



The A B Charitable Trust

Grantholder and unsuccessful
applicant perceptions audit
2022



Eva Spencer, Tim Harrison-Byrne

Table of contents

INTRODUCTION _____	3
OBJECTIVES AND METHODOLOGY _____	4
SUMMARY OF KEY FINDINGS _____	6
IN-DEPTH FINDINGS _____	8
Overview: ABCT is perceived as flexible and trusting, though some say they experienced barriers to funding _____	8
Application process: Simple, flexible and quick _____	10
Relationship with funder: Positive experiences of communication with staff, though more contact would be welcomed _____	15
Unsuccessful Applicants: Applicants appreciate detailed feedback _____	19
Funder Plus offers: Applicants recognise the benefits of Funder Plus offers, though some feel space is becoming overcrowded _____	22

Introduction

At the beginning of 2022, The A B Charitable Trust (ABCT) commissioned nfpResearch to carry out a grantholder and unsuccessful applicant perception audit. The aim of the research was to better understand how applicants, whether successful or unsuccessful, viewed the grant making processes, their relationship with the Trust, and ultimately where it could improve.

The research consisted of a survey of ABCT grantholders and unsuccessful applicants. Fieldwork for the survey ran through February 2022. As well as gathering perceptions and experiences of ABCT's grant making processes and organisation, ABCT also sought to explore applicants' perceptions of Funder Plus offers and the demand for this type of support (this is not something the Trust has previously offered in any structured way).

Objectives and methodology

The objectives of the research were to:

1. Explore grantholders' and unsuccessful applicants' understanding of ABCT's work and remit
2. Explore grantholders' and unsuccessful applicants' perceptions of ABCT, what it is doing well and where it could improve
3. Understand grantholders' and unsuccessful applicants' experiences of the application, monitoring and reporting processes
4. Find out how grantholders rate their relationship with ABCT
5. Understand applicant's perceptions of and demand for Funder Plus offers
6. Use the findings to inform an upcoming strategy review

The research consisted of an online survey with grantholders and unsuccessful applicants, which took place between the 2nd and 23rd February 2022.

- 319 out of the 893 organisations the survey was sent to responded and completed the survey, meaning there was an approximate response rate of 36%.
- The survey was sent to 260 grantholders and completed by 159. It was sent to 633 unsuccessful applicants and completed by 160. This means the response rate for grantholders was 61% and for unsuccessful applicants, it was 25%. Compared to other funding organisations, this is a very good response rate for grantholders and an expected response rate for unsuccessful applicants.
- Grantholders were defined as having been successful with their most recent grant application; unsuccessful applicants as those who were unsuccessful.
- It is important to note the percentage of successful and unsuccessful applicants per ABCT priority. Respondants under the justice system and penal reform priority¹ included a high proportion of unsuccessful applicants - 34% were successful, whilst 66% were unsuccessful. The opposite is true for the Migrants and Refugees priority, with 62% as successful and 38% unsuccessful. There was a more even split of successful and unsuccessful applicants to the Human Rights, particularly access to justice priority – 48% were successful, whilst 53% were unsuccessful. These differences may well have an

¹ Please note that the criminal justice and penal reform priority area was renamed *the justice system and penal reform* in 2022, the focus remains the same.

impact on the experiences of applicants within each priority area, as, overall, grantholders tend to have a more positive experience and unsuccessful applicants a more negative experience.

- We have included a 'benchmark average' based on research conducted with the grantholders and unsuccessful applicants from eleven other funding organisations. The sample size for the grant maker average is approximately 6,400. The sample size for the benchmark average can vary according to the question.
- The eleven funding organisations that make up the benchmark are the Lloyds Bank Foundation for England and Wales, Tudor Trust, the Wolfson Foundation, the Clothworkers' Foundation, Cumbria Community Foundation, BBC Children in Need, the Nominet Trust, the People's Postcode Lottery, the John Ellerman Foundation, the Esmée Fairbairn Foundation and the Road Safety Trust.

Summary of key findings

1. Overview: ABCT is perceived as flexible and trusting, though some say they experienced barriers to funding

ABCT is described as an approachable, supportive and flexible funder. The Trust is praised particularly for its commitment to the sectors it supports and its flexible approach to grant making and offer of core funding leaves applicants feeling trusted. 1 in 5 applicants say they experienced barriers to funding, with this being higher for unsuccessful applicants and organisations with a smaller annual income, which tended to stem from issues with limited capacity or from not meeting eligibility criteria.

2. Application process: Simple, flexible and quick

The ABCT application process is rated very highly. Applicants commended the simplicity and ease of completing the application form, and the flexibility of the approach. A particular strong point was the length of time taken to complete the application – ABCT application takes around half the time to complete than those of other funders in nfpResearch’s Grantmaker benchmark. Where applicants suggest the Trust could improve is by providing further guidance on criteria used to judge applications and by granting unsuccessful applicants the option of being able to reapply sooner.

3. Relationship with funder: Positive experiences of communication with staff, though more contact would be welcomed

Contact with the ABCT team is very valuable before the submission of an application and applicants describe the team as helpful, supportive, and responsive. Grantholders were particularly positive about the helpfulness of staff, whilst unsuccessful applicants were more neutral. Grantholders spoke highly of their relationship with the Trust after the grant had been awarded, with the light-touch approach to monitoring and reporting leading grantholders to feel trusted. However, some were open to developing a deeper relationship and establishing more contact.

4. Unsuccessful applicants: Applicants appreciate the detailed feedback

ABCT offer feedback calls, and unsuccessful applicants praise the time given to provide feedback and some mention this as an area where ABCT particularly excels compared to other funders. However, there is room for improvement as almost 1 in 4 found it unclear why their application was rejected and many either didn’t find feedback useful or did not receive feedback at all. Unsuccessful applicants would appreciate more clarity as to why they are rejected and the criteria they’re judged against in order to increase future chances of success.

5. Funder Plus offers: Applicants recognise the benefits of Funder Plus offers, though some feel space is becoming overcrowded

Some applicants expressed a desire for ABCT to provide opportunities and support that goes beyond financial support, including mentions of networking opportunities, learning materials and development training. In order to explore this type of support ABCT asked a series of questions about experience of Funder Plus offers. Funder Plus offers are approaches taken by funders to go beyond financial assistance, to offer advice and training additional to a grant. Many applicants had accessed a Funder Plus offer from another funder and the majority found this helpful. Those who hadn't accessed one were most commonly unaware this type of offer existed or concerned about the extra strain on already limited capacity. Nearly 7 in 10 say that it would be helpful for The ABCT to develop this kind of offer, however, some see this space becoming overcrowded and stress the importance of offering something tailored rather than duplicated.

In-depth findings

Overview: ABCT is perceived as flexible and trusting, though some say they experienced barriers to funding

Willingness to support the sector and offer core funding is very appreciated

Throughout the survey, it was clear that the majority of applicants had a very positive perception of ABCT and the way it approaches grant making. When asked what words came to mind when thinking of ABCT, applicants most frequently described them as helpful, approachable, supportive and flexible.

Applicants praised the Trust's focus on valuable projects in the areas of human rights and social justice, particularly appreciating its commitment to the sector and how it "*helps progress change in the sector*" (Modern slavery or trafficking, £501k - £1m, grantholder). In addition, applicants mentioned their gratitude for the ABCT offering core, unrestricted funding and one described this approach as "*the best thing A B Charitable Trust does*" (Refugees & migration, £50k - £100k, grantholder). This approach, along with their drive to "*understand and support the sectors it works with*" (Refugees & migration, £1m - £5m, grantholder) causes many grantholders to feel trusted in their work, as one grantholder expresses below.

*"Unrestricted funds are a god-send! **They trust organisations** to get on with what they do, and spend the time getting to know them so they can do this **in good faith.**"* (Justice system and penal reform, £501k - £1m, grantholder)

*"[They] **support organisations upholding human rights**, particularly for communities facing multiple barriers. In working towards this objective, the Trust has ensured **its processes are not creating barriers** for organisations requesting a grant through the guidance and application process and importantly **recognising the importance of being flexible in project and core costs.**"* (Legal advice, £501k - £1m, grantholder)

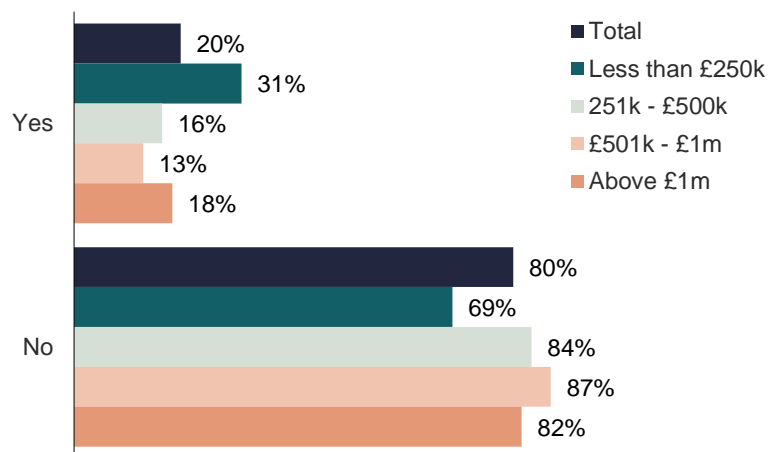
*"It was hugely helpful to have the option to accept the grant as unrestricted funds despite putting in a specific proposal, as this allowed us to act in more sustainable way this funding year. **It also showed a level of trust from AB Charitable Trust** as a funder that made us feel **respected**, and that showed an understanding for the fluctuating capacity needs of small-mid size grassroots organisations."* (Refugees & migration, £251k - £500k, grantholder)

Though providing core funding was highly praised, when asked about what ABCT could improve on, applicants did have suggestions of improvements when it comes to funding. A few mentioned that they would like to see the Trust provide multi-year grants with one expressing how "*...a multi-year grant would save time on applications, and more importantly, give extra support to our sustainability at a time when multi-year grants seem increasingly hard to come by, by putting secured income into future years' budgets*" (Refugees & migration, £251k - £500k, grantholder). Another mentioned they would like to see all three funding programmes (Justice system and penal reform; Migrants and Refugees; and Human Rights, particularly access to justice) open to applications.

Unsuccessful applicants and smaller organisations more likely to say they experienced barriers to funding

ABCT sought to understand whether applicants of their grants had experienced any barriers to accessing funding. One in five said that their organisation had experienced barriers to funding and unsuccessful applicants were much more likely to say they had experienced barriers compared to grantholders (32% of unsuccessful applicants compared to 8% of grantholders). Breaking this down by the annual income of the organisation also shows us that organisations with an annual income of less than £250k are 10% more likely to say that they have experienced barriers to funding.

Figure 1: Barriers to accessing funding from The ABCT by annual income



“Would you say that your organisation has experienced any barriers to accessing funding from The A B Charitable Trust?”
Base: 159 grantholders & 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch

Comments made by organisations in lower annual income brackets highlight the barrier that the limited capacity and resources of these smaller organisations create when competing against larger organisations.

“We are small and with limited capacity and competing with many organisations with strong capacity.” (Refugees & migration, £101k - £250k, unsuccessful applicant)

Others expressed that their area of work or project focus was a barrier as it did not fit within the narrower categorisations of the work that ABCT funds, causing the application to be rejected.

*“We are a project focusing on refugees and asylum seekers. The charity that is our umbrella organisation has other areas of work. Although we only work with refugees, **because we were part of a bigger organisation that wasn't solely working with migrants, we didn't get a grant.** We are responsible for raising our own funds and get no financial assistance from our umbrella organisation, so it seemed a harsh decision.”* (Refugees & migration, £101k - £250k, unsuccessful applicant)

*“With limited resources, I think it's good to have very specific criteria, **but you can miss the organisation working in the gaps** between the conventionally recognised categories of need.”* (Housing and homelessness, £101k - £250k, unsuccessful applicant)

Application process: Simple, flexible and quick

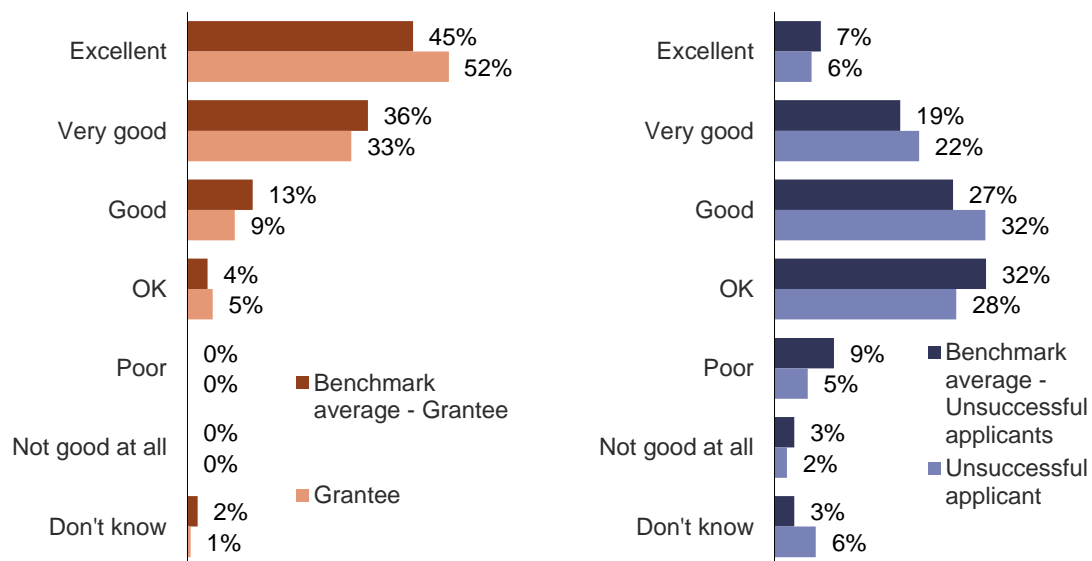
Overall, the application process is perceived positively

On the whole, ABCT’s application process is perceived very positively, with applicants commending its straightforward and clear approach. Applicants were particularly grateful for the flexible, conversational approach and communicative staff. The application process was seen as very quick to complete, with the average ABCT application taking around half the time than that of the benchmark average.

“A clear and accessible process. Good communication by staff with regards any questions and the timeframe. Not too many hoops to jump through, AND most importantly, a flexible funder willing to provide core funding!” (Legal advice, £251k-£500k, grantholder)

ABCT scored highly in terms of applicants' overall experience of the application process. Grantholders were especially positive about the application process, with 85% rating it ‘excellent’ or ‘very good, which is slightly higher than the benchmark average. Unsuccessful applicants do not rate the application process as highly which is consistent with the benchmark average, however, very few rate the process ‘poor’ or ‘not good at all’.

Figure 2: Rating The ABCT’s application process - by grantholders vs unsuccessful applicants



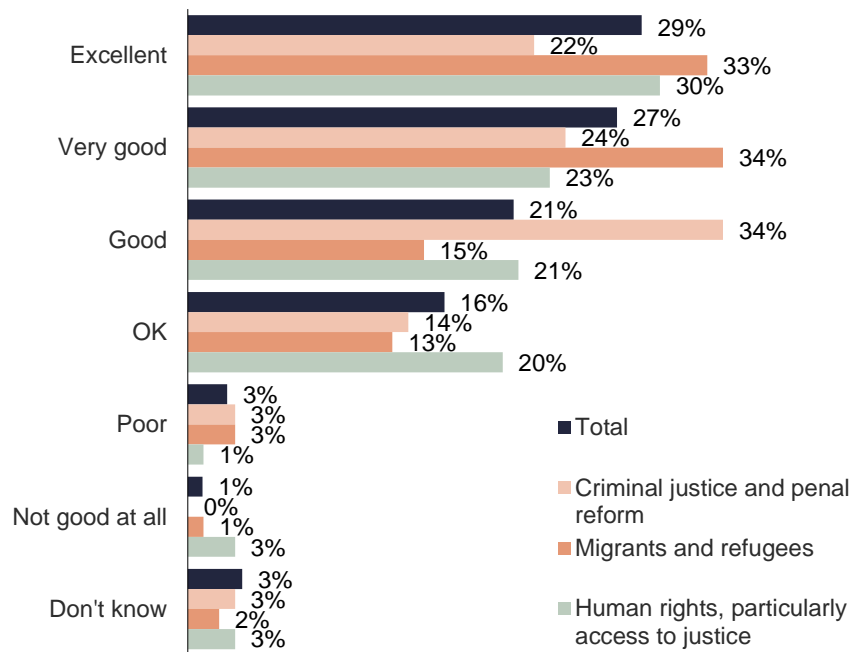
“How would you rate your experience of the application process?”

Base: 159 grantholders & 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~2,800 grantholders/ applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

Those who had applied under the migrants and refugees priority were the most positive about the overall experience of the application process, with 67% rating the process as ‘very good’ or ‘excellent’. Those applying under the justice system and penal reform priority were the least enthusiastic (46% rated it ‘very good’ or ‘excellent’). It is worth noting here that a larger proportion of respondents that applied under the migrants and refugees priority are grantholders – 62% compared to 34% of grantholders under the justice system and penal reform priority and 48% under the human rights priority. The fact that grantholders make up a higher proportion of the migrant and refugees sample and unsuccessful applicants a higher proportion of the Justice system and penal reform priority

sample may help to explain their differing experiences as grantholders are more likely to have had a positive experience given the successful outcome.

Figure 3: Rating ABCT’s application process - by ABCT priority



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

Base: 159 grantholders & 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch

The application process is reasonable and takes around half the time than that of the benchmark average

On average, applicants took just over half the time to complete an ABCT application than the benchmark. Applicants say they dedicated on average 19.8 hours compared to a benchmark average of 38.3 hours. We do need to treat this data with some caution as it is based on those who said that they spend time on each stage on the application. For example, 29% of applicants say they did not have any phone contact, but for those who did, on average they spent just over an hour on this stage of the application.

The averages in Table 1 below show the most time intensive stage for applicants was developing the funding proposal, though applicants spent only 6.6 hours on this stage compared to a benchmark average of 14.4 hours. Separating grantholders and unsuccessful applicants shows us that both say they spent a very similar amount of time on each stage of the application process.

Table 1: Average amount of time (hours) spent on each stage of the application process by grantholder and unsuccessful applicant

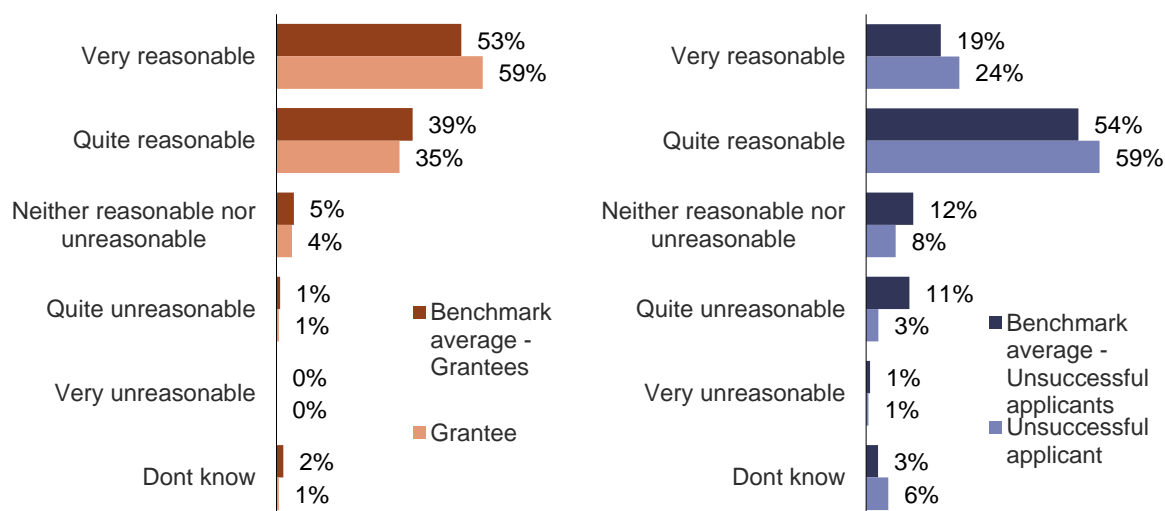
Full sample	Register enquiry	Assembling evidence and information	Developing funding proposal	Completing application	Post application clarifications and follow up	Phone contact	Total (hours)
The A B Charitable Trust	1.2	4.6	6.6	5.5	2.0	1.1	19.8
Benchmark average	1.5	11.5	14.4	11.7	4.0	1.2	38.3
Grantholder / Unsuccessful applicant							
Grantholder	1.0	4.6	6.6	5.7	1.9	1.1	20.3
Unsuccessful Applicants	1.4	4.6	6.7	5.4	2.0	1.0	19.4

“How many hours would you estimate you spent on the following aspects of your funding request / grant application to The A B Charitable Trust?” Average

Base: 159 grantholders & 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~6,000 grantholders/ applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

Consolidating applicants overall positive and non-onerous experiences of the application process, nearly 9 in 10 applicants felt the application was either ‘very’ or ‘quite’ reasonable for the size of the grant they were applying for. Though not as positive as grantholders, 83% of unsuccessful applicants still found the process reasonable.

Figure 4: Reasonableness of ABCT’s application process when considering size of grant by grantholders and unsuccessful applicants



“How reasonable did the application process feel for the size of grant you were applying for?”

Base: 159 grantholders & 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~1,000 grantholders/ applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

Many applicants appreciated the simple and straightforward nature of the application process and praised ABCT for developing a flexible and communicative approach to submitting applications that supported and allowed for organisations with more limited experience/ capabilities.

*“One of the most smoothest and simple process’s. I am dyslexic and having to do the grant applications for the charity can be difficult for me sometimes. **The application form and process is very effective, easy to complete and makes my work much easier and comfortable** when applications are not so difficult.” (Justice system and penal reform, £101k - £250k, grantholder)*

*“ABCT has been extremely **open and transparent**. We have somewhat limited fundraising capacity but the **demands of the funding application are not overwhelming for us.**” (Refugees & migration, £1m - £5m, grantholder)*

*“The process of the application **to talk and have a conversation instead of filling in an application form is very good for a small charity like us**, who may not have the bid writing skills. Many thanks for your support.” (Refugees & migration, less than £50k, grantholder)*

*“The application process was straightforward and focused on **“tell us what you really think and what you really do”** rather than trying to write what I thought the funder wanted to hear.” (Refugees & migration, £501k - £1m, grantholder)*

*“The AB trust has one of the best application processes of any organisation we have applied to. The main reasons for this are; **questions are easy to follow, the response time is quick, support is available** for any questions, everyone we have spoken to at the trust has been kind and approachable, and **feedback is prioritised.**” (Justice system and penal reform, £251k-£500k, unsuccessful applicant)*

*“**The process was simple and not overly onerous.** The information on the website was very clear. Might be good to know more about the organisations/projects you have already funded.” (Art Museum, £1m-£5m, unsuccessful applicant)*

Some applicants would like further guidance and the option of reapplying sooner

Though ABCT received a lot of positive feedback, asked where the Trust could improve, some applicants mentioned it would be useful to have more feedback and guidance in place during the application period and others asked for more briefing events to *“provide further clarity about what it is they are looking for in an application.”* (Domestic abuse, £501k - £1m, unsuccessful applicant)

*“Provide info **sessions on the available funds and learning workshops for charities to enhance the quality to funding applications.**” (Refugees & migration, £501k - £1m, unsuccessful applicant)*

*“Provide feedback. Work with applicants to discuss the project. **Maybe a webinar of what they expect and the criteria** in order to ensure people are aware of whether they are eligible or not and to answer any questions.” (Justice system and penal reform, £501k - £1m, unsuccessful applicant)*

*“Having a **process that helps charities to get feedback on applications before submission** and increase the chance to secure the funding.” (Refugees & migration, £501k - £1m, unsuccessful applicant).*

Some applicants mentioned it would be helpful to allow applicants to reapply sooner after their application is refused, rather than having to wait for 12 months.

Time taken to make a decision on application considered quick by applicants

Once the application was completed, the time taken for ABCT to make a decision on the request was deemed 'very' or 'quite' quick by over two thirds of applicants. Grantholders in particular consider the time taken to have been quick, and are more likely to think so compared to the average grantmaker grantholder (75% compared to 60%). Only 14% of unsuccessful applicants see it as slow, matching that of the grant maker benchmark.

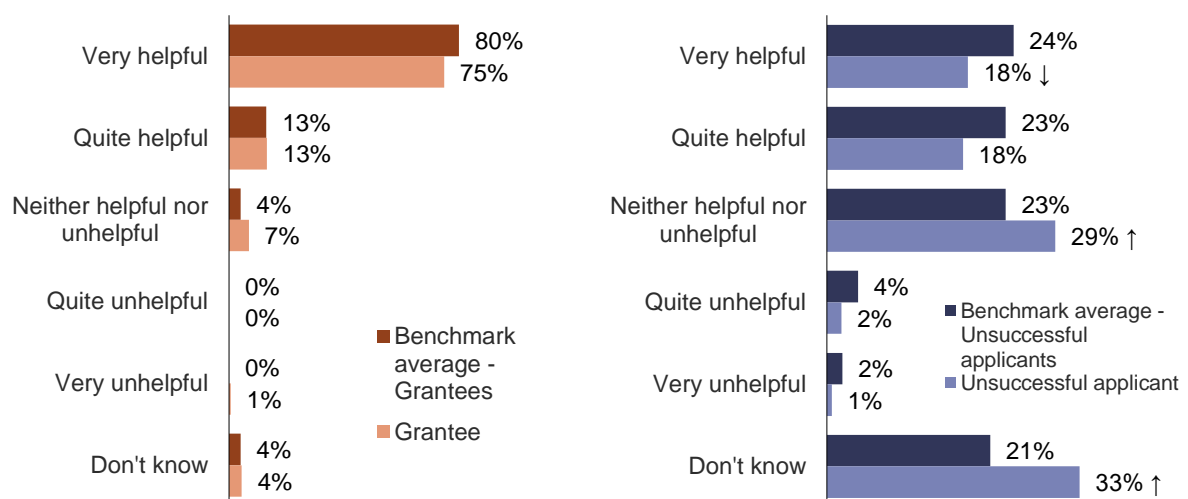
*"[There's a] Quick turnaround for grants. In some cases, **we have waited a year with other funders to know whether we have been successful. The quick turnaround makes it easier to plan...**" (Legal advice, £501k - £1m, grantholder)*

As we will go on to explore further, The Trust also received praise from many for its dedication to providing helpful and productive feedback.

Relationship with funder: Positive experiences of communication with staff, though more contact would be welcomed

In many cases where grantholders and unsuccessful applicants were in contact with ABCT staff, participants were satisfied with the relationships that they had developed. A large amount of applicants saw ABCT team as 'very' or 'quite' helpful (61%), though slightly less than the benchmark average of 73%. This number increased to 93% of grantholders finding the team helpful. Unsuccessful applicants were more indifferent or unsure, meaning around 10% less unsuccessful applicants found the team helpful compared to the benchmark average (36% vs 47%). However, only 3% found the team unhelpful.

Figure 5: Helpfulness of ABCT team while making application by grantholder and unsuccessful applicant



"How helpful were the A B Charitable Trust team while making your application?"

Base: 159 grantholders & 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~1,400 grantholders/ applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

Comments by applicants mentioned receiving excellent support and genuine interest from staff and many particularly mentioned interactions during the application process that "*showed their engagement and knowledge of our work and the wider sector, which was great to see in a funder.*" (Justice system and penal reform, £501k - £1m, grantholder)

*"We had an excellent experience making an application to ABCT - **the staff were warm, encouraging, and very helpful, which was motivating...**"* (Refugees & migration, £251k - £500k, grantholder)

*"Communication and feedback from ABCT was excellent and our grants manager was **responsive, clear and very helpful at all times.** We had been unsuccessful more than once over the years and to finally be awarded a grant was a significant progression - **made possible by the Trust's open, curious and supportive approach manifested in our grants officer.**"* (Justice system and penal reform, £101k - £250k, unsuccessful applicant).

Grantholders value ABCT’s light-touch approach to reporting, but some are open to more contact

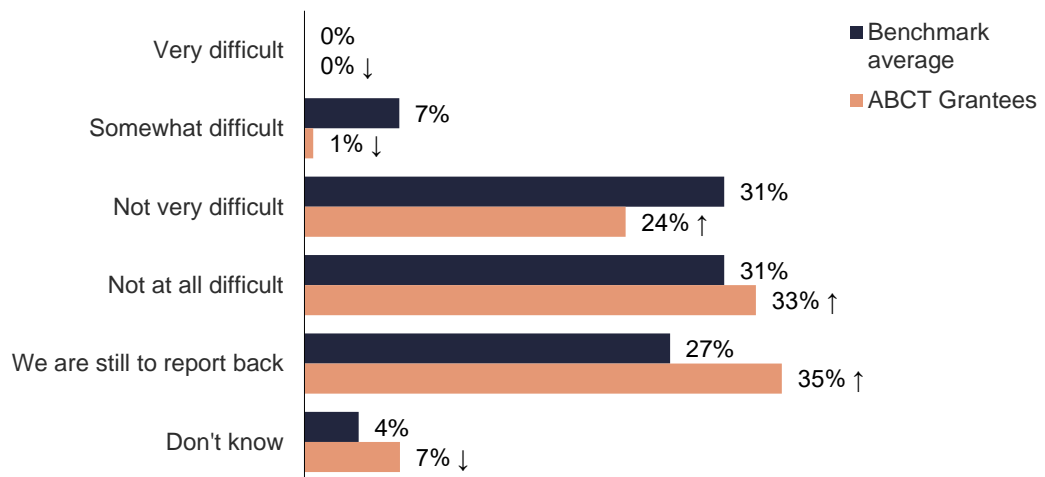
Grantholders also spoke very positively about their relationship with ABCT after they received their grant. 4 in 5 grantholders said the team was helpful after receiving their grant, with many mentioning that the team is very responsive and supportive. Good communication with their grant officer meant many grantholders felt the Trust understood their organisation and its aims well.

“Approachable and interested in forming meaningful partnerships with grantholders.”
(Refugees & migration, £251k - £500k, grantholder)

“During my interaction with grants officer, she asked all the relevant questions to find out more about our organisation as well as the people we work with. She also took some time to talk to us about AB trust while giving us an opportunity to ask all the relevant and affordable questions.” (Refugees & migration, £251k - £500k, grantholder)

Grantholders spoke highly of The ABCT’s light touch approach to monitoring and reporting and the majority (87%) said they receive about the right amount of contact with the Trust. Of those who had already reported back on the grant, nearly all found it either ‘not at all difficult’ or ‘not very difficult’ and as one former grantholder described: *“They communicate well and are down to earth, especially when it comes to reporting, which is not too complicated and onerous.”* (Refugees & migration, £251k - £500k, unsuccessful applicant)

Figure 6: Difficulty of reporting back on the grant once it was awarded



“How did you find the reporting back on the grant once it was awarded?”

Base: 159 grantholders | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~2,100 grantholders/ applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

As mentioned in the first section of this report, the Trust's light touch approach and unrestricted funding meant many grantholders felt trusted.

*"They unrestricted the grant to us. **Totally trusting us** to deliver against what we had set out to achieve and that we knew the best way to do this. **A dream funder.**"* (Refugees & migration, £251k - £500k)

*"We haven't had much contact, but this is OK. **I feel trusted to use the grant wisely.**"* (Refugees & migration, £501k - £1m)

Grantholders are open to developing a deeper relationship

However, comments from grantholders did highlight that some were open to more contact with the Trust in order to develop a deeper relationship and to understand more about the Trust to inform reporting and future applications.

*"We would be **happy to have more contact** if this is something the Trust would value, particularly if we could **develop a longer term understanding.**"* (Human rights, £501k - £1m, grantholder)

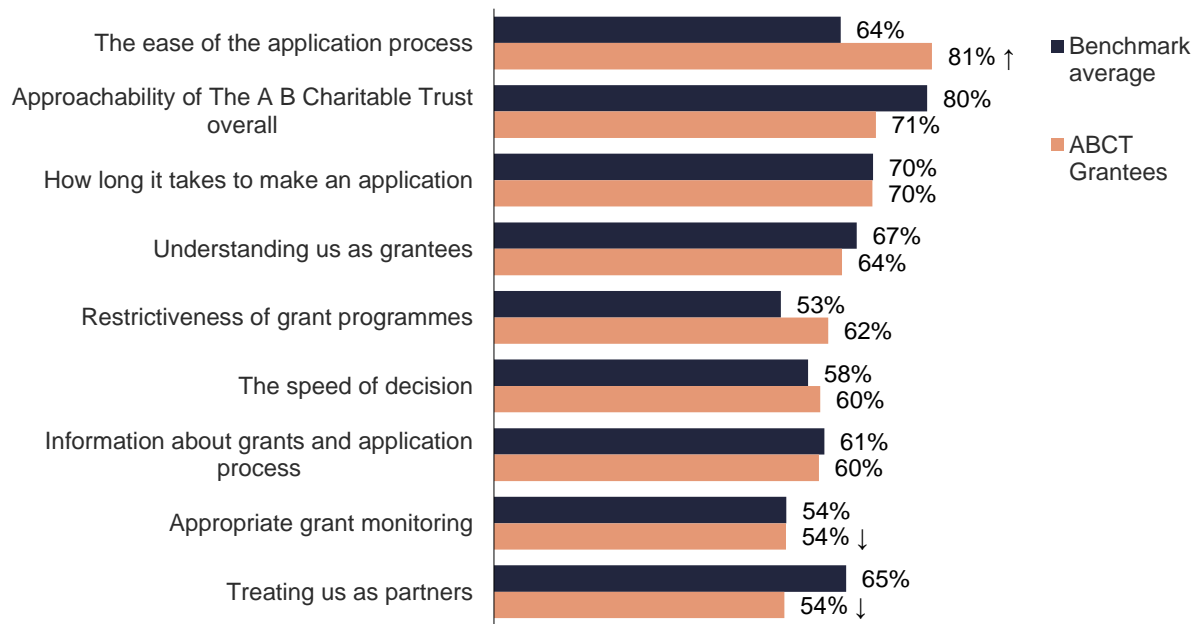
*"We would like to **build a relationship with ABC Trust** and have conversations about how the grant award is helping us to meet objectives and **build into ABC Trust networks** as well as other conversations." (Justice system and penal reform, £101k - £250k, grantholder)*

*"It would be nice to **meet the team and /or trustees** to get to know them better and **they can understand our work.**"* (Refugees & migration, £251k - £500k, grantholder)

"We welcome closer working/ Partnerships/ feeling that the funders "get us" and are in it with us." (Refugees & migration, £251k - £500k, grantholder)

As shown in figure 7, just over half of grantholders believed their experiences as partners was better with ABCT compared to other grant makers and 71% said the overall approachability of the Trust was better compared to other grant makers. These two areas were the only in which ABCT underperformed compared to the benchmark average. Perhaps grantholders willingness for a closer partnership and involvement from staff could be a contributing factor.

Figure 7: Grantholders' experiences compared to applications with other funders



"When you think about your experience of applying for and getting a grant with The A B Charitable Trust how would you say they compare with other grant-makers?" **Much better + Better**

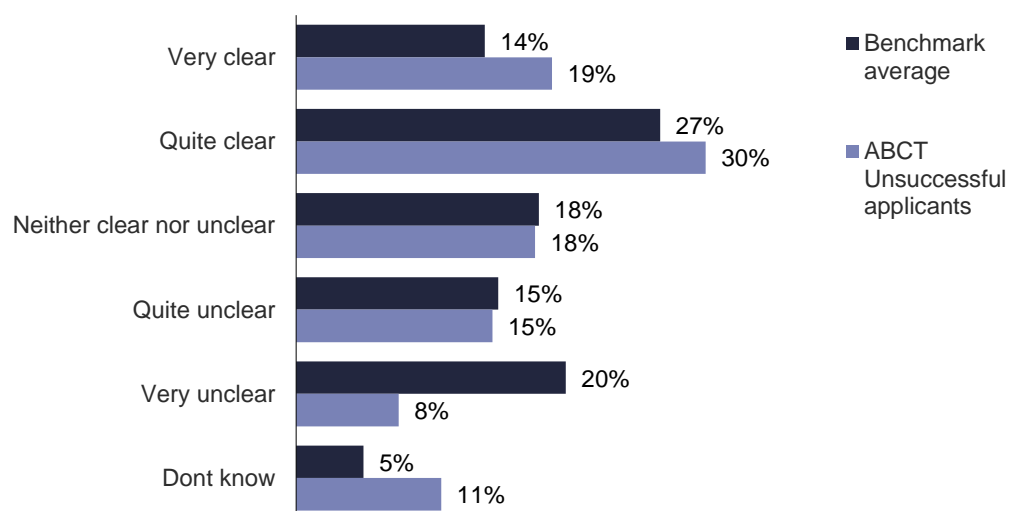
Base: 159 grantholders | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~2,100 grantholders/ applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

On the other hand, the results of this question also provide more evidence to show that grantholders appreciate the flexibility and ease of the application process, as addressed in the previous section. Ease of application process in particular, and restrictiveness of grant programmes are both areas in which the Trust outperforms the benchmark.

Unsuccessful Applicants: Applicants appreciate detailed feedback

Feedback for unsuccessful applicants is an area that particularly sets ABCT apart from other funders. Half of unsuccessful applicants were clear on why their application was rejected, compared to a benchmark average of 41%. However, there is room for improvement, with 23% of unsuccessful applicants 'quite' or 'very' unclear as to why the Trust had rejected their application – though this is much lower than the benchmark average. Comparing the three ABCT priorities, the number of unsuccessful applicants unclear on why their application was rejected increased to 28% for those who applied under the human rights, particularly access to justice priority.

Figure 8: Clarity on decision behind rejecting application



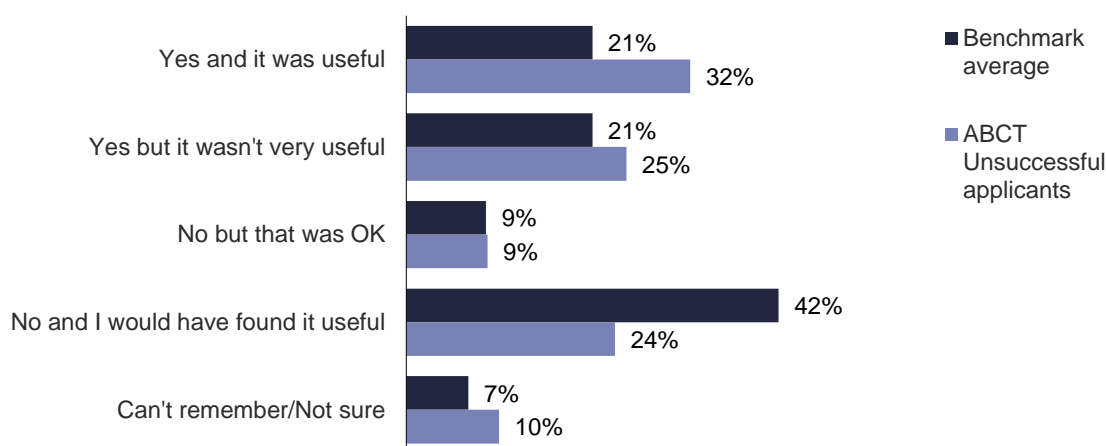
"How clear was it why The A B Charitable Trust declined your application?"

Base: 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~600 unsuccessful applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

Figure 9 gives more detail on unsuccessful applicants' perceptions of the feedback they received from ABCT. 57% say that they received feedback on why they were unsuccessful and of these, 25% did not find the feedback very useful. This is marginally higher than the benchmark average, however, 32% did find it useful, 11% more than the benchmark average of 21%.

On the other hand, a third of applicants whose applications were not successful did not receive any feedback. This is a lower number than the benchmark average at 51%, yet, a large proportion of these report they would have found feedback useful.

Figure 9: Rating ABCT's feedback on unsuccessful application



"Did you receive any feedback on why your proposal was unsuccessful?"

Base: 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch and ~600 unsuccessful applicants across 11 grant makers | Source: Grant makers benchmark, Feb 22, nfpResearch

ABCT was praised by some for providing feedback at all, particularly compared to other funders and there was an appreciation of the time taken by staff to give valuable feedback.

*"This is an area in which the AB trust is excellent in our view. We were very grateful that we were given a specific time to **chat over the phone** and get feedback. While different trusts have different available resources, making the time for **feedback makes an incredible difference**; both to the charity and to fundraisers. Thank you."* (Justice system and penal reform, £251k - £500k)

*I was incredibly **grateful for Emma's time**. It is incredibly valuable to receive feedback, and **only very few funders have the capacity/inclination to do so, thank you.**"* (Mental health, £1m - £5m)

*"We were particularly **grateful for the feedback process** when our application was initially unsuccessful. **This level of feedback is unusual in our experience** and was **invaluable not only in leading to a successful outcome for our application but for our future proposal writing for other trusts and foundations**. We were particularly impressed by the interest staff took in our application, their understanding of our situation and their flexibility and openness in processing it. Regardless of the outcome, this made the experience of applying a very positive one."* (Modern slavery or trafficking, £501k - £1m)

Some would like further information

The importance of feedback was particularly emphasised when talking about future applications, particularly reapplying for ABCT grants. Having a better understanding of the criteria and factors behind decision making would help to enlighten applicants as to why they were rejected and feedback is useful in knowing how to make changes to increase chances of success with future projects and proposals. A few applicants mentioned feedback being too generic, though one acknowledged that they did not take up the offer of a follow up phone call which would likely have helped with this.

*“I was told that there were many good applications that were in a similar area and we just missed out. **I don't know exactly why ours wasn't chosen** as the woman I spoke to didn't have any details of why. **The second time we didn't get the grant I didn't bother asking for feedback.**” (Children & young people, £501k - £1m)*

*“**It would be good to know what factors are being used** to make these difficult decisions without having to make a phone call.” (Justice system and penal reform, £501k - £1m)*

*“Simply informed that due to the high numbers of applicants I could not ask for feedback (which I understand), but **how do I set my next application if I am not informed of why ours did not stand out amongst competitor applicants?**” (Justice system and penal reform, £101k - £250k)*

Funder Plus offers: Applicants recognise the benefits of Funder Plus offers, though some feel space is becoming overcrowded

There is a desire for networking opportunities

Before discussing the topic of Funder Plus offers, it is relevant to note that one theme that emerged from asking applicants how ABCT could support them or the wider sector or how ABCT could improve was a call to provide more networking opportunities with funders and grantholders, to “*create spaces for collaboration and information sharing.*” (Refugees & migration, £251k-£500k, grantholder). There is a desire from some applicants for opportunities and support that goes beyond financial support.

“Building networks of charities and funders in criminal justice.” (Justice system and penal reform, £501k-£1m, unsuccessful applicant)

“More opportunities to network with funders and other grantees, but also aware that this has not been possible in the last two years!” (Substance abuse, £501k-£1m, grantholder)

“Offer more than just funding to help with capacity development of staff within small organisations, be more open and honest about what the trust is up to on a regular basis, help facilitate networking opportunities with other funders, facilitate networking opportunities with other funded organisations.” (Social welfare, £501k-£1m, grantholder)

Majority find Funder Plus offers helpful and there is encouragement for ABCT to develop similar support

Funder Plus offers are approaches taken by funders to go beyond financial assistance, to offer advice and training additional to a grant. Following conversations with other funders and grantholders, staff at ABCT wondered whether grantholders may be feeling ‘Funder Plused out’. In order to test this hypothesis, the Trust sought to delve deeper into applicants’ experiences and perceptions of Funder Plus offers they had received. The Trust also aimed to use this understanding to inform their own consideration of providing this type of approach for its grantholders.

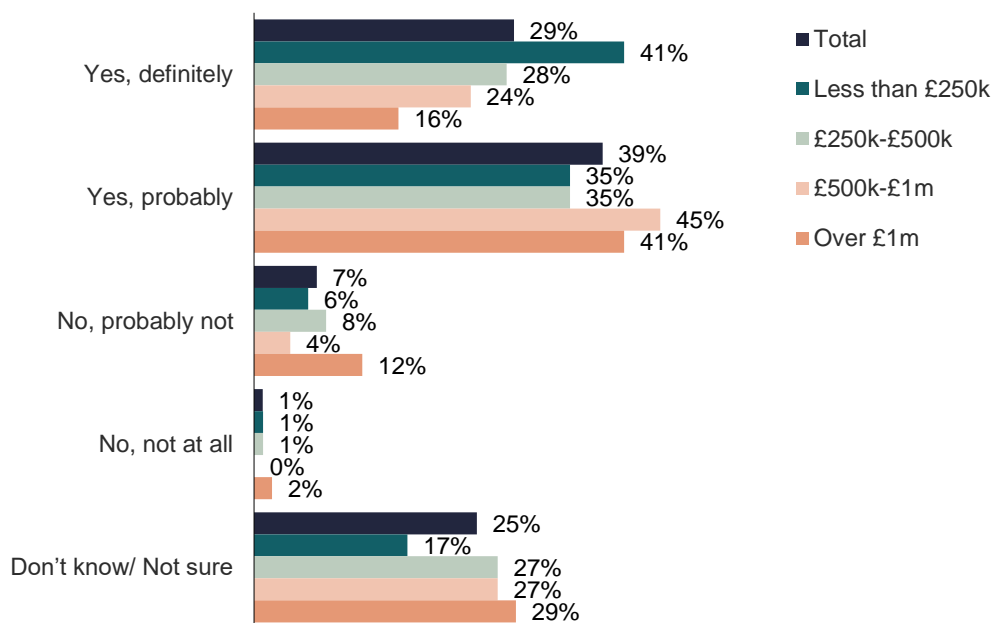
43% of applicants had accessed a Funder Plus offer from another funder. Of these, 93% found this offer ‘very’ or ‘quite’ helpful and only 1% found it unhelpful. The most common reasons cited for not having accessed this type of offer was being unaware that it existed and concerns about the limited capacity and resources of smaller organisations.

“We do not know much about it-as a small charity it may be hard to benefit from advice when we are preoccupied with delivering our mission.” (Refugees & migration, £101k - £250k, grantholder)

“For a hard pressed charity short of both financial and time resources, an offer of an expert to tell you what to do (better) without the financial or time resource to do it may just be helping the funder feel good about itself. (I have been a funder too).” (Housing and homelessness, £101k-£250k, unsuccessful applicant)

Many applicants were enthusiastic about the prospect of ABCT developing this type of non-financial support with over two thirds saying they'd find it helpful. Organisations with an income of less than £250k were particularly likely to say that the Trust developing this kind of offer would definitely be helpful, whilst organisations with an annual income over £1m were more likely to say it would probably not be helpful. The benefits of additional support and training, especially for smaller and younger charities, was particularly emphasised.

Figure 10: Helpfulness of ABCT developing a Funder Plus type offer by annual income



“Do you think it would be helpful if The A B Charitable Trust were to develop this kind of support?”
 Base: 159 grantholders & 160 unsuccessful applicants | Source: A B Charitable Trust survey, Feb 22, nfpResearch

“Because they understand the relevant sectors and small charities well, a funder plus idea (e.g. with support options including targeted training or mentoring to trustees and senior managers), could be a way of improving support to such small organisations, even if there is not enough funding to go round.” (Refugees & migration, £251k - £500k, unsuccessful applicant)

“It helps a funder build a better relationship with the organisation they are funding and to ensure that the organisation is supported more broadly, which is likely to result in better outcomes for those they support.” (Housing & homelessness, £1m-£5m, unsuccessful applicant)

“As a charity that’s grown from small to medium-sized relatively quickly, there are definitely skills we need to build on our team, but we don’t always have extra funding to devote toward operational capacity-building. This type of support would be very useful.” (Refugee & migration, £251k-£500k, grantholder)

Some feel space is overcrowded and emphasise importance of a tailored approach that differs from other funders

Those not keen on the idea of ABCT providing this kind of support expressed worries over the extra time and resources needed to manage these offers and a few suggested available funds and resources should continue to be directed towards grant giving.

*“In experience from previous work **these "offers" take up more time/resources than they save/provide** especially for the organisations that could benefit from extra resources. Too often **they are not tailored to the organisation's needs...**”* (Refugees & migration, £1m-£5m, grantholder)

*“...I felt quite cynical about private sector consultants benefitting financially from providing low grade support. On balance my view is that **I would prefer all available funds to be used for grant giving**. Local CVS can provide development and strategic support to inexperienced organisations.”* (Justice system and penal reform, £101k-£250k, grantholder)

Applicants who had accessed Funder Plus offers from other funders, particularly Lloyds Bank Foundation, expressed concern about the danger of overcrowding in this space. Some cited this as a reason why ABCT do not need to expand into this type of funding, whilst a handful keen on the idea still stressed the importance of offering something different to other funders.

*“This appears to be getting fashionable with funders and **we do not need everyone to be offering this extra support**. Managing these relationships/support packages itself can be a drain on already strained resources.”* (Legal advice, £251k-£500k, unsuccessful applicant)

*“I would be a little careful with this one - if all the funders start offering the same assistance then it's going to have an impact as we all feel duty bound to respond. This might sound a bit ungracious but **the help needs to be tailored and not duplicated and also not just put out there for the sake of it**. It would be good to have things available that no one else had.”*
(Refugee & migration, £251k-£500k, grantholder)

*“It might be **difficult to make best use of several similar offers of this type of support** if you had several concurrent grants from different funders with the same deal (it's quite time-consuming apart from anything else) - but our experience of 'enhanced' support from Lloyds has been really positive, and **after being initially sceptical about this kind of support we now appreciate its value**.”* (Refugees & migration, £251k-£500k, grantholder)



About us

nfpResearch is a leading market research agency in the not-for-profit sector. We put information in the hands of charities, to help them to help as many people as possible.

What sets us apart is the quality of our research. Using sophisticated analytical tools, we drill down into the detail to produce rigorous analysis that can take your organisation to the next level. We might not always tell you what you want to hear – but we promise to tell you what you need to hear, and to listen to your vision of where you want to go.

nfpResearch

2-6 Tenter Ground, Spitalfields, London E1 7NH
020 7426 8888 | nfpresearch.com

Registered in England No. 04387900
VAT Registration 839 8186 72