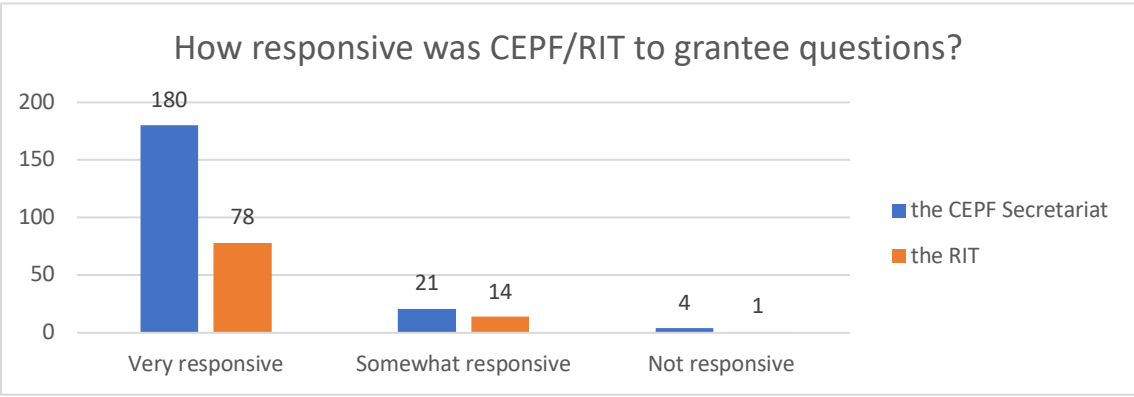
5a. Donor-grantee relationship: How comfortable did you feel approaching CEPF or the RIT if you had a problem with your grant?

Most grantees (94%) report having a good relationship with the Secretariat and RIT. Staff are praised for being available and competent.



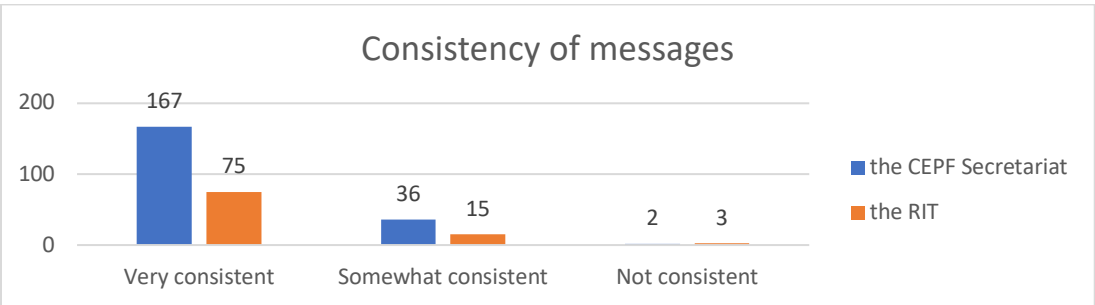
b. Donor-grantee relationship: Overall, how responsive was CEPF or the RIT to your questions and requests?

As the graph suggests, both the Secretariat and the RITs are very responsive to the needs of grantees.



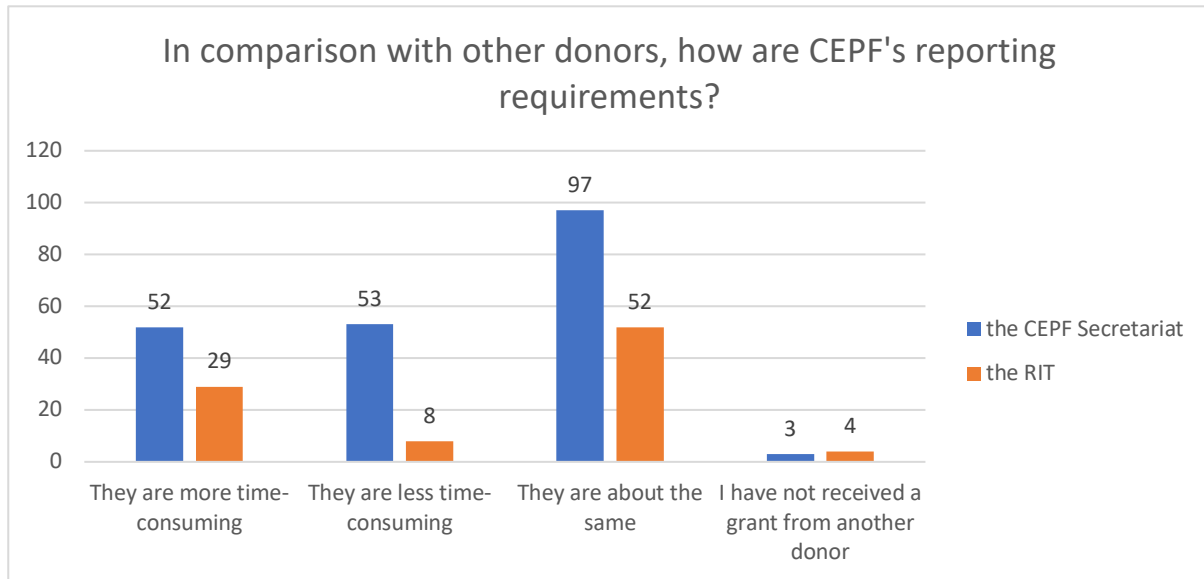
5c. Donor-grantee relationship: How would you rate the consistency of the information and messages that you received?

98% of grantees described the consistency of messaging to be very consistent or somewhat consistent.



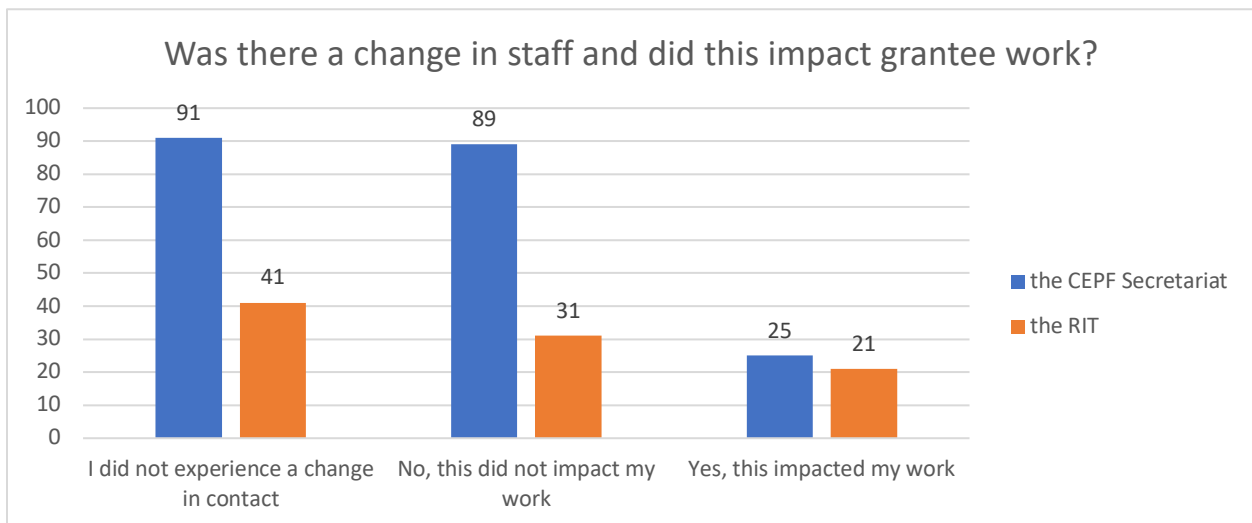
5d. Donor-grantee relationship: In comparison with other donors, how would you rate CEPF's reporting requirements?

Of the respondents who had received a grant from another donor, 72% reported CEPF's reporting requirements to be less time-consuming or about the same as other donors.



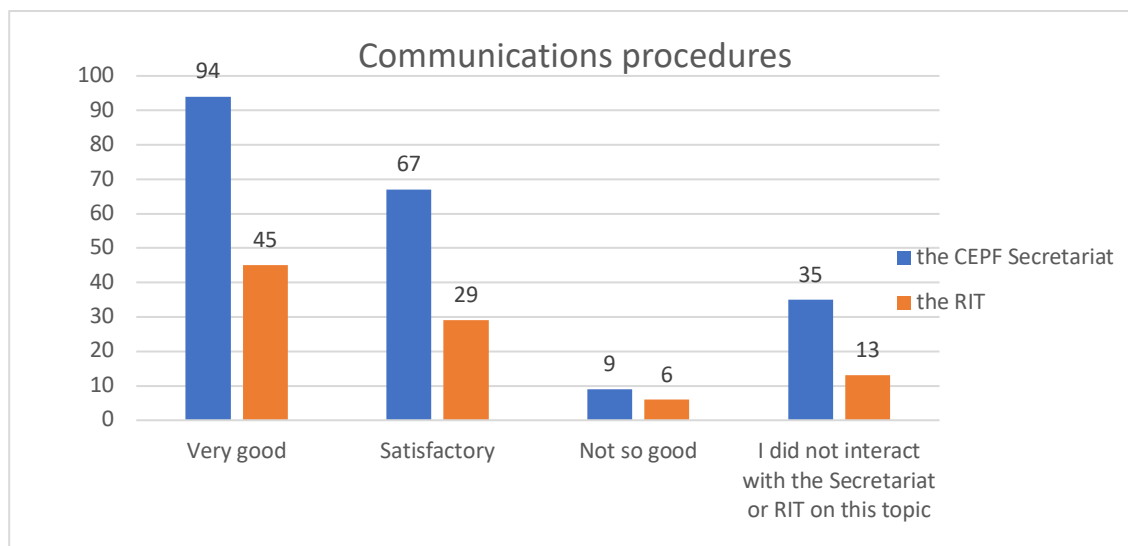
5e. Donor-grantee relationship: Did you experience a change in the CEPF or RIT staff that you worked with, and did this impact your work?

A total of 166 grantees reported experiencing a change in Secretariat or RIT staffing during their project, with 46 stating this impacted their work. Several comments were received pointing to the need for consistency in supervisory staff, and indicating that a change in staff led to divergent guidance that caused delays and confusion.



5f. Donor-grantee relationship: How would you rate your relationship with the Secretariat or RIT in terms of providing inputs for the CEPF newsletter or social media stories, or receiving support for your own communications activities?

Most grantees (78%) report their interaction on this topic to be very good or satisfactory. Many grantees had something to say about communications with the takeaway being that CEPF could improve its procedures by having better contact and follow-up with grantees about their projects.



5g. Please provide any recommendations for how CEPF can improve its donor-grantee relationships.

Grantees were asked to provide additional comments and recommendations, and these are listed below.

Recommendations:

- CEPF is a donor that works very closely with the implementers, which is very remarkable.
- It is better to have regular meetings between donors and grantees to get an overview of the conditions of grantees and also convey new policies/regulations from donors.
- Our experience with CEPF was positive, but it is one of our most rigid and inflexible funders. The application and reporting processes require too much detail.
- Consideration and flexibility in dealing with unforeseen major or key activities and the related financial resources of the project or certain projects.
- Create more opportunities for exchange with the beneficiary and don't wait for reporting periods to ask for discussions.

- To improve relations between us, we need to create a more efficient synergy of action for the common cause of combating global warming and support beneficiaries through capacity building.
- Responsiveness was excellent. Sites visit have helped us to build interaction and made us comfortable in approaching the Secretariat.
- Promoting and sharing more often social media posts on CEPF social media accounts regarding certain activities the grantee is implementing
- The person in charge of communications has too much work and is not able to respond to all the members, all the requests.
- The RIT should agree internally on the content of the topics and other issues, because sometimes we hear different versions.
- Interaction between donor and beneficiary was good during this project. In terms of communication, perhaps it would be useful, where possible, for a local CEPF representative to be present at communication events likely to promote the project and its protagonists, including the donor.
- We believe that donor-beneficiary relationships have taken place within the framework of transparency and clear communication, participation and consultation, respect for autonomy, long-term commitment, evaluation and shared learning within a given cultural context. We encourage them to continue to expand these inclusive forms of communication and work.

6. Additional Grantee Comments

The following two questions capture the general perception of survey respondents on their experience as a CEPF grantee. While CEPF receives a high score, grantees have plenty to say about their experience and what they would like to see in the way of changes and improvements.

6a. How would you rate your overall experience as a CEPF grantee?

On a scale of 1 to 7, with 1 being extremely negative and 7 being extremely positive, CEPF received an average score of 6.5.

6b. Is there anything else that you would like to tell CEPF about your experience as a grantee?

- We are "old" CSO and have extensive experience working with other donors. CEPF is the best donor that we have ever work with. We wish that other donors adopt CEPF's way of working with grantees (in terms of administrative, procedural and technical support).
- We have experience with plenty of different donors in the last 18 years. So far, CEPF is among the top three with whom we had minimum administration and communication issues. This is so important for our organization since we prefer to focus the energy on final deliverables and the sustainability effect of the project.
- CEPF is a donor that has been paying attention to socio-ecological aspects where ecosystem/species conservation programs have also paid attention to sustainable livelihoods for communities that depend on natural resources (coastal/marine). The next stage, if there is still an opportunity to receive further

grants, is "scaling up" the program that has been carried out previously, including replication to locations around the pilot area.

- The online grant application and reporting platform is very helpful and you should develop it further.
- We appreciate the fact that CEPF feels both like a partner and a donor, that CEPF is highly responsive to any questions we have and that CEPF is reasonably flexible and supportive when we need to request adjustments to the project plan. It has been a very positive experience.
- We have benefited from this experience by working on new procedures that strengthen our skills and, above all, our organization.
- CEPF should look at how other donors like PPI, GEF Small Grants, and other donors have simplified their grant process and learn from it. Their report review, grant release, communication is done just within less than a week.
- The rigor of the CEPF grant application process and reporting has built our capacity and skills. What we have learnt from CEPF has been applied to other grants and projects. CEPF have made a tremendous difference in our output as an organization, not just due to their support, but empowering us to build capacity internally in our organization.

V. CONCLUSION

This survey presents 298 responses from 12 hotspots over a four-year period. It provides insights and advice that CEPF will take on board to improve its operations. Notably, grantees are in general extremely positive about the CEPF experience, and at the same time candid in providing recommendations for the future.