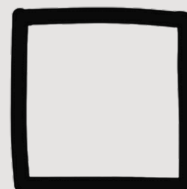




Foundation
Scotland

2024

Stakeholder Feedback



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1. 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 2024. We contacted grant applicants and fund recipients, fund Donors (across Communities and Philanthropy) and Panel/Board members.

This report contains analysis of feedback from:

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

2. Applicant/Grantee Survey



This survey was sent to all organisations that had applied for funding between April 2023 and March 2024. The results are based on the responses from 547 organisations.

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 did provide some feedback about areas for improvement, particularly relating to the Grantee Portal and application forms. Based on this feedback, we were able to identify where we can further enhance and strengthen our services.

Our Learning

While some applicants found our application forms accessible, others felt that they should be more proportionate to the amount of money requested.

Some applicants felt that the application form questions could be clearer.

While we included a question about environmental impact in all our application forms, most respondents said that it didn't make them reflect on their own environmental practice.

Although there were high satisfaction rates with the online Portal, there were still some technical challenges that they felt needed to be addressed.

Sometimes it can be unclear who to contact about a particular fund.

Our Actions

We have launched a small application form for grants under £5,000, which only asks two substantive project questions.

In Summer 2025, we undertook a review of all application forms and streamlined questions to use plain English and make them as clear as possible.

The environmental question has been removed as a question on our standard and small application form. Some funds have chosen to retain it if the fund has a climate/environmental focus, but we will now only draw on this in assessment if your funded activities have a clear climate dimension.

We will continue to review the user experience of our Grantee Portal and improve its functionality.

A designated contact is listed at the bottom of each fund page, who can be contacted for any fund queries. We are also running fund specific webinars for some funds.

Key stats from applicant survey

85%

found the pre-application advice and support useful

82%

said the onscreen guidance for applications was clear and easy to understand

83%

said they were happy with the application process overall

76%

were satisfied with the grantee portal

73%

were satisfied with the end of grant reporting process

86%

felt that the length of time between applying and hearing back was acceptable



92%

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

Comments about our grantmaking

- “Your application process helped us improve our internal financial management standards and how we now run with a more effective accounting system.”
- “I appreciate the honest discussion, and that funding was limited, in this context making the project more efficient and focusing on the strong points resulted in a win-win situation.”
- “There were a lot of questions for a small grant.”
- “I feel that it is not clear who the contact is for applications. It would help that at the end or before the application the person who covers our area or that grant should be noted in comments.”

Comments about using our grantee portal

- “When a technical problem has occurred, the staff have been very helpful in resetting the portal to enable the application process to continue, as well as provide access to the feedback forms prior to them being due.”
- “It took a little time to navigate and understand what was required of me. However, I got in touch and that was sorted out.”
- “It could be made easier moving forward or backwards on each page without losing information already entered.”

3. Donor Survey

Philanthropy and Communities



This survey was sent to all Donors of funds managed by Foundation Scotland's Philanthropy and Communities teams, including individuals, families, corporate, charitable and commercial organisations, who donate funds for us to distribute on their behalf. The survey was completed by 15 donors - 2 Communities and 12 Philanthropy respondents.

Our Findings

Overall, the survey results were highly positive, with Donors expressing strong satisfaction with their experience of working with Foundation Scotland. Respondents particularly valued the personalised, responsive support provided by staff and Fund Advisors, the smooth management of their funds, and confidence in the impact their giving is achieving. A small number of improvements were identified, including enhancing the clarity of impact reporting, refining aspects of the Donor Portal, and offering more regular or tailored updates on funded projects.

Our Learnings

Many Donors highlighted the value of strong, responsive relationships reinforcing that personalised support remains one of our greatest strengths.

Donors also expressed confidence in the impact their funds are making. For many, involvement in decision-making and contact with funded groups strengthened their sense of connection.

Impact reports were generally well received, especially in terms of the level and type of information included.

While many used the Donor Portal confidently, others found aspects of it less intuitive. A small number of respondents experienced practical issues, such as delays in moving money between accounts or minor administrative challenges.

Some Donors also expressed a desire for more regular updates on funded projects, particularly between award rounds and after project completion.

Our Actions

We will continue to prioritise proactive, relationship-based support for Donors, ensuring that Fund Advisors have the tools and time to provide personalised guidance.

We are enhancing the clarity and accessibility of our impact reporting to help Donors more easily understand the emerging impact of their giving.

We will offer additional support to help Donors feel confident assessing longer-term outcomes.

We are improving the usability of the Donor Portal by reviewing functionality, supporting Donors to use the Portal where helpful.

We will continue to increase visibility of funded projects, helping Donors stay connected to the progress and outcomes of their supported work.

We will use this year's feedback alongside ongoing, informal Donor conversations to shape continuous improvement across our services.

Key stats from 2024 donor survey

80%

were very satisfied with the responsiveness of staff

87%

were likely to recommend Foundation Scotland (with 0% unlikely to recommend)

80%

were satisfied with the impact their fund is making with 0% reporting any dissatisfaction with impact

67%

used the Donor Portal with real-time financial information receiving the highest satisfaction of all Portal features

1 in 5

'not sure' responses suggest around 20% of Donors wanted clearer or more accessible impact information



strong satisfaction with the level and type of information in impact reports



87% of donors said they were either 'highly likely' or 'likely' to recommend us to others

Reflections on the difference funds are making

- “ The thanks I receive from (some) charities show that my donations are welcome and being applied to good purposes. ”
- “ All the data we get from you clearly indicates we are meeting our charitable objectives. ”
- “ I get good feedback on the impact of my funding which is very heartening. ”
- “ The long term impact cannot easily be assessed. ”

What is working well/could work better

- “ The project visits arranged via our advisor have been high points for all of the Trustees. ”
- “ Support for my fund has been impeccable, and I was very happy to be able to invite my manager to one or two events put on by the recipients of grants. ”
- “ I do not do online banking so can only make an online payment by phoning my bank, the Co-op Bank. That can take a long time. (paying into fund) ”
- “ No particular challenges, I am a bit disappointed in the performance of the invested fund, but I understand why, and indeed other investments I have in ethical funds have not done well either. ”

4. Panel/Board Member Survey



This survey was sent to individuals involved in decision-making Panels and Boards for the funds we administer. The vast majority of respondents were members of Community Benefit Fund Panels or Boards (93%), with a small minority from Philanthropy Panels or Boards (7%). A total of 93 responses were received.

Our Findings

Overall, the survey results were highly positive, with Panel and Board Members expressing strong satisfaction with their experience and with Foundation Scotland's support. The Panel Portal was widely used and overall satisfaction with its usability and information quality was strong. Suggestions for improvement mainly focused on navigation, accessibility on mobile/tablet devices and clearer guidance.

Our Learnings

Panel and Board Members are deeply committed to fair, informed and community-focused decision-making. Many valued the learning they gained through the role, as well as support from Foundation Scotland staff.

While the Panel Portal is working well for most, some members need additional support to navigate it confidently, particularly newer members and those using mobile devices.

The importance of maintaining shared understanding across Panels and Boards.

Variability in interpreting funding criteria, confidence in challenging views and mixed levels of participation indicate a need for continued support.

Members' desire for more impact updates reflects a wider appetite for understanding the difference their decisions make.

Many Panels and Boards benefit from experienced members, but some groups would welcome more diverse voices and improved recruitment processes.

Our Actions

Strengthen training, induction and refreshers: Continue to provide regular induction for new Panel/Board Members, offer refresher training on funding criteria, assessment expectations and decision-making.

Continue improvements to the Panel Portal experience: Enhance navigation and accessibility, improve ease of use, develop short guidance videos, quick-reference guides and more consistent instructions.

Increase clarity and consistency in assessment guidance: Provide more fund-specific examples and scenario-based guidance on interpreting funding criteria.

Support healthy membership and group dynamics: Encourage ongoing recruitment to promote inclusive decision-making practices and help Panels manage dominant voices.

Strengthen impact feedback and transparency: Provide more post-award updates, photos and project progress information

Key stats from Panel/Board Member survey

81%

81% have served for one year or more, showing an experienced and stable cohort

29%

said the hardest part was being fair to all applicants and 20% found it challenging to attract new members

77%

use the Panel Portal, 45% were very satisfied with how information is presented

90%

felt the amount of information provided for decisions was "about right"



a high percent of member were interested in training such as effective decision making and community wealth building

88%

rated their Panel or Board as effective or very effective



89%

rated Foundation Scotland's support as good or very good

Reflections on the role

- “Churn of members does lead to different dynamics among the Panel so induction and a regular refresh on what we should and shouldn't do in decision making meetings is always useful.”
- “Not keen on online. Prefer meetings which use our community facilities.”
- “I really enjoy my role, I look forward to the panels and hearing the differing views. We have worked hard to get a good cross community speak, I think it's well balanced.”
- “It gets the job done but it feels like some members are a bit stuck in a rut as to their beliefs about what can be funded and what they are reluctant to fund...”
- “Sometimes one person with dominant viewpoint and little discussion / inclusion from members many being new.”
- “Foundation Scotland staff have been so helpful and professional. Very approachable and have great subject knowledge. We make much better decisions because of the experience they provide us with as well as diligently checking applications against criteria.”
- “I would like to see more on impact monitoring and revisiting projects after time to see what progress and impacts have been achieved or not.”

5. Conclusion

The 2024 stakeholder feedback provides strong evidence that Foundation Scotland is delivering a high-quality, trusted service across its grantmaking, philanthropy and governance support. Applicants, Donors, and Panel and Board members consistently reported positive experiences, particularly valuing the professionalism, responsiveness and expertise of staff, and the fairness and care embedded in our decision-making processes.

At the same time, this feedback has highlighted important opportunities to strengthen how we work. Across all stakeholder groups there was a shared appetite for greater clarity, consistency and accessibility, whether in application processes, digital Portals, assessment guidance or impact reporting. The actions outlined in this report demonstrate our commitment to responding proactively, including simplifying application forms, refining questions and guidance, improving Portal usability, and strengthening training, induction and support for Panels and Boards.

A clear theme emerging from the feedback is the importance of relationships. Donors value personalised support and meaningful engagement with funded work; Panel and Board members benefit from shared understanding, confidence to challenge and diverse perspectives; and applicants and grantees appreciate accessible advice and transparent processes.

Strengthening these relationships, while maintaining consistency and credibility, will remain central to our approach.

This feedback directly informs our ambition to embed a culture of continuous improvement and to achieve excellence through our people, practice and systems. We will continue to use stakeholder insights, alongside ongoing dialogue, to refine our services, deepen our understanding of impact and ensure that Foundation Scotland remains responsive, inclusive and effective in supporting communities and donors across Scotland.

We are grateful to everyone who took the time to share their experiences and perspectives. Feedback is welcomed at any time, and we remain open to ongoing conversation as we continue to learn, adapt and improve.