Applicant perceptions research: survey findings

Community Foundation Tyne & Wear and Northumberland

nfp Research.

Community Foundation

What does Community Foundation do well? (1)

Understands local need

"**It understands what we are about and what we are trying to do in supporting our community**. Its a go to place for friendly advice and support gives quick decisions when they are needed the most. It feels as if we are asking friends for help."

Grantee

"**Knows the region well and always understands what you are trying to achieve with/on behalf of you community through their grants**. The grants officers are local - they live in our community and see what we do all the time. The Foundation is a great partnership funder."

Grantee

"Community Foundation **understands the local context better than other funders in the sector, and grants programmes are often developed in collaboration with the sector**."

Grantee

"It **knows it's local projects and is very good at matching projects and grants to the benefit of communities**."

Grantee

Communicates and supports

"**Approachable and understanding** funding advisors - we have been able to seek advice and support when projects change. A sense that funds are used to make a difference for local people and communities for issues that matter."

Grantee

"**Advice and support.** Once a relationship has been established it feels like an informal friend! **I can contact at any time and get good advice.**"

Grantee

"**You have enabled the development of a very useful working relationship with us as a charity over the years.** You have been extremely supportive to us. You answer queries by email in a timely way."

Unsuccessful applicant

What does Community Foundation do well? (2)

Robust application process and good at referrals

"Feel like we have a good relationship with our Grant Managers. **When we have been unsuccessful with a particular grant, the Community Foundation have found other funders we can apply to for the same project and forwarded our application.** Admin support is good when I have had problems with the online applications."

Grantee

"The **CF is thorough with its applications** I don't think anyone could take advantage. **The safeguarding requirements are solid and staff are super helpful and transparent about funds and advice**."

Unsuccessful applicant

"**Application process seems very robust**. Wide range of grants available to a wide range of organisations."

Unsuccessful applicant

"**Follows up to try and find a solution to funding a project if it believes that it requires funding**. Standard questions carried forward to future applications."

Grantee

Supports small organisations

"**A good resource for small organisations, especially those in areas which fall outside the usual funding priorities**. The grant applications are not complicated.

Grantee

"**Provide local small groups/organisations with small amounts of funding via a relatively easy process**. Not to much paperwork."

Grantee

"**It brings together the funding opportunities for small voluntary organisations. like ours, to apply for grants in one place.** Communication is one of their strong points too."

Grantee

Where might Community Foundation need to improve? (1)

‘Clunky’ online portal

“I **had problems with the online application portal and on one occasion lost the whole application as it had not saved**. I made sure that my last application was ready before entering it onto the portal so it could be completed in one go.”

Grantee

“Sometimes **the online portal has caused me some issues and been a bit clunky** sometimes the auto-filled info on the application has not been accurate and it's not easily changed.”

Grantee

“Potentially the **organisation of uploading documents, sometimes it is unclear whether they are required or not**.”

Unsuccessful applicant

“Online application process through the website is sometimes **difficult to use**.”

Grantee

Elements of the application process could be clearer

“I'm a **little confused by the general application route and when to use this or just apply to a specific fund** - perhaps this could be clearer.”

Grantee

“Making it **more clear that you can phone up before you make your application** for advice.”

Unsuccessful applicant

“I think the Foundation could engage more with applicants in terms of **explaining the requirements for evidence of Policies** (Safeguarding, H&S etc.)”

Grantee

Where might Community Foundation need to improve? (2)

Be more proactive with new opportunities

"Streamlining the process and clarifying the opportunities across the year - giving a **quarterly update on what funds will be inviting applications to enable applicants to plan for fundraising**."

Grantee

"**Being proactive letting people know about new opportunities**. We are volunteers so trawling websites can take time. Funding central used to send a weekly email of opportunities based on your profile. This helped a lot."

Grantee

Visiting grantees

"Visit sessions that are funded to see and feel the difference the funding makes as you can write on paper the outcomes but too physically see is different."

Grantee

"**Community Foundation Staff allowed to visit the applying organisations.** Seeing the facilities and staff, offering face to face advice and guidance."

Grantee

"It **would be nice to have visits from the Community Foundation staff every so often so they can see the work taking place** for themselves other than just receive the monitoring reports."

Grantee

Phase 1 Methodology

Online survey of grantees and unsuccessful applicants

12th April – 10th May 2022

Grantees

654	274	42%
Emails sent	Responses	Response rate

Unsuccessful applicants

305	83	27%
Emails sent	Responses	Response rate

- We have included a **'benchmark average'** based on research conducted with **13** other funding organisations **since 2013**
- The sample size of the benchmark is approximately **8,600**, although this varies according to the question asked

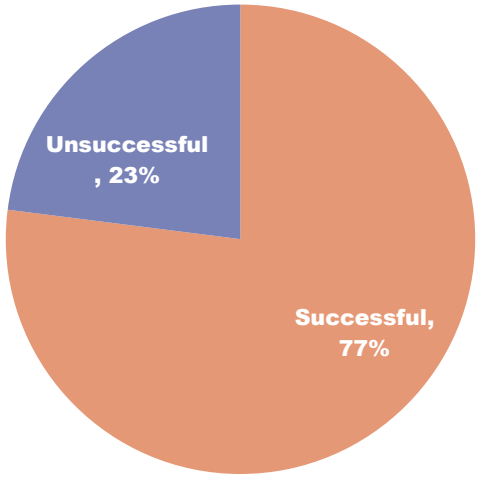
nfp Research.

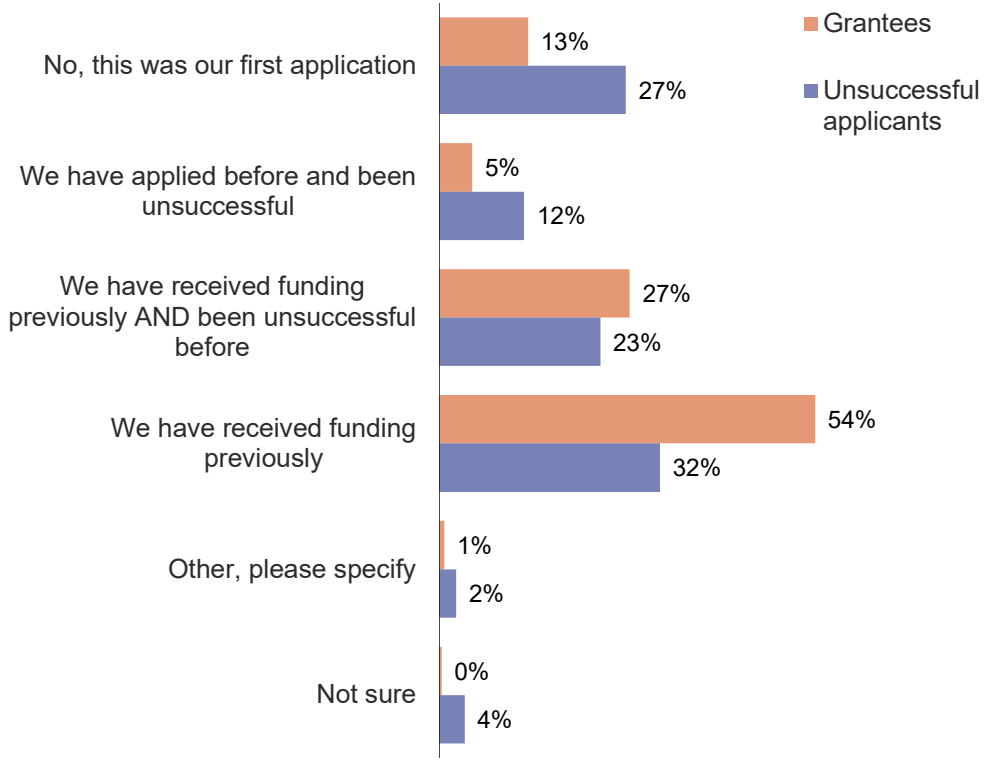
The sample is made up of 274 grantees and 83 unsuccessful applicants, but many of whom have received funding before

"Were you successful with your most recent grant application?"

&

"Had you applied to Community Foundation previously?"

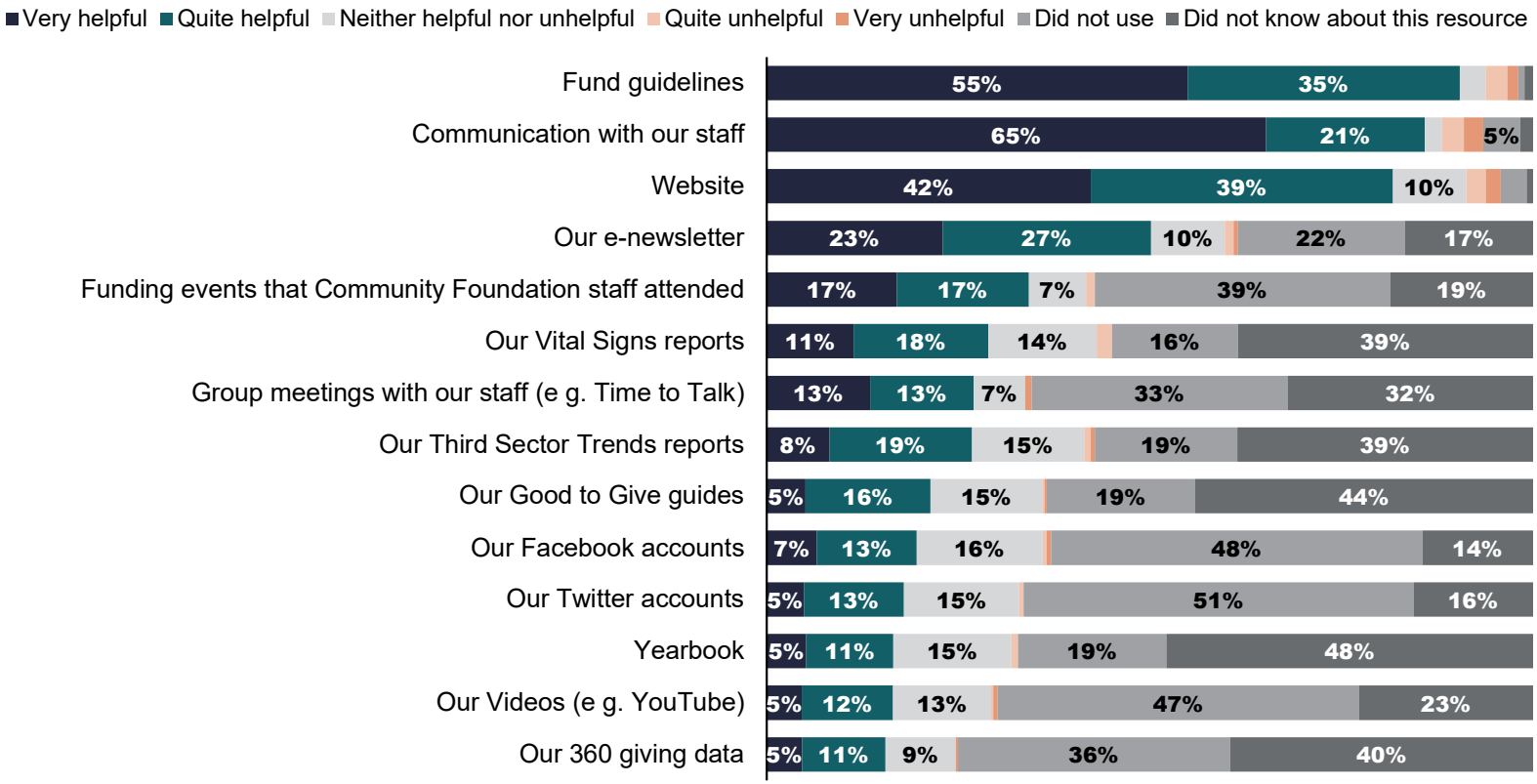




Base: 274 grantees & 83 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

Among applicants there is a lack of awareness of some of your resources and additional support

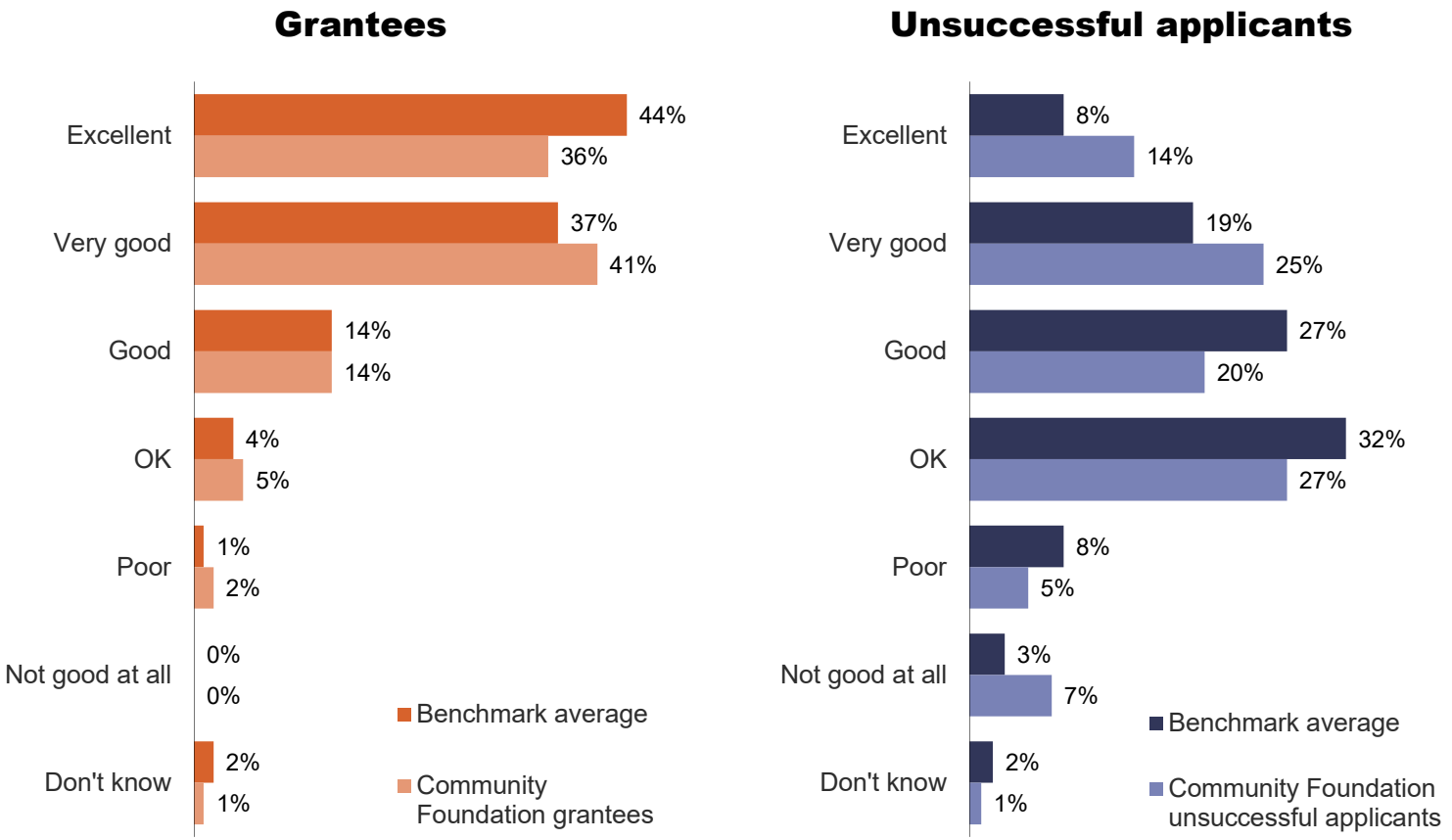
"How helpful do you find these Community Foundation resources as an applicant?"



Base: 274 grantees & 83 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

Fewer grantees see the process as ‘excellent’ compared to the benchmark, but UA’s rate the process highly

“How would you rate your experience of the application process?”

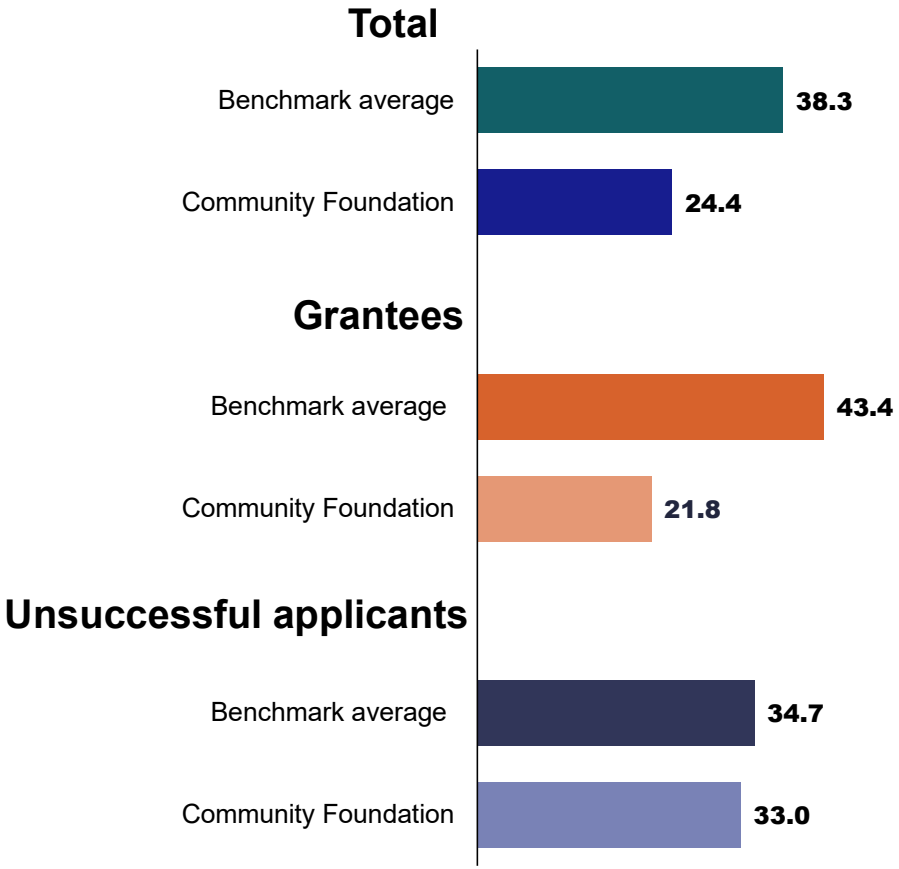


Base: 8,484 applicants across 13 funders | Source: Grant maker benchmark, nfpResearch
Base: 264 grantees & 71 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

On average, UA's are spending more time on their application than grantees, but both spend less time than the benchmark average

"How many hours would you estimate you spent on the following aspects of your funding request / grant application to Community Foundation?"

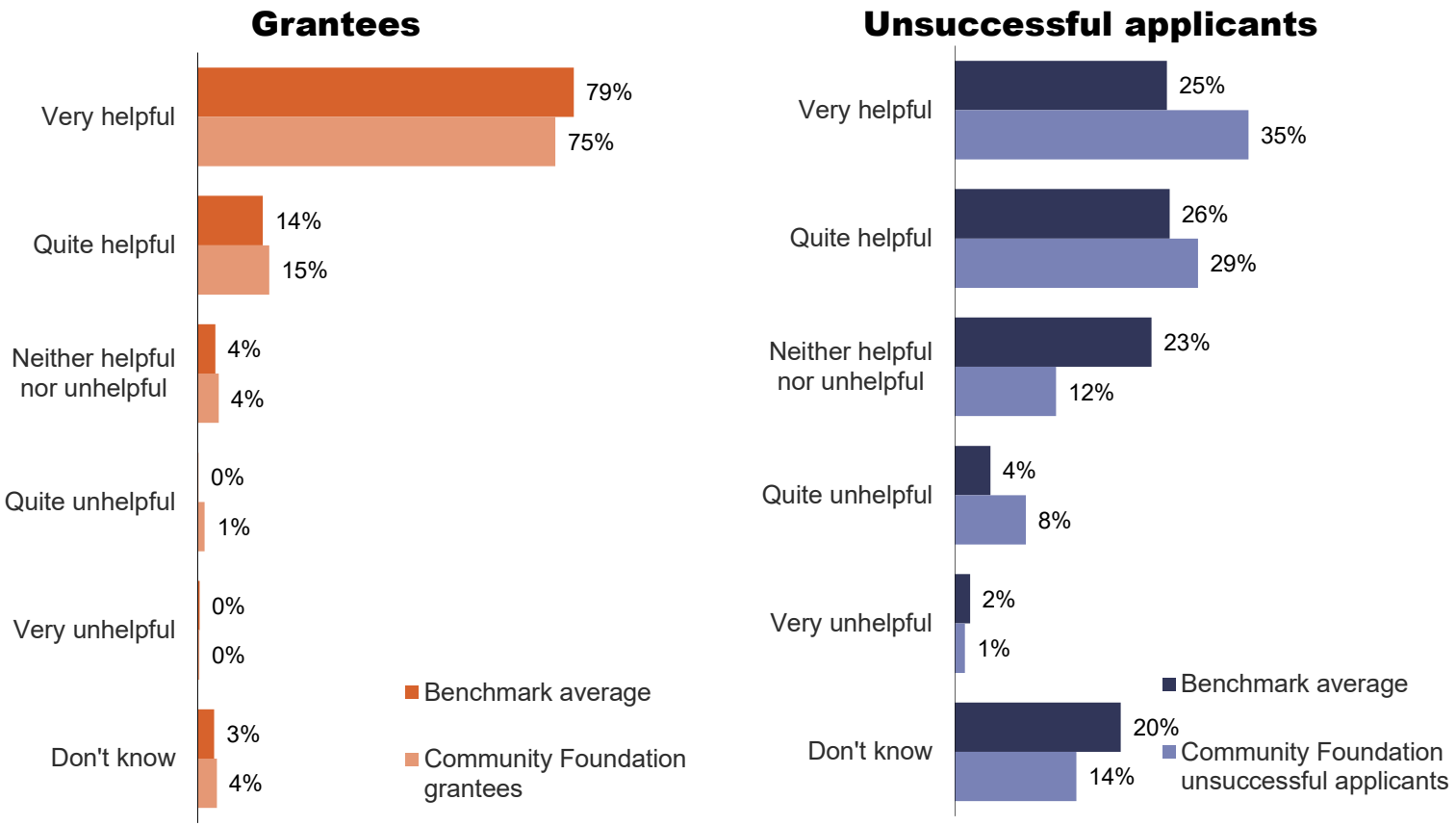
Average number of hours (total)



Base: ~8,600 applicants across 13 funders | Source: Grant maker benchmark, nfpResearch
Base: 274 grantees & 83 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

All in all, Community Foundation staff are seen as helpful, and outperform the benchmark for UA's

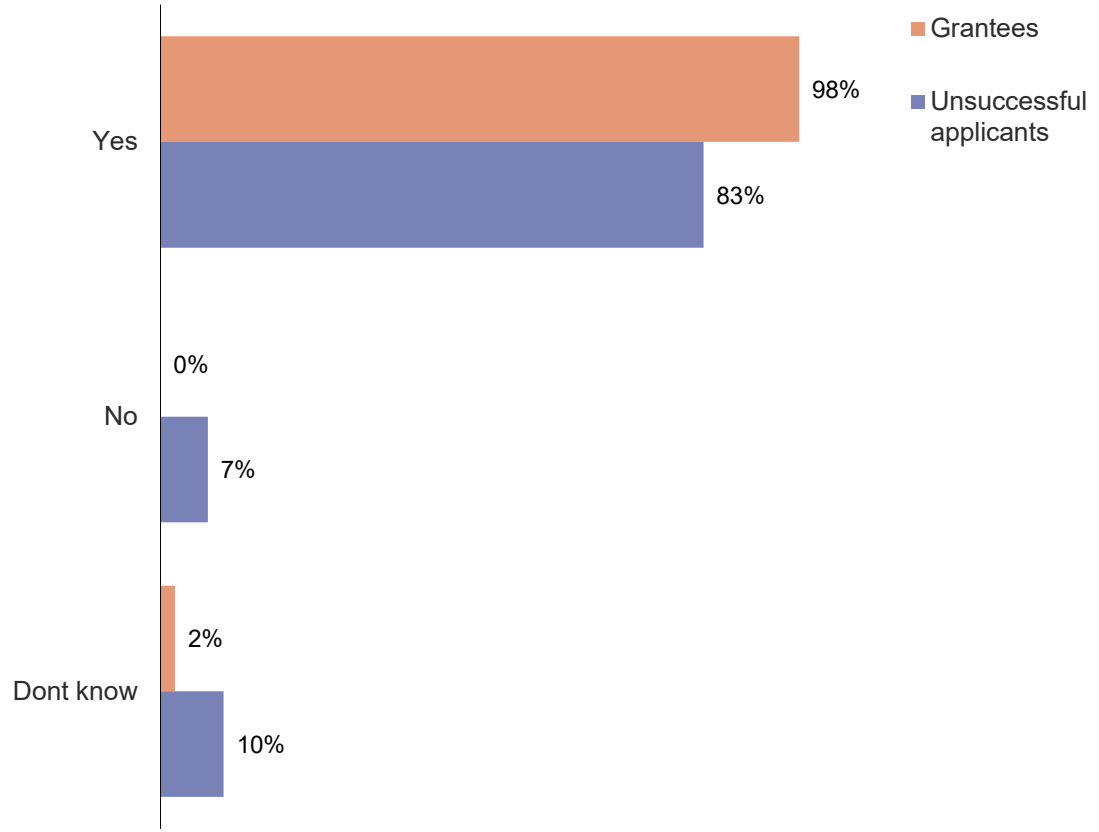
"How helpful were Community Foundation staff while making your application?"



Base: 6,367 applicants across 13 funders | Source: Grant maker benchmark, nfpResearch
Base: 274 grantees & 83 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

Most applicants would consider applying to Community Foundation again in the future

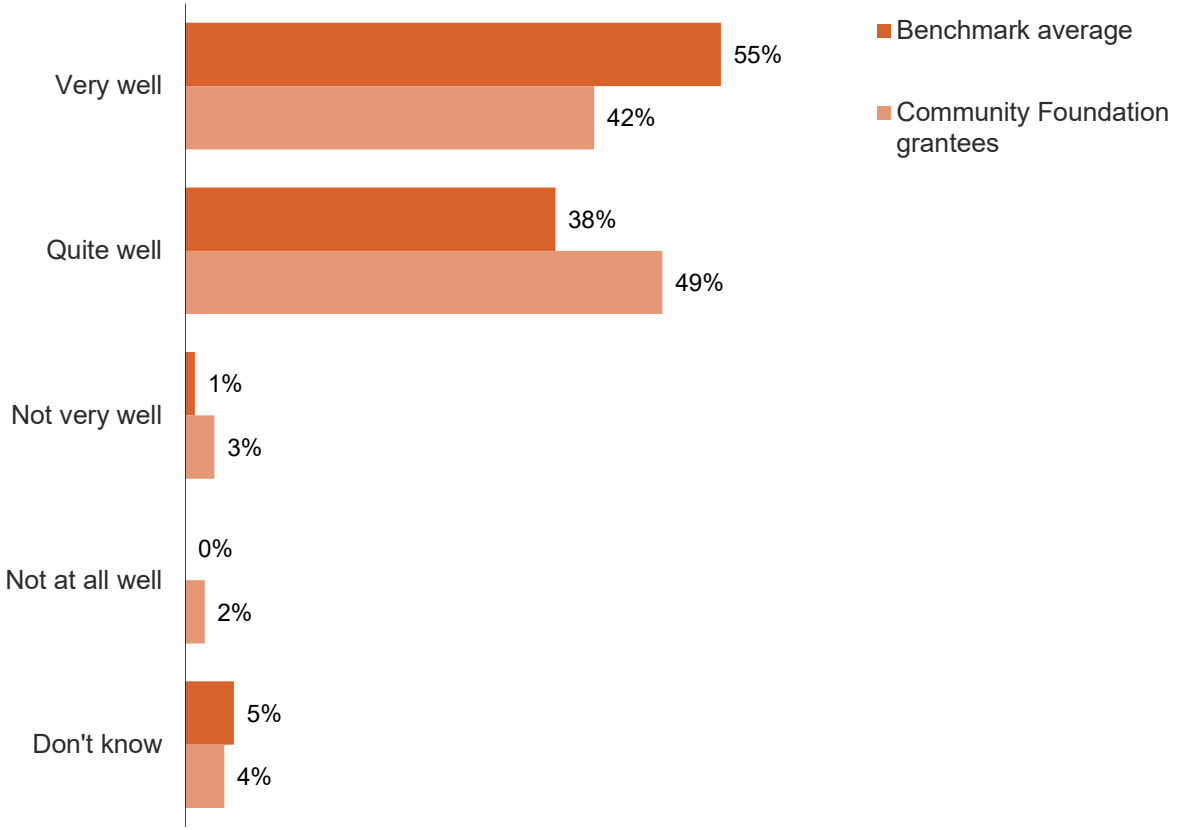
"Would you consider applying to the Community Foundation again in the future?"



Base: 273 grantees & 83 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

91% of grantees feel Community Foundation has a good understanding of their organisation and its aims; 5% feel you could understand them better

How well do you feel Community Foundation understands your organisation and its aims?"

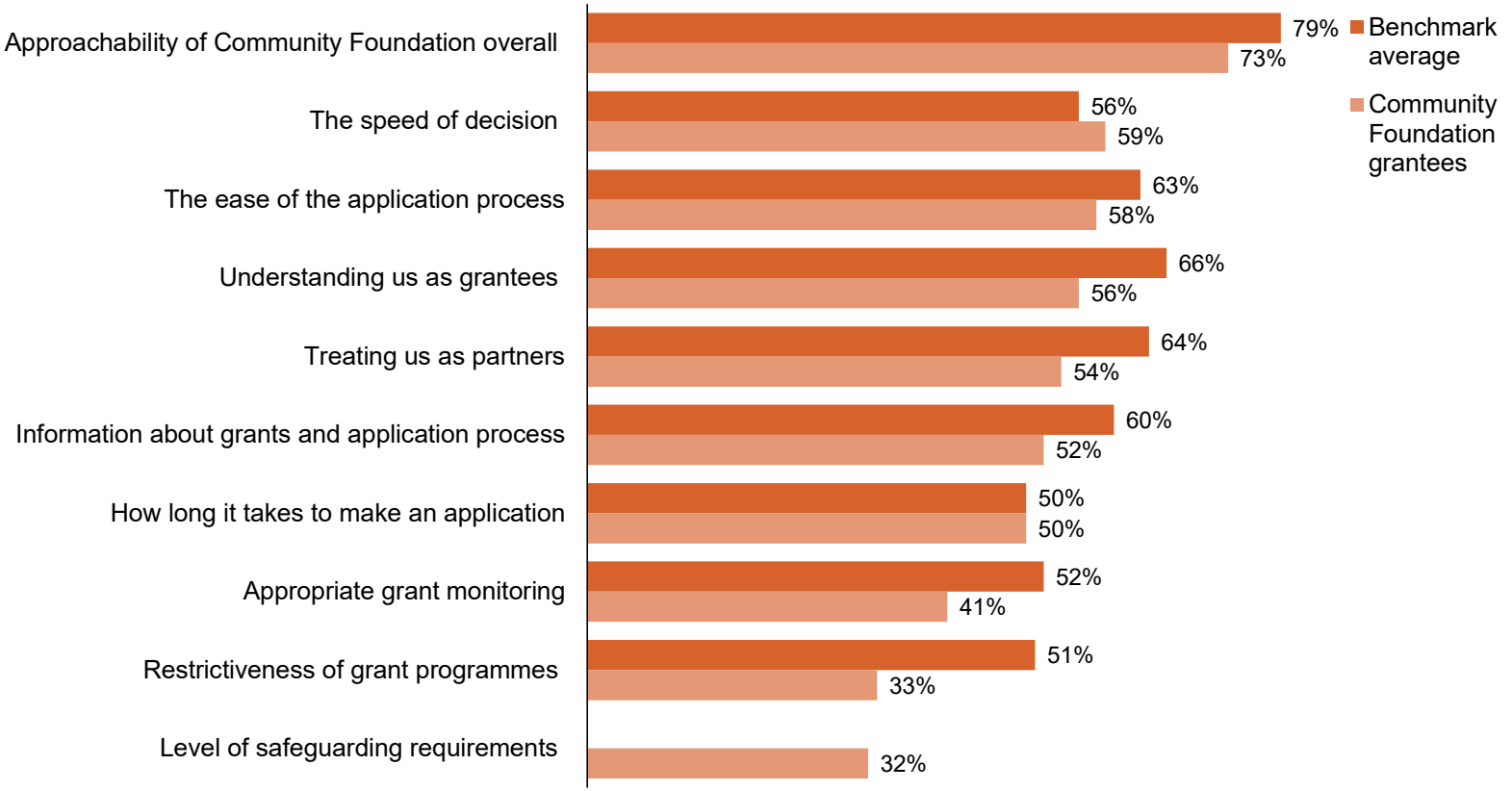


Base: 4,986 grantees across 13 funders | Source: Grant maker benchmark, nfpResearch
Base: 271 grantees | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

You are performing well in most areas for grantees but could do better in understanding grantees and in the monitoring of grants

"When you think about your experience of applying for and getting a grant with Community Foundation how would you say they compare with other grant-makers?"

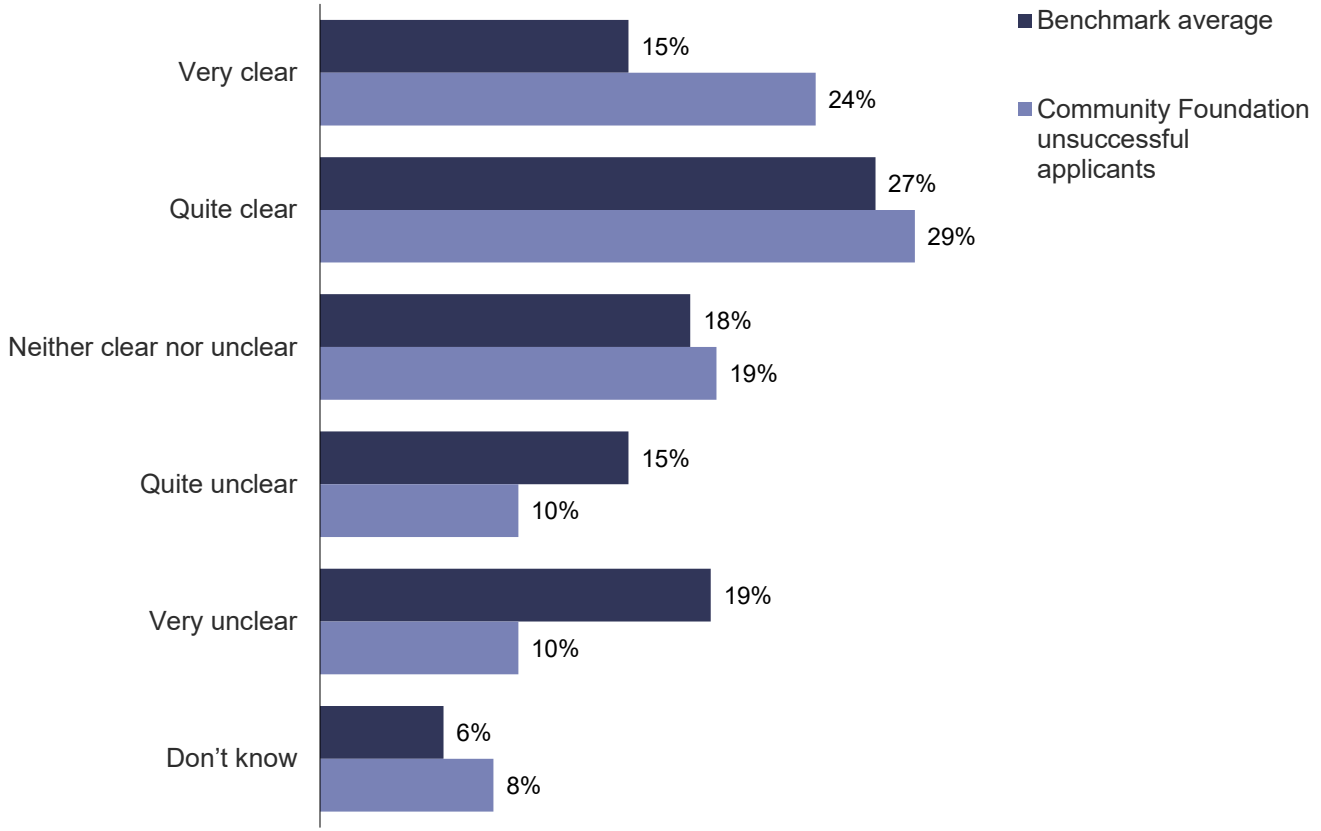
Much better + Better



Base: ~4,964 grantees across 13 funders | Source: Grant maker benchmark, nfpResearch
Base: 274 grantees | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

Over half of UA's felt the basis for your decision to decline the application was clear; around a quarter felt it was ‘very clear’ – compared to just 15% in the benchmark

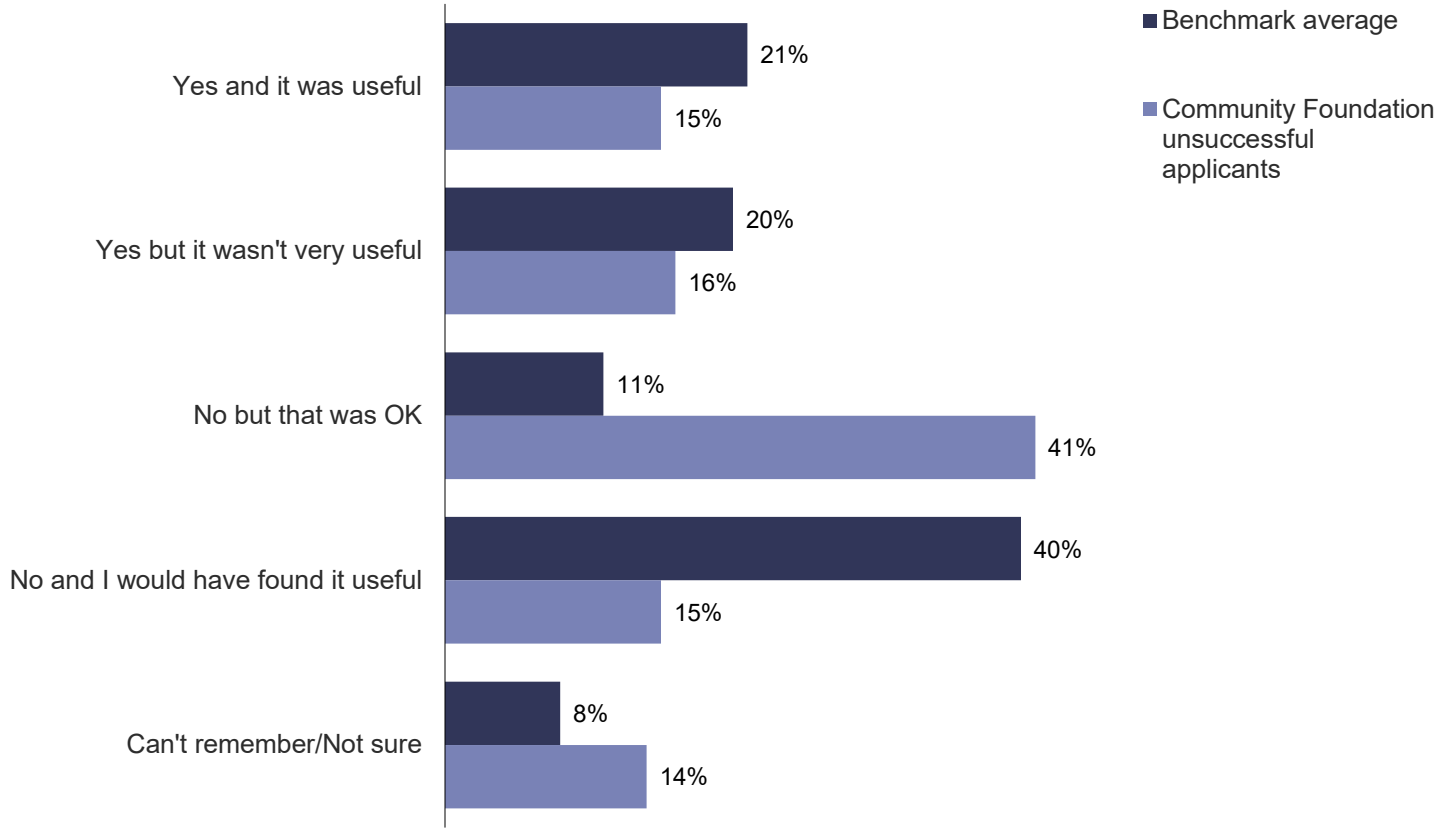
“How clear was the basis of this decision to you?”



Base: 2,974 unsuccessful applicants across 11 funders | Source: Grant maker benchmark, nfpResearch
Base: 83 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

46% didn’t receive feedback on why their application was unsuccessful but said that was ok

“Did you request any feedback on why your proposal was unsuccessful?”

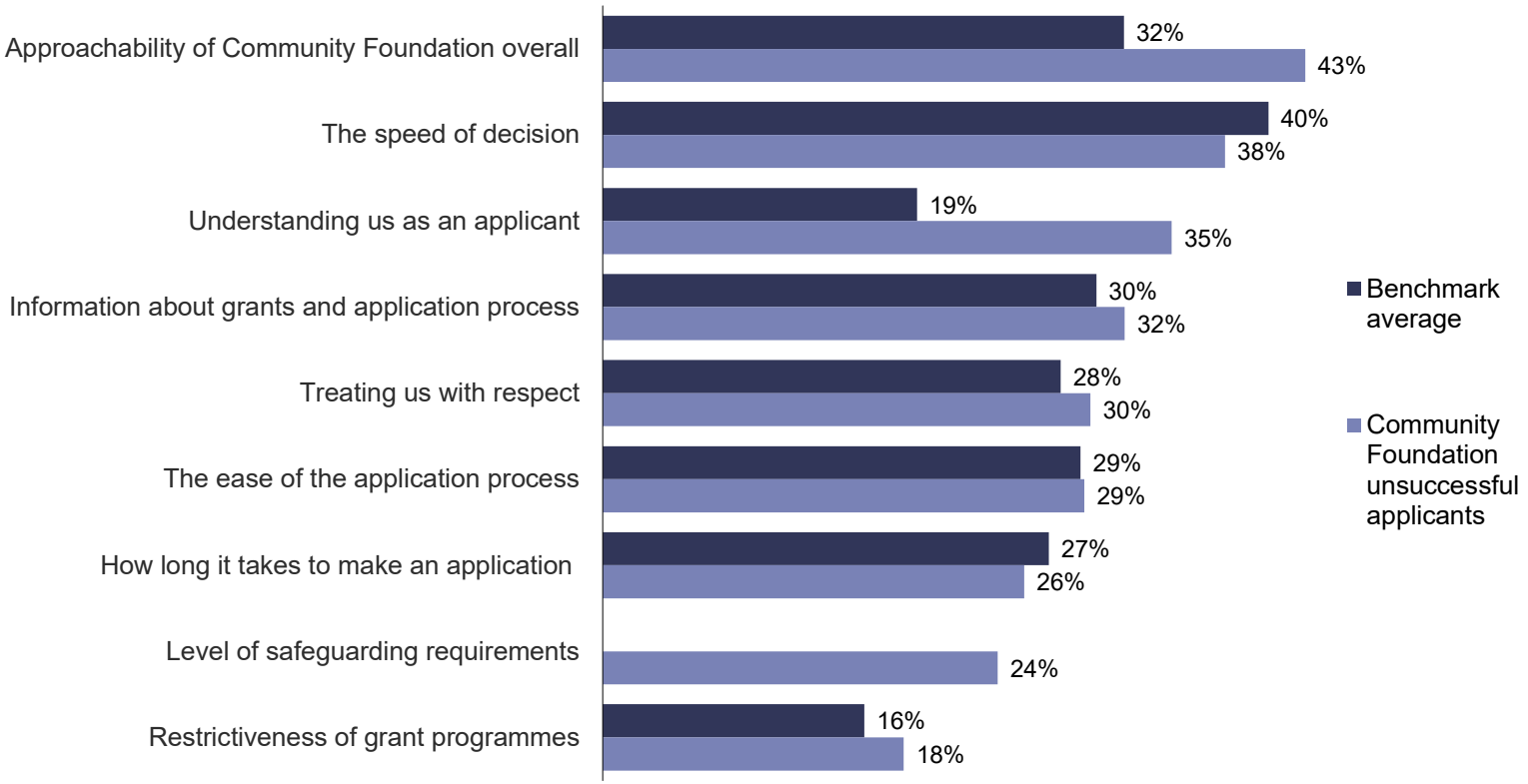


Base: 2,973 unsuccessful applicants across 11 funders | Source: Grant maker benchmark, nfpResearch
Base: 83 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

Areas where you outperform the benchmark for UA's are your overall approachability and understanding

"When you think about your experience of applying for and NOT getting a grant with Community Foundation how would you say they compare with other grant-makers?"

Much better + Better



Base: 3,412 unsuccessful applicants across 12 funders | Source: Grant maker benchmark, nfpResearch
Base: 82 unsuccessful applicants | Source: Community Foundation Tyne & Wear and Northumberland survey, May 22, nfpResearch

Phase 2: Research objectives

1. To develop a deeper understanding of grantees' and unsuccessful applicants' experiences of applying for funding from Community Foundation Tyne & Wear and Northumberland.

2. To understand what they think about the application process, with a particular focus on what they consider to be proportionate and reasonable; if and how guidance and communication from the Community Foundation could be clearer/more helpful; any barriers encountered (and how these were overcome by fundees); the need for core vs projects funding and what Community Foundation should focus on.

3. *Among grantees:* to understand how they feel about their relationship with Community Foundation and any ways it could be improved; to understand perspectives on the monitoring process.

4. *Among unsuccessful applicants:* to understand how they felt about any feedback they received and whether they would apply for funding from Community Foundation again.

5. To understand the role that Community Foundation as a funder could play in relation to climate change; how well Community Foundation understands the context that applicants are operating in.

Phase 2: Methodology

nfpResearch conducted 10 interviews by via Zoom and Teams between November 24th and January 31st 2023.

In April/May 2022 interview participants had previously completed an online survey about their experience of applying for funding from the Community Foundation Tyne & Wear and Northumberland (CFTW) and agreed to be contacted for a follow-up interview.

The discussion guide was drafted and approved in collaboration with the CFTW.

The interview conversations lasted around 30-45 minutes.

Interviewees were assured confidentiality at the outset.

Profile of interview participants

Sample	
Status of most recent application	
Grantee	6
Unsuccessful applicants	4
Income	
Less than £10k	1
More than £10k but less than £50k	3
More than £50k but less than £100k	1
More than £100k but less than £250k	3
More than £250k but less than £500k	1
More than £500k but less than £1m	0
More than £1m but less than £10m	1
First time applicant?	
First time applicant	3
Received funding previously AND been unsuccessful before	4
Received funding previously	3
Applied before and been unsuccessful	0

Overall impressions of the application process

Applicants mostly described the process as straightforward, clear and in-depth

Grantees:

- Thought the process was straightforward and clear.
- Many liked the fact information from previous applications was saved on the portal, saving organisations time and the hassle of a repetitive process.
- The application questions delve into why organisations are doing what they are not just what they are doing – this helps bid writer to better understand the context of their work and the objectives.

Unsuccessful applicants:

- Some found the process straightforward and pragmatic; however, a first time applicant noted there was a lot to do and lots of guidance to follow which they found hard.
- One interviewee also felt the application process was not intuitive and found the grant portal to be “unwieldy” and difficult to navigate.
- Another described difficulties sometimes in providing quantifiable measures for the benefits of their programme.

Clarity of guidance for applicants

- Most read through the guidance provided before submitting an application and found it helpful.
- If anything was unclear within the guidance or additional support was needed, a few interviewees noted that they were able to phone the CFTW and discuss concerns.
- One volunteer led organisation discussed how there might be a lot of guidance and information on the website but due to time constraints they were unable to look at all resources that might have been useful.

"So, I do always read through what they've got up just in case anything's changed or just to refresh so that you can target particular priorities, buzzwords, call it what you will. So, I do always read it and it's never too cumbersome, so you don't feel like you're waiting through 30 pages of research and theory. So that's useful."
Grantee

"And then partly, I think to be fair, it's our fault as well, because we are volunteers. I think there's an awful lot more probably on the website, that if you've got the time and you've got somebody who's dedicated to finding funding, then you can do. But for me, fitting it in around teaching and running a scout group, and all of that, there's probably just not quite as much time there"
Grantee

Proportionality of the application process

- The time spent on applications varied between 5 to 30 hours depending on the grant size. Both grantees and unsuccessful applicants felt the time they spent on applications was reasonable.

"It did, yeah. And I never write them with the community foundation and think, "Oh that was awful lot of effort for £200." I always think, yeah, that's it. It does genuinely feel like a good balance of time and effort for potential reward."

Grantee

"{Half a day total on application} It seems that that seems a reasonable amount of time to me, because ones that take less, you think, well, are they really understanding what we want to do? Is it a bit more of a lottery that they're just going to, "Oh, well, I like that one, " without understanding it?"

Unsuccessful applicant

Length of time before decision

- The length of time before a decision was made varied between 1 and 3 months.
- Overall, this was seen as reasonable, and in line with, if not better than other funders.

"It was quick, yeah. I'll give you an example. I've been writing a bid that's specific to schools for some English literacy money. And that has to be spent by this summer. The bid went in at the end of October. Decisions were meant to be by December. And then we got a message to see we wouldn't get the decision until February. So, you're talking months down the line..."

Grantee

"Yeah. It's much better. Often, it's like you've got to apply by March deadline or October, you can wait six months. And again, I get it, but when you're waiting on the money it can create an additional layer of uncertainty. It's much better."

Grantee

What does the CFTW do well?

- Overall grantees and unsuccessful applicants agree the CFTW application process is amongst the best.
- The one stage application process is generally viewed positively, with one grantee saying: *“I think it seems a bit fairer in the sense that there's one process that we've gone through and they don't then come back after three months and go, "Oh, well, you've met stage two, let's try the next stage." So, I think, again, as volunteers, it's quite helpful to just be able to take it off the list and move on to the next one, rather than having a ongoing thing.”*
- Interviewees like the fact the application is clearly written by the CFTW and not a consultant or third party e.g., not using lots of buzzwords and it is not a repetitive process in terms of the questions asked.
- Other positive aspects of the CFTW as funder included, how well the local context is understood and how flexible the CFTW is in terms of where funding is spent/allocated.

The ideal application process

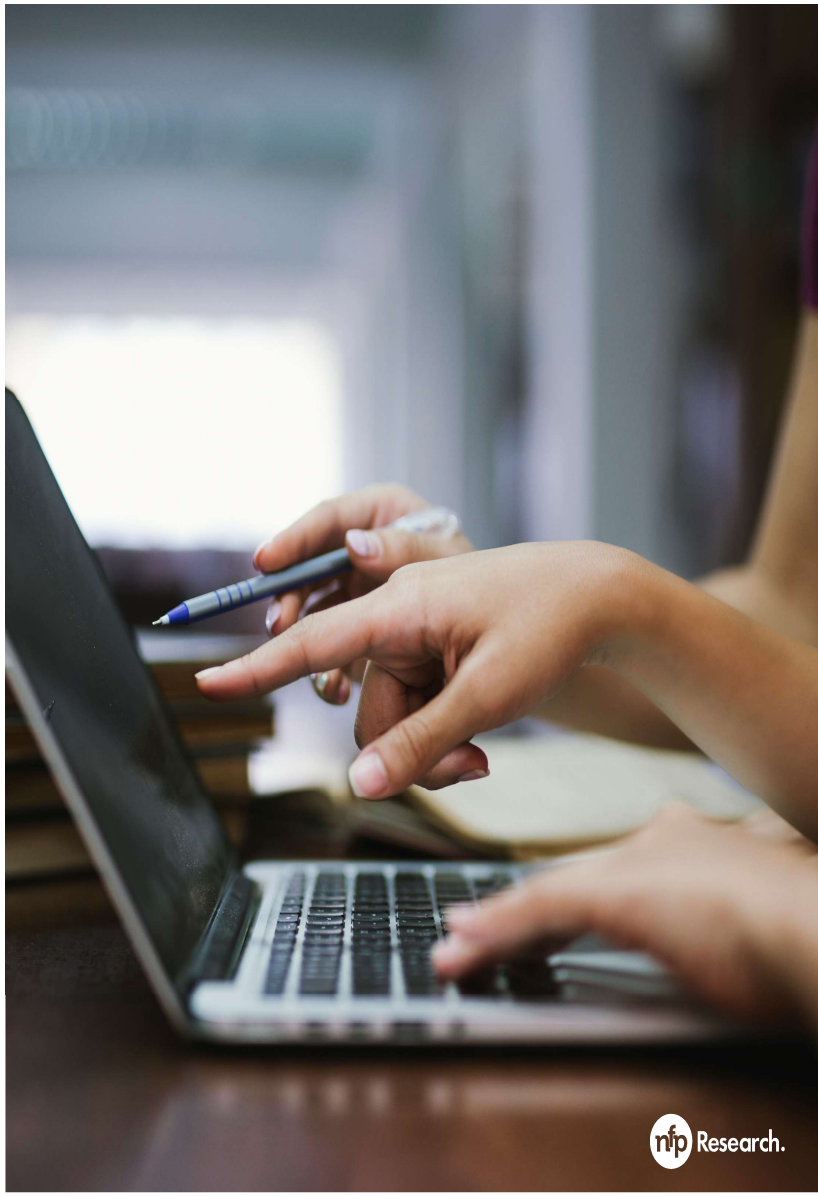
- One volunteer led organisation suggested that it would be helpful to receive email alerts when new funds become available which matched the individual organisations profile.
- It is appreciated that your online system saves core information but an interviewee suggested building in further triggers for updating information would be helpful e.g., your safeguarding policies are due for renewal.
- Another interviewee (unsuccessful) recently had a positive experience with a family-based-trust, where they conducted an online virtual application interview. This approach was seen as valuable as it showed they were thoroughly reviewing applications and it made the organisation reflect more on the work they were doing.
- An experienced bid writer expressed interest in moving to a multi-stage application process and said this would be helpful, so the chances of success are clearer to applicants.

Online application process & website

- Overall both grantees and unsuccessful applicants like the online process. Interviewees like the save & return function and the fact they get in an email with the content submitted.
- A few interviewees had some issues with the online portal but all of these were resolved quickly by the CFTW.
- There were a few comments about the CFTW website and this being slightly less user friendly.

"I think the website could be improved slightly. There's a little bit of disconnect between when you go onto the website and then you go into the grantee area.{...} Really, I think they just need to integrate the two a little bit more. I found sometimes you'll get almost like kicked out of the grantee portal, so if you want to go back in and see the list of applications you've got, you get stuck in a bit of a loop and you have to go back and re-enter it. {…} It could be advisable that they actually group the different grants by specific strands. So you could go on the website and it could be environmental grants and you can click on that and go in and that's where all the grants that are around the environment are, or youth projects or whatever. That might be helpful rather than you having to go into each individual grant and check what they're after."

Grantee

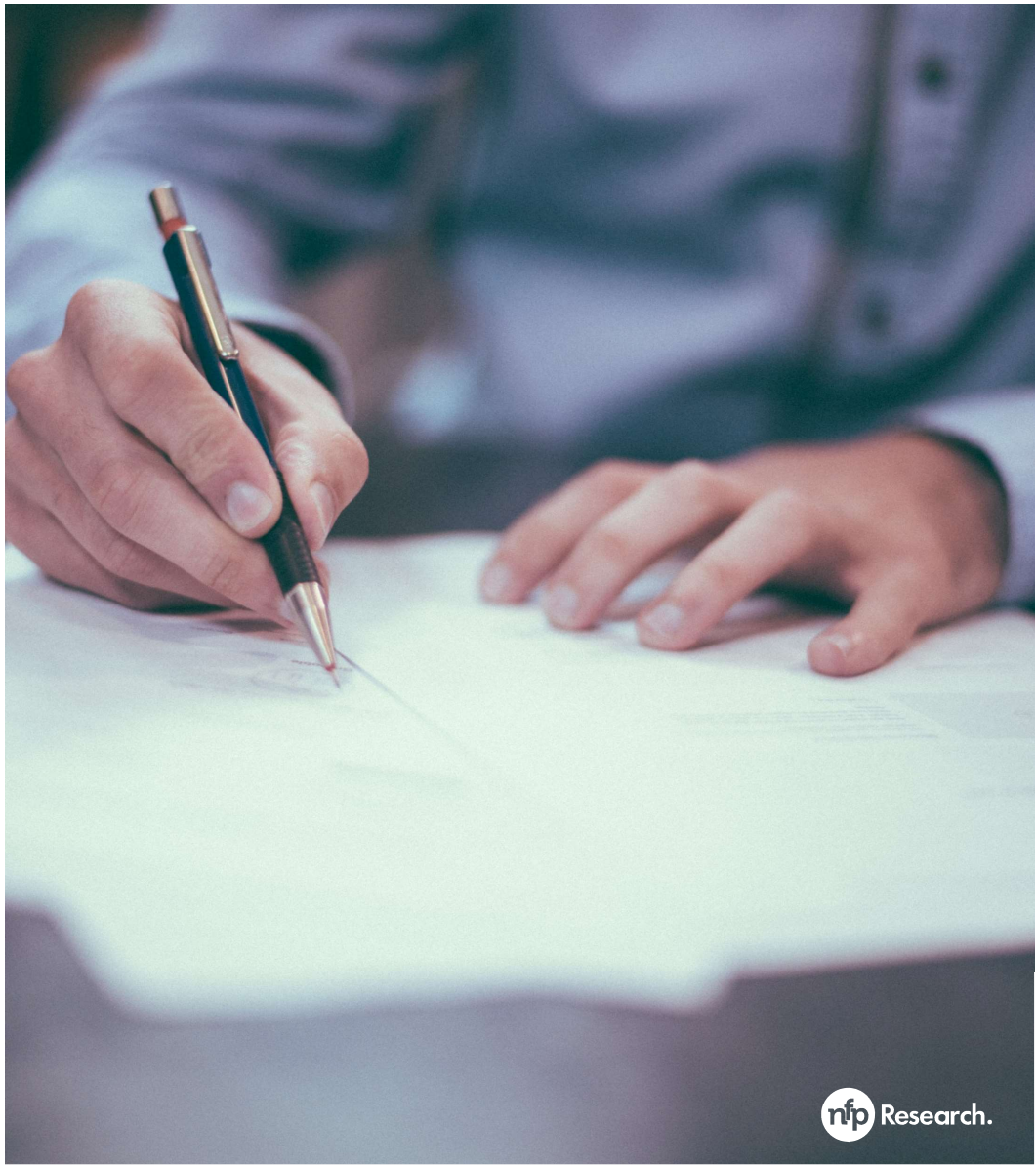


Feedback

- All unsuccessful applicants did receive an initial email with a generic statement as to why they had been turned down.
- One interviewee was very unhappy with this saying *“It's useless, isn't it? If you'd only bothered to tell us you were only giving X number of grants out, then we'd perfectly understood it's not a problem. We probably wouldn't have invested the time and effort.”*
- Another had been given the opportunity to follow up with a member of the CFTW team but didn’t even though they thought it would have been useful.
- However, one grantee who had previously been an unsuccessful applicant, commented on feedback they’d had for an old application: *“The feedback came from the second bit about an issue with the governing document. One of my team, he deals with the governance thing. So he picked that up and did eventually get through to somebody who gave him a bit of feedback. I don't think he was that happy with the feedback. But at the end of the day, at least we got some, so it wasn't just, sorry, you've been unsuccessful.”*

Reporting back

- Grantees found the reporting back process to be relatively straightforward, easy to complete and focussed.
- The application itself helped grantees with the reporting process as the objectives and how organisations were going to monitor impact were clear from the outset.
- The CFTW was also seen as flexible and understanding in this regard, with one start up organisation commenting on being reassured that there was *"wiggle room"* with their objectives.
- Grantees also like the fact they get reminders for when reporting is due: *"We have done grant reports. What I really like about them is, they'll give you the heads up, this is due next month, which is always a great help. And I do like that element. And again, you can speak to one of their advisors and say, "Well, this is the report I've got," et cetera. Then have a look at it. They'll come back with some comments. So they're good assistance with the to that work."*



Grantees relationships with CFTW

- Grantees describe their relationship with the CFTW as minimal but professional and functional.
- Although the relationship is described by some grantees as minimal this is seen as a positive as constant monitoring would cause a strain on some organisations and feel like chasing, for example: *"I'd describe it probably as minimal, which from our perspective isn't necessarily a bad thing because we're so busy trying to get everything up and running that if they were expecting us to feedback every month or have meetings every two months or whatever, it would probably be detrimental."* Grantee, start up organisation.
- A few grantees touched on building the relationship beyond one round of funding i.e., when the CFTW has funded an organisation, following up and working with them on a development plan so they are in a better position to apply for other funding or suggesting other pots they could apply for that would be beneficial.

Understanding social/cultural/socio-economic factors

- Grantees mostly feel the CFTW does understand the social/cultural/socio-economic factors that impact their organisations.
- Most feel they know this because of the questions you ask during the application process.
- One grantee noted sometimes filling out the diversity section of an application can be difficult, not because they are not inclusive, but because the profile of the area isn't very diverse/representative.

"Because they ask the questions. It's such a huge part of your bid, is not what you're going to do. It's why do you need to do it, and you can't demonstrate that unless you know that.{…} National Lottery Awards for all their feedback all the time is there's not enough community consultation. It's like, we're a school, that's what we do. Talking to people is what we do every minute of every day. Knowing our environment, knowing what's on around us. So, the Community Foundation, they don't ask for that because they don't need it. You are giving them that information and they've got a really good understanding of what's required. "

Grantee

Role of the CFTW disseminating best practice & representing the sector

- Some think the CFTW do play a role and could play more of a role in representing the sector, for example, by acting as a lobby group for the North East and driving agendas; however, others caution against spreading the organisation too thin and crossing over into campaigning territory.
- *"I think the Community Foundation has, they do represent the sector, I do think, and it's probably going to be balance, isn't it, as to what's appropriate in terms of campaigning? I think they can raise issues and I think they are doing quite a bit at the moment around cost of living and impact on people and that sort of thing. I think they probably do what they can. It's hard, isn't it, because it's around, where do things become politicised, and what is true campaigning? I think probably do a little bit more. Maybe raise a bit more around key issues."* Grantee.

Role of the CFTW promoting local collaboration

- There are mixed opinions whether the CFTW should play a role in this area.
- Some think the CFTW could drive agendas and push for positive collaboration, such as: *"So, I think they can drive agendas in a way that others can't, like the rest of us can't. Although we always try to drive these things, I think the more they push things around collaboration and consistency and quality the more we have to respond to it. So, I think the more bullish a funder can be around those requirements, to me the healthier the sector as a whole, whether you are getting a grant or just part of that network that area. So, few more events would be welcome again."* Grantee.
- And they see the CFTW encouraging local collaboration as a positive learning opportunity: "*So with things like finding volunteers or organising events where you can come together and learn from each other or training, subsidised training, that sort of thing. Because they are a massive organisation around the country, aren't they? And I think there could be capacity for them to do more of that."* Grantee.

Core or project funding?

- Most organisations spoke about their need to obtain core funding to cover the costs of bills and salaries but despite this need, many have not applied for it from the CFTW or other funders.
- There are various reasons for this including:
  - Feeling like their organisation should be self-sufficient, they should be responsible for the core costs they incur.
  - Feeling like funders will not/do not provide core funding because it is less attractive compared to applying for project funding.
- Although core funding is essential, particularly in the post-Covid and cost-of-living crisis environment, applicants did emphasise the value of project funding and that the CFTW offers a good range funding pots in this area.

"There's other places I can go to, but I wouldn't go to Community...That wouldn't be my first pot to look up itself {for core funding}, but then you look at the pots that we get and the specific communities that have to apply and as I said, antisocial behaviour here is a huge, huge issue. But if you could apply for somebody to continue football lessons, I think that's the level of funding missing. Community Foundation is there, they're at that level and they've got the million pounds of pots as well. But they'll have those small pots they use to support individual families and it works."

Grantee

What should the CFTW focus on?

- There is good awareness of your project funding and applicants appreciate the range of funding types and amounts available.
- However, there is a need for core funding and there is not the clarity on whether this is offered by CFTW. This suggests a need for better communications on core funding, specifically around removing the stigma that asking for funding to help with bills or salaries is “boring” or “dull” and won’t be funded.

Schools, social enterprises and CICs

- We interviewed some organisations that were not charities, with some participants who had a detailed knowledge on CICs and social enterprises. There was a frustration among some of these individuals that core funding was not available to these groups.
- Some said that CFTW could carry out more checks on CICs to ensure they can be confident the funding is needed and will be well spent.
- One school spoke about working around not being able to access core funding - applying for LED lights under environmental umbrella to help reduce energy costs and save money.

What are organisations doing to tackle climate change?

- The majority of organisations interviewed are doing something to help try and combat climate change.
- The types of actions taken were wide ranging going from recycling and using environmentally friendly art supplies to reducing carbon footprint through installation of LED lights and undergoing energy audits.
- One of the main issues with tackling environmental issues stemmed from operating out of rented property or property that was old/listed e.g., one organisation discussed the difficulties trying to install solar panels on a listed building.

"It's a big issue for us. And because we rent the building from our landlords just next door, it's a horrendous building. So, it's freezing, it's inefficient, it's old heating just goes straight out the roof in the windows. We would like to do more and if we had our own building, I think we really would push this agenda through a lot more. Because it's something I think I personally feel strongly about, some of the staff do and we have ran a fair few projects now in relation to in mental health and the environment."

Grantee

How could the CFTW provide support

- Most interviewees would welcome support with tackling climate issues, suggestions of support included:
  - A “one stop shop” where the CFTW shares best practice e.g., “*how similar organisations sought to improve environmental stewardship*” Grantee.
  - A consultancy programme where the CFTW goes into organisations and challenges their thinking i.e., Have you thought about this?
  - A funding pot which allows organisations to replace equipment with more sustainable/energy efficient options or funding to run energy audits which help identify low cost solutions.
  - Some communication work around the financial benefits that go hand in hand with environmental sustainability.
- There was some caution from smaller organisations with regard to their low capacity and capital, and climate policies possibly becoming too much of a requirement for obtaining funding opportunities.

How has the cost-of-living crisis impacted organisations?

- Organisations are feeling the strain of the cost-of-living crisis, whether this be through increases in demand of services or through struggling to pay increasing energy bills, rent and staff salaries.
- There were many harrowing examples of how the cost-of-living crisis is impacting service users and the extreme measures people are taking to try and save money (see example below).
- Although many organisations are finding the current situation extremely difficult, particularly having just come out of the pandemic, most felt they were resilient and would make it through the next year.

"One of the conversations I had with a client the other week was around how best to use the kettle. I said, well switch it on. Just joking, just switch it on. What she actually meant was, what would be the most efficient way to have her six cups of tea a day? It was like, for goodness's sake, have we really got to this? Have we actually got to the point where we we're talking about, if you boil the kettle once, you could fill a flask? But then we looked at the cost of flasks and they were like 15 pounds. Where do people spend them? You could say, well that's overthinking, it is a bit, and you might think that, but if you are on 70 odd quid a week, maybe you're not overthinking it. Maybe it really does come down to making those choices."

Grantee

How could the CFTW provide support

- Interviewees were cautious in suggesting solutions for how to tackle the cost-of-living crisis and those who did make suggestions had varied viewpoints, for example:
  - One interviewee (unsuccessful) suggested that this is an area where local governments should be acting/providing intervention not funders.
  - Another (grantee), suggested the best solution would be to provide a specific funding pot, anything else e.g., how to save energy workshops, would be like *"trying to knock down a wall with a toothpick".*
  - In contrast again, one interviewee (unsuccessful) was cautious about having a responsive funding pot as it is seen as "*sticking plaster stuff*" and doesn't provide a long term solution.