

Introduction

We're really proud of the partnerships we have across the country with great charities, large and small, and we work hard to ensure we are as accessible and friendly as possible, as we cannot succeed without our charity partners. However, we're always looking to improve what we do and how we do it, so what better way than to ask those who apply to us for their honest feedback!

We therefore commissioned external organisation, nfpResearch, to conduct an anonymous survey and review, so that those who applied to us (both successfully and unsuccessfully) had the opportunity to 'hold the mirror up' and help us improve. The reason for working with an external organisation was to ensure genuine anonymity in the responses, which we hoped would enable people to be honest with us. We asked applicants from across the range of our grant-making – charities of all sizes, across all our categories and all parts of the country. The majority were volunteer and non-professional fundraisers as we wished to ensure we truly understand the views of our applicants, especially those for who fundraising may be a new thing or outside their typical experience.

In a nutshell, we wanted to understand:

- what people liked and appreciated about the way we work – and therefore what we should continue doing
- what people wanted more or less of from us
- what suggestions people had for us – and therefore what we could consider doing

We are enormously grateful to the over 1,300 charities that gave precious time to give their anonymous feedback, and to our nfpResearch partners for their expertise and thorough approach. We were especially pleased at the high response rate as nfp informed us that this is an unusually high level of engagement.

You can read the report produced by the nfp team (which includes an executive summary) separately as we have made this publicly available. This overview is our response to the key points raised so that you can see some of the ways we intend to amend or review our approach.

What our charity partners tell us we're doing well

Straightforward approach and communications

We know that fundraising is time-consuming and can divert charities' resources away from their crucial work, especially for smaller organisations. As a result, we strive to make applying to us as easy and straightforward as possible. We were pleased therefore to learn that our application guidance, one step application process and communication is easy to follow and that our simple grant reporting is appreciated. At the end of 2022 we redesigned our website to ensure it exceeds the highest accessibility standards and were particularly pleased that our website is universally praised as being easy to navigate and understand.

Speed of decision making

We are open for applications all year round and our Trustees make funding decisions throughout the year. We manage our funds carefully which means that every applicant has a fair opportunity for a grant, irrespective of when they apply to us. We are reassured that the relative speed of our decision making was recognised by applicants.

Helpful and responsive staff

Respect, humility, and trust are key to the Foundation's grant-making philosophy, and we are proud that our diverse team reflects these values. Most of our grants team have worked for, or volunteered with, charities, and all our Grants Managers have been fundraisers previously, so they all have a good understanding and appreciation of the pressures that charities are under. We particularly appreciated the feedback on how helpful and responsive our staff are.

What our charity partners would like from us

Greater level of communication

Because we respect the pressures on our charity partners' time, we are consciously careful not to make unnecessary demands or request lots of reports and engagement with us. We were surprised therefore to learn that our grant holders would like a closer relationship with us, even though they appreciate our simple reporting processes. The survey has given us food for thought on what a good relationship looks like from our charity partners' perspective and how we might achieve a sense of closeness without being burdensome.

Greater clarity on what we fund

One of the strengths of the Trustees' funding model is that the Foundation supports a wide range of causes across the UK. What we had not appreciated, however, is how confusing this breadth can be for those who are looking for specific types of funding or who may be new to fundraising. While we provide examples of organisations and activities we fund as case studies on our website, and we publish our grants each quarter (and in our annual report and on 360Giving) we clearly have further work to do to clearly convey what we do and don't fund.

Feedback on funding decisions

We, like most funders, struggle to strike the balance between providing detailed feedback to unsuccessful applicants with prioritising our funds towards supporting charities, rather than on maintaining a larger team. We have listened carefully to calls for better feedback on why applicants are unsuccessful and will consider how we might address this, particularly if it helps charities to focus their fundraising where they are more likely to be successful.

Greater signposting to capacity building/'funder plus' type activities

Increasingly over the past 10 years, we have developed strategic partnerships with delivery partners on a range of capability and capacity building programmes. These include the Weston Charity Awards with Pilotlight, Weston Loan Programme with Art Fund, training programmes with the likes of The Cranfield Trust and Ethical Property Foundation and, more recently, Weston Communicating Climate with the Media Trust. We were struck that this work is less visible in the sector than we realised, something which we can now rectify!

What we're considering as a result of the survey findings

In addition to some of the areas highlighted above, some immediate steps we are taking include:

Better use of technology

How can we improve the frequency and depth of our communication with applicants and grant-holders with the smarter use of technology? Options we are considering range from a regular newsletter (which would also help us to raise awareness of our own and others' capability building programmes), to more regular communications points during an applicant's 'life cycle' throughout the Foundation.

Our feedback

We know this is something that charities often value, however in practice we receive a relatively small number of requests for bespoke feedback. It is also the case that we simply don't have the resources to support every good application and there isn't always a 'problem' with a proposal, but that our Trustees have difficult decisions and have to make very fine distinctions between applications. That said, we are considering how we might offer feedback to unsuccessful applicants, while ensuring our resources are focussed on funding vital charities, rather than supporting a large staff team.

Greater clarity on what we fund

We are considering the challenge of conveying the breadth of what we fund in a way that helps potential applicants to understand if we are the right organisation to apply to. We will test our messaging with a small number of charities, before rolling any changes out, to ensure our communication is as clear as possible.

Thank you

Lastly, thank you again to the hundreds of kind people who participated in our survey. We are committed to improving and can only do so if our charity partners tell us what they think. We will be repeat this important survey in future years so we can track our progress.



Philippa Charles
Director