

# WALCOT FOUNDATION



## Grant-making Processes Debrief

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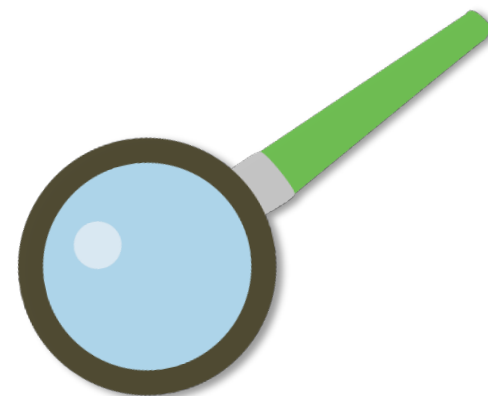
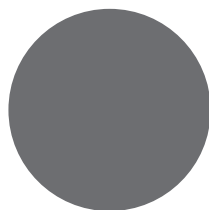
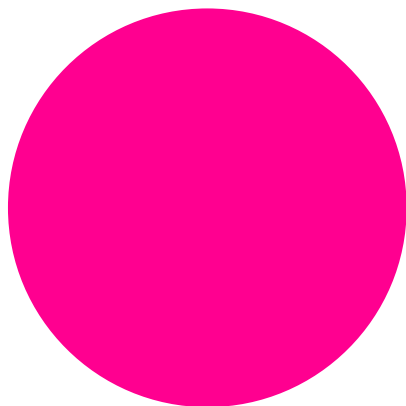
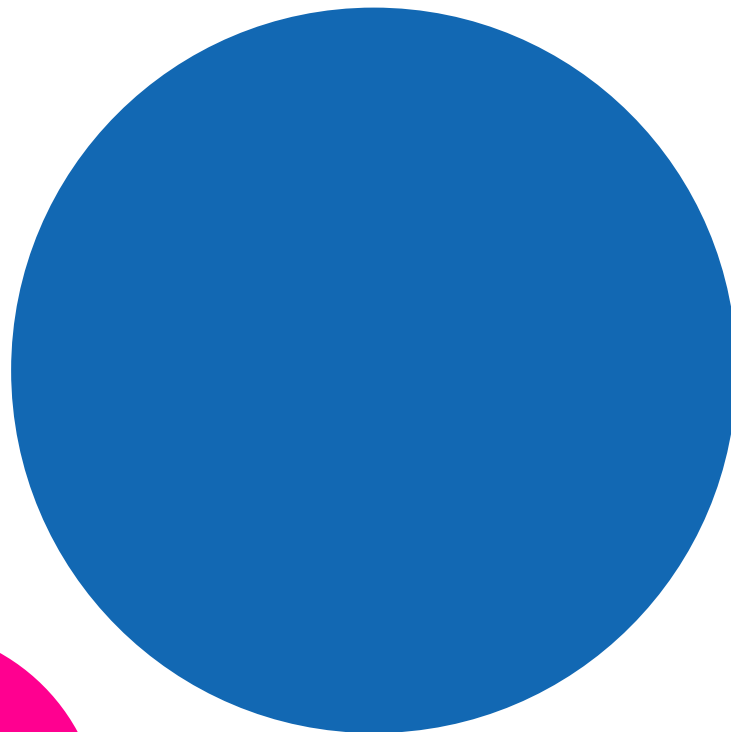
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# Executive summary



Executive summary

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## Key insight (I): almost all of the feedback gathered during the survey was very positive

**When asked to make a final overall comment at the conclusion of the survey, participants spoke of how 'exceptional' or 'great' the Foundation is, and said that it makes a difference to the community.**

The research also reveals that:

- Most applicants find the application process easy
- The majority use the Foundation's online application form which is easy to use and also provides clear guidance notes

Most are happy with the amount of information required to enable the Foundation to evaluate the success of its grants.

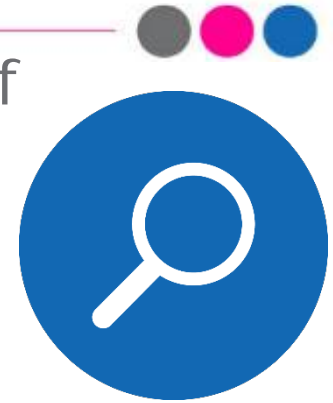
The vast majority of grant payments are made in a prompt and timely manner.

### **Organisations:**

- Value three-year's multi-year funding
- Are happy with the current two-stage application process

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**Key insight (II):** there are a small number of areas where improvements can be made



**Over one in ten applicants:**

- Either experienced a problem applying for a grant themselves, or knew someone else who had
- Believe that the Foundation requires too much information to help make a decision on their application

**16% of individual applicants do not have contact with Foundation staff over the duration of the funding.**

- Whilst most applicants found the application process to be easy and straightforward, some did suggest that further improvements could be made to make the process simpler and clearer
- There is good cause to raise awareness that applicants experiencing problems with their projects or courses can possibly get help from the Foundation



## Key insight (III): Action point - review the amount and complexity of information that *individual grantee applicants* are required to provide

**This was a cause of concern for over one in ten applicants and a suggested area for improvement.**

**In addition to this, the data also shows that applicants who feel that the amount of information required is too much are also:**



- **More** likely to have their application rejected than those who feel that the amount is reasonable
- **More** likely to find the online application form hard to use
- **More** likely to feel that the guidance notes supporting the online application are not clear
- **Less** likely to say that the application process is easy and straightforward

# Research aims and methodology





# Research context

## Background

The work of the Walcot Foundation aims to break cycles of financial deprivation in Lambeth and is based on a hand up, not a hand out approach.

The Foundation offers grants to individuals, organisations, projects and schools.

The Foundation wanted feedback from grantees on their views of the grant-making processes.

DJS Research was commissioned to conduct research to explore this concern.

## Objectives

- 1 Understand what prevents some people from completing their application
- 2 Assess levels of satisfaction with the grant-making processes
- 3 Identify key challenges when completing the application and monitoring forms
- 4 Identify areas where the grant-making processes could be improved



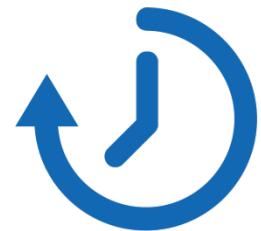




# Methodology & sample



**Telephone survey**



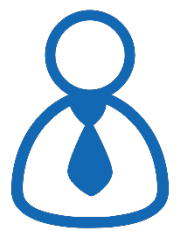
**14 minute average duration**



**Fieldwork**  
18<sup>th</sup> Oct to  
8<sup>th</sup> Nov 2018

**Taking part:**

- 39 organisations/ schools
- 51 individuals whose applications were approved
- 16 individuals whose applications were declined

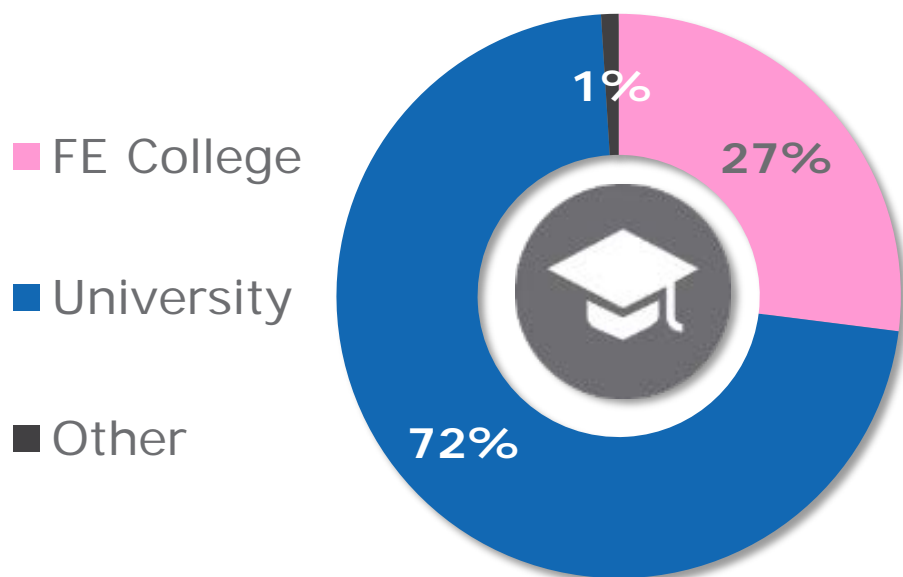


# Background information on participants

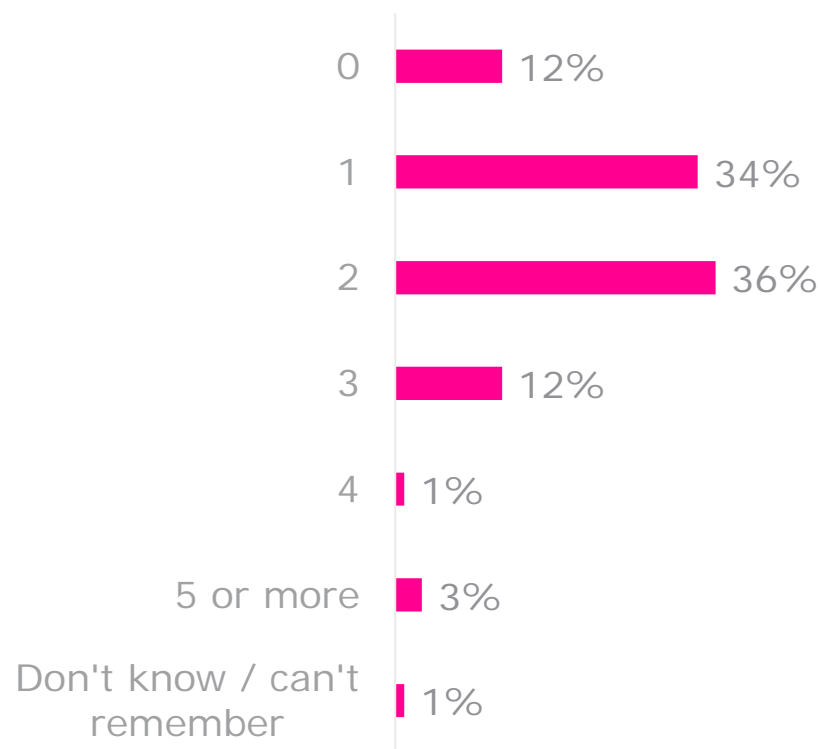




## The majority of individual respondents were university students



## Over half of these individuals have received multiple grants from the Foundation



Source: Q01. May I ask where you are, or where you were, studying when you made your most recent grant application to the Walcot Foundation? Base: All individuals, n=67

Source: Q05. How many grants have you received in total from the Walcot Foundation? Base: All individuals, n=67



The majority of organisational respondents were charities

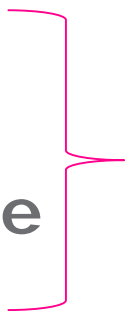
**69% Charity**

**10% Social Enterprise**

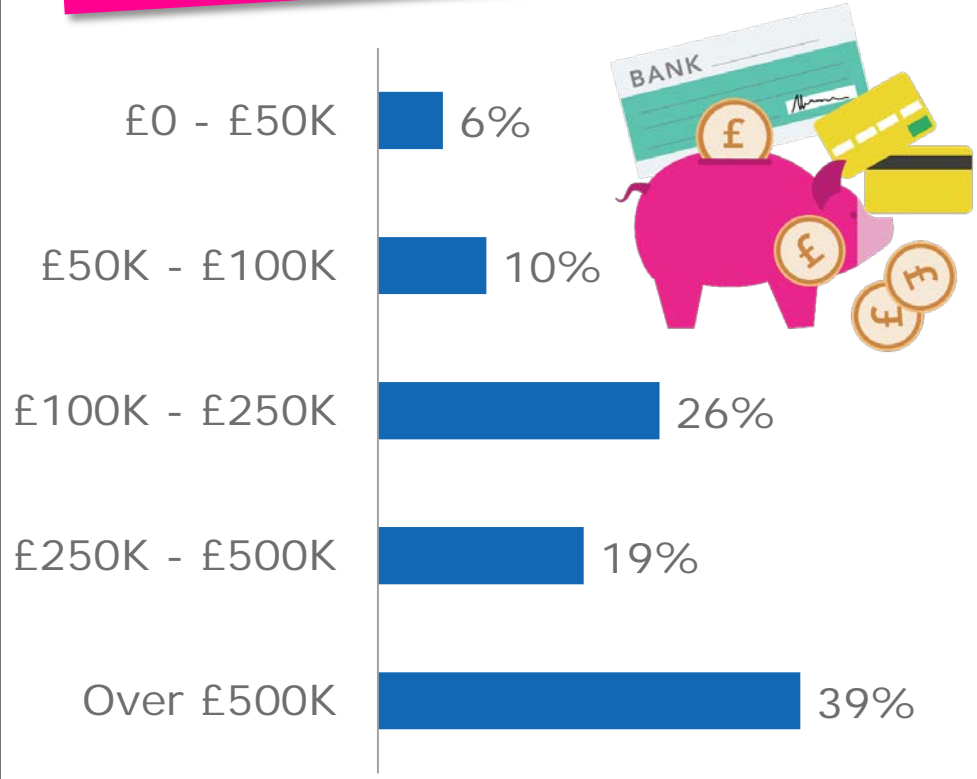
**8% Primary School**

**8% Secondary School**

**5% School Cluster**



**Many of the charities and social enterprises included in the research receive quite substantial incomes (over £500K)**



Source: Q02. Which of the following best describes your organisation? Base: Organisations / schools, n=39

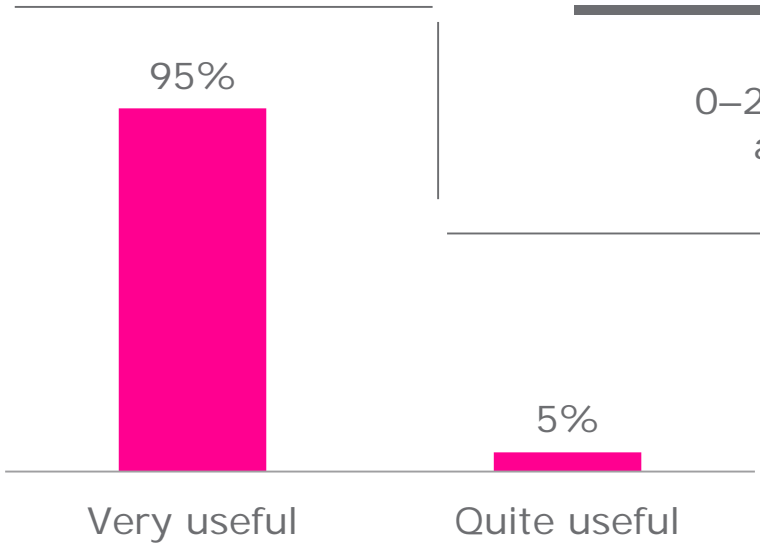
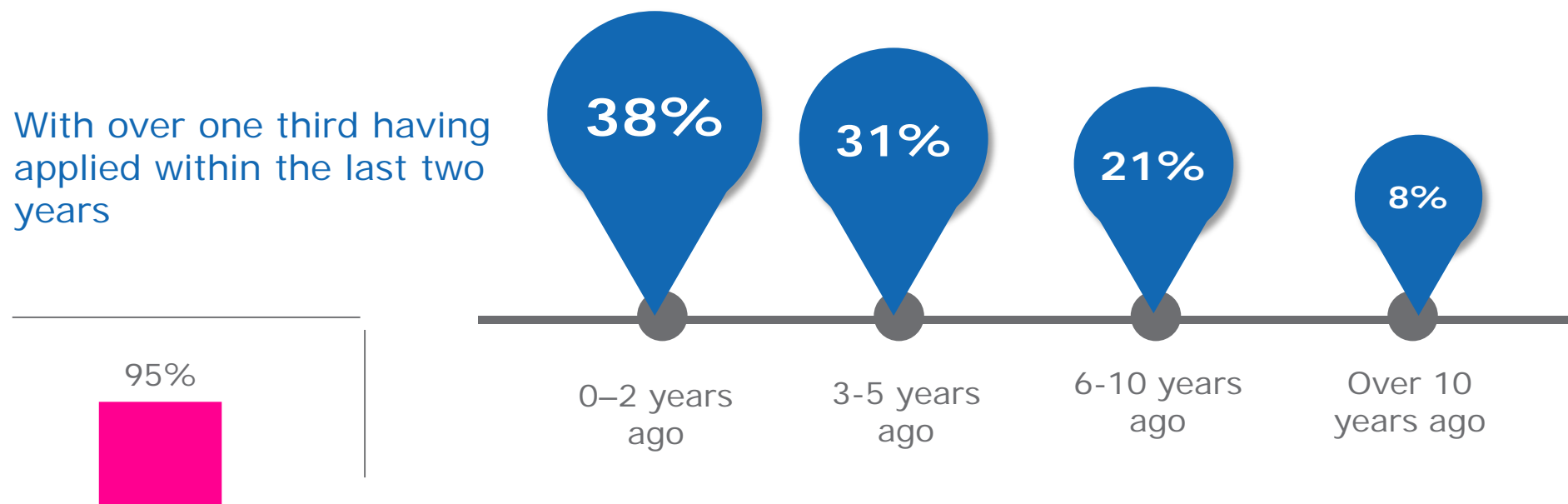
Source: Q03. Please can you tell me which of the following bands covers your organisation's total income in the last financial year?

Base: Charities and Social Enterprises, n=31



# Over two thirds of organisations first received funding within the last five years

With over one third having applied within the last two years

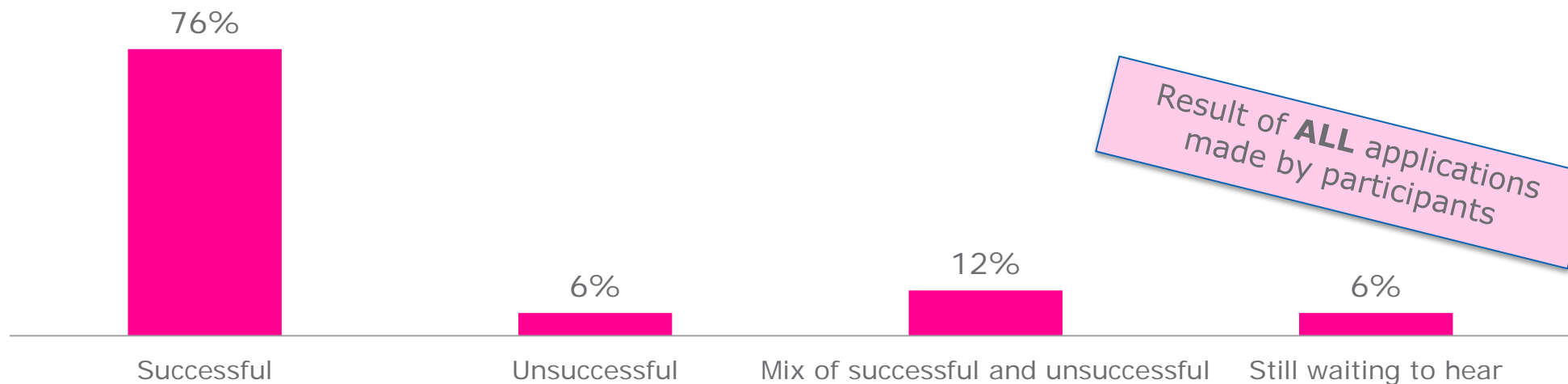
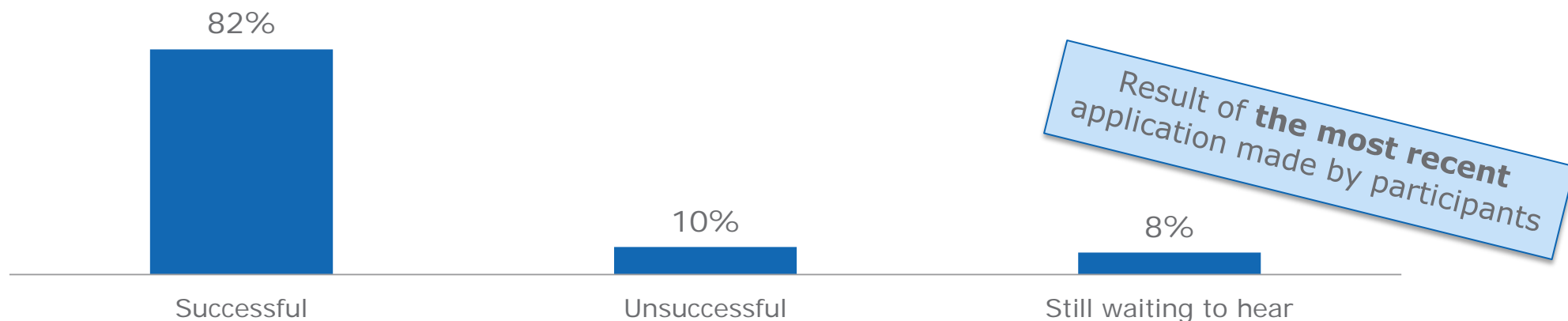


All organisations value three-year's multi-year funding

Source: Q06. Including your most recent application, when was your organisation's first funding application to the Walcot Foundation?  
Base: Organisations / schools, n=39  
Source: Q14. The Walcot Foundation currently offers up to three-years multi-year funding. How useful do you think offering three-year<sub>13</sub> multi-year funding is? Base: Organisations / schools, n=39



# The majority of respondents are successful applicants



Source: Q07. What was the result of your most recent grant application to the Foundation? Base: All respondents, n=106

Source: Q08. Please now think of all of the applications you have made to the Walcot Foundation, have these been...?

Base: All respondents, n=106



# A very small number felt that the feedback they received on their unsuccessful application was not useful

19 (18%)\* made applications that were either unsuccessful, or a mix of successful and unsuccessful.

Of these 19...

- 15 (79%) received feedback that explained why their application was declined



Of these 15...

- 12 (80%) found the feedback helpful
- 3 (20%) found it unhelpful

*"No funders are clear about their priorities."*

*"It just didn't help with the situation I am in."*

*"They sent me to charities for the disabled that only help children, so the references that they sent me were unhelpful."*

Source: Q09. Did you receive feedback on why your unsuccessful application was declined? Base: Respondents who had at least one application declined, n=19

Source: Q10. How helpful was the feedback? Base: Respondents who received feedback, n=15

Source: Q11. Why do you feel that the feedback was not helpful? Open question. Base: Respondents who felt that the feedback was not helpful, n=15

\* Note that findings on this slide should be treated with caution due to the very low base sizes



## Comments made on the type of funding that the Foundation should offer generally reflected respondents' appreciation of what is already available

### Fits their needs

*"I think the grant is perfect the way it is. It is helpful as I do a dance course and the grant sorted me out with everything."  
(Individual, grant approved)*

*"I think they currently offer good funding as I'm in my final year and it has the requirements needed."  
(Individual, grant approved)*

*"In relation to secondary schools, it is very well targeted at present."  
(Organisation/ school, received funding)*

*"The multi year funding is very useful."  
(Organisation/ school, received funding)*

### Support

*"Walcot are of the better funders to work with, we've appreciated their support over the last 7 years...Very good locally and the visits mean you get to know them...Told us they can't fund us next year which is disappointing."  
(Organisation/ school, received funding)*

*"The grant was on time and they got back to me on time. I have had no problems or issues, but if I did I could always phone or email."  
(Individual, grant approved)*

*"I found them helpful for people on low incomes."  
(Individual, grant approved)*





## The support helps both individuals and the community to develop

*"I am grateful as without their support I wouldn't be able to get to where I am today. I gained skills and confidence."  
(Individual, grant approved)*



*"I am grateful as it has been difficult at uni, and they helped me with their support."  
(Individual, grant approved)*

*"It's good to give it to new projects who can't get other funding. Give to projects which are trying new things and trying to help people with disabilities in innovative ways."  
(Organisation/ school, received funding)*



*"It focuses on education and training and it is needed by Lambeth residents and organisations."  
(Organisation/ school, received funding)*

*"The size and length of the grant and support sustained is just the sort of grant needed in the sector because without that we wouldn't have grown, we've doubled in size and turnover since the first grant because they do due diligence."  
(Organisation/ school, received funding)*

*"Their service is good. Helping alleviating poverty in Lambeth. Good range of chances offered...It allows charities to think 'we fit into that'.  
(Organisation/ school, received funding)*

*"I think what they offer is excellent and matches the target groups and services we want to reach."  
(Organisation/ school, received funding)*

## Suggestions for improvement concentrated on either the process or on the reach of the funding (location or eligibility)



*"I think they have tight parameters to work, it can be quite difficult with the location specific targets."*  
**(Organisation/ school, received funding)**

*"I'd probably say part of the foundation could be offering mental health programmes."*  
**(Individual, grant approved)**



*"Just why it is only for Lambeth residents."*  
**(Organisation/ school, received funding)**

*"The grant is for people to study so need more support for when people are working."*  
**(Individual, grant approved)**

*"Grants could be made available to students who would like to study abroad or go into a placement. The grant could go towards travel costs, accommodation, or qualification costs."*  
**(Individual, grant approved)**

*"Their priority is to alleviate poverty and they could broaden their views on both how to tackle this, and on going beyond this."*  
**(Organisation/ school, received funding)**

*"It would be useful for them to consider to continue to fund beyond 3 years."*  
**(Organisation/ school, received funding)**



*"Could be longer term for more stability."*  
**(Organisation/ school, received funding)**

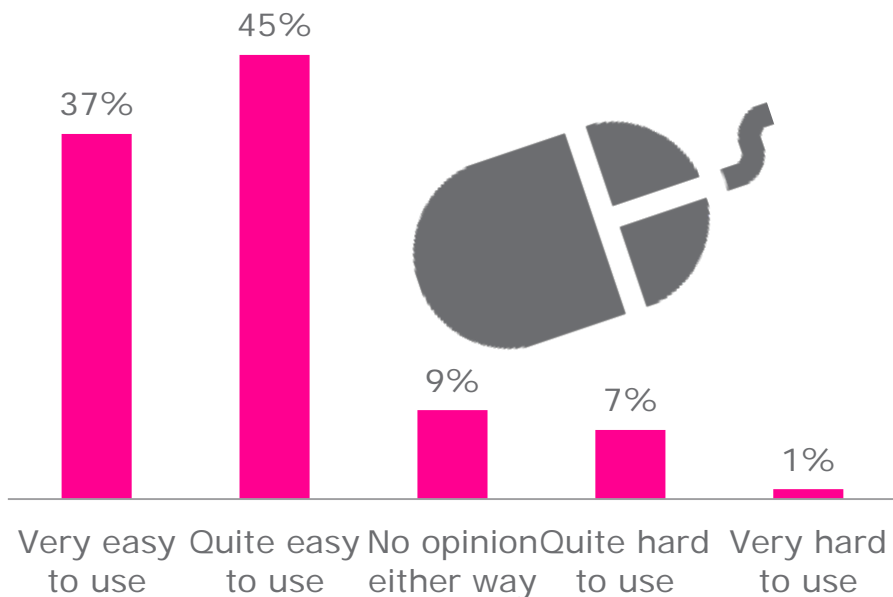
*"I do think it is slightly unnecessary to apply every year."*  
**(Individual, grant approved)**

# Online application





# Only 8% found the online application form hard to use



6 individuals found the online application form hard to use (4 declined and 2 approved), compared to only 2 organisations.



*"The outcomes can be difficult as you need to have short and long term outcomes which can be a challenge."  
(Organisation/ school, received funding)*

*"Going back and finding the draft applications can be quite difficult."  
(Individual, grant approved)*

*"Simplification."  
(Organisation/ school, received funding)*

*"Takes time to write up, be better if you could have some examples."  
(Individual, grant declined)*

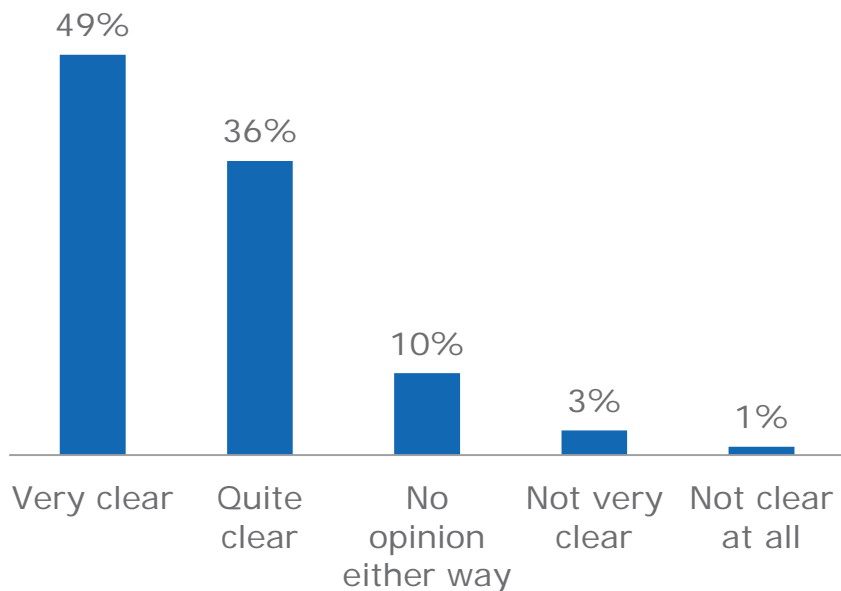
Source: Q17. If you used [the online application form] can you please tell me your overall opinion on the form? Base: All respondents excluding Did not use or Don't know, n=95

Source: Q18. Can you make some suggestions on how it can be improved? Open question. Base: Respondents who found the form difficult to use, n=8



# Only 4% did not find the guidance notes clear

Of those who used the guidance notes, most found them clear



4 individuals found the guidance notes unclear (3 declined, 1 approved), no organisations found the notes unclear.



*"Some I did not understand, make the notes clearer."*  
**(Individual, grant approved)**

*"I wish they would have given me more information."*  
**(Individual, grant declined)**

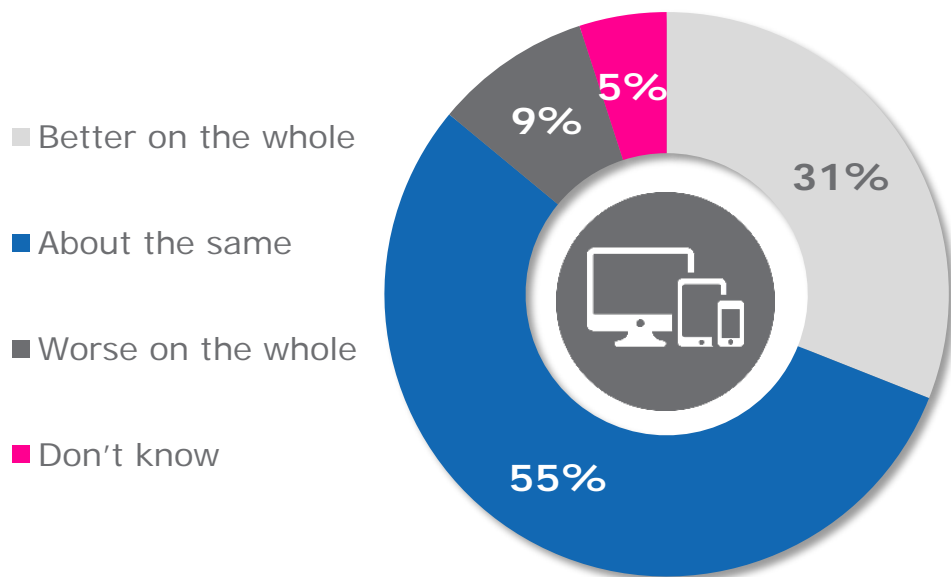
*"The criteria was met as I have low income, live in the Borough and have a disability. Other people have been rejected too."*  
**(Individual, grant declined)**

Source: Q19. The Foundation also provides online guidance notes to help applicants to understand the programme. Thinking of this guidance, do you think that it is... Base: All respondents who used the guidance excluding Don't know, n=86

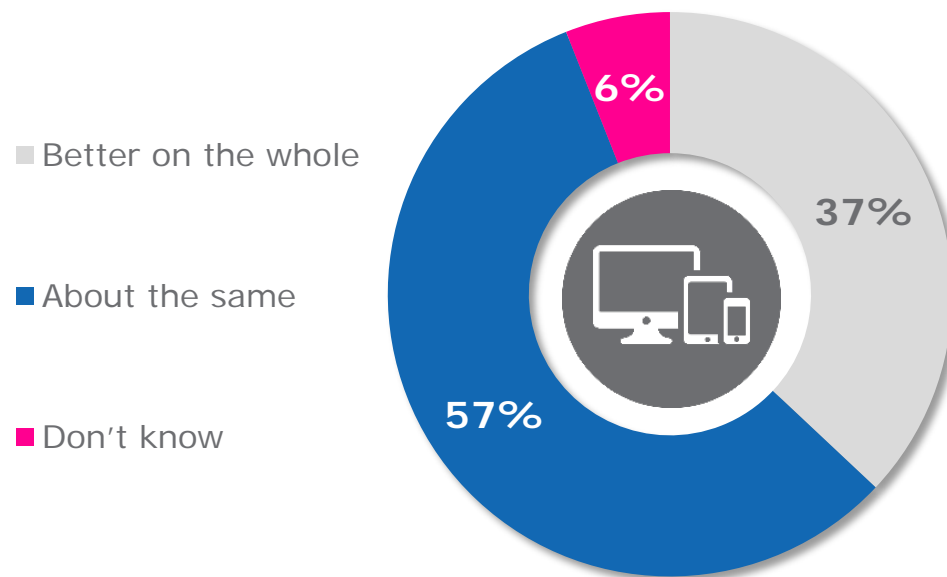
Source: Q20. Can you make some suggestions on how it can be improved? Open question. Base: Respondents who found the guidance unclear, n=3



# The Foundation's application portal is viewed as 'about the same' as other online (or grant) application portals



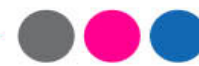
Individuals



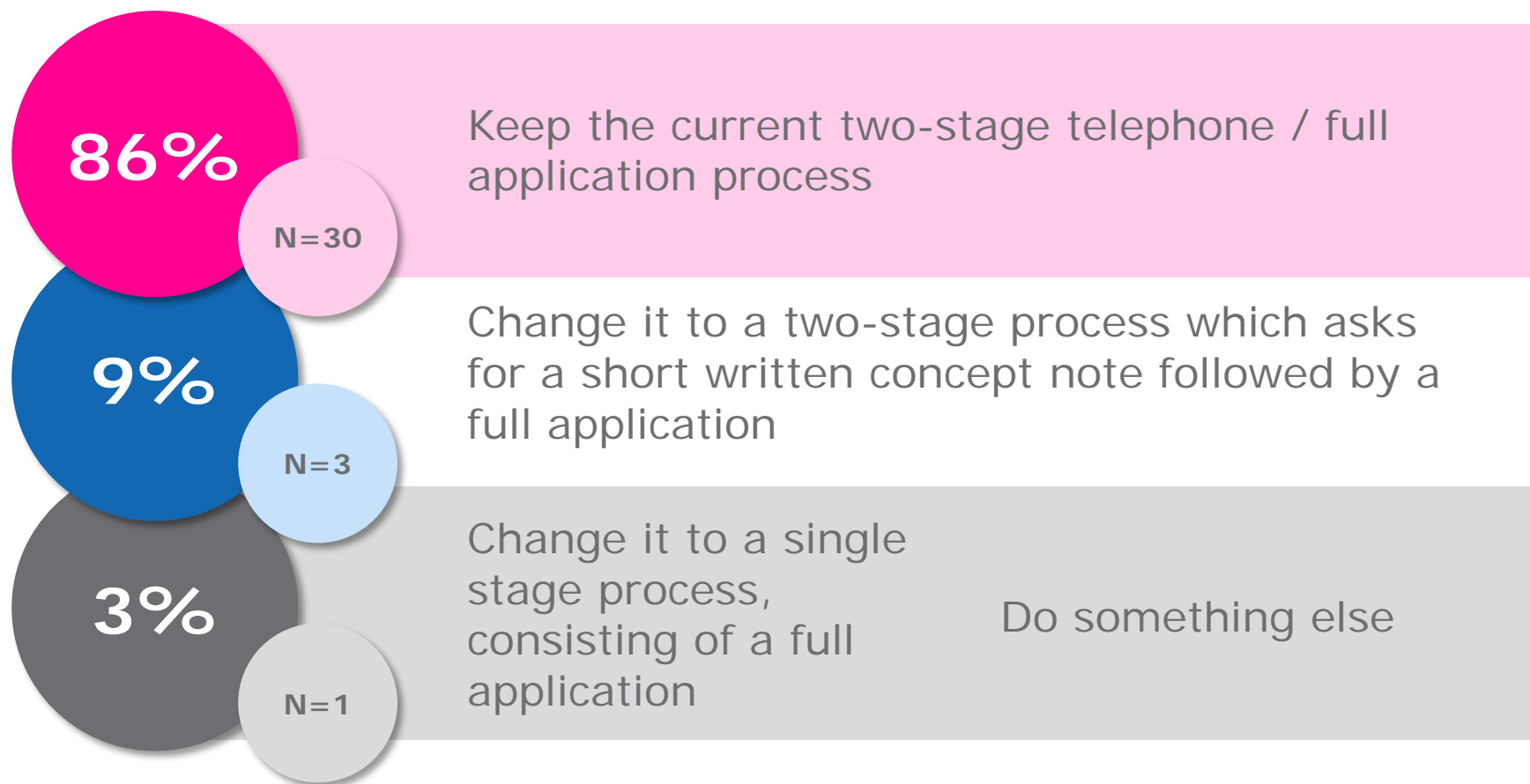
Organisations / schools

Source: Q21. Thinking of other online application portals that you have used, how does the Walcot Foundation's online application form compare to other such portals? Base: All individuals, n=67

Source: Q21. Thinking of other online grant application portals that you have used, how does the Walcot Foundation's online application form compare to other such portals? Base: Organisations / schools, n=39



# The majority of organisations would like to keep the current two stage process



Source: Q23. The Foundation currently operates a two-stage process with an initial telephone conversation followed by an invitation to submit a written application if a proposal meets the criteria. Which, if any, of the following changes do you think the Foundation should<sup>23</sup> make to the process? Base: Organisations / schools, n=39



# Over one in ten individual applicants believe that the Foundation requires too much information to help make a decision



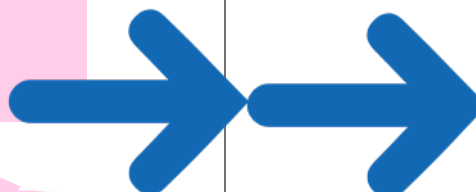
**87%**

A reasonable amount

*"The form is too lengthy and requires details from family members. I am in my final year so felt it was tedious and needed quite a few documents, everything I had to send needed more evidence which was stressful and draining."*

**13%**

Too much information



*"You can get the information from the college and they have already asked them for the information."*

3% of organisations  
(n=1)

12% of approved individuals  
(n=6)

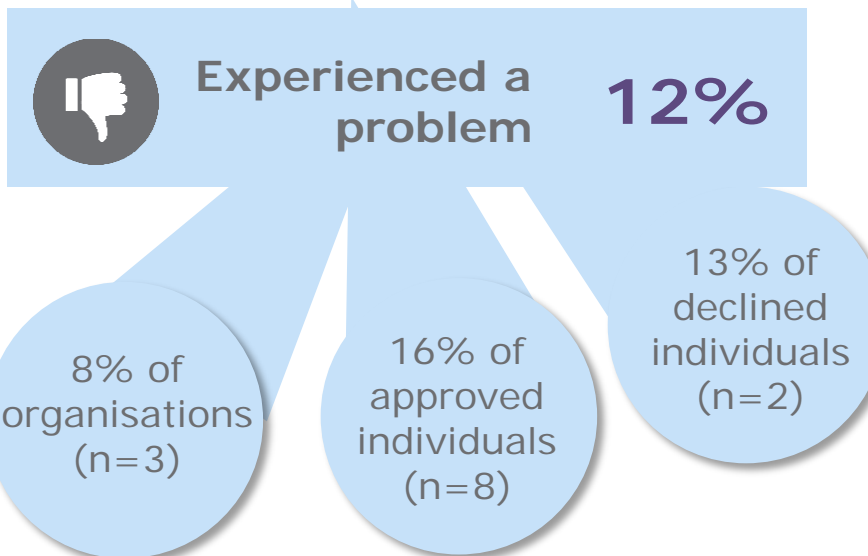
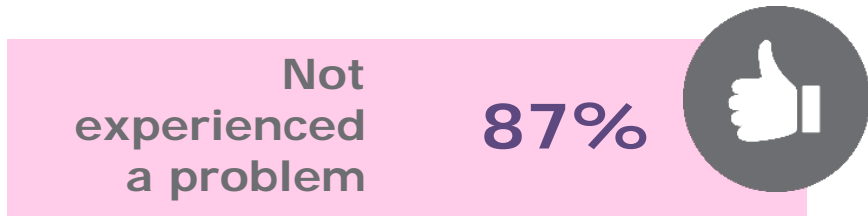
44% of declined individuals  
(n=7)

*"Because I have applied for four applications, a lot of the time I have to send some of the same stuff."*





# Over one in ten applicants had either experienced a problem applying for a grant themselves, or knew someone else who had



*"I was going back and forth with them, I had to repeat myself and as a result I now cannot apply again."*

*"My brother struggled, as with me everything was emailed over and he didn't get any emails so he had to contact them."*

*"Me and some others met the criteria (low income) but were all rejected."*

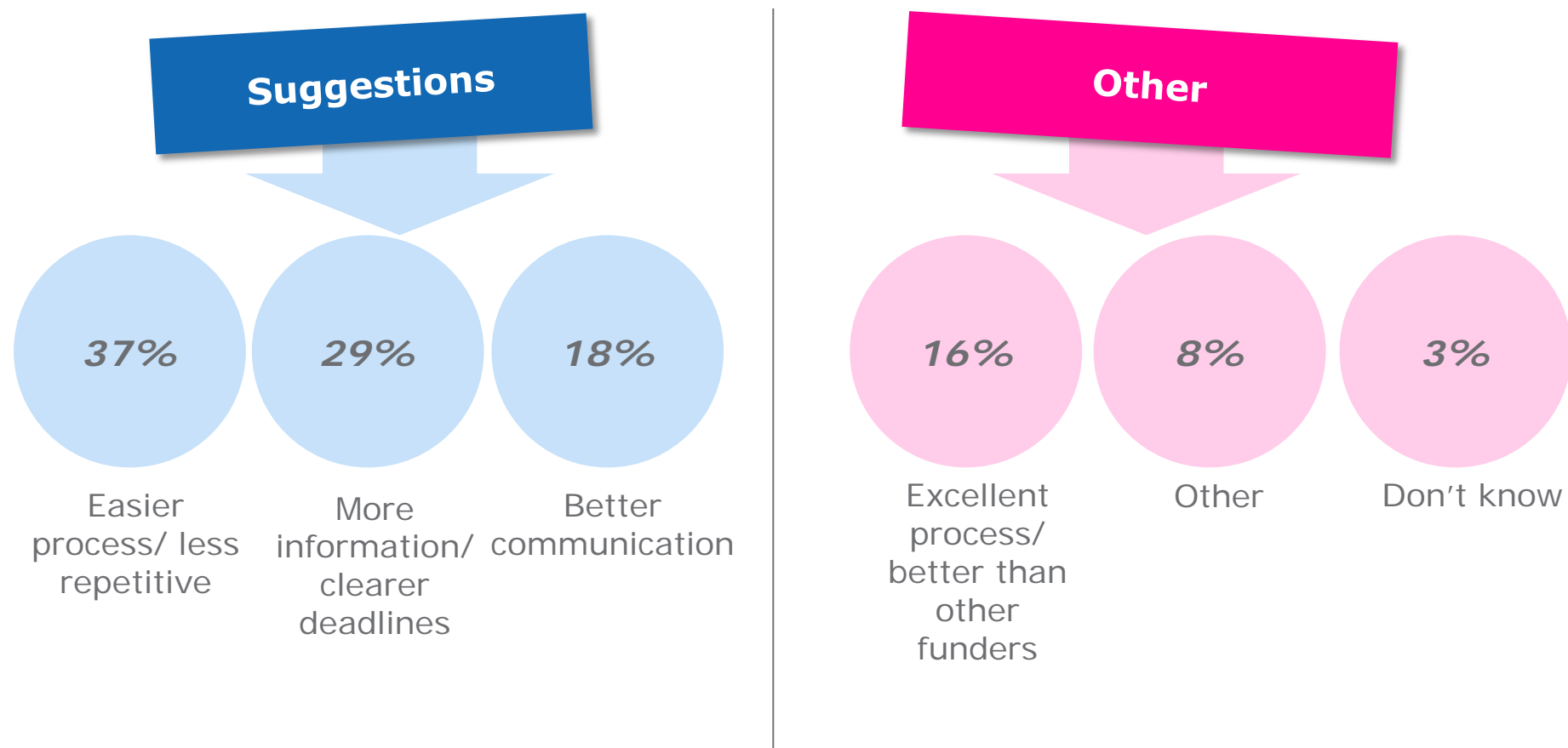
*"My friend applied for a grant but she only just received it just now, so she ended up starting late. They had asked for all the college information to be uploaded and some sent by post sometimes. She was eligible, but it just took too long at getting the grant."*

Source: Q26. Have you, or has anyone you know, experienced any difficulties when applying for a grant from the Walcot Foundation?  
Base: All respondents, n=106



# Suggestions for improvement

Over half (59%) felt that the application process is easy and straightforward. However amongst those who did make a suggestion on how it could be improved, focus was drawn to making the process simpler and clearer.





# Supporting comments



*"Perhaps a telephone call after the application has been received."*

Better communication

*"Perhaps provide some example budgets, some good budgets."*

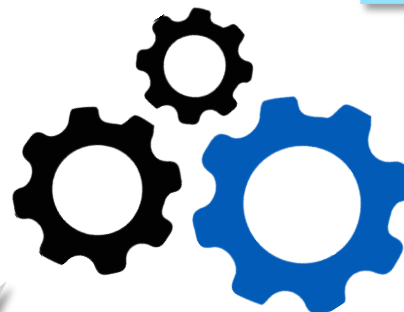


More information/  
clearer deadlines

*"An advisor you can contact to help you through it, instead of always online."*

*"When you are rejected they do not give a reason why. I don't know if there is an option to re-apply."*

*"When I was applying they did not get back to me and I had to email them. I could have dealt with the situation earlier if they had got back to me."*



Easier process/  
less repetitive

*"The whole process was long and I was rejected, I am not sure why when I met the criteria."*

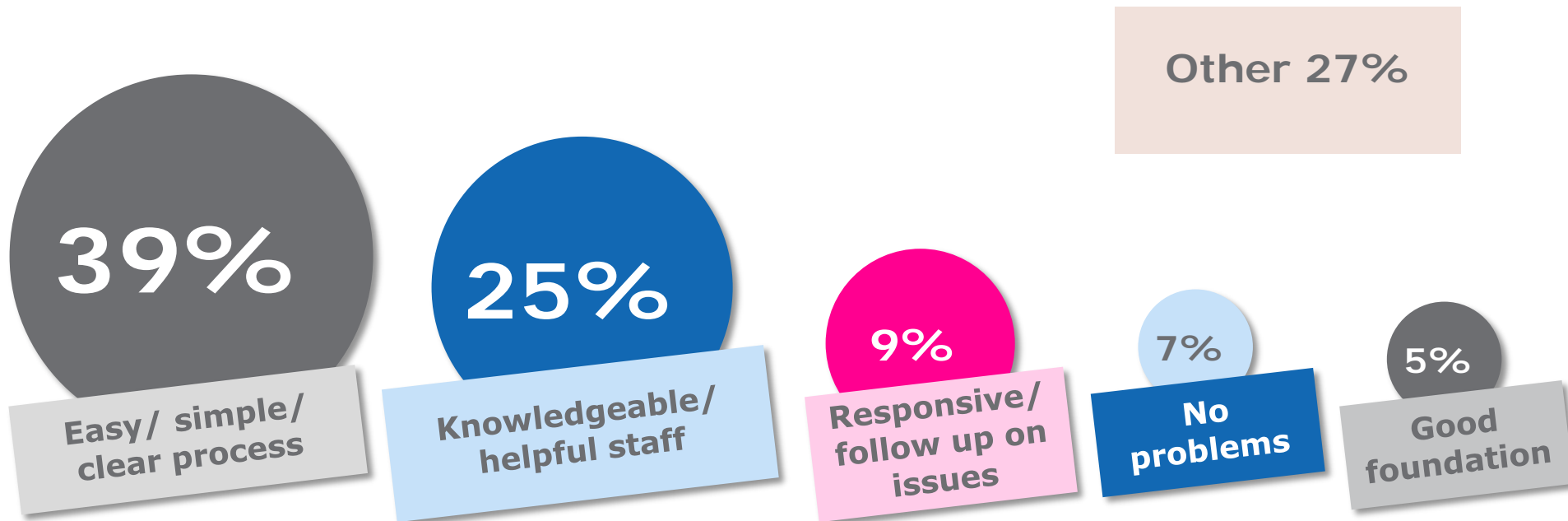
*"When you run out of time you have to go through the same process next year, if you have already registered on the system you should not have to do that again."*

*"Make the process simpler...I am repeating what I filled in the first time. Details like passport information should be stored from the first application."*



# General comments

Over half (58%) chose not to make a general comment on the application process. Amongst those who did, all made positive comments.



Source: Q29. Do you have any general comments you would like to make on the application process? Base: Respondents commenting, n=44



# Supporting comments

## Easy/ simple/ clear process

*"Walcot are generally trying to help and give a simple, easy process."*

*"The fact that they enable you to go through the application in stages and that you can save it as you are working through is very helpful"*

## Knowledgeable/ helpful staff

*"I think Walcot gives a personal touch. The knowledgeable staff are good and important to have, who know what is going on and help the applicants."*

*"Walcot grants officers are very helpful and more helpful than any other funders."*

## Responsive/ follow up on issues

*"Walcot was very responsive and prompt on emails and giving answers."*

*"They give a good level of engagement in terms of a visit to our social enterprise. They are available over the phone and get back to you on what you have to do."*

# Grant award

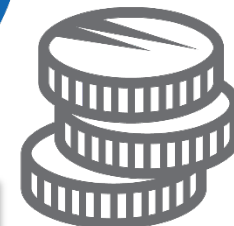




# The majority received their grants in a prompt and timely manner



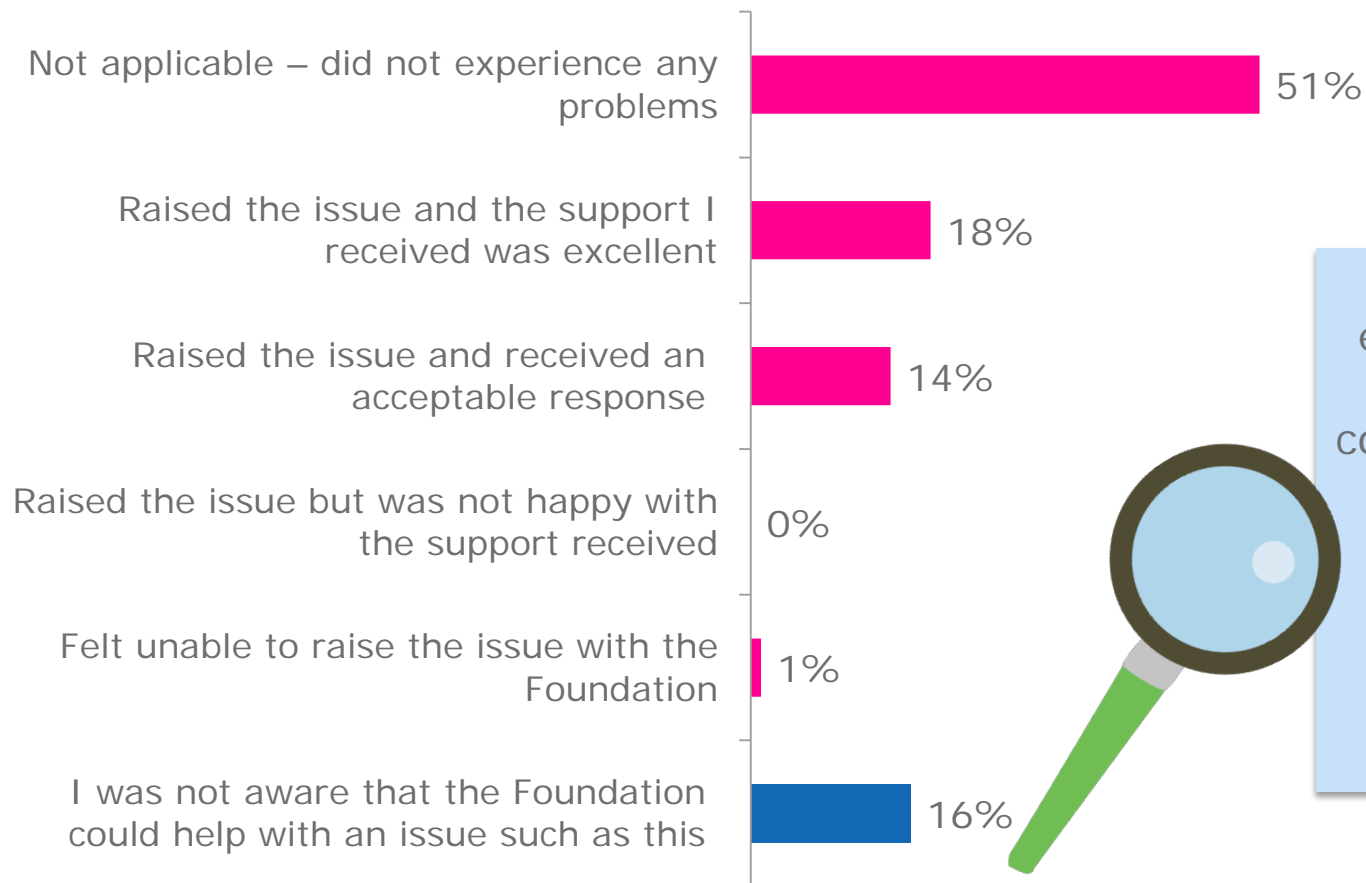
**97%**  
of grant payments are  
made in a prompt and  
timely manner



**3%**  
of grant payments  
were not made in a  
prompt and timely  
manner



## Over four fifths experienced no problems or received an acceptable response



15 individuals who experienced a problem with their project or course did not know that they could raise this with the Foundation.

By contrast, only one organisation had the same issue.





## The majority are happy with the amount of information required by the Foundation to help evaluate the success of its grants

5%

Too much information



*"Asking for two case studies is a bit too much where one is more manageable."*

92%

A reasonable amount



*"The information is too much for me as I am a full time carer."*

3%

Not enough information



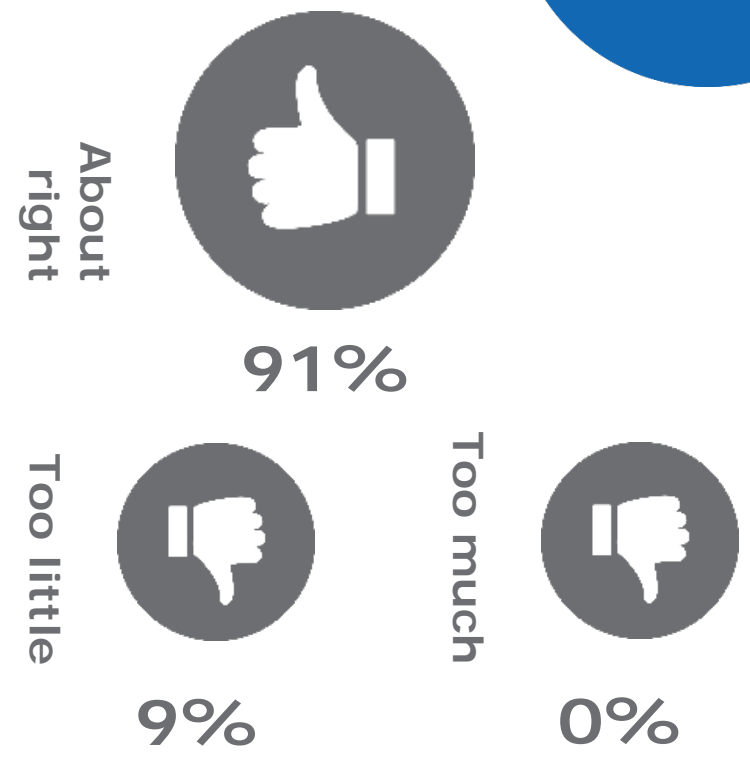
*"There was a lot more that I could have said but there was a word limit."*

Source: Q32. Do you think that the level of information required in the reports [used to evaluate the success of the grant] was...?  
Base: All respondents who have received a grant excluding 'Not involved', 'Not submitted yet' or 'Don't Know', n=87  
Source: Q33. Why do you say that? Open question. Base: Respondents who think that the amount is too much or too little, n=7



# Organisations do not have frequent contact with Foundation staff, however they feel that this is acceptable

Monthly	5%
Every three months or so	29%
Every six months	29%
Annually	29%
I had no contact	8%



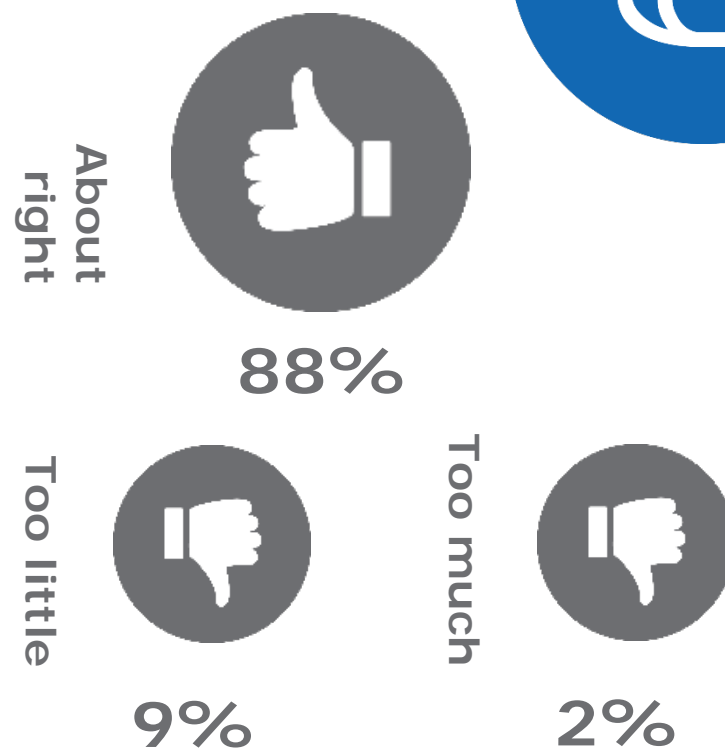
Source: Q35. After the grant was awarded, roughly how often did you have contact with Foundation staff over the duration of the funding? Base: Organisations / schools who have received a grant excluding 'Don't know', n=38  
 Source: Q36. Do you think that this amount of contact is...? Base: Organisations / schools who had contact with Walcot staff, n=35



# 16% of individual applicants do not have contact with Foundation staff over the duration of the funding



Monthly	6%
Every three months or so	57%
Every six months	8%
Annually	14%
I had no contact	16%



Source: Q35. After the grant was awarded, roughly how often did you have contact with Foundation staff over the duration of the funding? Base: Individuals who have received a grant excluding Don't know, n=51

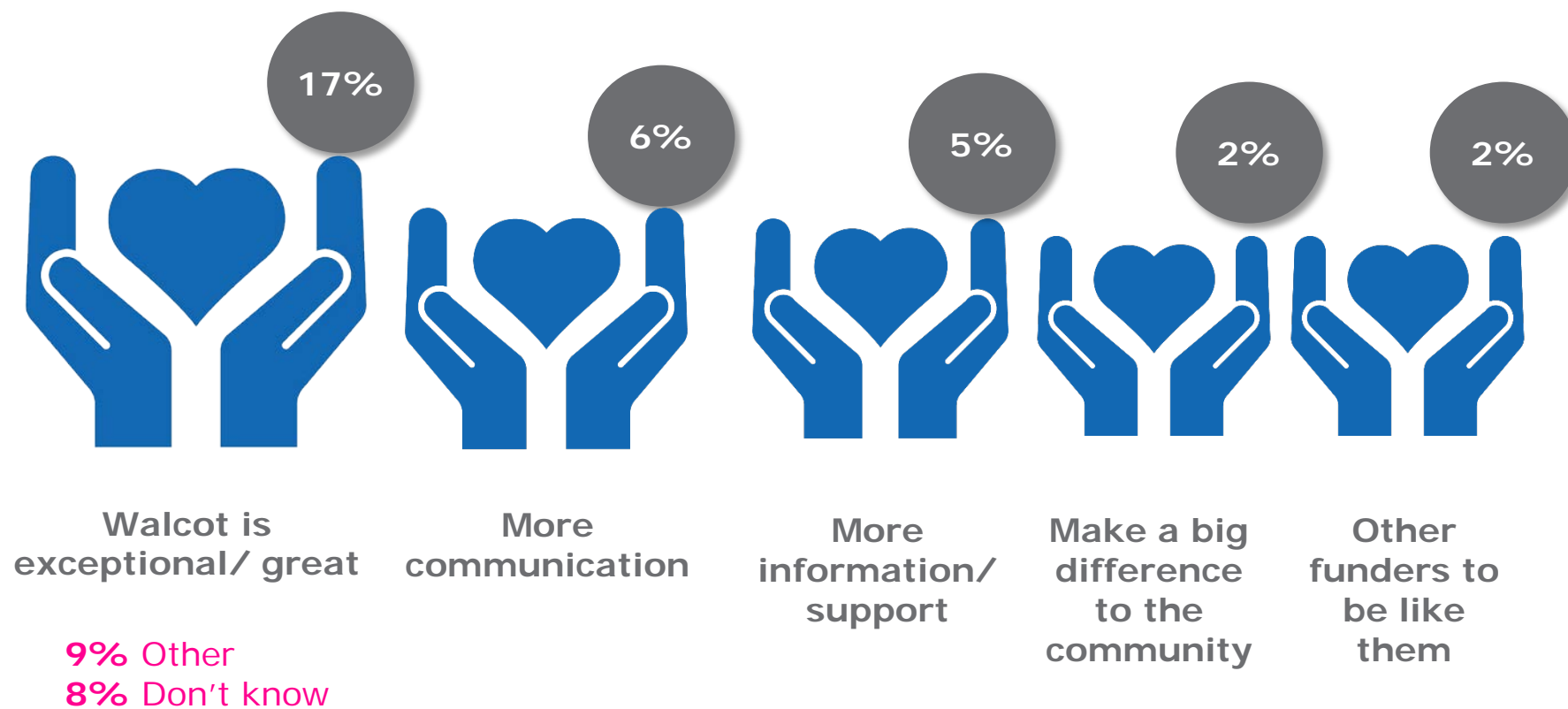
Source: Q36. Do you think that this amount of contact is...? Base: Individuals who had contact with Walcot staff, n=43



# Final comments

Over half chose not to make a final comment on the grant process, and the predominant feedback was that Walcot is great!

Nothing 57%





# Supporting comments

## Walcot is exceptional / great

*"Walcot are exceptional. I suggest to other funders to be more like them."*

*"They are an important funder and they make a big difference to the community."*

*"I think they should carry on the way that they are. A lot of students benefit from it."*

*"It is a really good concept and they handle individual cases very well."*

## More communication

*"They could do with a bit more contact before the end of the year to see how things are going."*

*"Only thing I happen to think is for someone to come and visit when in action."*

*"We would have appreciated more contact with Walcot, plus any networking opportunities they could offer."*

## More information/ support

*"I would say give more leeway in certain situations, and more support...just a bit more support for students."*

*"Be more clear about what the grant actually offers, they were not very clear, but I applied anyway."*

# Contact us

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