Key Findings and Recommendations from
The Trust for London's 2020 Grantee and Applicant Perception Report

Prepared by the Center for Effective Philanthropy

In October and November of 2020, the Center for Effective Philanthropy (CEP) conducted a survey of the Trust for London's ("the Trust") grantees and applicants, achieving a 64 percent response rate for the grantee survey and a 38 percent response rate for the applicant survey. The memo below outlines the key findings and recommendations from the Trust's Grantee Perception Report (GPR) and Applicant Perception Report (APR).

Grantee perceptions should be interpreted in light of the Trust's goals and strategy. Context matters – both in terms of interpreting results and planning for future actions.

This memo accompanies the comprehensive survey results found in the Trust's interactive online report at https://cep.surveyresults.org and in the downloadable online materials. The Trust's full report also contains more information about survey analysis and methodology.

Highly Positive Grantee Perceptions of The Trust's Field and Community Impact

▸ Grantees' perceptions of the impact the Trust is having on their fields have significantly improved from 2014 and are now in the top twenty-five percent of CEP's comparative dataset.

- Grantees note the positive impact the Trust is having in their fields, writing that the Trust "has been very influential," is "driving change," and is at the "forefront of championing user-led organisations."

▸ Grantees continue to provide ratings similar to the typical funder for its impact on and understanding of local communities.

▸ When it comes to understanding more specific aspects of grantees' contexts, grantee ratings are strong and often higher than typical. When asked how well the Trust understands the social, cultural, or socioeconomic factors that affect their work, grantees provide ratings that are in the top 15 percent of CEP's comparative dataset.

- Grantees' ratings place the Trust in the top third of CEP's comparative dataset for their sense that the Trust understands their beneficiaries' needs and has programs that reflect those needs.

Diversity, Equity, and Inclusion

▸ Of important note, grantees agree more strongly than the typical funder that the Trust is committed to combatting racism, demonstrates an explicit commitment to diversity, equity, and inclusion in its work, and has clearly communicated what diversity, equity, and inclusion means for its work.

- Further, more than half of grantees report that they discussed diversity issues with their board based on their work with the Trust. And about 40 percent of grantees report discussing diversity issues with staff.

▸ Moreover, the majority of the Trust's grantees (62 percent) also strongly agree (rating at least a 6 on a 1-7 scale) that because of their work with the Trust, their organisation was able to create more meaningful opportunities with first-hand experiences of poverty and inequality shape campaigns.

- Grantees whose organisations are led by individuals with experience of the core issues they seek to address provide consistently significantly more positive ratings for their perceptions of the Trust's impact on and understanding of their work.

▸ That said, respondents identifying as women interact significantly less frequently with the Trust, find themselves initiating contact more, and discuss their reports with Trust staff less frequently than respondents who identify as male. Subsequently, respondents identifying as male rate significantly more positively on many measures in the report, including for their perceptions of the Trust's impact on their fields, overall understanding, comfort approaching the Trust if a problem arises, and openness to grantees' ideas.

- Yet grantees with Executive Directors identifying as female report receiving significantly larger grants (a difference of £16K GBP compared to organisations with ED's identifying as males). Despite interacting less frequently with the Trust, these grantees provide significantly more positive ratings than grantees with Executive Directors who identify as male on a few measures in the report, including the Trust's impact on their local communities, effect on public policy, transparency, responsiveness, and fairness of treatment.

"Trust for London is very influential in the field of poverty in London, which is what our project aims to address by helping poor Londoners to move into better employment."

"The Trust is vital supporter of [our] policy work, leading to systems change. We are able to capture insights and impact from the community we support, and the Trust has and continues to support us to fight for real change for our beneficiaries."

Strong Organisational Impact with Opportunities to Provide More Unrestricted and Non-monetary Support

▸ Since 2014, grantees' perceptions of the impact the Trust has on their organisations have significantly improved and are now in the top 15 percent of CEP's comparative dataset.

- Likewise, grantees' perceptions of the Trust's awareness of challenges are higher than typical and now fall in the top third of CEP's comparative dataset.

▸ Compared to 2014, the Trust's grantmaking characteristics remain virtually unchanged. Subsequently, as the Trust reconsiders its strategy, it has an opportunity to reflect on its grantmaking patterns.

▸ CEP's research finds that the specific pattern of larger (often six-figure), multi-year, general operating support grants are associated with significantly more positive perceptions of impact on grantees' organisations.

- The Trust continues to provide grants that are similar in size to the typical funder and are longer than typical – about 2.5 years compare to 2.2 years at the median.

- Consistent with its strategy and goals, the Trust also continues to fund smaller organisations than typical. The median grantee budget of £300K Pounds is substantially smaller than the median grantee budget of £1.2M Pounds in CEP's overall dataset. As a result, the Trust funds a larger than typical proportion of grantees' budget: 11 percent versus four percent at the typical funder.

- As in 2014, the Trust provides less core support than is typical. Four percent of grantees report receiving unrestricted funding, compared to 16 percent at the typical funder.

- The largest proportion of grantee suggestions (23 percent) relate to longer and more flexible grants. Grantees suggest the Trust to provide "longer and more flexible funding," that allows organisations "to plan and act strategically."

Assistance Beyond the Grant

▸ CEP's research has found that intensive patterns of non-monetary assistance – defined as at least three forms of field-related assistance or a combination of 7 types of different support beyond the grant check – are associated with higher perceptions of impact on grantee organisations.

▸ Fifteen percent of grantees, a typical proportion, report receiving field-focused or comprehensive assistance. These grantees rate the Trust significantly higher than grantees who do not report this intensive assistance beyond the grant on many measures in the survey, including grantees' perceptions of how well the Trust understands their organisations' goals and strategy.

- These findings are supported by grantees' qualitative comments. When asked for suggestions for improvement, ten grantees request more non-monetary support, particularly more convenings, collaboration, and capacity building support.

> *"More longer-term core grants to user-led organisations that are addressing social justice issues."*

> *"Not to exclude business planning and organisational development as fundable propositions... It can't be all about delivery, delivery, delivery – we need support and systems in place to do mundane business and programme management."*

Opportunity to Improve Funder-Grantee Relationships

▸ Trending down from 2014, grantees now rate the quality of their interactions with the Trust lower than grantees at the typical funder, with ratings falling in the lowest third of CEP's comparative dataset.

▸ This matters because CEP's research finds that higher ratings for the quality of interactions and communication are frequently associated with higher perceptions of impact on grantees' organisations, communities, and fields.

- In their open-ended comments grantees write that staff are "approachable," "considerate," and "supportive." Nonetheless, one of the two largest proportions of suggestions - nearly a quarter of grantees' suggestions (N=24) - relate to opportunities

to improve the funder-grantee relationship. Specifically, grantees ask for "increased contact," "a more personal connection," and "faster responses from grant officers."

Opportunities to Enhance the Quality and Frequency of Interactions

▸ Grantees' ratings place the Trust in the bottom thirty percent of CEP's comparative dataset for the responsiveness of staff.

- Moreover, grantees rate lower than typical for their comfort approaching the Trust if a problem arises. They also report the Trust's staff exhibit less trust in grantees than typical and rate lower than typical for the candor about the Trust's perspective than is typical.

- On a positive note, grantees rate similar to typical for the Trust's fairness and openness to grantees' ideas and provide ratings in the top quarter of CEP's comparative dataset for the Trust's overall transparency.

▸ Importantly, grantees report having less frequent contact with the Trust staff compared to the typical funder in the GPR comparative dataset. Only 7 percent of grantees report having monthly contact with their grants manager compared to twenty-seven percent at the average funder.

- Grantees with more frequent contact, monthly or more often, provide significantly more positive ratings across many survey measures, including for perceptions of impact, and for relationships with the Trust.

- Compared to 2014, significantly more grantees, thirteen percent, report having experienced a contact change in the past six months. While this is a typical proportion, grantees that did not experience a contact change rate significantly higher for the Trust's responsiveness, fairness and understanding of their local communities.

- It is important to interpret these findings within the context of the Trust's organisational capacity. According to Trust provided data, on average each fulltime programme staff member has 46 active grants and 70 applications to manage, compared to 30 active grants and 26 active applications per employee at the typical funder.

Declining Ratings for the Clarity and Consistency of Communications

▸ Grantees find the Trust's communications to be significantly less clear and consistent than in 2014. Grantees now place the Trust in the bottom 30 percent of CEP's comparative dataset for the consistency of different communication resources used to learn about the Trust.

- Nonetheless, nearly 80 percent of grantees are aware of the London Poverty Profile. These grantees provide significantly more positive ratings for many measures in the report, including the clarity and consistency of the Trust's communications.

" *"There are lots of formal process i.e. long application form, detailed evaluation plan, a particular form to sign to claim each payment. It makes Trust for London feel quite formal and less approachable than other funders, and so it doesn't feel easy to come forward if we might be struggling with anything. It feels we have to give an impression that everything is always on track."*

" *"Our understanding of what the Trust is interested in would perhaps be assisted by a more frequent communication with [our] grants manager."*

Very Helpful, Yet High Pressure Processes

Selection Process

▸ As in 2014, grantees perceive the Trust's selection process to be more helpful than typical in strengthening their organisations and programmes funded by the grant. Grantees write that the selection process is "useful and valuable," while staff were "supportive," and "helpful."

▸ While helpful, about two-thirds of grantees report waiting 4-6 months between the submission of their grant proposal to a clear commitment of funding compared to just 30 percent at the typical funder.

▸ Moreover, grantees continue to report experiencing more pressure than is typical to modify their organisation's priorities in order to create grant proposal likely to receive funding.

  • Grantees who report at least feeling a moderate amount of pressure (rating at least 3 on a one-to-seven scale where seven is significant pressure or lower) rate significantly lower than grantees who report little or no pressure on most measures in the survey, including on aspects of their relationship with the Trust and the helpfulness of the selection process.

Helpful Reporting and Evaluation Processes with Opportunities for More Engagement

▸ Grantees place the Trust's reporting process in the top third of CEP's dataset for the extent to which it was a helpful opportunity for them to reflect and learn. However, grantees find the Trust's reporting process less straightforward than is typical – placing the Trust in the bottom quarter of CEP's comparative dataset.

  • Grantees who report exchanging ideas with the Trust about how their organisation would assess the results of the work funded by their grant rate significantly higher on a number of measures in the report.

  • Similarly, grantees who had a substantive discussion with the Trust about submitted reports also rate the Trust significantly higher on most measures in the report.

▸ A larger than typical proportion of grantees (45 percent) indicate participating in the Trust's evaluation processes and the vast majority of grantees (73 percent) report that their own staff carried out the evaluation.

  • Grantees having participated in the Trust's evaluation provide stronger than typical ratings for the extent the evaluation incorporated input from their organisation in the design of the evaluation.

  • However, grantees provide lower than typical ratings for the extent the evaluation resulted in their organisation making changes to the work that was evaluated.

> *"Greater flexibility about reporting and evaluation requirements. I understand the Trust's need to understand the impact of what it funds. However, we are a small organisation and we don't have 'spare' resource to undertake reporting and data capture...."*

> *"Reduce the time scale to approve the finding application."*

Lower than Typical Perceptions of Declined Applicants

Applicants' perceptions are lower than typical on many measures throughout the report and are comparatively less positive than the Trust's grantees' perceptions. The Trust's applicants provide lower than typical ratings for aspects of the Trust's understanding of their organisations, communities, and fields, alongside relationship-oriented measures.

Applicant Characteristics

▸ The median organisational annual budget of the Trust's applicants (£100K Pounds) is smaller than typical and falls in the bottom five percent of CEP's comparative dataset. Yet at the median, applicants are requesting grants of £47K, a grant request amount in the top forty percent of CEP's comparative dataset.

▸ Importantly, 76 percent of applicants report that at least 50 percent of their organisations' trustees and senior staff are from the primary community they serve. In comparison, using Trust provided data, only 36 percent of grantees are led by those with first-hand experience.

Applicant-Funder Interactions

▸ Applicants place the Trust in the bottom 25 percent of CEP's comparative dataset for overall staff responsiveness and for their perceptions of how accessible the Trust is to applicants.

▸ Likewise, declined applicants provide lower than typical perceptions for aspects of the Trust's communications.

- Applicants find the Trust's goals and strategy less clear and its overall communications less consistent than is typical of other declined applicants – in the bottom 20 percent of CEP's comparative dataset for both of these measures.

▸ Applicants' written comments build on these findings. Twenty-one percent of applicant suggestions – the second largest proportion – ask that the Trust improve the quality of interactions. Applicants ask for "more engagement on a regular basis," and suggest that the Trust "could do better talking to the organisation."

The Trust's Application Process

▸ Similar to the typical funder, applicants are applying to the Trust because of reading the Trust's guidelines and 88 percent of applicants indicate they will reapply to the Trust in the future.

▸ Thirty percent of applicants requested feedback following their declination and about 70 percent of applicants who requested feedback received it. Overall, a smaller than typical proportion of applicants (30 percent) report receiving feedback on their application.

- These applicants who received feedback rate significantly higher than applicants who did not receive feedback for many measures in the report.

- Further, applicants report that the feedback the Trust provided was relatively helpful. Applicants' ratings of the Trust's feedback are similar to the typical funder for this measure.

▸ As it relates to the technical aspects of the Trust's processes, applicants largely agree that the portal was easy to use without additional technical assistance. However, applicants neither agree nor disagree (rating a 4.26 on a one-to-seven scale) with the statement "If technical assistance was needed to use the portal, Trust staff were helpful."

"Very clear priorities using examples and very clear exclusions again using examples, and more feedback on unsuccessful applications - otherwise it just creates more work for us as well as you because we will apply again."

CEP Recommendations

Based on its grantee and applicant feedback, CEP recommends that the Trust consider the following:

▸ Given the Trust's lower than typical ratings for its relationships with grantees and applicants, seek ways to improve the responsiveness and accessibility of staff.
Recognizing potential internal capacity constraints, the Trust could consider:

- Establishing clear internal standards of responsiveness and enhanced clarity on the expected level of interaction with grantees.

- More clearly communicating expectations to grantees and applicants.

- Considering additional efforts to communicate about the Trust's goals and strategy, reinforcing what it has learned, the risks it has taken, and its overall impact, ensuring that the information shared is consistent across written and personal communications.

▸ Reflect on best practices leading to the Trust's strong perceptions of impact on grantees' fields and communities in order to codify these practices and maintain grantees' positive experiences.

▸ Consider providing a larger proportion of its most closely aligned grantees with longer and/or more unrestricted (flexible) grants.

- Relatedly, explore whether the Trust could provide even more support beyond the grant, particularly by facilitating more frequent convenings and collaboration amongst its grantees.

▸ Considering grantees' positive feedback about its helpfulness, increase the engagement of Trust staff in discussions about how grantees will assess the results of their funded work and discussions about grantees' reports.

▸ Provide a greater proportion of applicants with more specific feedback, particularly those requesting.

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