

# Stakeholder Feedback



# Introduction



One of the key ambitions within our 2030 Strategic Plan is 'Achieving excellence through our people, practice, and systems'. To help us achieve this, we aim to embed a culture of continuous improvement across everything we do.

To help us understand areas for improvement and gather feedback on our services, we issued a number of digital surveys throughout the summer of 2021. We contacted grant applicants, fund donors and community panel/board members.

To accurately reflect the sentiment amongst our broad spectrum of donors, the survey sent to our community benefit fund donors was different to those of individuals, families, corporate and charitable organisations.

The results of the surveys are summarised in this report.

**This report  
contains analysis  
of feedback from:**

- ✓ Applicants
- ✓ Donors
- ✓ Panel & Board Members

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# Applicant Survey



This survey was sent to all organisations that had applied for funding since January 2020. The survey went out to 3,088 applicants, the results are based on the responses from 288 (9%).

## Our Findings

Overall, the survey results were positive, with all areas showing that applicants, both successful and unsuccessful, were happy with their experience of applying to Foundation Scotland. The survey provided only a small amount of feedback on areas of improvement; however, from some of the comments made, we were able to identify some areas where we can further enhance and strengthen our service.



## Our Learnings

Some applicants told us there was a lack of advice or access to staff for support during the pre-application stage, and this was an area for improvement.

Some applicants told us that grant application forms are too bureaucratic for the size of the grant requested.

Feedback to unsuccessful applicants is sometimes not clear enough and could be more helpful.

Some grantees were unclear on why we request grant monitoring forms and what we do with this information.



## Our Actions

We will introduce live and recorded application webinars for each open grants programme.

Where capacity allows, we shall provide set dates and times for funding surgeries.

We will create a set of service standards around the length of time to respond to enquiries.

We will review our application forms to ensure they meet the IVAR principles, only asking relevant questions and details proportionate to the additional information required.

We will ensure as much as possible that we provide clear and detailed feedback when an application is unsuccessful.

We will explain in grant offer e-mails, and at the end of grant stage, why we need end of grant reporting and how the information is used.



# Key stats from applicant survey

**81%**

Say funding has helped to sustain or improve people's wellbeing

**58%**

Say their grant helped to strengthen their organisation 'a lot'

**45%**

Of grants had contributed to improving the environment 'a lot' or 'to some extent'.

**80%**

Believe we have an 'extremely good' or 'good' understanding of their communities needs

**61%**

Say their funding helped to enhance their community

**33%**

Say their grant helped to reduce their organisation's carbon footprint



The percentage of applicants that would consider applying for funding from us in the future

## How can we improve on your experience of applying for a grant?

- “ Maybe save the organisation's basic details and committee details so that the organisational information will auto-populate when applying for multiple funds. ”
- “ Consider increasing turnover levels for applicants. Our turnover is now too high but we are not a rich organisation. It's high because of staffing ratios to vulnerable people. ”
- “ Make the application short and clear, not too long drawn out questions which can be too complicated to fill. ”

## Do you have any other comments about our grantmaking, or any improvements you would like to see?

- “ It's great to have this resource. We find it extremely challenging to find funders happy to support 'overheads', 'transport' and 'subsistence', and the definition of those overheads varies hugely. ”
- “ It is a supportive process and that is really important to smaller organisations like ours. ”
- “ Perhaps those applying for smaller grants should not have to go through the same strict criteria as for those seeking larger amounts of money ”

# Donor Survey

## Philanthropy



This survey was sent to individuals, families, corporate and charitable organisations who donate funds for us to distribute on their behalf. The survey went out 70 different donors, the results are based on 20 responses (29%).

## Our Findings

The results of our survey were positive overall, with easily identifiable areas for improvement. We can do more to inspire our donors and encourage them to see the added value beyond the transactional nature and tax-efficient financial benefits of working with us. Feedback illustrated a need for us to be able to more fully illustrate the impact their funds make in a way that's engaging, illustrative and succinct.

Our donors have an appetite to consider different ways of achieving impact, including themed funds and supporting social investment in Scotland. Almost half of our donors noted they would be interested in attending online learning sessions on key issues to help inform their funding.

## Our Learnings

Our donors would like more information about levels of contributions for Foundation Scotland's services in the early stages.

Donors are interested in learning more about maximising the impact of their giving, being informed about key issues and new funding opportunities such as social investment.

We need to improve our feedback to donors about the impact of their funds.

We need to find a balance between keeping donors informed and not sending them too much information.

## Our Actions

We will develop clear and consistent presentations to support the onboarding of new donors.

We will provide clear information on contribution levels and all services offered by Foundation Scotland.

We will improve our feedback to donors, including feedback on donations made through our online giving accounts.

We will develop a series of online sessions on the different ways we can distribute funding.

We will develop a series of online events focussing on key issues such as education, climate change, health and wellbeing and reducing inequalities.

# Key stats from donor survey

## (Philanthropy)

**60%**

Of donors work with us so they can support smaller grassroots organisations

**4.6**

Our score out of five from donors who say they believe their fund is making a difference

**50%**

Of donors told us they work with us so they can choose who they support.

**80%**

Of donors are very satisfied with the support received from their fund advisor

**70%**

Of donors would like to see more fund and financial information available online

**70%**

Of donors told us our staff respond to their needs very efficiently



**95%**

Of donors said they were either 'highly likely' or 'likely' to recommend us to others.

## Can you tell us if you think we do anything well?

- “ The grant suggestions that you make are good at matching my target organisations ”
- “ Knowledge of where best to divert funds to and the sense that I am well guided and that my fund is well looked after, a good feeling of trust ”
- “ Very good at engaging with projects. Always appreciate the advice given, it is always well thought out, clear. ”

## Is there anything you think we can improve upon?

- “ I'd like more digital options for grantmaking. For example, the ability to check details online via a portal i.e. how much has been distributed etc. ”
- “ Making it clear that there is a difference between the fund and Foundation Scotland. Making this clear when speaking to projects which fund you are representing. ”
- “ Lower fees, especially with third party investment firms ”

# Donor Survey

## Community Benefit Funds



The survey was sent out to donors whom we distribute community benefit funds on behalf of, in partnership with members of the local communities in the areas of commercial renewables projects. This was the first time we'd surveyed this group of donors. The level of response represented 69% of our corporate donor fund portfolio.

### Our Findings

Overall, our donors showed a high level of satisfaction amongst these donors regarding our processes and service delivery. Most donors came to us based on our reputation for managing and delivering community benefit funds. The main area of improvement highlighted was external communications. An increase in media coverage, videos and photographs of funded projects and coverage of the funds on social media would be welcomed.

### Our Learnings

Feedback tells us that the process of setting up funds seems reasonably robust. However, there may be some improvements we can make to support the finalising of the Fund Agreement.

One donor linked our work with community benefit funds specifically to community development, a helpful recognition of our approach and the principles behind it.

There is a clear trend for more communication outputs related to fund activity and delivery of these in a more timely fashion.

Donors place high value on our annual fund reports. However, we can improve on our timing for delivery.

Donors are interested in learning more about how funds align with the UN Sustainable Development Goals (SDGs).

There's an appetite amongst our community benefit donors to have more access to fund data available to them online.

### Our Actions

There is a clear demand from donors for more communications about fund activity. We will undertake a review of fund communications and address how this can be improved.

We will create a new blog to communicate more about who we are and how we work. We will share this directly with all our donors.

We will plan a series of themed sessions for donors focussing on the UN Sustainable Development Goals (SDGs) in early 2022.



## Key stats from donor survey (Community benefit funds)

67%

Of donors said they were highly satisfied with the efficiency of our staff

56%

Chose to work with us based on our reputation for delivering community benefit funds

63%

Would like to access real-time fund information online on a quarterly basis

73%

Were satisfied with the quality of information received regarding their fund

46%

Of donors felt their fund was making a difference in the community

73%

Are 'very likely' or 'likely' to attend learning events on aligning funds with the SDGs

100%

Of donors said they would recommend us to others.

### Is there anything you think we do really well?

“ You take all the leg work out of the community funds management to which the asset managers can't give 100% of their time. This is a huge help to those sites that Foundation Scotland manages on behalf of our company ”

“ You work with organisations like us superbly. Your staff are your biggest asset and are excellent at what they do. We care deeply about the way community benefits are developed and delivered with communities, and so do you, and that makes for a great match. ”

### Are there any aspects of our services we could improve on?

“ More focus on Sustainable Development Goals would be welcomed. ”

“ The online access to data about funds would be REALLY welcome, a brilliant idea. This is just what we need ”

### Can you share any feedback on setting up your fund?

“ Foundation Scotland worked extremely hard to get the local community groups engaged. That hard work at the outset has meant funds have moved forwards from a strong, robust base. ”

“ Foundation Scotland did a really good job under challenging community circumstances. ”

# Panel & Board Members Survey



This survey went out to individuals involved in decision making panels for some of the funds we administer. The majority of responses came from panels that support grant distribution for our donor's community benefit funds. A total of 69 responses were received.

## Our Findings

In general, our work with panels appears to be sound and built on good foundations. We received positive feedback regarding the level of support members received from Foundation Scotland staff, and the information they provided supported informed decision making. There was also an appetite for learning and development amongst members in areas such as community capacity and alternative funding models. There was some frustration amongst some members on the length of time the grantmaking process could take. There was also recognition about involving 'less heard' voices from communities to diversify and attract 'new faces' to panels to represent all community members.



## Our Learnings

The response rate was low compared to previous annual surveys to community panel members. It may be helpful to give panels advance notice of surveys being issued to improve future response rates.

We're not clear what panel members may want more of or less of. We should ask more precise questions around this next time.

Panels members felt the level of information provided to help inform decisions was 'about right'.

Some panel members highlighted how much of their own time was committed to the role. This can create challenges when juggling their other commitments.

Panel members have a lot to share about their experience working with us, their experience working for their communities and the challenges of distributing funding fairly and effectively. They are keen to share with and learn from others.



## Our Actions

We will continue to address diversity on panels by actively identifying and approaching under-represented groups.

We will better communicate alternatives to open grantmaking via briefings, blogs, case studies and learning events.

We will deliver more training & development sessions specifically for panel members.

We will ensure assessment reports are proportionate to grant size but without compromising on quality.

We will provide consistent information to all panels on ineligible or withdrawn applications.

We will consider how we can better involve panel members in our wider work, for example, contributing to a blog or sharing their experiences with others.

We will review and refine our conflict of interest policy for panels.

# Key stats from our panel survey

**53%**

Of Panel/Board members have been in their role for more than 3 years

**90%**

Of respondents chose 'being a service to my community' as the most enjoyable part of their role

**4.1**

The rating out of 5 on how effective they felt their panel is

**58%**

Are interested in learning more about how funds can build community capacity

**4.5**

The rating out of five for how well supported panel members feel in their role

**78%**

Of members rated our induction process 4 or 5 out of 5



**94%**

Of panel members told us they were able to make informed decisions based on the information we provided

## Can you provide any more feedback on your role?

- “As a local individual, it is good to be involved in making decisions and assessing needs with local knowledge. Hopefully, decisions made reflect this need and funds will be used appropriately.”
- “I think that it is important that Board members are local people from within the area of responsibility and will have a wide knowledge of life and activities within the area.”
- “I have learned so much from the insight of other panel members and value the knowledge and experience that they have. I also grant assess and my role as a board member has improved my report writing and understanding of the information panels need.”

## Can you provide any feedback on Foundation Scotland?

- “Any questions raised have been dealt with, explained and discussed in a timely fashion. Never feeling pressurised to make a decision and Foundation Scotland representatives have always been objective.”
- “I feel supported regardless of who the Foundation Scotland person I have dealt with over the years. Well done.”
- “In seeking funding applications it would be good to ask for information as to how the project will continue to be of benefit to the community and not dependent of the approved funding.”

# Conclusion

Collecting feedback from our stakeholders has been an extremely valuable process for our team at Foundation Scotland. The detailed insights provided by respondents have created some clear actions to help us improve our processes and services. Survey recipients also told us how much they valued the opportunity to give feedback on their relationship with us.

The response rate to the survey was lower than anticipated. In the future, we will avoid issuing surveys in the summer months, which may hinder staff or volunteer availability for responding. Where possible, we will also alert stakeholders in advance of future surveys, so they know what to expect.

**The staff Board at Foundation Scotland would like to thank everyone who took the time to complete our 2021 annual surveys.**

**We're always available for anyone who'd like to share any feedback; there's no need to wait for a survey. Just get in touch, and we'll happily set up a call with the relevant member of our team.**



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