



Key Findings and Recommendations from Trinity Church Wall Street Philanthropies' 2022 Grantee Perception Report

Prepared by the Center for Effective Philanthropy

In February and March of 2022, the Center for Effective Philanthropy (CEP) conducted a survey of Trinity Church Wall Street Philanthropies ("Trinity") grantees, achieving a 70 percent response rate. The memo below outlines CEP's summary of key strengths, opportunities, and recommendations from Trinity's Grantee Perception Report ("GPR"). Trinity's grantee perceptions should be interpreted in light of its goals and strategy.

This memo accompanies the comprehensive survey results found in Trinity's interactive online report at <https://cep.surveymresults.org> and in the downloadable online materials. Trinity's full report also contains more information about survey analysis and methodology.

Throughout this summary, Trinity's ratings are defined as higher than typical when it is rated above the 65th percentile in CEP's comparative dataset, lower than typical when it is rated below the 35th 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 0.1.

Overview

The Center for Effective Philanthropy is pleased to share the results of Trinity Church Wall Street Philanthropies' first survey of its grantees.

- ▶ Grantees perceive Trinity to have a positive impact on their fields, communities, and organizations. They also report strong funder-grantee relationships, applauding Trinity as "a wonderful partner," "a respected thought leader in our field," and "a responsive, honest, and community-centered funder."
- ▶ Grantees' ratings and written comments indicate some opportunities for Trinity to reflect on their capacity to provide more support beyond the grant, provide a larger proportion of flexible and multi-year grants, and revisit the structure of their application, reporting, and evaluation processes.
- ▶ As you review these findings, it is important to interpret them in light of Trinity Church Wall Street Philanthropies' own goals, context, and strategy.

Positive Perceptions of Field and Community Impact

- ▶ Grantee ratings place Trinity Church Wall Street Philanthropies in the top 30 percent of funders in CEP's dataset for their perceptions of Trinity's impact on and understanding of their fields. Grantees

also provide higher than typical ratings for their perceptions of Trinity’s impact on their local communities.

- In addition, Trinity grantees provide ratings that place it in the top 10 percent of funders for the extent to which its funding priorities reflect a deep understanding of the needs of the people and communities that grantees serve.
 - In their written comments, grantees describe Trinity as a “leader in the field” that “actively [engages] in events, conversations, and various forms of support.” As one grantee writes, “Trinity is outside in the rain and snow advocating with us.”
- ▶ Grantees also recognize Trinity Church Wall Street Philanthropies’ commitment to diversity, equity, and inclusion (DEI), providing consistently positive perceptions related to its work. In particular, grantees provide ratings that place Trinity in the top 15 percent of CEP’s dataset for their agreement that Trinity demonstrates an explicit commitment DEI in its work, that Trinity is committed to combatting racism, and that Trinity staff embody a strong commitment to DEI.
 - ▶ Trinity grantees indicate that its grantmaking strongly aligns with its core values. In particular, grantees indicate that Trinity acts with integrity, actively works to advance social justice, and reflects the beliefs and values of The Episcopal Church to a great extent.
 - In a custom question about perceived impact, 64 percent of grantees report that Trinity’s role as a church positively affects their perception of Trinity’s impact.



“Trinity has significantly elevated homelessness as a crisis [which] philanthropy should be focused on and has also advanced the sector’s understanding that housing and homelessness at heart are issues of racial equity.”



“The partnership with Trinity has allowed my community to dare to plan and dream of self-sustainability. Trinity has brought hope to small communities, as it supports institutional strengthening actions as well as social projects!”

High Quality Relationships with Grantees

- ▶ Strong funder-grantee relationships – including clear, consistent communications and high-quality interactions – are a key predictor of grantees’ perceptions of a funder’s impact on their organizations, fields, and local communities.
- ▶ Grantees provide ratings that place Trinity Church Wall Street Philanthropies in the top 15 percent of funders in CEP’s comparative dataset for Trinity’s overall transparency, how clearly Trinity communicates its goals and strategies, and for grantees’ understanding of how their funded work fits into Trinity’s broader efforts.
- ▶ Additionally, grantees experience high quality interactions with Trinity Church Wall Street Philanthropies. Grantee ratings place Trinity in the top 20 percent of funders in CEP’s dataset for its responsiveness, candor, and openness to ideas from grantees about its strategy.
 - How Trinity interacts and engages with grantees matters. Thirty-one percent of grantees report having contact with Trinity monthly or more often. These grantees rate significantly higher on several survey measures, including perceptions of Trinity’s processes and understanding of how grantees’ work fits into Trinity’s broader efforts. The 87 percent of grantees who report this contact is either reciprocally initiated or funder initiated also rate

significantly higher on several survey measures compared to grantees who indicate that they are most frequently the ones initiating contact.

- ▶ Grantees express appreciation for Trinity staff in their written comments, stating Trinity staff “have been transparent, flexible, and understanding” and “demonstrate integrity, professionalism, respect, and a deep appreciation for the unique challenges that nonprofits face.”



“Everything about our interaction with Trinity has been professional, encouraging, supportive, and collaborative. It has been a wonderful experience and we hope to have many more chances to work with them.”



“Trinity has been an amazing grantor to work with. The program officers are responsive to the needs of their grantees, information provided is clear and concise and the grants they provide are integral to the success of our organization.”

Helpful, High-Value Processes with Opportunity to Streamline Reporting

- ▶ Grantees provide positive ratings for Trinity Church Wall Street Philanthropies’ application, reporting, and evaluation processes. They also indicate some opportunities for Trinity to streamline and adjust aspects of its processes.
 - Grantees report spending a typical amount of time on grant processes (31 hours at the median) and receive a larger than typical grant amount for every hour they spend on Trinity grant requirements.
 - The largest proportion of grantees’ suggestions (23 percent) relate to Trinity’s processes. Four grantees request more user-friendly systems, noting that “the UX of the grantee portal is counterintuitive,” and “the grant web portal can be a little rigid on occasion when nuance would be helpful.” Other grantees suggest modifications to the process for returning grantees, and other opportunities to streamline processes.

Helpful but High-Pressure Application Process

- ▶ Grantees rate Trinity higher than the typical funder in CEP’s dataset for the helpfulness of its application process. In their written comments, grantees praise Trinity for “a simple, direct application process” and that “we felt supported and encouraged all the way through.”
- ▶ Grantees also report experiencing higher than typical levels of pressure to modify their organizational priorities in order to receive a grant from Trinity.
 - Grantees who indicate feeling more pressure during the application process provide significantly lower ratings on many survey measures, including the quality of their relationships with Trinity and perceptions of Trinity’s impact.

Opportunity to Streamline Reporting and Evaluation Process

- ▶ Trinity Church Wall Street Philanthropies receives higher than typical ratings for the adaptability and relevance of its reporting process. Grantees also rate Trinity higher than the typical funder for the extent to which its evaluation process incorporates grantee input and results in grantees making changes to their work.
 - One practice in particular may contribute to grantees’ positive experiences. Eighty-seven percent – a higher than typical proportion – report that they discussed how they will assess

the results of the funded work with Trinity. These grantees rate significantly higher on many survey measures.

- ▶ At the median, grantees report spending 10 hours per year on monitoring, reporting, and evaluation which is more time than at the typical funder.
 - Grantees provide comments that indicate some opportunity to streamline and adjust the timing of the reporting and evaluation processes. As one grantee writes, “the grant proposal and reporting cycles seem a little wonky with a report due shortly after a proposal has been approved.” Others request that Trinity “give adequate time for reporting” and express that they “feel that every few months we are reporting or writing.”

Behind the numbers: When analyzing data from Trinity grantees by initiative, Mission Real Estate Development grantees report spending 71 hours on funder requirements over the lifetime of their grant. This is significantly more time than other Trinity grantees, and more time than 85 percent of funders in CEP’s dataset. At the same time, Mission Real Estate Development grantees rate significantly higher for the helpfulness of the selection process in strengthening grantees’ work, the clarity and transparency of the proposal criteria, and the extent to which the reporting process is a helpful opportunity to reflect and learn.



“Allow for organizations to send proposals and reports that have been sent to other funders or written for general operating purposes, rather than only using the Fluxx portal. Sometimes portals can be limiting and requires staff to modify answers to fit the funder’s particular categories and questions.”

Stellar Impact on Grantees’ Organizations, with Opportunities to Provide More Flexible, Unrestricted Grants and Support Beyond the Grant

- ▶ Grantees perceive Trinity Church Wall Street Philanthropies to have a strong impact on and understanding of their organizations, providing ratings that place Trinity in the top 15 percent of CEP’s dataset. In addition, grantees provide ratings that place Trinity in the top 15 percent of funders for its awareness of challenges their organizations are facing.
- ▶ One grantee writes that “before contacting Trinity, we only thought about reaching next month, at most a year, but now we are already looking beyond that horizon and we are teaching our communities to do the same.”

Positive Perceptions of Non-Monetary Support

- ▶ The provision of non-monetary assistance is an important way in which funders can strengthen organizations. Forty-nine percent of Trinity grantees – a typical proportion – report receiving non-monetary support during their grant period, and nearly all of those grantees indicate it was a moderate or major benefit to their organization or work.
 - Trinity grantees who report receiving non-monetary assistance indicate a significantly more positive experience compared to those who did not. In particular, they rate significantly higher for multiple aspects of funder-grantee relationships and contextual understanding, and report significantly lower pressure during the application process.
- ▶ Grantees perceive an opportunity for Trinity Church Wall Street Philanthropies to expand its provision of non-monetary support, which is the topic of the second largest proportion of grantee’s written suggestions (21 percent). Grantees most often request that Trinity provide opportunities for

grantee collaboration and capacity building, writing that “providing opportunities to meet with other colleagues to learn and connect is very helpful.”

- In a custom question about potential types of support beyond grant funding, Trinity grantees most frequently indicate that communications assistance, fundraising, financial sustainability and management, and strategic planning would be the most valuable.

Potential Opportunity for Longer, More Flexible Grants

- ▶ CEP’s broader research finds that grantmaking characteristics are often related to perceptions of organizational impact, with grants that are relatively large, multi-year and/or unrestricted being associated with stronger perceptions of impact.
 - Trinity grantees report a median grant size of \$200K, which is larger than 70 percent of funders in CEP’s overall dataset. A typical proportion of grantees indicate receiving unrestricted funding (21 percent) and multi-year grants (47 percent). A lower than typical proportion of grantees indicate receiving multi-year unrestricted funding (3 percent).
 - The third largest proportion of grantees’ suggestions (18 percent) relate to Trinity Church Wall Street Philanthropies’ grantmaking characteristics. Grantees ask Trinity to “consider a small budget to support struggling partners meet some of the administrative costs,” and that “we would also appreciate multi-year grants where possible” since “fundraising takes time away from core mission.”



“[Trinity’s] willingness to provide their funding with flexibility has provided very effective support for our organization. It has allowed us to use the funding to build our infrastructure and obtain much more funding than past efforts.”



“Multiyear funding would be extremely helpful - I understand Trinity is already moving in this direction and we look forward to that.”

Recommendations

Based on its grantee feedback, CEP recommends that Trinity Church Wall Street Philanthropies consider the following to build on its strengths and address potential areas for improvement:

- ▶ Celebrate the stellar ratings across the survey. Consider which aspects of Trinity’s values, systems, and structures have contributed to grantees’ strong perceptions and work to reinforce these strengths over time.
- ▶ Explore opportunities to further grow Trinity’s impact on grantees’ organizations, perhaps by:
 - Building on Trinity’s strong practice of providing non-monetary assistance to grantees and considering additional support where possible to align with grantees’ suggestions.
 - Taking into account Trinity’s approach to grantmaking, determining whether there is interest and/or capacity to increase the proportion of multiyear and unrestricted grants, particularly for grantees that Trinity intends to fund again in the future.
- ▶ Facilitate internal reflection to identify why grantees feel a higher than typical level of pressure to change their organizational priorities during the application process and seek ways to mitigate the potential adverse effects of that pressure. Refine pieces of the reporting and evaluation process that grantees and Trinity staff find most time-consuming.

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