

Key Findings and Recommendations from Tull Charitable Foundation's 2023 Grantee Perception Report and Grantee Interviews

Prepared by the Center for Effective Philanthropy

In May and June 2023, the Center for Effective Philanthropy conducted a survey of Tull Charitable Foundation (“Tull” or “the Foundation”) grantees, achieving a 78 percent response rate (70 grantee respondents). During August 2023, CEP conducted interviews of 10 Tull grantees with a set of customized questions to hear about grantees’ experiences in further detail.

This memo outlines CEP’s summary of strengths, opportunities, and recommendations for this Grantee Perception Report (GPR) and set of supplementary interviews. Grantee perceptions should be interpreted in light of the Foundation’s goals, strategy, and context.

The Center for Effective Philanthropy is pleased to share the results of Tull Charitable Foundation’s first Grantee Perception Report. On a majority of dimensions, the Foundation is rated higher than most other funders in CEP’s dataset. Grantee feedback highlights Tull’s exemplary impact on grantees’ communities, as well as the Foundation’s thorough understanding of its grantees, their communities, and the contextual factors that affect their work.

Grantees are extremely complimentary about how they experience relationship building and grant processes with the Foundation. In particular, Tull’s staff are highlighted as a strength, with grantees overwhelmingly expressing gratitude for the quality of their interactions with the Foundation in their survey comments and interviews, describing staff as “completely approachable, knowledgeable, and helpful,” “kind and engaging,” and “genuinely interested in our success.”

When prompted for ways the Foundation could further build on its impact, grantees provide suggestions related to Tull’s grantmaking characteristics, capacity building support, and the Foundation’s broader communication about its work and priorities, including Tull’s DEI efforts.

Exceptional Impact on and Understanding of Grantees’ Communities

- ▶ Tull Charitable Foundation’s grantees provide ratings in the top ten percent of funders in CEP’s overall dataset – and higher than the median funder in its custom cohort – for its impact on and understanding of grantees’ local communities.
- ▶ In written survey comments and in interviews, grantees highlight the Foundation’s focus on making a difference in the greater Atlanta area and its reputation as “one of the best funders in the region,” sharing that Tull is a “strong community partner,” “well-regarded in the Atlanta community,” “a philanthropic leader,” and “a significant player in Atlanta philanthropy.”



“Tull is very active throughout the Atlanta community and has been for many years. My perception is that they are very aware of the broad range of needs throughout the community.”



“The Tull Foundation is a thought leader in Metro Atlanta and many other foundations look to them to guide their respective grant making decisions.”

Positive Perceptions of Understanding Grantees, Potential for Even Further Impact on Grantees’ Organizations

- ▶ On every measure related to Tull’s understanding of grantees’ organizations and their contexts, grantees’ perceptions are more positive than at the typical funder. Ratings are in the top ten percent of CEP’s dataset and at the top of the Foundation’s custom cohort for how well Tull understands grantee organizations’ strategies and goals.
 - Grantees also provide ratings in the top 20 percent of the overall dataset for how well Tull understands the social, cultural, or socioeconomic factors that affect grantees work and how well Tull understands the needs of those whom grantees serve.
- ▶ This understanding is reflected in grantees’ written comments, as they share that the Foundation “took the time to visit our community and to speak directly to the [people] we serve,” and “asks thoughtful questions and engages in meaningful discussion to learn about the strengths of each organization and how connections can be made in the community.”

Considerations for Further Impact: Grantmaking Characteristics and Capacity Building Support

- ▶ For the Foundation’s perceived impact on grantees’ organizations, grantees’ ratings are in line with the typical funder in both CEP’s overall dataset and Tull’s custom cohort.
- ▶ CEP’s broader research shows that grant characteristics – specifically size, length, and whether the grant was restricted – are often meaningful predictors of grantees’ perceptions of impact.
- ▶ Tull grantees report a median grant size of \$100K – comparable to that of the typical funder in CEP’s dataset. The Foundation awards a lower proportion of multi-year grants (20 percent) and unrestricted grants (four percent) than most funders in the overall dataset (54 and 22 percent at the median funder, respectively).
- ▶ In a custom survey question that asks grantees to identify the two most important grant characteristics that would help their organization achieve even greater impact, 77 percent of respondents select the grant amount, and 72 percent select the type of grant they received (e.g., capital, general operating, program, capacity building).
 - To this end, over half of grantees’ written suggestions for improvement request Tull consider modifying grant characteristics, with the majority these comments specifically asking for unrestricted or general operating support. In interviews, grantees – while recognizing the more narrowly-defined parameters of the Foundation’s funding strategy – also highlight general operating support as an important need for their organizations, particularly in the current operating environment.

- ▶ Less than a third of grantees report receiving at least one form of non-monetary assistance from Tull – a lower proportion than at the average funder. In survey comments and interviews, grantees express an appetite for capacity building support. Many of these grantees specifically share how critical the challenge of staffing is (i.e., hiring, retention, and compensation, especially in light of the prevalence of staff burnout in recent years).
 - Other forms of non-monetary assistance commonly requested by Tull grantees include professional development for grantees’ staff and strategic planning support.



“Building capacity with our staff requires offering competitive salaries, new training opportunities and compensation to retain our current talent. In addition, the cost to operate our programs continues to increase each year. It would greatly assist our organization to have the opportunity to request general operating support from the Foundation.”

Helpful, Clear Grant Processes and Stellar Perceptions of Relationships

- ▶ Overall, grantees’ perceptions are more positive than most funders for measures related to Tull’s grant application/LOI process and reporting process. Notably, grantees’ ratings are at the top of Tull’s custom cohort and in the top 10 percent of funders overall for the helpfulness of the grant application process. Tull is also the *highest rated funder* overall – setting a new maximum in CEP’s dataset at the 100th percentile – for the Foundation’s clarity and transparency about the grant application process requirements and timelines.
 - Grantee ratings place Tull within the top six percent of funders for how straightforward, relevant, and adaptable they find the reporting process.
 - Grantees report spending a median of 12 hours on Tull process requirements over the grant lifetime, making Tull the funder with the most streamlined processes in its custom cohort and more streamlined than over 90 percent of funders in CEP’s full dataset.
- ▶ Most grantees (81 percent) report that they interact with Tull staff once every few months, with site visits in particular appearing to be strongly associated with positive perceptions. The nearly two-thirds of grantees (a higher than typical proportion) who report a site visit from Tull provide significantly higher ratings for a few key measures in the report, including Tull’s understanding of their organizations’ goals and strategies, grantees’ understanding of how their funded work fits into Tull’s broader efforts, and the helpfulness of the grant application process.
 - In both grantees’ written survey comments and grantee interviews, the value of site visits as part of the application process was discussed, as grantees explain that “the ED gave us very good advice on our request,” and that “the site visit was essential and allowed us to discuss our organization beyond what is contained in an application.”
- ▶ On nearly every measure in the survey related to grantees’ relationships with the Foundation, grantees’ perceptions place Tull in the top 20 percent of CEP’s overall dataset and higher than the median funder in its custom cohort. This includes grantees’ ratings for Foundation staff responsiveness, grantees’ comfort approaching Tull if a problem arises, and the degree to which the Foundation exhibits trust, candor, respect, and compassion.
- ▶ While Tull is rated higher than all but 15 percent of funders for the clarity of its communications, grantee ratings are in line with the typical funder for how well grantees understand how their own

work fits into Tull’s broader efforts. And in interviews, some grantees struggled to respond when asked to identify specific focus areas of the Foundation (outside of Tull’s regional focus on Atlanta and capital projects). In fact, a handful of grantees mentioned looking at the Foundation’s website before the interview and seeing Tull’s funding priorities for the first time. However, grantees noted that ambiguity can be helpful, since more precise focus areas might exclude their organizations from being eligible for funding because of their “niche” fields of work.



“It was a very genuine process and [Tull staff] asked very intentional questions to learn more about our work. Communication was frequent, and I was very aware of both the requirements and what was needed for my organization to be viewed competitively.”



“The processes are straight-forward, reasonable, and sensible. All of our interactions with staff members have been pleasant and professional. We’re impressed with how much Foundation staff members know about us and how they ask very thoughtful and engaging questions. They seem to be very supportive and understanding of our work and the challenges we face. Communication has always been thorough and consistent.”

Positive Feedback Related to DEI Efforts, Potential for More Communication with Grantees About This Work

- ▶ In relation to its equity efforts, the Foundation is regarded highly by grantees. Survey respondents overwhelmingly agree (rating above a 6 out of 7) with a series of custom statements based on the Foundation’s stated funding priorities of working in under-resourced communities; providing services and support to historically marginalized populations; advocating for under-served populations; promoting racial equity; and building community assets that strengthen civic infrastructure. In the words of one grantee: “Work with underserved and at-risk communities is highly valued and supported by the Foundation.”
- ▶ Nearly all of Tull grantees (94 percent – a higher than typical proportion) report that their grant funded efforts are meant to benefit historically disadvantaged groups.
- ▶ When analyzing grantee responses by demographic characteristics, ratings from respondents who identify as a person of color are significantly higher than those who do not identify as a person of color for a few key measures, including Tull’s awareness of grantees’ challenges and the helpfulness of the grant application and reporting processes.¹
- ▶ In a custom question, grantees provide very positive ratings for the Foundation’s accessibility to applicants (an average rating of 6.22).
- ▶ In interviews, when asked about how to make the Foundation’s communications and application process and requirements more equitable, grantees were unable to provide any substantive suggestions, instead highlighting how equity-centered these areas already are.
- ▶ Still, a few data points suggest a potential opportunity area as it relates to the Foundation’s communication and demonstration of its equity efforts:

¹ CEP always analyzes results by respondent demographic characteristics to understand differences in experiences. For more detail on differences by demographic characteristics, please refer to the online report.

- While still positive and similar to the typical funder, grantees provide some of Tull’s lowest comparative ratings for their agreement that the Foundation and its staff are committed to racial equity and combatting racism, and that the Foundation has clearly communicated what its racial equity commitment means for its work.
- When asked about Tull’s communications regarding DEI, respondents most often report that this communication happens as it relates to grantees: grantee organizations’ staff and board (64 percent) and grantees’ programmatic work (78 percent). They less frequently indicate that Tull has communicated how DEI relates to the *Foundation’s* own programmatic work (59 percent) or the *Foundation’s* staff and board (37 percent).
- A few grantees expressed in their interviews not being familiar with the Foundation’s equity-focused efforts, while others were aware it was an emerging priority for the Foundation, but wanted to learn more about how DEI would be integrated in Tull’s work with grantees and the larger community.
- A handful of grantees gave suggestions for where Tull could focus its attention in its DEI work, including DEI-specific capacity building for grantees and greater access to Tull funding for smaller, more grassroots organizations.
 - ◆ In conversations with CEP, several grantees shared that they felt the need to reach a certain maturity level as an organization before being “ready” to apply for funding from Tull.
 - ◆ Notably, less than 20 percent of survey respondents reported an organizational budget size of less than \$1.5M, and for these grantees their Tull grant makes up more of their budget – 12 percent at the median compared to three percent or less for larger Tull grantees.

CEP Recommendations

Based on this grantee feedback, CEP recommends the Tull Charitable Foundation consider the following in order to build on its strengths and address potential areas for improvement:

- ▶ Celebrate the Foundation’s outstanding ratings for its impact on and understanding of the Atlanta community, and the positive perceptions of Tull’s understanding of grantee organizations and their contexts. Consider which aspects of Tull’s values, behaviors, and approaches have contributed to these strong perceptions and reinforce these strengths over time.
- ▶ Identify and maintain aspects of the grant application/LOI and reporting processes that are helpful to grantees and continue transparent communication about process requirements, timelines, and funding criteria.
- ▶ Despite its relatively small staff size, work to codify individual behaviors and practices that may be contributing to grantees’ exceptionally strong perceptions of staff and their relationships with the Foundation.

- ▶ Where there is alignment with Tull’s strategic priorities, consider grantee ideas for expanding the Foundation’s impact.
 - The types of grants and support provided to grantees:
 - ◆ Award larger and longer grants, as well as more general operating support and/or more program grants; or
 - ◆ Approximate the experience of general operating support through less restrictive funding; and
 - ◆ Offer even more capacity building support beyond the grant check that is suited to grantees’ needs.
 - Communication with grantees:
 - ◆ Provide grantees with a clearer picture of Tull’s broader efforts and how their funded work fits into the Foundation’s funding priorities.
 - ◆ Clarify how the Foundation’s commitment to diversity, equity, and inclusion is integrated into different aspects of Tull’s work, and what that means for grantees regarding funding opportunities or other types of support they might access through these efforts.