

The Robertson Trust's grant holder survey— Customer service

Analysis of findings

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Contents page

Executive summary	3
Introduction	5
Background information about survey respondents	6
Views on the Trust’s grant-making processes	10
Views on the Trust’s engagement.....	16
The Robertson’s Trust’s strategy	20
Funder Plus Support.....	24
Cost-of Living Support	25
Other feedback for the Trust.....	28
Conclusion	30

To assist navigation:

Introductory material will be indicated with a **purple** flag (Executive summary, Introduction, Background information about survey respondents).

Views on the Trust and its strategy will be indicated with an **orange** flag.

Funder plus support, Cost of living support, and Other feedback will be indicated with a **pink** flag.

The Conclusion will be indicated with a **yellow** flag.

Executive summary

In June 2023, The Robertson Trust (the Trust) hosted a survey for its existing grant holders, to help understand the Trust's effectiveness as a funder, and to identify areas to improve upon. A total of 468 grant holders responded to the survey which is a response rate of 63%.

Views on the Trust's funding processes

The responses to statements about the Trust'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 the Trust at each stage of the funding process.

On the funding process questions repeated from the Trust's 2022 grant holder survey, the % of positive responses increased from a high base, with consistency across the different aspects of funding process.

Views on the Trust's engagement

The responses to statements about how the Trust engages with grant holders were mostly very positive. Most grant holders responded that they know what to expect from engagements, they feel trusted and able to trust the Trust, they have a positive relationship with the Trust, and they feel they can speak to them honestly and openly.

On the repeated questions relating to the engagement, the % of positive responses increased from a high base, with consistency across the different aspects of trust engagement.

Views on the Trust's strategy

Most respondents (more than 70%) aligned with the primary theme of Emotional Wellbeing and Relationships, with Financial Security, Education Pathways and Work Pathways making up much smaller proportions—although for large grant holders we saw a more even distribution. Responses were positive in grant holders understanding of the overall strategy, understanding of themes, and the Robertson Trust living its values.

Funder Plus support

The survey responses highlight that few 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 largely positive.

Introduction

Background

In June 2023, The Robertson Trust hosted a survey for its existing grant holders, to help understand the Trust's effectiveness as a funder, particularly around its strategic priorities. A total of 468 grant holders responded to the survey which is a response rate of 63%.

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 the scoring statement and multiple-choice questions and identifying areas for cross-analysis by breaking the data down by organisation size, geographic focus and grant type. 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 the Trust and its grant holders and may be of interest to other funders. This report is focused on the Trust's customer service—how it works with grant holders. The report covers:

- Background information about survey respondents.
- Findings around grant holder views on the Trust's grant-making processes.
- Findings around grant holder views on the Trust's engagement as a funder.
- Feedback on the Trust's Funder Plus support.
- Feedback on the Trust's Cost-of-Living payments.
- Specific feedback and areas of possible improvement.

A companion report, *The Robertson Trust's grant holder survey—Social change; Analysis of findings*, draws on data collected in the same survey, but focused on information shared by grant holders about their work and the context they're working in.

Background information about survey respondents

Organisation size

Out of 468 survey respondents, around 22% had an annual income of less than £25,000, 10% had incomes between £25,000-£50,000, 16% had incomes between £50,000-£100,00, 22% between £100,000-£250,000, 14% had annual incomes between £250,000-£500,000, 9% between £500,000-£1 million and about 7% had an annual income of over £1 million.

Figure 1: Table showing the percentage size of the organisation

Organisation size	
Small organisations (annual income less than £100,000)	48%
Medium organisations (annual income £100,000-£500,000)	36%
Large organisations (annual income £500,000-£1 million +)	16%

Geographic focus

When asked “where is the majority of your work focused?”, 47% of organisations selected the Central Belt. A further 12% selected Highlands and Islands, 11% categorising their work as Scotland-wide. 6% categorised their work as South-West Scotland, 5% as The Borders, 4% as North-East Scotland, 3% as Tayside, and 2% Preferred Not to Say.¹ 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.

¹ Due to an error in the survey, the North East geographical option was initially omitted and introduced a week after the survey opened. Based on comparison to the Trust's full funding portfolio, this does not seem to have skewed the data substantially.

Figure 2: Table showing the percentage of primary geographic focus for organisation size

	Small organisations (annual income less than £100,000)	Medium organisations (annual income £100,000-£500,000)	Large organisations (annual income £500,000-£1 million +)
The Borders	4%	5%	8%
Central Belt	49%	47%	41%
Highlands & Islands	11%	12%	18%
Scotland-wide	20%	20%	18%
North-East Scotland	4%	4%	7%
Tayside	4%	3%	3%
South-West Scotland	6%	6%	4%
Prefer not to say	3%	2%	1%

Grant type

Respondents selected which of six different grant types they currently receive from the Trust: programme award, large grant, small grant, wee grant, community building grant, and community vehicle 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 3.

Figure 3: Table showing percentage of each grant type for organisation size

	Small organisations (annual income less than £100,000)	Medium organisations (annual income £100,000-£500,000)	Large organisations (annual income £500,000-£1 million +)
Programme awards	3%	4%	14%
Large grant	8%	56%	65%
Small grant	39%	28%	9%
Wee grant	41%	0%	0%
Community building grant	2%	2%	1%
Community vehicle grant	5%	5%	8%
Prefer not to say	3%	5%	3%

Type of award

When asked “what type of award do you have?”, 60% of organisations selected restricted funding, compared to 40% of organisations who selected unrestricted funding. These proportions were broadly consistent across organisation type and grant type. For larger organisations the weighting towards restricted funding increased to 69%.

Figure 4: Table showing percentage of type of award for organisation size

	Small organisations (annual income less than £100,000)	Medium organisations (annual income £100,000-£500,000)	Large organisations (annual income £500,000-£1 million +)
Restricted funding	60%	61%	69%
Unrestricted funding	40%	39%	31%

Award length

Respondents selected from three options when asked “How long is your award for?” the length of the award: 1 year, 2 years, or 3 or more years. We cross-analysed these grant types received by organisation size. The results were as we expected, with the shorter grants being received by the smaller organisations, and longer grants being received mainly by the medium and large organisations as shown in Figure 5. In total 87% of the 1-year grants were received by small organisations however small organisations only accounted for 30% of the grants awarded that were for 3 or more years.

Figure 5: Table showing percentage of award length for organisation size

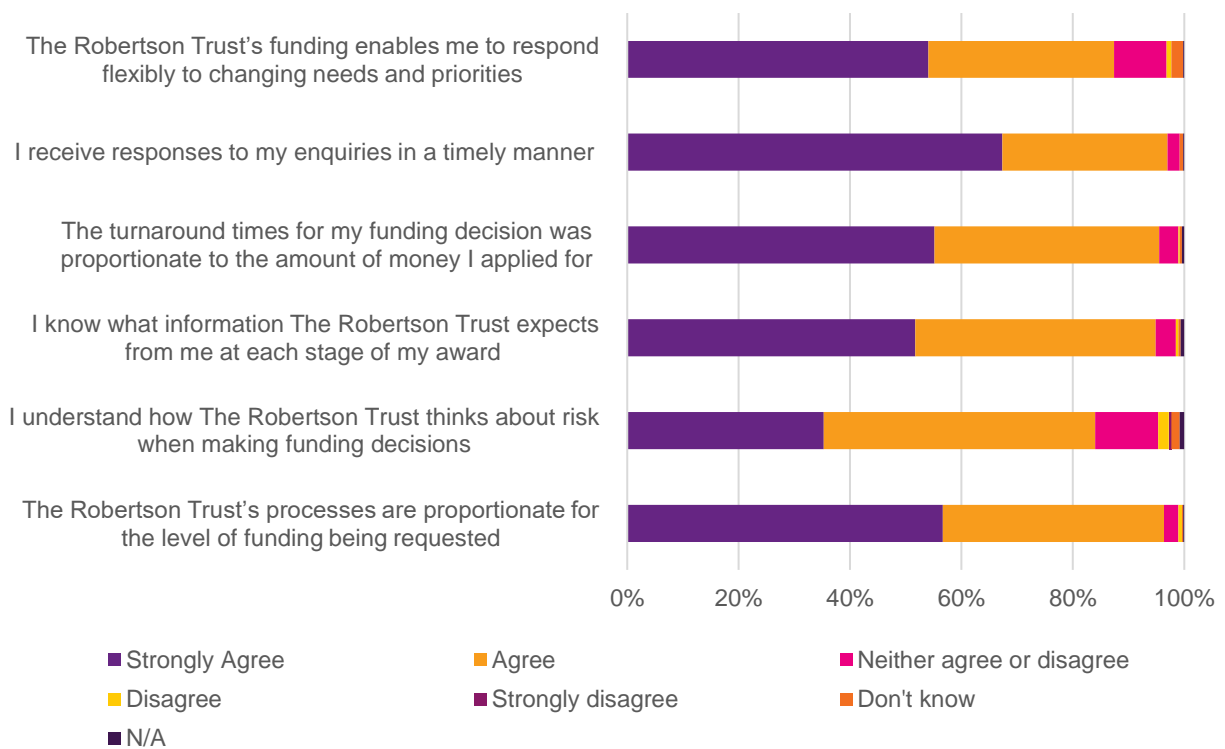
	Small organisations (annual income less than £100,000)	Medium organisations (annual income £100,000-£500,000)	Large organisations (annual income £500,000-£1 million +)
1 year	54%	6%	9%
2 years	6%	9%	5%
3 or more years	40%	85%	86%

Views on the Trust's grant-making processes

Overall findings

The responses to statements about the Trust's funding processes were mostly positive, as shown in Figure 6 below.

Figure 6: 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 the minority who disagreed with each of the statements tended to be smaller organisations and small grant holders.

On all questions repeated from 2022, the percentage of positive responses increased; from an average of 90% agreement (combining Agree and Strongly agree categories) across all statements in 2022, to an average of 96% agreement in 2023.

Responses to changing needs

When scoring the statement “The Robertson Trust’s funding enables me to respond flexibly to changing needs and priorities”, most respondents across the three organisation size groups responded with strongly agree or agree: 86% for small organisations, 86% for medium organisations, and 95% for large organisations. For large organisations 0% strongly disagreed or disagreed, and only 1% of small and medium organisations strongly disagreed or disagreed.

Comments in the open text box included:

“It was refreshing during the pandemic that Robertson Trust was quick to allow charities to use funds as and where needed. Additionally, this has translated into further core funding support”.

“The Robertson Trust are excellent at accepting changes or tweaks to approach as things evolve”.

Among the 4 respondents disagreeing with the statement, comments included:

“We have applied for core costs because we really needed it, however, we got a phone call suggesting our application to change to working with children as it was what Robertson's wanted to support.”

“The new criteria for the Trust's large grants are much tighter than they were previously. Although I understand why this is, I also feel that this could make it tricky for the third sector to respond to changes on the ground in a flexible way, depending on what those changes may be.”

This question was not part of the survey in 2022.

Responses to enquiries

When scoring the statement “I receive responses to our enquiries in a timely manner”, similarly the majority across the three organisation size groups responded with strongly agree or agree: 97% for small organisations, 97% for medium organisations, and 97% for large organisations. There were no respondents who strongly disagreed or disagreed. This is an improvement from the 2022

survey where 85% for small organisations, 93% for medium organisations, and 91% for large organisations responded with agree or strongly agree.

Comments in the open text box included:

“Communication has always been extremely quick and positive and supportive”.

“Meetings with our Grant Funding Officer have been timely and supportive. Communications from Community Enterprise support have been timely and helpful, too.”

The positive responses to this question increased from 88% in 2022 to 97% in 2023.

Turnaround times for decisions

When scoring the statement “The turnaround times for your decisions are proportionate to the amount of money I applied for”, similarly the majority across the three organisation size groups responded with strongly agree or agree: 97% for small organisations, 94% for medium organisations, and 95% for large organisations. For small and large organisations 0% strongly disagreed or disagreed, and only 1% of medium organisations strongly disagreed or disagreed. Again, this is a marked improvement from the results of the 2022 survey where 90% of small organisations, 94% of medium organisations, and 91% of large organisations responded with agree or strongly agree.

Comments in the open text box included:

“I found your processes very quick and responsive from application to hearing about grant being successful or not”.

“I feel there is very good communication channels, and when required officers respond very quickly to any queries”.

The positive responses to this question increased from 92% in 2022 to 96% in 2023.

Information expected at each stage

When scoring the statement “I know what information The Robertson Trust expects from me at each stage of my award”, similarly the majority across the three organisation size groups responded with strongly agree or agree: 96% for small organisations, 94% for medium

organisations, and 94% for large organisations. For small and large organisations 1% strongly disagreed or disagreed, and 0% of medium organisations strongly disagreed or disagreed. As with the other areas that were surveyed last year, responses have improved. In 2022, 89% of small organisations, 93% of medium organisations, and 91% of large organisations responded with agree or strongly agree.

Comments in the open text box included:

“The reporting schedule is made clear at the outset”.

“The requirements as we go along have been clear and well communicated”.

“It's useful, as we complete each stage to receive a reminder about the forthcoming expectations / next phase of impact reporting”.

With two respondents who disagreed, one comment was:

“At times the questions seem simple but then there are further questions which related to the answers that require a more detailed response, be good to be clear what level of response is required.”

The positive responses to this question increased from 91% in 2022 to 95% in 2023.

Risks and decision-making

When scoring the statement “I understand how The Robertson Trust thinks about risk when making funding decisions”, similarly the majority across the three organisation size groups responded with strongly agree or agree: 86% for small organisations, 83% for medium organisations, and 81% for large organisations. For small and large organisations 3% strongly disagreed or disagreed, and only 2% of medium organisations strongly disagreed or disagreed. On review of the comments, it is clear that most organisations who disagreed did so because they had not been made aware of The Robertson Trust's risk criteria through the application process:

Comments in the open text box included:

“Whilst I was clear about the focus and purpose of the grant, I don't think there was anything in the application guidance on risk considerations”.

“I wouldn't say I really understand your position on risk, for example, how financially sound an organisation would need to be before you would consider funding them and what your risk 'red flags' are”.

This question was not part of the survey in 2022.

Application processes

When scoring the statement “Your application processes were proportionate for the level of funding we were looking for”, 95% of small organisations strongly agreed or agreed, 1% of small organisations strongly disagreed or disagreed, and the remaining respondents neither agreed nor disagreed or left it blank. For the same statement, 98% of medium organisations strongly agreed or agreed, and the remaining responses neither agreed nor disagreed or left it blank; and for large organisations, 97% strongly agreed or agreed, and the remaining responses neither agreed nor disagreed, or left it blank. Last year, 88% of small organisations, 87% of medium organisations, and 87% of large organisations responded with agree or strongly agree so this is the area greatest improvement from 2022.

Comments related to application processes in the open text boxes highlighted the importance of simple and jargon-free application processes:

“The application guidance is very helpful, and is in language that 'non grant advisor' brains can understand fully”.

“Some other funder's guidance notes have a lot of 'jargon' in them, whereas The Robertson Trust is in good, easy to understand language”.

“The Robertson Trust funding process is perhaps the most straightforward there currently is. Funding is one of the most challenging aspects of our work and is the most time-consuming element and the one where the pressure is high and the workload very heavy”.

From the three respondents who disagreed, comments included:

“The application we put forward was proportionate to a larger grant; when we met with our funding advisor in person, that was also the impression we were given and we felt assured that we met at least one of the Trust's criteria. However, we received a phone call from our advisor after our initial meeting, and just before we were expecting a decision, to say that we actually didn't meet the criteria for large grants after all, and most likely wouldn't be successful when the application went to committee.”

“There was a lot of information requested at a later date or revised which could have been avoided and hence would've taken less time.”

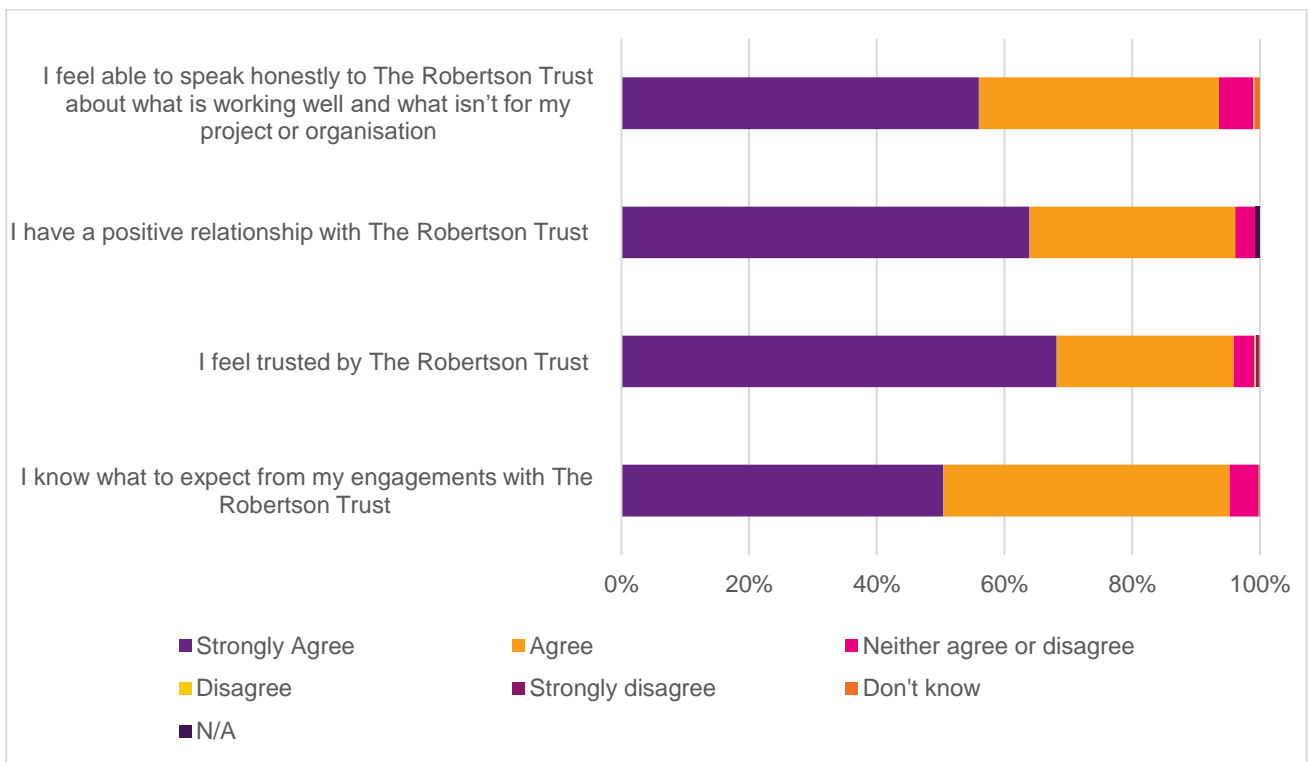
The positive responses to this question increased from 89% in 2022 to 96% in 2023.

Views on the Trust's engagement

Overall findings

The responses to statements about how the Trust engages with grant holders were mostly very positive as shown in Figure 7 below.

Figure 7: 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. Whilst the numbers are low, it is noticeable that a minority of small organisations disagreed with each of the statements.

On the three questions repeated from 2022, the percentage of positive responses increased; from an average of 87% agreement (combining Agree and Strongly agree categories) across all statements in 2022, to an average of 95% agreement in 2023.

Speaking honestly

The survey also showed respondents overall felt they have positive communication with the Trust: an average of 91% of small organisations feel able to speak to the Trust honestly about what is not going well for their projects, or about any difficulties their organisation is facing; and less than 1% of respondents felt they could not. For medium organisations, an average of 96% respondents similarly felt able to speak to the Trust 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 96% of respondents. This was improvement on last year where 81% of small organisations, 88% of medium organisations and 84% of large organisations reporting being able to speak honestly to the Trust.

Most grant holders across all grant types strongly agreed or agreed with this statement.

Comments in the open text box included:

“We are open and honest when meeting with the Trust. It would be great to strengthen this relationship further”.

“The Trust are approachable and very supportive. I feel we have an open and honest relationship”.

In 2022 the survey asked two questions: feeling able to speak honestly about the organisation, and separately feeling able to speak honestly about the project. The proportion of positive answers was similar, at 84%. Positive responses to this question increased to 94% in 2023.

Feeling trusted

In terms of feeling trusted by the Trust, 95% of small organisations felt trusted, and only 1% strongly disagreed or disagreed with this. For medium and large organisations, 95% and 100% respectively agreed they feel trusted by the Trust. These figures are improvement on last year where 89% of small organisations, 90% of medium organisations and 91% of large organisations agreed they feel trusted by the Trust.

Most grant holders across all grant types strongly agreed or agreed 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”.

The positive responses to this question increased from 90% in 2022 to 96% in 2023.

Having a positive relationship

94% of small organisations felt they have a positive relationship with the Trust, with the remaining only 6% neither agreeing nor disagreeing with this. For both medium organisations, 98% agreed they have a positive relationship with the Trust and for large organisations 100% agreed that they have a positive relationship with the Trust. As with the other questions, results have improved since 2022, 88% of small organisations, 91% of medium and large organisations agreed that they have a positive relationship with the Trust last year.

Most grant holders across all grant types strongly agreed or agreed with this statement. There wasn't a single respondent who disagreed that they have a positive relationship with the Trust.

Comments in the open text box included:

“The Robertson Trust staff are really helpful and encouraging. It's a pleasure to work with them”.

“Always accessible and friendly. Having a named Grants Officer is very helpful”.

The positive responses to this question increased from 89% in 2022 to 96% in 2023.

Knowing what to expect from engagements

95% of small organisations know what to expect from their engagements with the Trust, and no respondents strongly disagreed or disagreed with this statement. Similarly, for medium organisations, 95% also strongly agreed or agreed that they know what to expect from their engagements with the Trust and for large organisations, 99% also strongly agreed or agreed with this. These figures compare with 82% of small organisations, 93% of medium organisations and 87% of large organisations selecting agree or strongly agree last year.

Most grant holders across all grant types strongly agreed or agreed with this statement. There wasn't a single respondent who disagreed that they know what to expect from engagements with the Trust.

Comments in the open text box included:

“Friendly, professional, compassionate staff who want to help you submit the strongest application possible. Not sure how you could improve”.

“It is lovely as everyone speaks to me like a human being, with a genuine interest in the project and us as people and there is zero power dynamic, it is a partnership”.

This question was not part of the survey in 2022.

The Robertson's Trust's strategy

Primary themes

When asked “which primary themes does your work align to”, about 72% of organisations cited Emotional Wellbeing and Relationships, a further 12% selected Financial Security, and the remaining 16% opted for Education Pathways and Work Pathways. Those proportions were broadly consistent across organisation size. There were no significant differences between views on the funding processes expressed by organisations funded under different strategic themes.

The work of approximately 80% of the small organisations aligned with the theme of Emotional Wellbeing & Relationships, and 12% did some work on Education Pathways. The remaining small grant holder organisations undertook work aligning with Financial Security and Work Pathways.

Similar to the small organisations, the work of 70% of medium sized organisations aligned with the theme of Emotional Wellbeing & Relationships. However, unlike the relatively low proportion of small organisations working on Financial Pathways, around 15% of medium grant holders aligned their work with the theme. The remaining medium organisations undertook work aligning with Education Pathways and Work Pathways.

Lastly, the work of approximately half of the large organisations aligned with the theme of Emotional Wellbeing & Relationships, with around 20% of them working on Financial Security. Equal proportions of the remaining large grant holders focused on Education Pathways and Work Pathways.

The table in Figure 8 shows that the large grants, small grants and wee grants received by survey respondents covered a mix of the strategic themes.

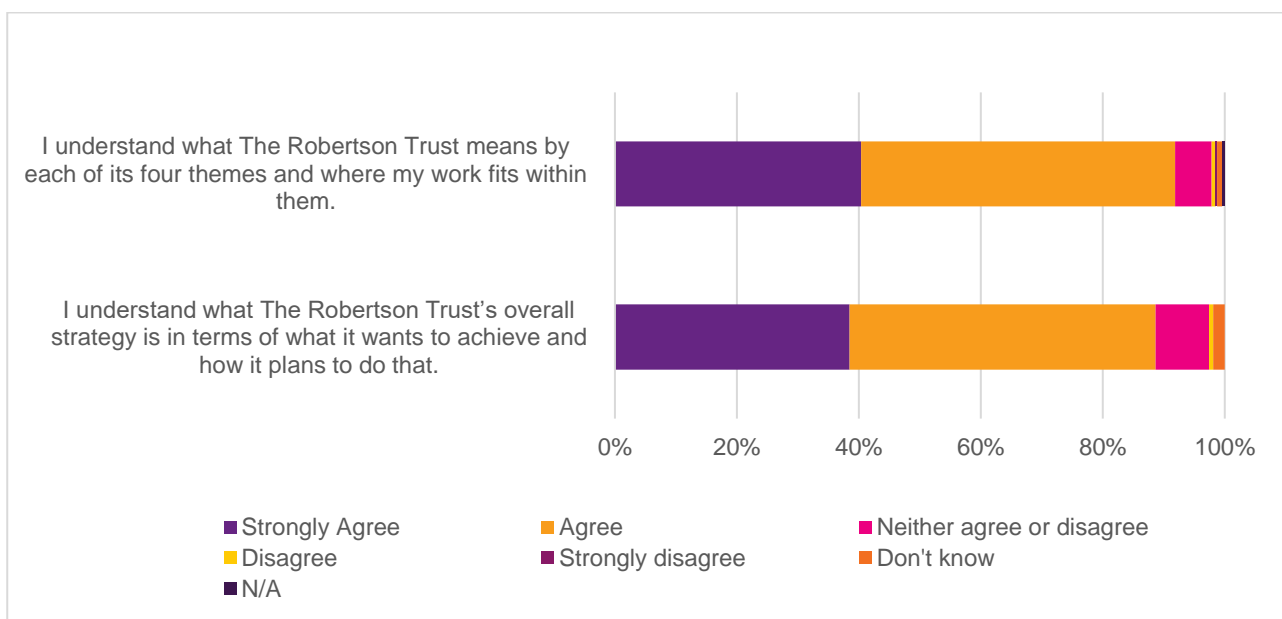
Figure 8: Table showing the percentage of grant holder organisations' alignment with The Robertson Trust's themes for organisation size

	Small organisations (annual income less than £100,000)	Medium organisations (annual income £100,000-£500,000)	Large organisations (annual income £500,000-£1 million +)
Emotional Wellbeing & Relationships	77%	73%	55%
Financial Security	8%	14%	21%
Education Pathways	12%	8%	12%
Work Pathways	3%	5%	12%

Overall strategy

The responses to statements about the Trust's overall strategy was mostly positive, as shown in Figure 9 below.

Figure 9: Percentage of respondents agreeing or disagreeing with statements about The Robertson Trust's overall strategy



Understanding of strategy

When scoring the statement “I understand what the Robertson Trust’s overall strategy is in terms of what it wants to achieve and how it plans to do that”, 88% of the small organisations strongly agreed or agreed, 8% of small organisations neither agreed nor disagreed, and the remaining respondents either disagreed or answered “don’t know”. For the same statement, 89% of the medium organisations strongly agreed or agreed, 10% of medium organisations neither agreed nor disagreed, and the remaining respondents disagreed; and for the large organisations, 92% of grant holders strongly agreed or disagreed, and a huge chunk of the remaining respondents answered “don’t know”.

Understanding of themes

When scoring the statement “I understand what the Robertson Trust means by each of its four themes and where my work fits within them”, 91% of small organisations strongly agreed or agreed, 6% of small organisations neither agreed nor disagreed, and the remaining respondents either answered “don’t know” or left it blank. For the same statement, 92% of the medium organisations strongly agreed or agreed, 6% neither agreed nor disagreed, and the remaining respondents either disagreed or answered “don’t know”. Further, 93% of the large organisations strongly agreed or agreed, and the remaining respondents neither agreed nor disagreed or left it blank.

Comments in the open text box for both the statements included:

“Clearly set out strategy which is easy to follow and immensely helpful”.

“The overall theme of addressing poverty and trauma is well communicated. it is communicated in a way that is open to approaches rather than imposing something on organisations”.

“The themes are broad enough to allow organisations to do what they do well instead of trying to shoehorn projects into narrow outcomes”.

“Maybe some short video animations would help instead of assuming people have time/capacity to do the reading or googling. Just thinking if it's short and sharp might be easier for people to be more familiar. Could also offer workshops in each area - that share examples of good practice in those areas and challenges”.

Embedding values

When asked to what extent does The Robertson Trust live up to its values, 95% of small organisations strongly agreed or agreed, 4% of small organisations neither agreed nor disagreed, and the remaining respondents either answered “don't know” or left it blank. Equally for medium organisations, 95% of the medium organisations strongly agreed or agreed, with the remaining respondents neither agreeing nor disagreeing. The results increased for large organisations with 97% agreeing, with the remaining respondents neither agreeing nor disagreeing. Overall, 448 respondents answered this question and not a single respondent disagreed with the statement that The Robertson Trust lived up to its values.

Funder Plus Support

Overall findings

The survey responses highlight that relatively few of the Trust'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.

Usefulness of support

Out of 468 respondents, 48 of these have used Trust's Funder Plus support. When broken down by organisation size, 13 organisations who had accessed the Trust's Funder Plus support were small organisations, 24 were medium organisations and 13 were large organisations.

Results were positive in terms of how useful these organisations found the Funder Plus support. 90% of organisations agreed or strongly agreed when asked "to what extent that they found the Funder Plus support useful". Only 1 respondent disagreed with this question.

Accessing support

When asked if they were aware that The Robertson Trust provides Funder Plus support, 61% respondents indicated that they did not know it existed.

When invited to provide more detail in the open text box, some respondents provided other reasons why they had not accessed the Funder Plus support. Key themes were: a lack of time or capacity; prioritisation; and lack of digital channels to access support. Comments included:

"We have been at full stretch due to the pandemic but hope to have more time to spend on developing our organisation in the coming years".

"The challenge for me is finding time to make better use of these resources".

“The pressure of delivering programmes against a huge demand while spending so much time trying to get funding means that it is difficult to get our heads up to look at other support needs”.

“Make us aware of it and suggest what we could access and how - tell us how these supports can help, be non-bureaucratic in accessing”.

“I was aware of facilities available but haven't fully explored. Our Scotland staff will book into the digital workshop”.

There were other suggestions for non-financial support which have been included in the “Social Change” report—these comments together can support The Robertson Trust in implementing funder plus support initiatives in the future.

Cost-of Living Support

Out of 468 respondents, 250 received a Cost-of-Living Uplift Payment from The Robertson Trust. When broken down by organisation size, 40% of respondents who had received a Cost-of-Living Uplift Payment were small organisations, 42% were medium organisations and 1% were large organisations.

When asked what they had spent or planned to spend the money on, 213 of the respondents who received a Cost-of-Living Uplift Payment selected to answer this question. The vast majority of respondents talked about putting the payment towards increasing costs, this was the case across all organisation sizes. Our analysis identified three key uses for the Cost-of-Living Uplift Payment: covering utility bills / core costs; funding an uplift in staff salaries; supporting the individuals that the grant holders support through the Cost-of-Living increases. Comments included:

“It was hugely welcome as our core costs are rising fast and our income from client donations keeps dropping. We used the uplift payment to offset our heating bills”.

“We have spent the payment by adding it in the increased costs of items such as buying stationeries in the office and paying utility bills for the office”.

“The grant was a lifeline to our organisation due to the cost of living. Our weekly bill for food had doubled, the extra money allowed us to keep stable and provide the service our members had pre-Covid”.

“We spent it on a pay rise for our staff. They work extremely hard, and, like everyone, their bills had gone through the roof. Without committed and fairly paid staff we could not continue our work, so the uplift was very helpful”.

“We used the money towards our electric bill and supported young people by purchasing vouchers which we disseminated to the young people to get basic essentials”.

“We used the uplift payment to boost our stock of winter duvets and blankets as many of the people we help have difficulty with fuel bills”.

“We provided our staff with a small one-off payment to assist them with the cost of living. This was most helpful particularly as we are not in a financial position to give staff salary increases”.

“Yes, we did receive the Cost-of-Living Uplift Payment from The Robertson Trust in December 2022. “By allocating the funds towards our operational expenses, we were able to ensure the smooth running of our organisation and maintain the necessary resources to offer a comprehensive and accessible advice service across different channels”.

“The uplift payment played a crucial role in strengthening our capacity to provide valuable assistance and guidance to our clients through various communication channels”.

Other feedback for the Trust

Overall findings

When asked finally for any other feedback about the Trust as a funder or the support they offer, most responses were positive, with 59 responses simply saying, 'thank you'.

Specific feedback

Some organisations offered specific feedback:

“Cost of living crisis is major as we like many others are a small charity. Ideally quarterly funds to help with the cost-of-living crisis e. g heating would be major for so many charities. It would help charities continue to have a steady reserve base that they can use in an emergency and not dig into to cover major costs of increasing fuel and food bills”.

“We would be really delighted if you offer financial support for charities with incomes up to £25000”.

“We appreciate the Robertson Trust's support. We would greatly benefit from longer-term unrestricted funding to help us expand our team and further develop our charity in order to broaden the impact of our work”.

“We were unsuccessful in our application to the large grant (but) were fortunate to receive the small grant. Feedback on the original application would have been useful”.

Outside of these, the feedback was generally in the form of appreciation, and included responses like:

“We really appreciate the way the grant advisors work in that it is not just a flat yes or no, it can sometimes be a yes, but a different amount for whatever reason. It is very much appreciated that the advisors take an individual approach to each application and consider alternative funds etc. if the application better fits there”.

“I have found Robertson Trust to be a very supportive funder and someone who offers support on multiple fronts, not just financial. It has been a pleasure to be partnered with The Robertson Trust and we hope it can continue”.

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 strategy and areas of priority. These results were relatively consistent across organisation size and grant type. The minority of negative responses mostly came from a group of small organisations. The Robertson Trust can be proud of its record as a supportive funder and valued partner, with clear objectives and communications.

Of the Trust's four primary themes, this survey found Emotional wellbeing and relationships was the theme most grant holders identified with—particularly among the smaller organisations.

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 said they had not accessed it, mainly due to the fact that they weren't aware of it. This could indicate that clarifying and publicising the funder plus offer could be an area of focus in the future.