

The Robertson Trust's grant holder survey

Analysis of findings

Katie Boswell, Ben Fowler, Lily Meisner

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Executive summary

At the end of 2021, The Robertson Trust (TRT) hosted a survey for its existing grant holders, to help understand TRT's effectiveness as a funder, particularly around its Funder Plus support. A total of 237 grant holders responded to the survey.

Views on TRT's funding processes

The responses to statements about TRT's funding processes were mostly positive. The main reasons being positive experiences around the application process, timely and prompt responses to enquiries, proportionate turnaround times, and that grant holders mostly know what information to expect from TRT at each stage of the funding process.

Views on TRT's engagement

The responses to statements about how TRT engages with grant holders were mostly very positive. Most grant holders responded that they know what to expect from engagements with TRT, they feel trusted and able to trust TRT, they have a positive relationship with TRT, and they feel they can speak to them honestly and openly. Areas of improvement included more frequent reviews for grant holders and more in-depth engagement by TRT with grant holder projects.

Funder Plus support

The survey responses highlight that few of TRT's grant holders have accessed the Funder Plus support. For most of them, this appears to be down to a lack of knowledge that the support existed. For the few organisations that had accessed Funder Plus support, the experience has been mixed.

Impact of grants

Most respondents thought that grants from TRT have had an overwhelmingly positive impact. Out of 205 responses to 'what difference(s) has our grant made to your organisation (if any)?', only two answers were not wholly positive: one simply because delays have meant they haven't received their grant yet, and the other mentioned that a 48-month grant would have offered more stability but noted that 24-months will still make a difference. As for the remaining 203 responses, all of them stated their grants from TRT have had a positive impact in some way.

Introduction

Background

At the end of 2021, The Robertson Trust (TRT) hosted a survey for its existing grant holders, to help understand TRT's effectiveness as a funder, particularly around its Funder Plus support. A total of 237 grant holders responded to the survey. Comments in the survey suggested that many grant holders welcomed the chance to feed back to TRT: one grantee observed that conducting a survey of this nature was unusual in this context as "many funders do not ask for feedback".

The Robertson Trust commissioned NPC to analyse and summarise the findings. We conducted both quantitative and qualitative analysis of the survey responses, including summarising responses from scoring statement and multiple-choice questions and identifying areas for cross-analysis by breaking the data down by organisation type, size, grant type and strategic themes. We then supplemented our quantitative findings with qualitative analysis of responses to open-ended questions, allowing us to thematically analyse the results and gather findings.

About this report

This report shares our findings, including areas for improvement identified by respondents as well as strengths of the existing grant programmes. The findings will be useful to TRT and its grant holders, and may also be of interest to other funders. The report covers:

- Background information about survey respondents
- Findings around grant holder views on TRT's grant-making processes
- Findings around grant holder views on TRT's engagement as a funder
- Feedback on TRT's Funder Plus support
- A qualitative analysis of the general impact of TRT grants, specific feedback and areas of possible improvement

Background information about survey respondents

Organisation size and type

Out of 237 survey respondents, around 34% had an annual income of less than £25,000, 26% had incomes between £25,000-£100,000, 28% between £100,000-£500,000, 6% between £500,000-£1 million and about 4% had an annual income of over £1 million (the remaining 2% did not respond to this question).

For the purpose of our analysis, we grouped the two smallest categories into one category of 'small organisations' with an annual income of less than £100,000. This aligns with income bands used by the UK Civil Society Almanac, SCVO and others across the sector.¹

All of the medium and large organisations were registered charities, whilst small organisations were a mix of community groups and registered charities as shown in Figure 1 below.

Figure 1: Table showing the percentage of organisation types for each size

	Community Groups	Registered Charities
Small organisations (annual income less than £100,000)	17%	83%
Medium organisations (annual income £100,000-£500,000)		100%
Large organisations (annual income £500,000-£1 million +)		100%

¹ See NCVO (2021) *UK Civil Society Almanac 2021*, <https://beta.ncvo.org.uk/ncvo-publications/uk-civil-society-almanac-2021/> and SCVO (2020) *SCVO submission to the House of Lords: lessons from coronavirus*, <https://scvo.scot/p/39501/2020/07/10/scvo-submission-to-the-house-of-lords-lessons-from-coronavirus>

Grant type

Respondents selected which of five different grant types they currently receive from TRT: community building, community vehicle, large grant, small grant, and wee grant. We cross-analysed these grant types received by organisation size. The results were as we expected, with most smaller grants being received by the smaller organisations, and larger grants being received mainly by the larger organisations as shown in Figure 2.

Figure 2: Table showing the percentage of organisation size for each grant type

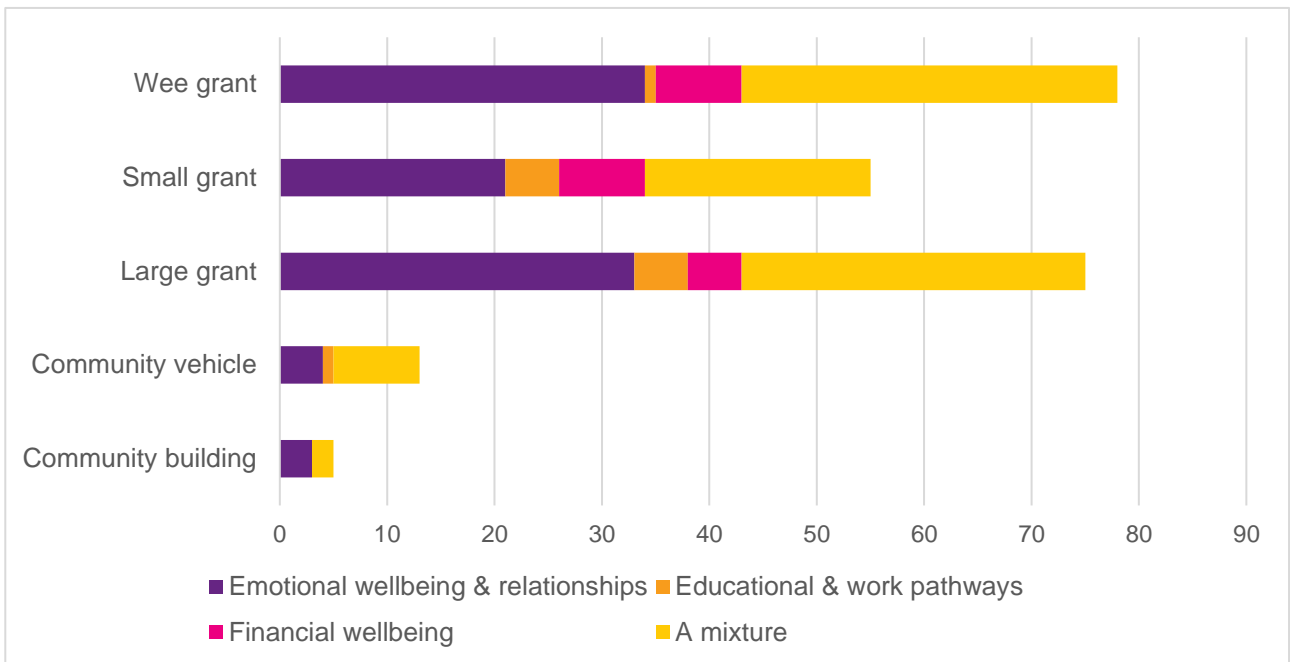
	Small organisations	Medium organisations	Large organisations
Community building grants	60%	40%	
Community vehicle grants	8%	77%	15%
Large grants	16%	60%	23%
Small grants	80%	13%	4%
Wee grants	100%		

Strategic themes

When asked “which strategic themes do you think your organisation most relates to”, about 45% of organisations cited emotional wellbeing & relationships, a further 45% selected a mixture of the multiple choice options, and the remaining 10% opted for either the financial wellbeing strategic theme or education & work pathways. Those proportions were broadly consistent across organisation type and grant type. There were no significant differences between views on the funding processes expressed by organisations funded under different strategic themes.

The graph in Figure 3 shows that the large grants, small grants and wee grants received by survey respondents covered a mix of the strategic themes. Community building and community vehicle grants however only covered the emotional wellbeing & relationships strategic theme or a mixture of themes, with just one community vehicle grant relating to the educational & work pathways strategic theme.

Figure 3: Number of grant types being received by each organisational strategic theme

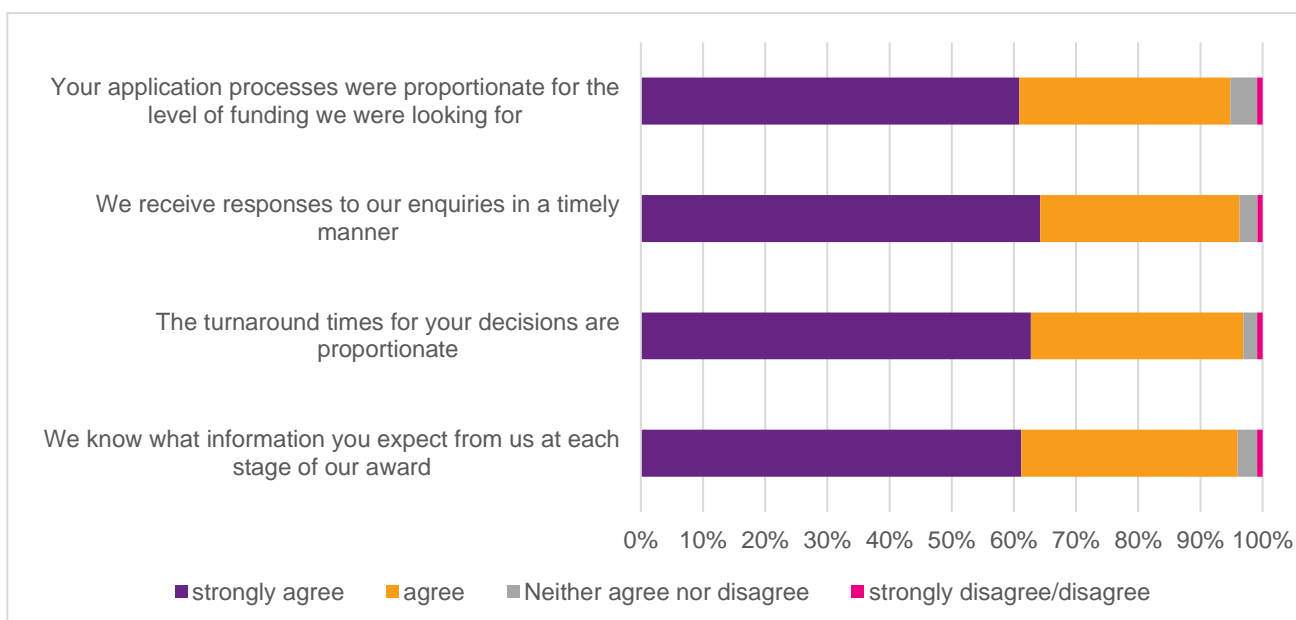


Views on the funding processes

Overall findings

The responses to statements about TRT's funding processes were mostly positive, as shown in Figure 4 below.

Figure 4: Percentage of respondents agreeing or disagreeing about the funding processes



Responses were relatively consistent across small, medium, and large organisations as reported in more detail for each of the statements below. Overall, responses to the statements were very positive across all organisation sizes. Whilst the numbers are low, it is noticeable that a minority of small organisations disagreed with each of the statements.

When we cross-analysed the responses against the type of grants, this revealed trends which aligned with the analysis against organisation sizes. The majority of different grant type holders responding in positive agreement with the statements. The minorities that disagreed with the statements were amongst wee grant holders and community vehicle holders: for responses on the proportion of funding, 4% of wee grant holders and 15% of community vehicle holders disagreed. It

is worth noting here that the sample size for community vehicle holders was small, with only 13 responses, meaning that each response counts for a significant percentage.

For “We receive responses to our enquiries in a timely manner”, “The turnaround times for your decisions are proportionate,” and “We know what information you expect from us at each stage of our award,” the only type of grant where the response wasn't 100% positive were the Wee Grant holders, with a 3% minority responding with disagree or strongly disagree for each of the three questions.

Application processes

When scoring the statement “Your application processes were proportionate for the level of funding we were looking for”, 88% of small organisations strongly agreed or agreed, 3% of small organisations strongly disagreed or disagreed, and the remaining respondents neither agreed nor disagreed or left it blank. For the same statement, 87% of medium organisations strongly agreed or agreed, and the remaining responses neither agreed nor disagreed or left it blank; and for large organisations, 87% strongly agreed or agreed, and the remaining responses neither agreed nor disagreed, or left it blank.

When asked about what TRT had done well as a funder over the last 12 months in an open text box, respondents highlighted the importance of simple application processes, approachable funding officers, and individual treatment of grant requests. Comments included:

“The application was very simple and our funding officer very approachable. It felt good to not have to jump through hoops and to be respected by a funder.”

“We have only applied once to yourselves so based on that experience I feel compared to other grant funders you actually listen and care about the cause instead of looking at it as a box ticking exercise. For this I thank your organisation because not everyone fits into the same box and it is important to treat each grant request individually and on its merits. By doing this the process for me felt more personal instead of clinical and feeling like a first come first serve basis. Thank You for being different.”

Responses to enquiries

When scoring the statement “We receive responses to our enquiries in a timely manner”, similarly the majority across the three organisation size groups responded with strongly agree or agree: 85% for small organisations, 93% for medium organisations, and 91% for large organisations. For medium and large organisations 0% strongly disagreed or disagreed, and only 2% of small organisations strongly disagreed or disagreed.

Comments in the open text box included:

“Robertson Trust staff are helpful, honest and you know exactly where you are with the application process.”

“RT staff are excellent. Clear and efficient communicators, who go out of their way to help us.”

“Sharing of information and in a timely manner”

Turnaround times for decisions

When scoring the statement “The turnaround times for your decisions are proportionate”, similarly the majority across the three organisation size groups responded with strongly agree or agree: 90% for small organisations, 94% for medium organisations, and 91% for large organisations. For medium and large organisations 0% strongly disagreed or disagreed, and only 2% of small organisations strongly disagreed or disagreed.

Comments in the open text box included:

“[T]he funding support and the ability to turn applications round within a relatively quick timescale has made a real difference.”

“The speed of turn around for funding decisions was fantastic. The application form [was] succinct and clear”

“Easily contactable to clarify and resolve things. Very quick and efficient at processing application and awarding funding”

Information expected at each stage

When scoring the statement “We know what information you expect from us at each stage of our award”, similarly the majority across the three organisation size groups responded with strongly agree or agree: 89% for small organisations, 93% for medium organisations, and 91% for large organisations. For medium and large organisations 0% strongly disagreed or disagreed, and only 2% of small organisations strongly disagreed or disagreed.

Comments in the open text box included:

“You are a very approachable funder, but you also keep it 'light touch' and don't ask too much from us (when we are all so busy delivering the projects you fund).”

“Communication is very good and I have just completed our first end of year report for this round of funding. The process was much easier, less time consuming and allowed me to use reports and data I had readily to hand - I did not have to re-write the wheel.”

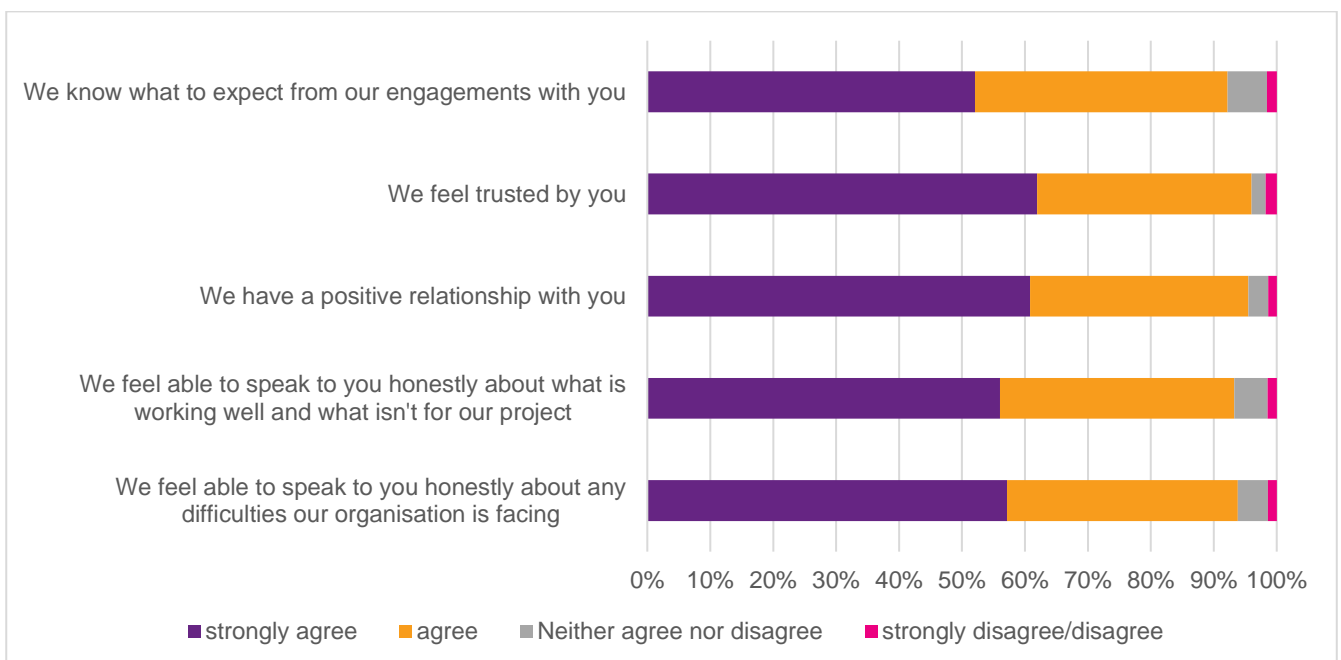
“The communication between the funding officers and the applicant was very professional, timely and informative.”

Feedback on The Robertson Trust's engagement

Overall findings

The responses to statements about how TRT engages with grant holders were mostly very positive as shown in Figure 5 below.

Figure 5: Percentage of respondents agreeing or disagreeing with statements about The Robertson Trust's engagement



As with previous questions, the responses were very positive overall and were relatively consistent across different sizes of organisation apart from a minority of smaller organisations disagreeing with each statement.

Similarly, the cross-analysis by grant type revealed that the minorities who disagreed with these statements were mostly wee grant holders and community vehicle holders. In addition, 3% of large grant holders disagreed that they felt trusted by TRT.

When we analysed the open text comments about TRT's engagement, the most frequent words used by grant holders included 'care', 'trusted', 'accessible', 'understanding', 'efficient' and 'supported' as shown in Figure 6 below.

Figure 6: A word cloud of most frequently used words with regards to how grant holders feel about their engagement with TRT



Knowing what to expect from engagements

82% of small organisations know what to expect from their engagements with TRT, and only 3% strongly disagreed or disagreed with this statement. Similarly, for medium organisations, 93% also strongly agreed or agreed that they know what to expect from their engagements with TRT and for large organisations, 87% also strongly agreed or agreed with this.

Most grant holders across all grant types strongly agreed or agreed with this statement. 4% of wee grant holders and 8% of community vehicle holders disagreed that they know what to expect from engagements with TRT.

Comments in open text box included:

“Very clear funding objectives and clear expectations of the application process”

“You were helpful and understanding, and clear with what you needed from our service to complete the application process”

“Great communication at every stage of the application and requirements are clearly set out”

Feeling trusted

In terms of feeling trusted by TRT, 89% of small organisations felt they do, and only 3% strongly disagreed or disagreed with this. For medium and large organisations, 90% and 91% respectively agreed they feel trusted by TRT.

Most grant holders across all grant types strongly agreed or agreed with this statement. 3% of large grant holders, 4% of wee grant holders and 8% of community vehicle holders disagreed with this statement.

Comments in the open text box included:

"I feel it's been a 'light touch' approach whereby I've met my funding officer and she has responded promptly when I've made contact. This makes us feel trusted and respected"

"The trust put in organisations through unrestricted funding is very beneficial and has proven vital in delivery in light of the pandemic. Putting trust in organisations to adapt delivery and respond meaningfully to the challenges their communities face helps charities to have the highest impact from your investment and react to the needs as they arise."

Having a positive relationship

88% of small organisations felt they have a positive relationship with TRT, and only 3% disagreed with this. For both medium and large organisations, 91% agreed they have a positive relationship with TRT.

Most grant holders across all grant types strongly agreed or agreed with this statement. 4% of wee grant holders and 8% of community vehicle holders disagreed that they have a positive relationship with TRT.

Comments in the open text box included:

"The officer dealing with our application was really helpful in teasing out the information needed to support it."

"The Robertson Trust has provided excellent communication and have responded to any enquiries we have made in a friendly constructive and positive way."

Speaking honestly

The survey also showed respondents overall felt they have positive communication with TRT: an average of 81% of small organisations feel able to speak to TRT honestly about what is not going well for their projects, or about any difficulties their organisation is facing; and only 3% of respondents felt they could not. For medium organisations, an average of 88% respondents similarly felt able to speak to TRT honestly about what is not going well for their projects, or about any difficulties their organisation is facing; and for large organisations this sentiment was shared by an average of 84% of respondents.

Most grant holders across all grant types strongly agreed or agreed with this statement. 3% of wee grant holders and 8% of community vehicle holders felt they couldn't talk to TRT honestly about what is not going well for their projects, or about any difficulties their organisation is facing.

Comments in the open text box included:

"Like all organisations there have been bumps in the road, however, we feel we can speak openly about our challenges."

"When we were going through the application process you asked for clarification of our finances and we had an open conversation"

Suggested improvements

The open-ended answers revealed possible reasons for the minorities disagreeing with the statements about TRT's engagement. For some grant holders, more frequent check-ins would better support them and their projects.

"Ask for a review in first 6month of award or report just to know if there's any problems but I do know that we can call if we needed help etc"

"Follow up support within 3 months of grant award"

"Perhaps more frequent informal check-ins in order to help build and develop relationships"

Other grant holders mentioned the value of TRT funding officers visiting projects to see the impact for themselves.

"Have funding officers more involved throughout the delivery of the projects, to see first-hand the impact. This is significantly better than putting this in writing."

"I know it is not always possible but in our case we would love it if one of your representatives could visit our club and see first hand what we do for the community. Putting it on paper and reading it from paper and actually witnessing it first hand makes a huge difference... By visiting you may also be better able to advise us on the best way we can be supported."

Funder plus support

Overall findings

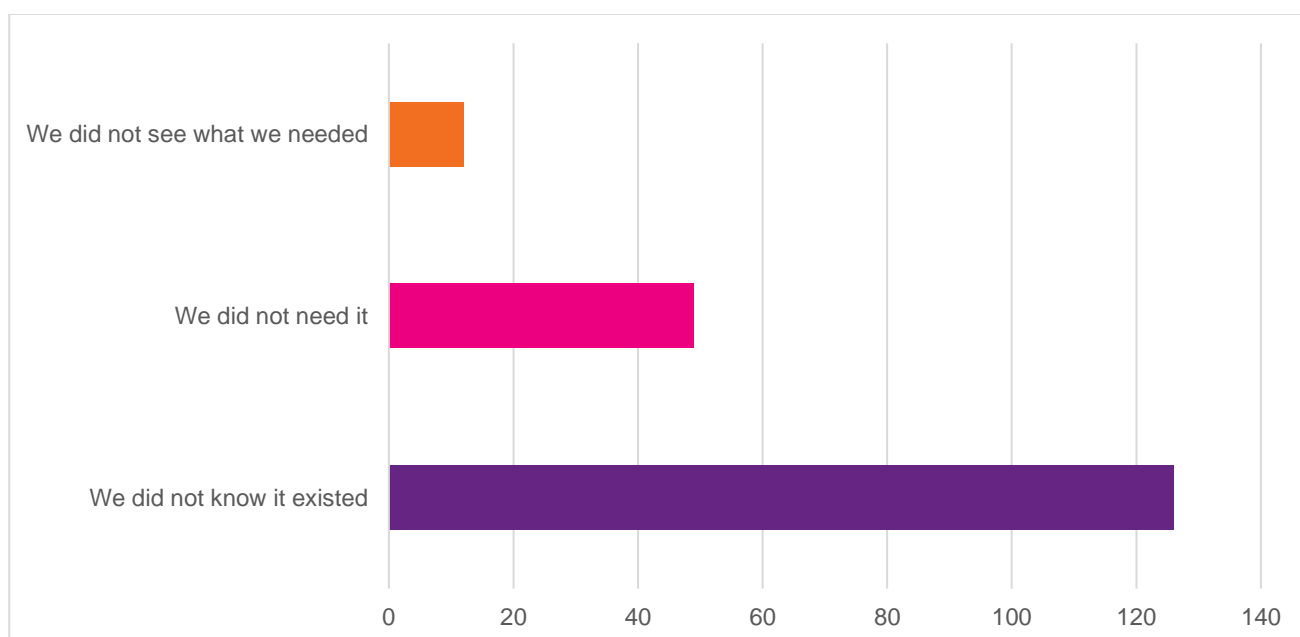
The survey responses highlight that few of TRT's grant holders have accessed the Funder Plus support. For most of them, this appears to be down to a lack of knowledge that the support existed. For the few organisations that had accessed Funder Plus support, the experience has been mixed.

Accessing support

Out of 237 respondents, five of these have accessed TRT's Funder Plus support over the last five months. Four out of these five were small organisations, and one of them was a medium organisation. Two of the small organisations and the medium organisations received the Evaluation Support Scotland Funder Plus support, and the remaining two small organisations did not specify their type of support.

When asked why they did not access Funder Plus support, most respondents indicated that they did not know it existed. Some thought they did not need it, whilst others did not see what they needed. Responses are shown in Figure 7 below.

Figure 7: Graph showing why organisations did not access Funder Plus support



Usefulness of support

Results were mixed in terms of how useful these organisations found the Funder Plus support. The two small organisations receiving the Evaluation Support Scotland support rated it 5 (very useful), and the medium size organisation left this blank. Another small organisation that did not specify their type of support rated it a 2. The small organisations who rated the Funder Plus support as a 5 (very useful), gave the following reasons:

“The organisation didn't have robust evaluation processes so it's been really helpful to have this course paid for as otherwise we wouldn't have been able to attend”

“TRT guidance showed us the right organisation to support our evaluation processes.”

The organisation that rated the support a 2 said:

“No online resources available if you couldn't get to the event”

There were however three more organisations, a small, a medium and a large organisation, who rated Funder Plus 5 (very useful), yet answered “don't know” when asked if they had accessed it. The large and the medium sized organisation made comments in the open text box:

“It clarified the difference between outcomes and indicators and learned that it is better to limit the outcomes to what is achievable rather than list a lot of outcomes, some of which we may not be able to achieve. Learned a little about what funders are looking for.”

“It was great for staff to learn about outcomes and measurements. They now understand what is fully expected from them and why I ask for evidence in the way I do”

Impact of grants

Overall findings

Most respondents thought that grants from TRT have had an overwhelmingly positive impact. Out of 205 responses to 'what difference(s) has our grant made to your organisation (if any)?', only two answers were not wholly positive: one simply because delays have meant they haven't received their grant yet, and the other mentioned that a 48-month grant would have offered more stability but noted that 24-months will still make a difference. As for the remaining 203 responses, all of them stated their grants from TRT have had a positive impact in some way.

When we analysed the open text comments about the different that grants have made, the most frequent words used by grant holders included 'enabled', 'allowed', 'supported', 'survival', 'stability' and 'difference' as shown in Figure 8 below.

Figure 8: A word cloud of most frequently used words around the impact of TRT grants



When we further analysed the differences cited by respondents in the open text box, the key impacts identified were that TRT grants had:

- Enabled or allowed a positive impact
- Provided security or stability

- Made a significant difference
- Helped increase confidence

We explore each of these themes in more detail below.

Enabled or allowed a positive impact

37% of responses mentioned their grant had 'enabled' or 'allowed' them to progress and see a positive difference in ways that would not have been possible without TRT funding. For some organisations, funding 'enabled' them to invest in something new for their mission, and for others their grants simply allowed them to keep going.

"It has enabled us to invest in a new, more efficient vehicle resulting in financial efficiencies but also a zero emissions transport which is aligned with our ambition to become a zero emissions community transport service by 2025"

"It has enabled us to continue working. TRT is a major contributor to our running costs"

"It has enabled us to move forward with a degree of certainty that wouldn't have been present without it"

Provided security or stability

A number of respondents shared a sentiment of grants from TRT being a life-line or allowing them to survive, particularly throughout the difficulties of the pandemic. A further 16 organisations mentioned that TRT funding provided them with 'security' or 'stability'.

"Without your grant we would have found it virtually impossible to continue with our work"

"we're still here"

"The three year funding has given stability and a backbone to our organisation. it shows us that you are fully aware of what we are trying to achieve"

"The grant has made an enormous difference. it has given us a degree of security for the next few years."

Made a significant difference

30 respondents mentioned that their grant from TRT has made a "huge", "tremendous", "massive" or "big" difference to their organisation.

“This grant has made and will make a huge difference to our organisation and our local community. Having this funding has and will enable us to deliver much wanted and needed activities to all aspects of our community”

“Huge differences in being able to offer an additionally which previously we were trying to do without financial support. This means families are now better supported, staff have time and resources and are under less pressure.”

“Your grant made a huge difference to our organisation, it showed you believed in our project, the same way we do.”

Helped increase confidence

Another common response was that grants from TRT have supported organisations to develop confidence in their work, boost staff morale, and attract other funding for their work.

“The funding awarded also gives confidence in our organisation to other funders and enables us to demonstrate secured income for a few years hence. Being awarded funding not only offers financial support, but actually also boosts morale, improves confidence in what we are doing and supports us to feel valued.”

“A huge difference. It's given us the confidence to enter new collaborations and be able to respond positively to organisations who approach us. It helps us attract other funding for our work.”

Other feedback for TRT

Overall findings

When asked finally for any other feedback about TRT as a funder or the support they offer, most responses were positive, with 21 responses simply saying, 'thank you'.

Specific feedback

Some organisations offered specific feedback:

"It would just be useful that when a grant is to be offered that the first payment could be discussed before being made in respect of timing. When grant is made the payment is automatic but does not always fit with the funding period requested"

"More funding opportunities to support digital/data skills upskilling and reskilling and BAME led charity funding"

"please could you publish details of the 'Funder plus' scheme or send out details in a general email?"

"£1,000 is not enough to make an impact on what we are trying to achieve."

Outside of these, the feedback was generally in the form of appreciation.

Conclusion

Overall, our analysis found that the majority of survey responses from grant holders were positive about The Robertson Trust's funding processes and engagement, as well as its general impact and support. These results were relatively consistent across organisation type, grant type and strategic themes. Small minorities of negative responses mostly came from a group of small organisations, wee grant holders and community vehicle holders.

Areas for improvement, whilst few, were largely around ideas of more consistent and thorough engagement. It is clear that grant holders strongly value the relationship established with TRT and some would like to see more frequent check-ins or project visits from TRT funding officers.

With regards to funder plus support, those who have accessed it are generally pleased with the support. However the majority of grant holders who took the survey had not accessed it, mainly due to the fact that they weren't aware of it.

The vast majority of respondents thought that grants from TRT have had an overwhelmingly positive impact on their organisations. The main impacts highlighted were that TRT grants had: enabled or allowed a positive impact, provided security or stability, made a significant difference and helped increase confidence.

Some respondents chose to offer specific feedback at the end of the survey, but many chose simply to say 'thank you'.