

# Turn2us/ACO Grant-Giving Charities Research

December 2014



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# Foreword

Turn2us, in collaboration with the Association of Charitable Organisations (ACO), has led this research to provide insight into the vital work of the UK's grant-giving charity sector. It has provided greater understanding of how the sector operates and an evidence base for measuring improvements in grant-giving across the sector.

This research will be used by Turn2us and ACO to inform how we deliver our services, future developments and how we can better support the sector by addressing some of the challenges and opportunities identified.

We hope that individual charities will use the research findings to inform their own developments to services, collaborations and processes to help people struggling in financial hardship.

Turn2us and ACO

# Summary of key findings

## Profile of organisations

- Two fifths of organisations had less than £50k available to spend last year on financial grants, items and support services and the minority have paid staff.
- Low awareness of financial outgoings including administration costs incurred by their organisation coupled with low understanding about how to define administration costs.

## Financial support & items

- Most charities offer one-off payments and provide support directly to individuals.
- Purposes of financial support are most commonly for disability equipment, education costs, and white goods.
- Most organisations issue grants through traditional payments, usually cheques and bank transfers, with lots of space in the sector to expand into new methods (pre-paid card, mobile).

# Summary of key findings

## Support services

- Organisations with £1m+ in available funds are more likely to spend on support services, or are more likely to be considering 'Grants Plus' - the combination of financial assistance plus other services, often through partnerships with other organisations, to have more overall impact.

## Application process

- Application numbers have on average increased more than decreased, due to increased grant profile and more demand for help due to welfare cuts.
- The mean average time taken from receiving a completed application to confirming the outcome is 4.4 weeks.
- The mean average time taken from confirming a successful application to issuing payment is 2.2 weeks.
- Methods to improve turnaround times tend to focus on the application part of the process (e.g. moving to online forms and making the application form easier to complete).

## Emergency support

- Almost a third provide emergency support, half of which have a target turnaround of ASAP or 24 hours.

# Summary of key findings

## Triggers, marketing, referrals:

- Profile of applicants is changing in relation to increased austerity measures.
- Online methods key in raising awareness of organisations' work and the help offered.
- Most referrals for support come directly from individuals.
- Organisations happy to work within a network of grant-giving charities to refer to others and receive referrals.

## Impact

- Over half of organisations see the importance of measuring impact.
- Both measurable and softer categories of impact are currently considered, but very few set formal targets based on impact.
- Organisations gave reasons for currently not needing to measure impact including not applying for funding and not currently being asked to measure impact by a funder.

# Summary of key findings

## Areas where there is appetite for future support from ACO

- ACO members are keen to receive guidance on a range of topics, most notably networking and good practice, grant making practice, and developing non-financial support.
- Impact assessment not as high a priority area for support among ACO members, reflecting relatively low levels of engagement with impact measurement within the organisation.

## Important areas for the grant-giving sector to develop

- Improving public understanding of the grant-giving sector and collaboration between organisations were seen as the most important areas for the sector to develop.
- Developing campaigning work was seen as less of a priority for the sector.

# Background

- Turn2us and the Association of Charitable Organisations (ACO) have collaborated to research grant-giving, evaluation and impact assessment across the grant-giving charity sector.
- The audience for the research was grant-giving charities, defined as those who administer grants and provide other support services to individuals.
- The research sought to provide greater insight into the support provided by the sector as a whole and will help to identify and share best practice. The findings will be used to inform how we deliver services, future developments and how we can better support the sector by addressing some of the challenges and opportunities identified. It is also hoped that the research will be used by charities to inform their own developments to services, internal processes and collaborations.



# Background

- The results from the online and postal survey form the basis of this report.
- The survey made a point of emphasising those parts of the survey that related to the charity as a whole, and those which related to their grant-giving operations.
- Some of the survey results have been split by amount of funds available for grant-giving to help provide more context.
- The results are supplemented with qualitative data from six in-depth interviews with grant-giving charities, which has been woven in throughout the report as further context and case studies of best practice.

# Overall objectives for the research

**To talk with grant-giving charities from the Turn2us Grants Search database to:**

- Provide insight into how the grant-giving charity sector operates and share best practice and initiatives aimed at shortening time between application and receipt of help; effective distribution of funds and service design to meet individuals' needs.
- Provide an evidence base to help improve standards in grant-giving and impact assessments within the grant-giving charity sector.
- Provide data for benchmarking key charity activities.
- Provide data for benchmarking charity engagement with Turn2us and enriching the Grants Search database.

# Methodology

## Online and postal survey

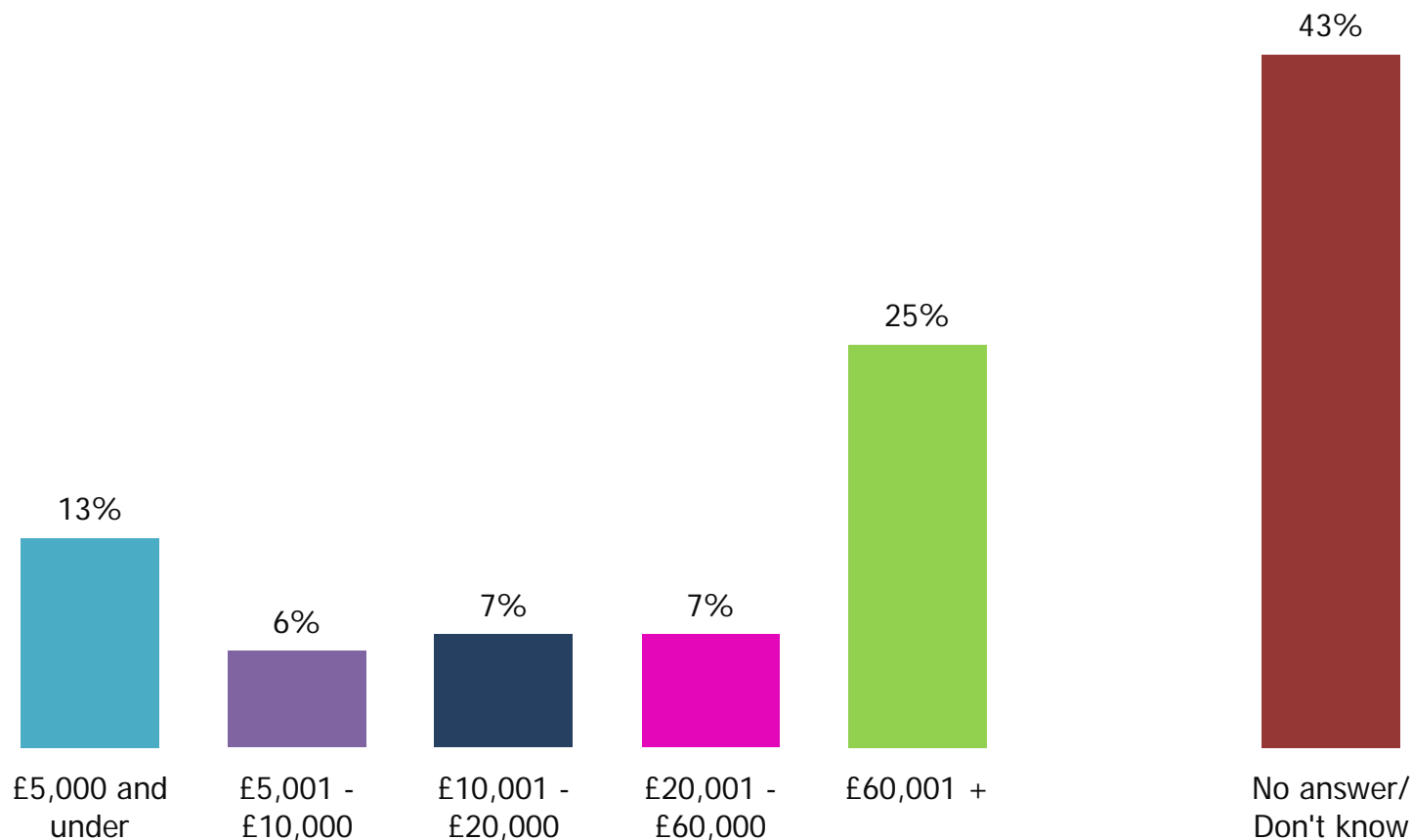
- Every grant-giving charity in the Turn2us Grants Search database was invited to take part in the research, either by postal or online survey. nfpSynergy surveyed grant-giving charities between 8<sup>th</sup> September and 8<sup>th</sup> October 2014.
- The survey was sent out online to 1153 grant-giving charities and by post to 1390. 144 responded to the survey online and 71 by post giving a sample of 215.
- An additional 105 responses were received from a combination of organisations who responded after the deadline or wished to update their Turn2us Grants Search database record but not answer the questions.
- The overall response rate for the survey was 12.6%.
- The margin of error for the total sample is +/- 6.4%.

## In-depth interviews

- nfpSynergy interviewed six grant-giving charities who had taken part in the survey. Interviews took place between 20<sup>th</sup> and 31<sup>st</sup> October 2014. Organisations were chosen to provide examples of best practice.

# Profile of Organisations

# A fifth of sample's gross income <£10k

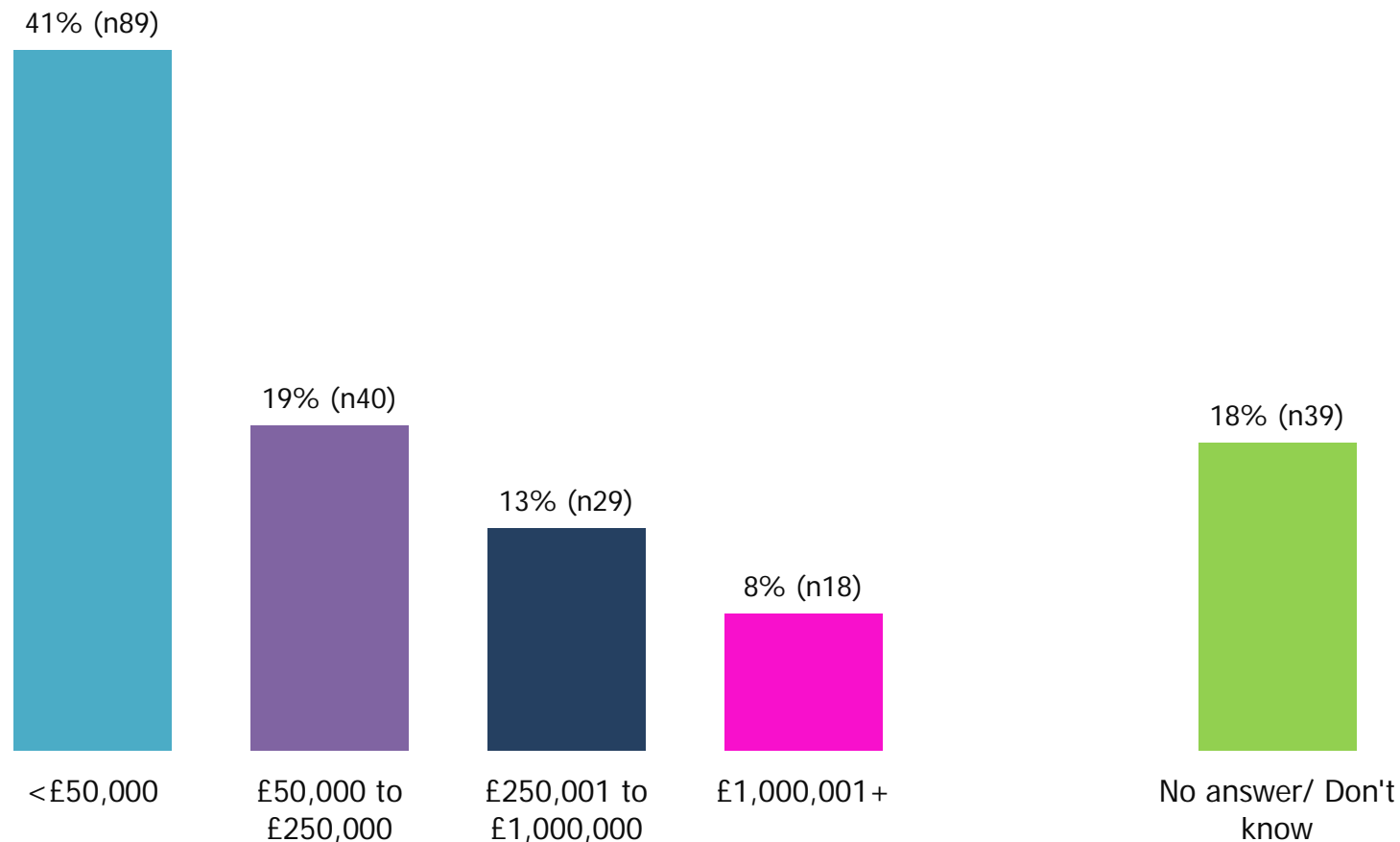


“What was your organisation's gross income in your last financial year (including investment returns) (£)?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Two fifths of funds in our sample had less than £50k available to spend last year



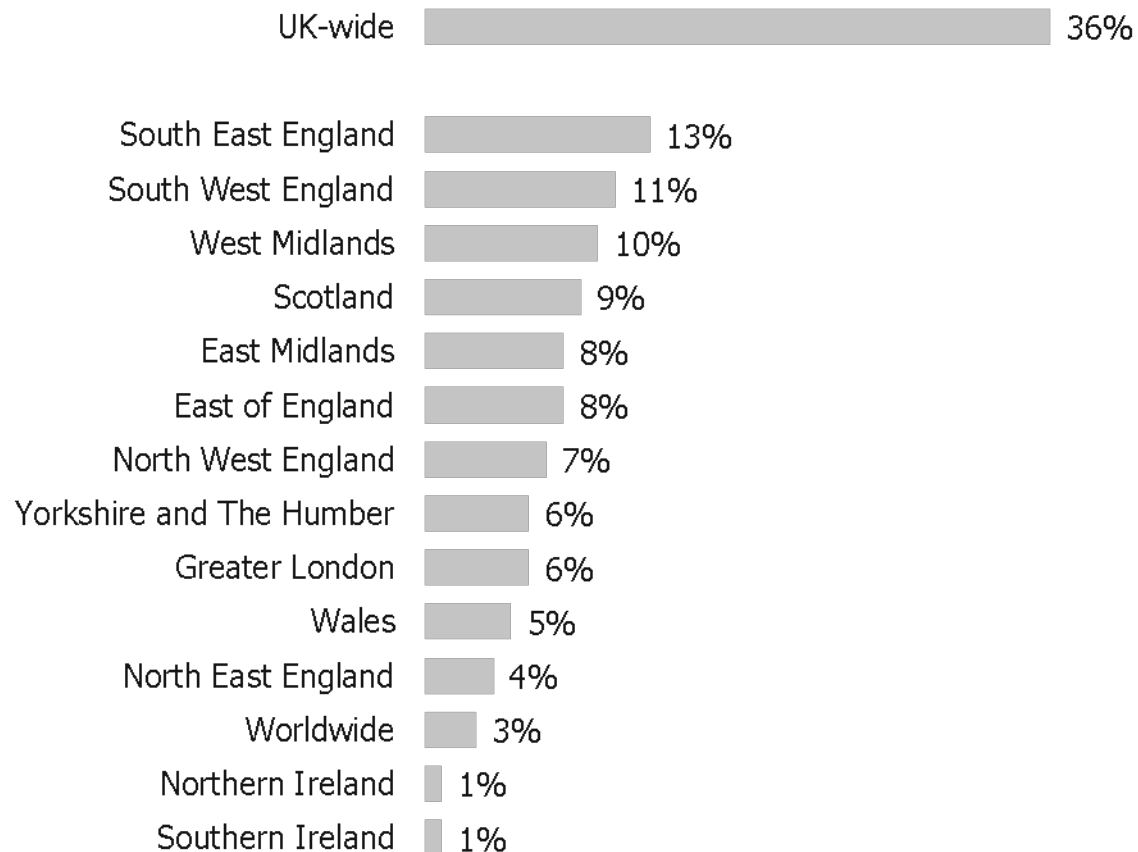
“How much did your fund have available to spend on **financial grants, items and support services** in your last financial year, gross (£)?”

Base: 215 respondents

14

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Biggest presence in the South East

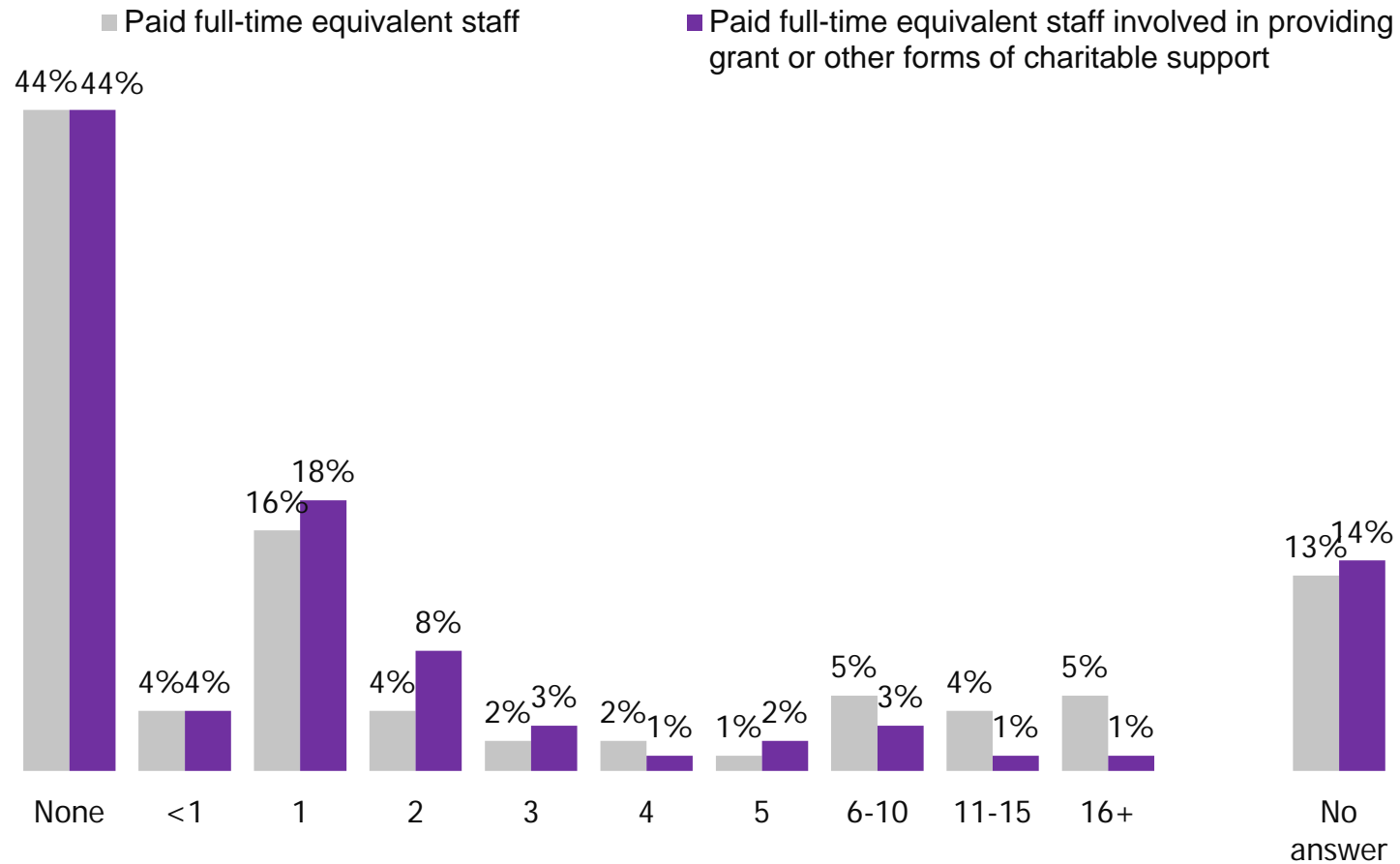


“Where does your organisation operate?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Almost half of sample have no paid staff



“How many paid full-time equivalent staff does your organisation have?/How many paid full-time equivalent staff are involved in providing grants or other forms of charitable support?”

Base: 215 respondents

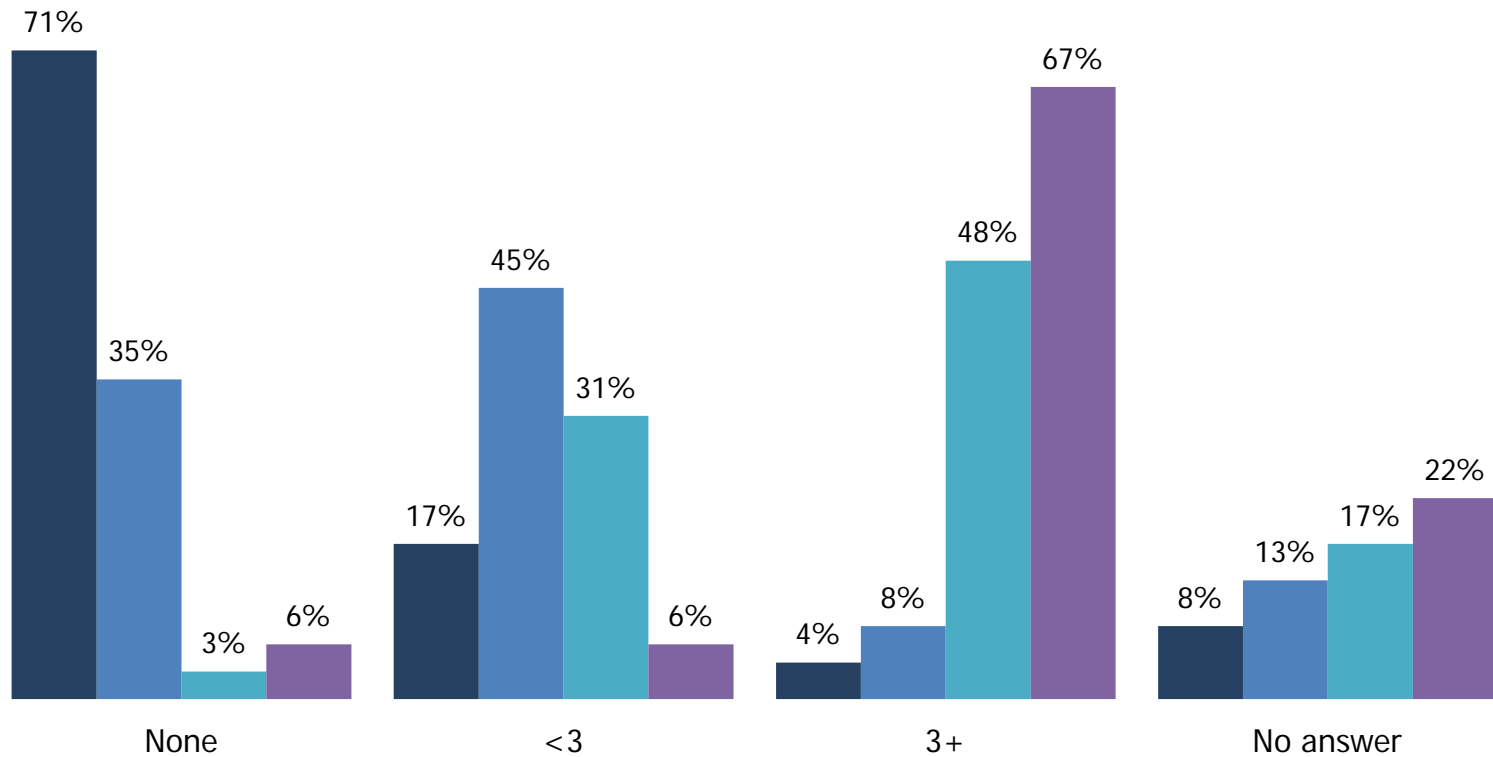
Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy



# Paid full-time equivalent staff

## Available funds to spend on grant giving:

■ <£50K   ■ £50K - £250K   ■ £250K - £1M   ■ £1M+

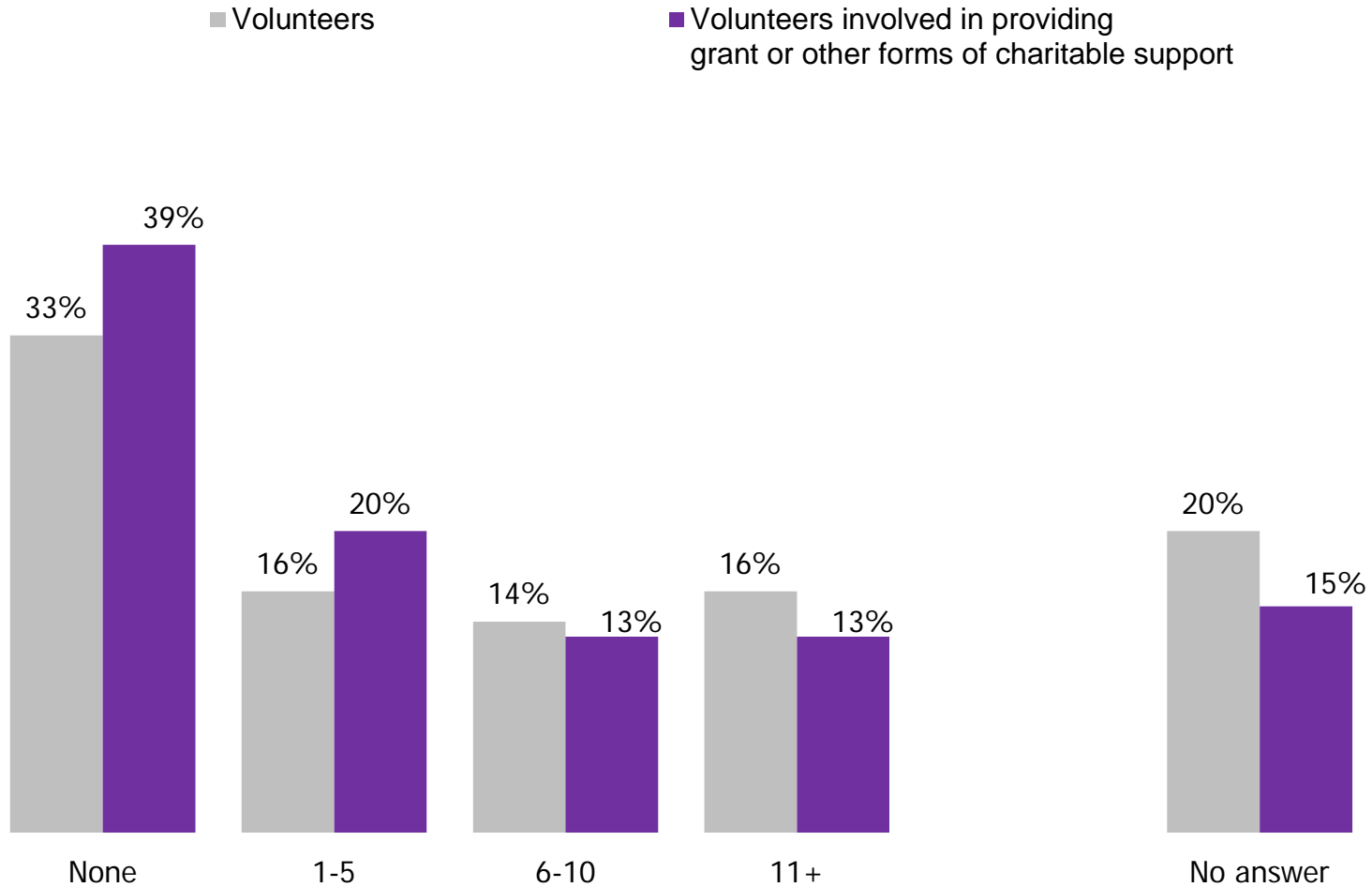


“How many paid full-time equivalent staff does your organisation have?/How many paid full-time equivalent staff are involved in providing grants or other forms of charitable support?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Volunteers widely used

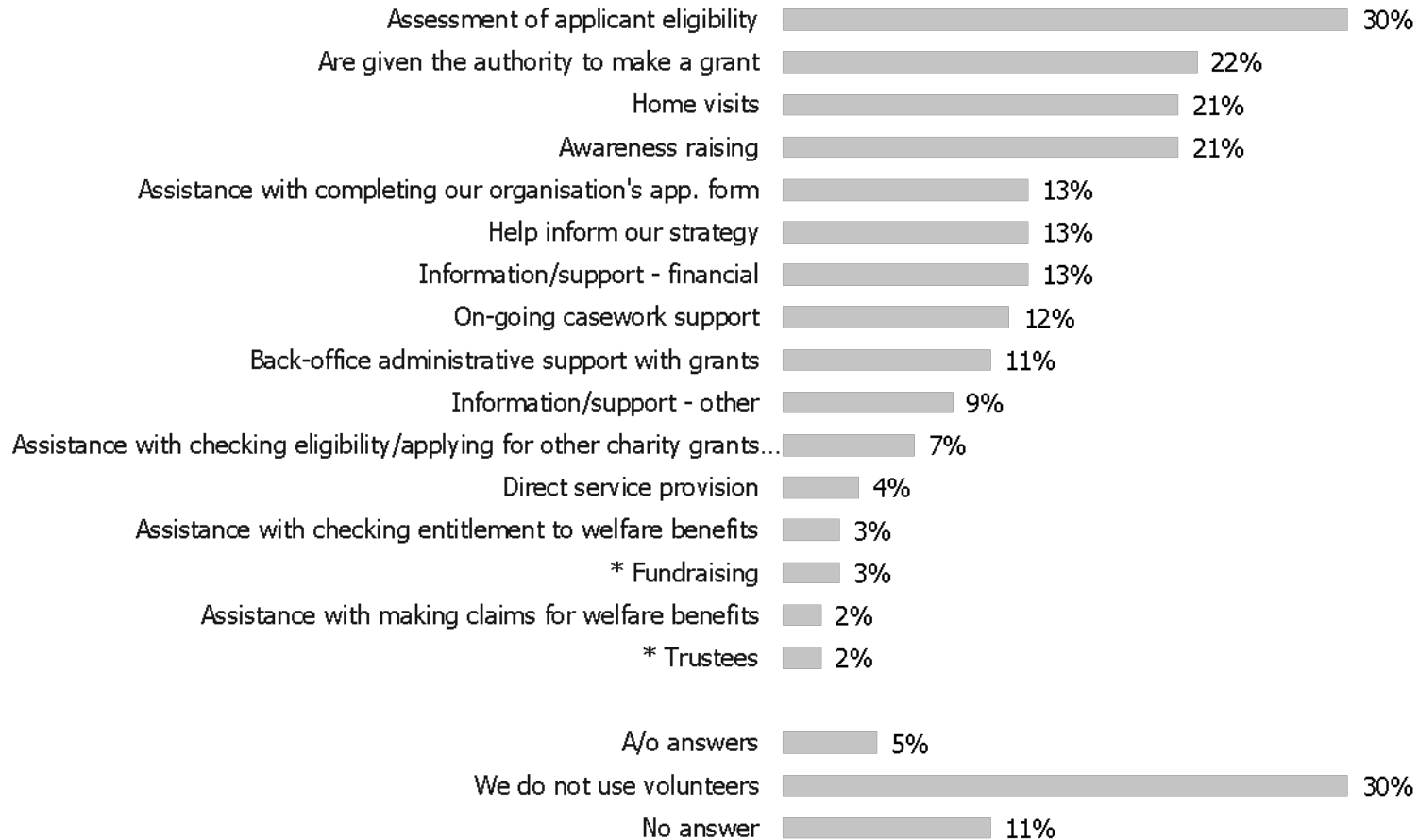


“How many volunteers does your organisation have?/How many volunteers are involved specifically in grant giving activities?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Volunteers involved in grants decision making and casework



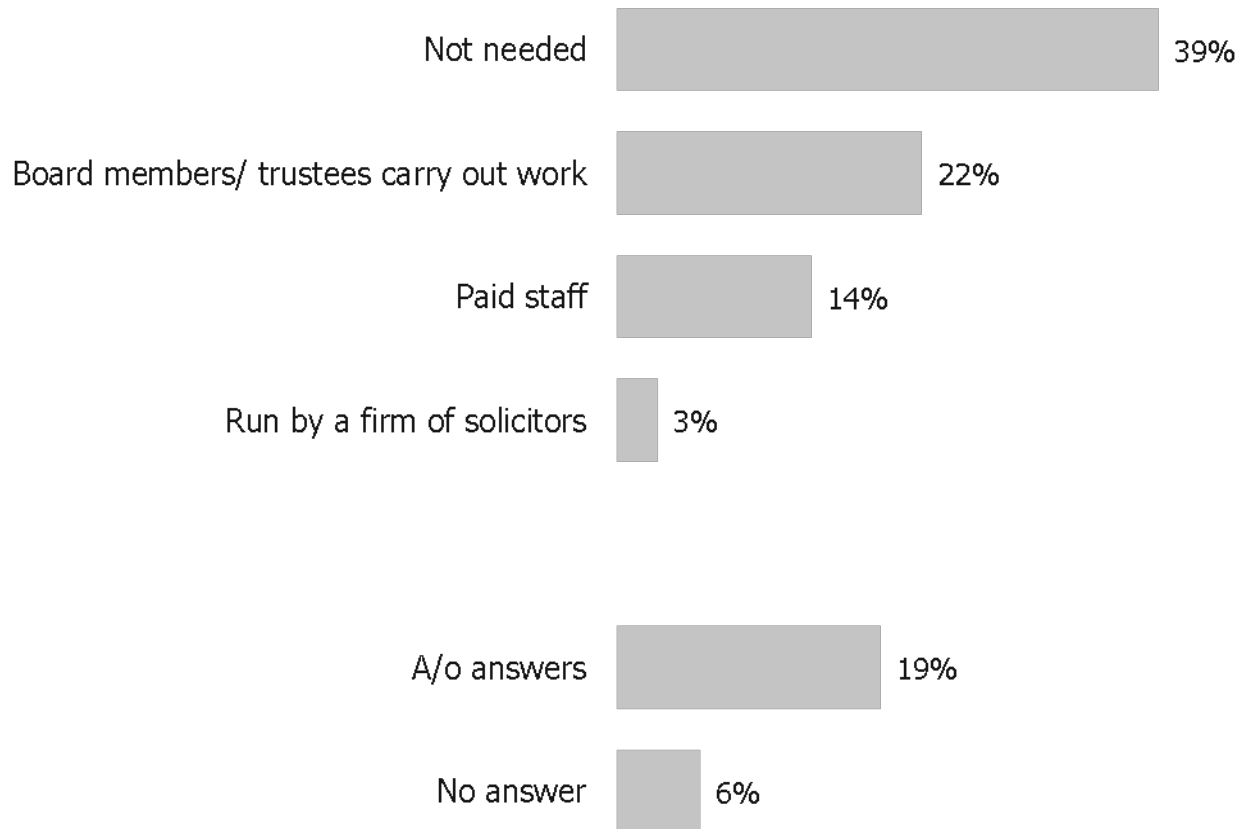
"How do volunteers assist your organisation?"

\*open ended response (all other responses prompted)

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Reasons given by charities who do not use volunteers



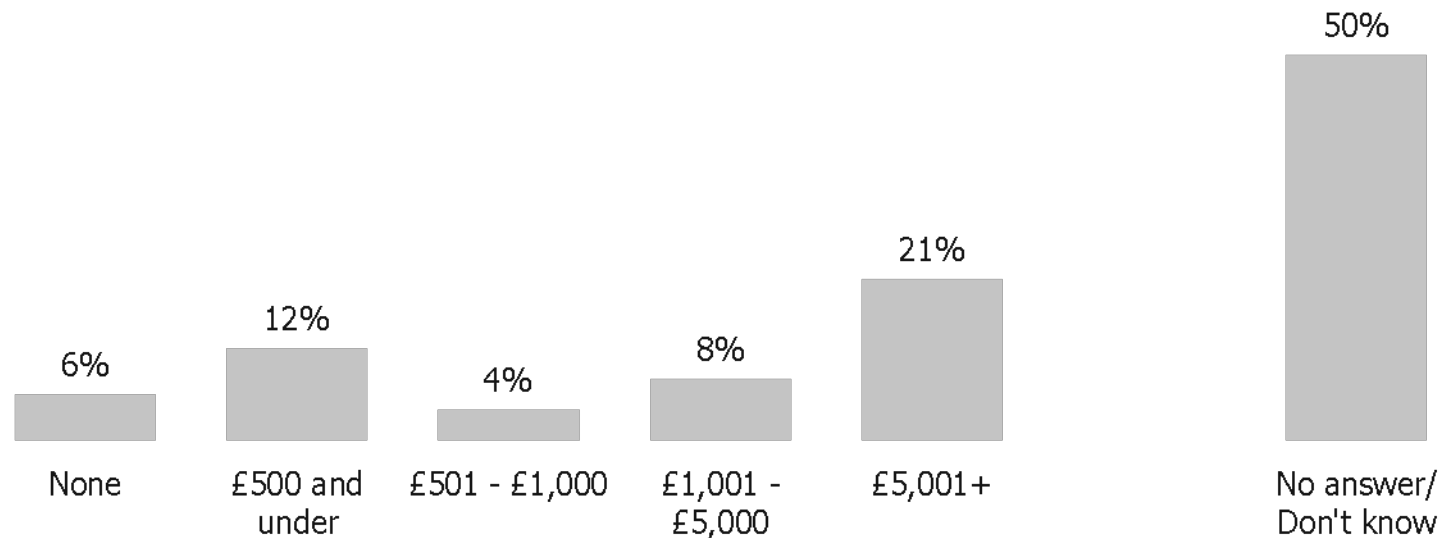
“How do volunteers assist your organisation? Please specify why you do not use volunteers”

Base: 64 who do not use volunteers of 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Low awareness of admin costs

- **16%** of sample have admin costs that are **under 10%** of overall costs
- **15%** have admin costs that are **over 10%** of overall costs
- **70%** no answer or don't know the percentage of admin costs compared to overall costs.



“How much did your organisation spend on administration costs in your last financial year, gross (£)?”

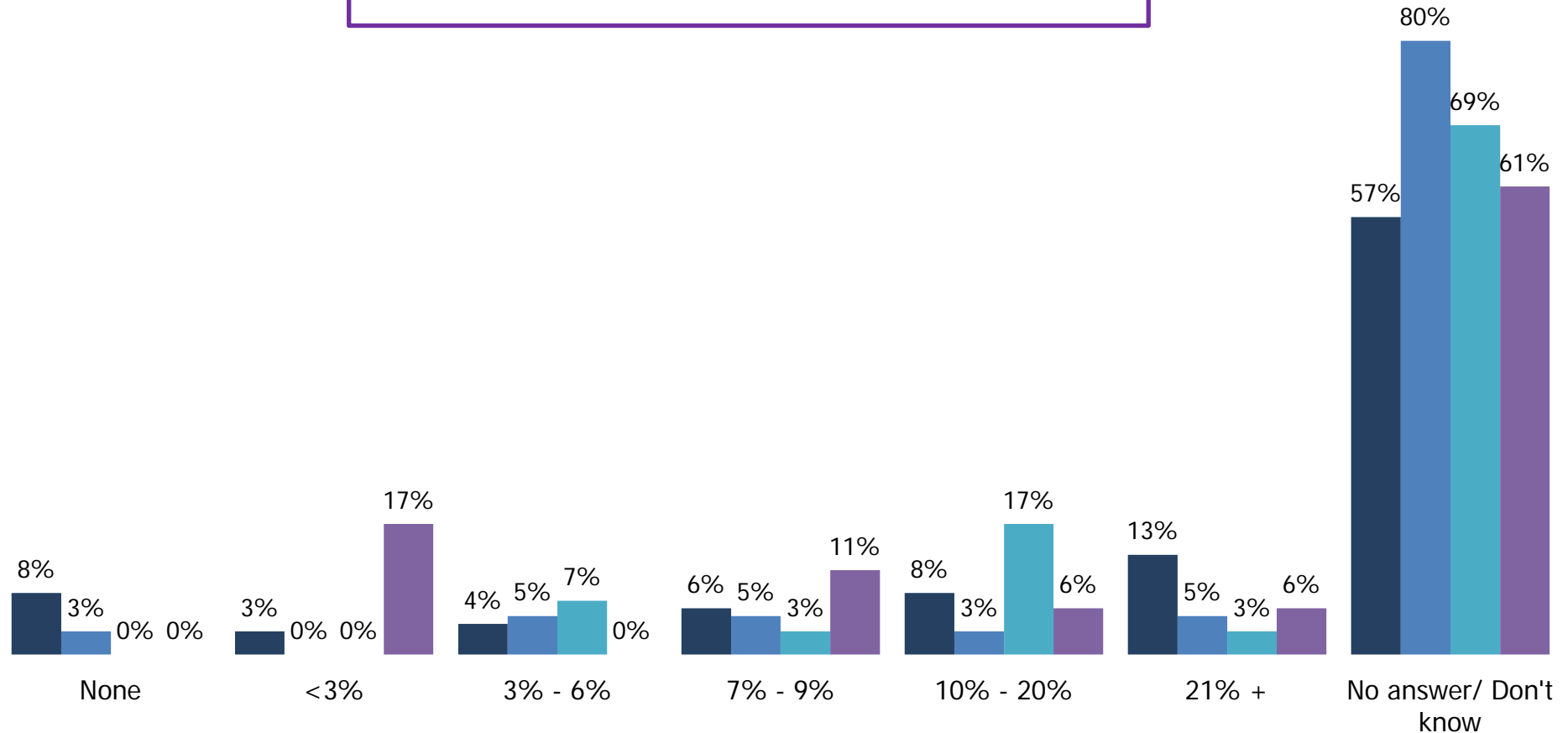
Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# % Spend on administration costs

## Available funds to spend on grant giving:

■ <£50K   
 ■ £50K - £250K   
 ■ £250K - £1M   
 ■ £1M+

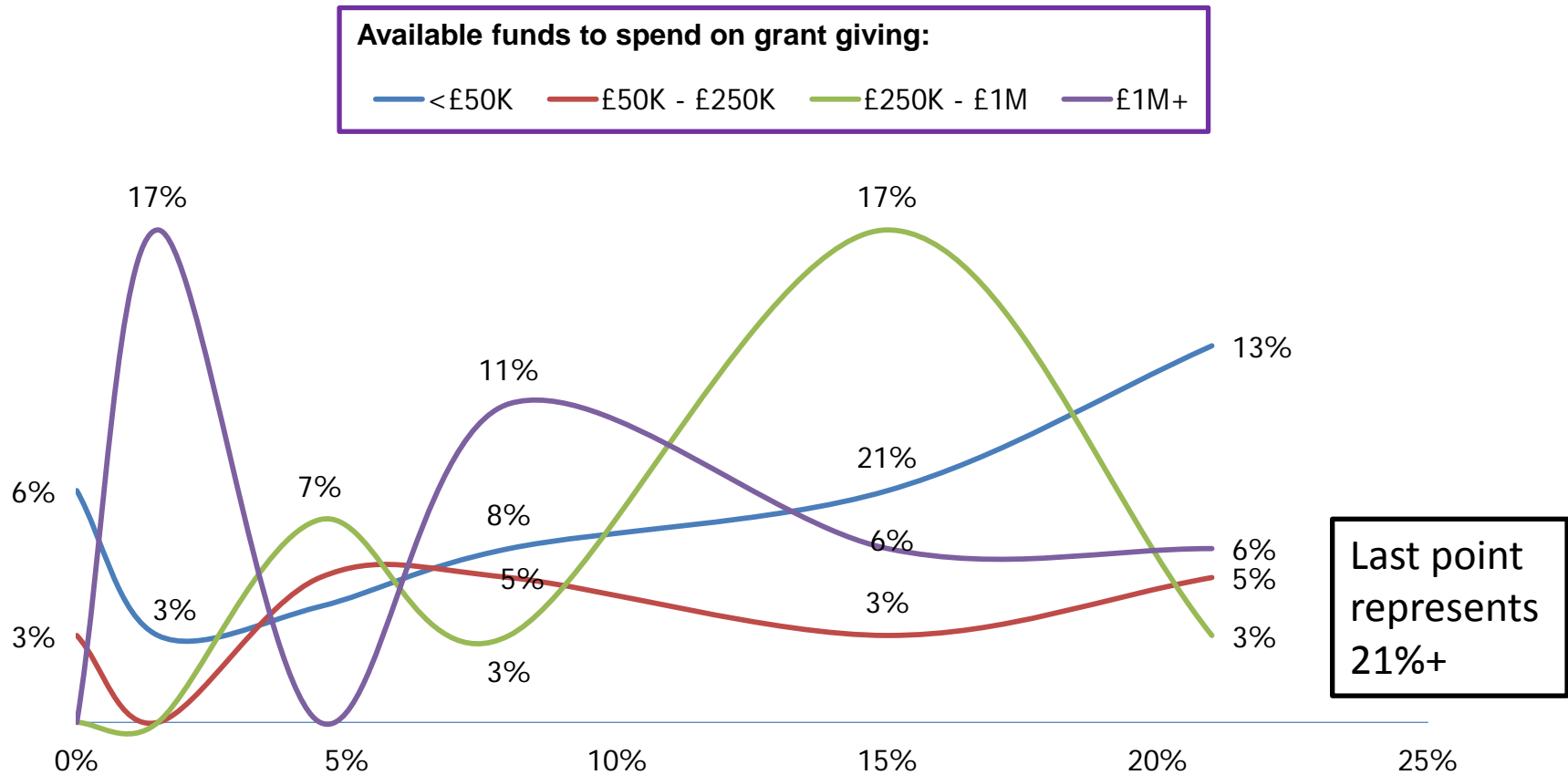


“Please give the percentage (%) spend on administration costs compared to your overall costs in your last financial year ”

Base: 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# % Spend on administration costs

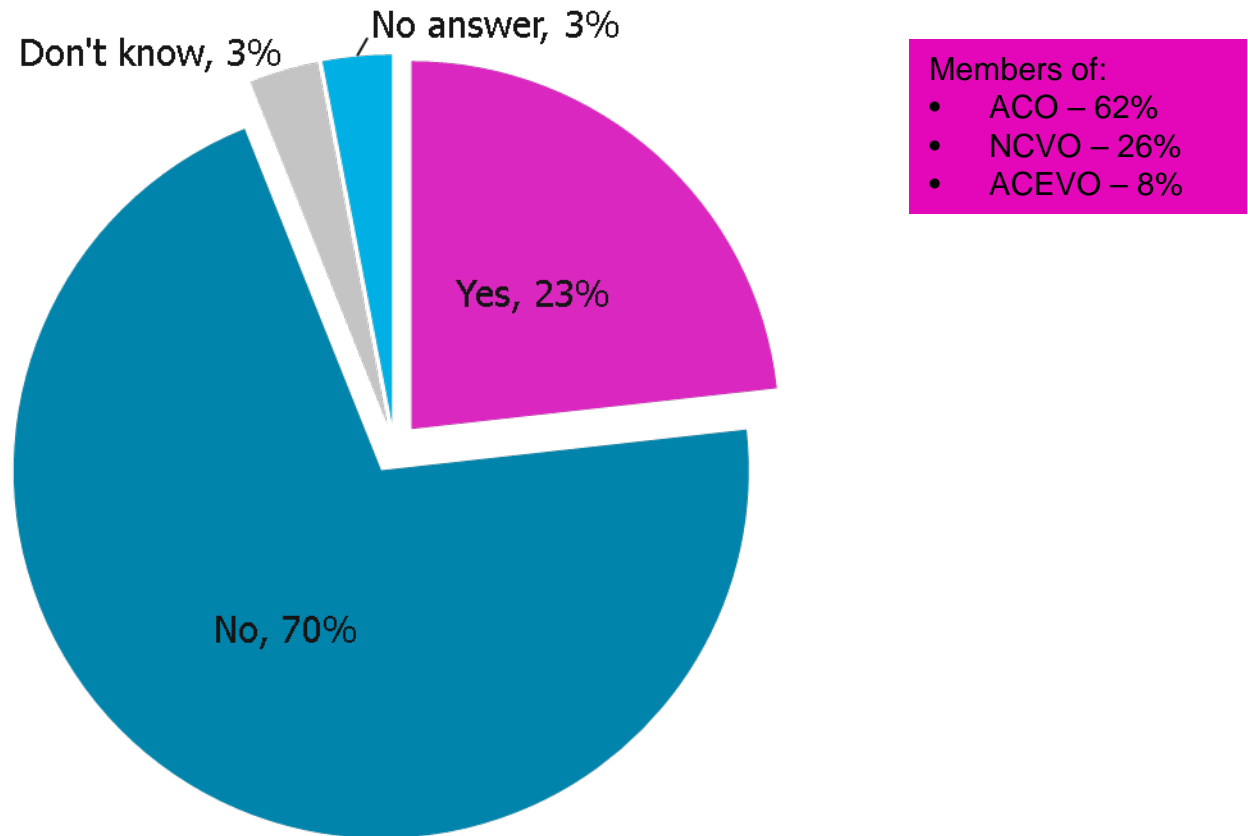


“Please give the percentage (%) spend on administration costs compared to your overall costs in your last financial year ”

Base: 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Less than a quarter of sample are members of an umbrella organisation association



“Is your organisation a member of an umbrella organisation/trade association?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy



# Financial Support & Items

# Wide range of spend on financial support

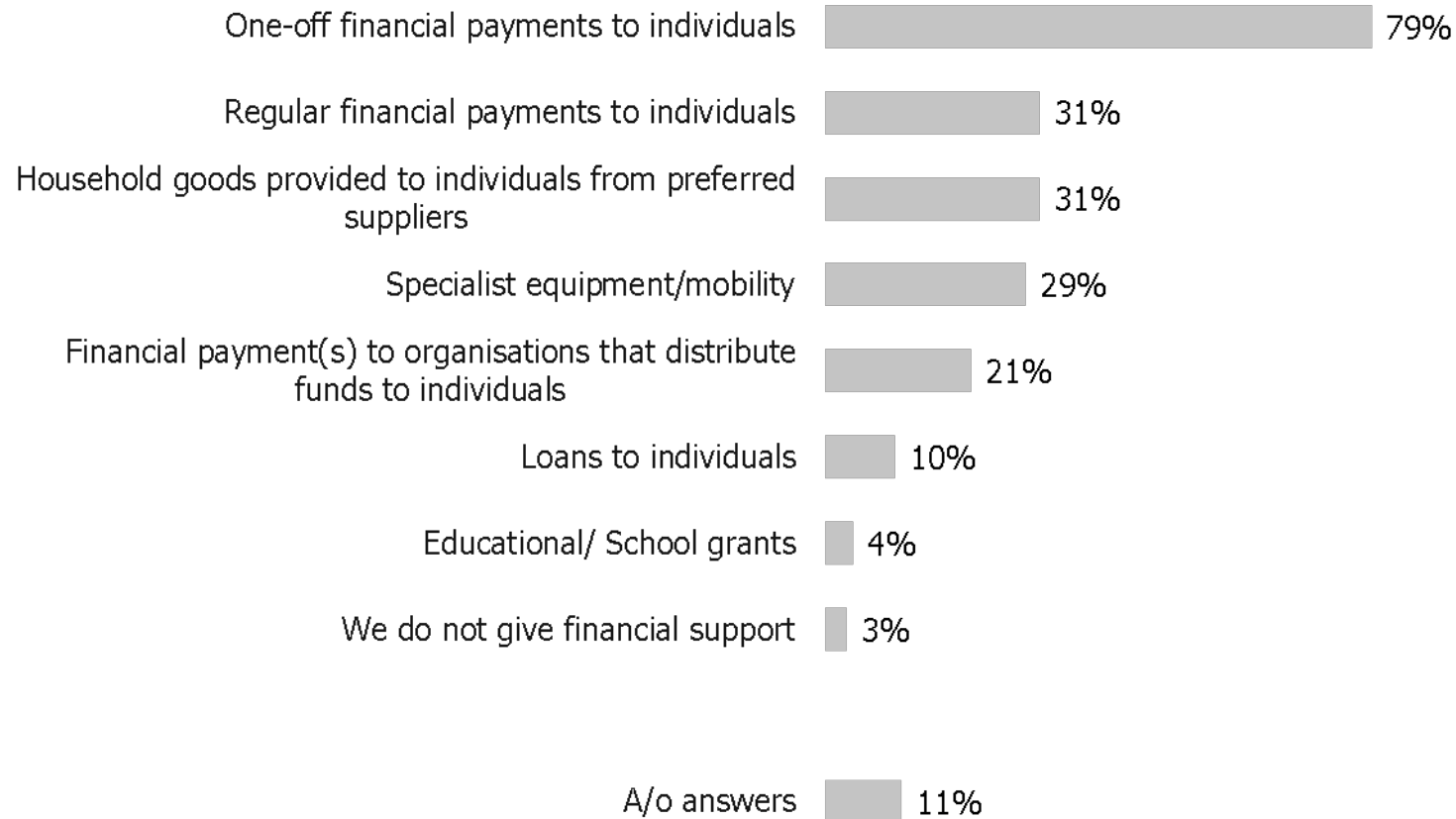


“How much did your organisation spend on providing **financial support & items**, i.e. direct grant support (including to partner agencies to distribute on your behalf) in your last financial year, gross (£)?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Types of financial support mainly one-off payments to individuals



“What types of **financial support and items** does your organisation provide?”

Base: 224 funds, from 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct, nfpSynergy

# High proportion of small grants per individual

## Available funds to spend on grant giving:

■ Total 
 ■ <£50K 
 ■ £50K - £250K 
 ■ £250K - £1M 
 ■ £1M+



“How much on average did your organisation give **per individual** through **financial support & items** in your last financial year, gross (£)?”

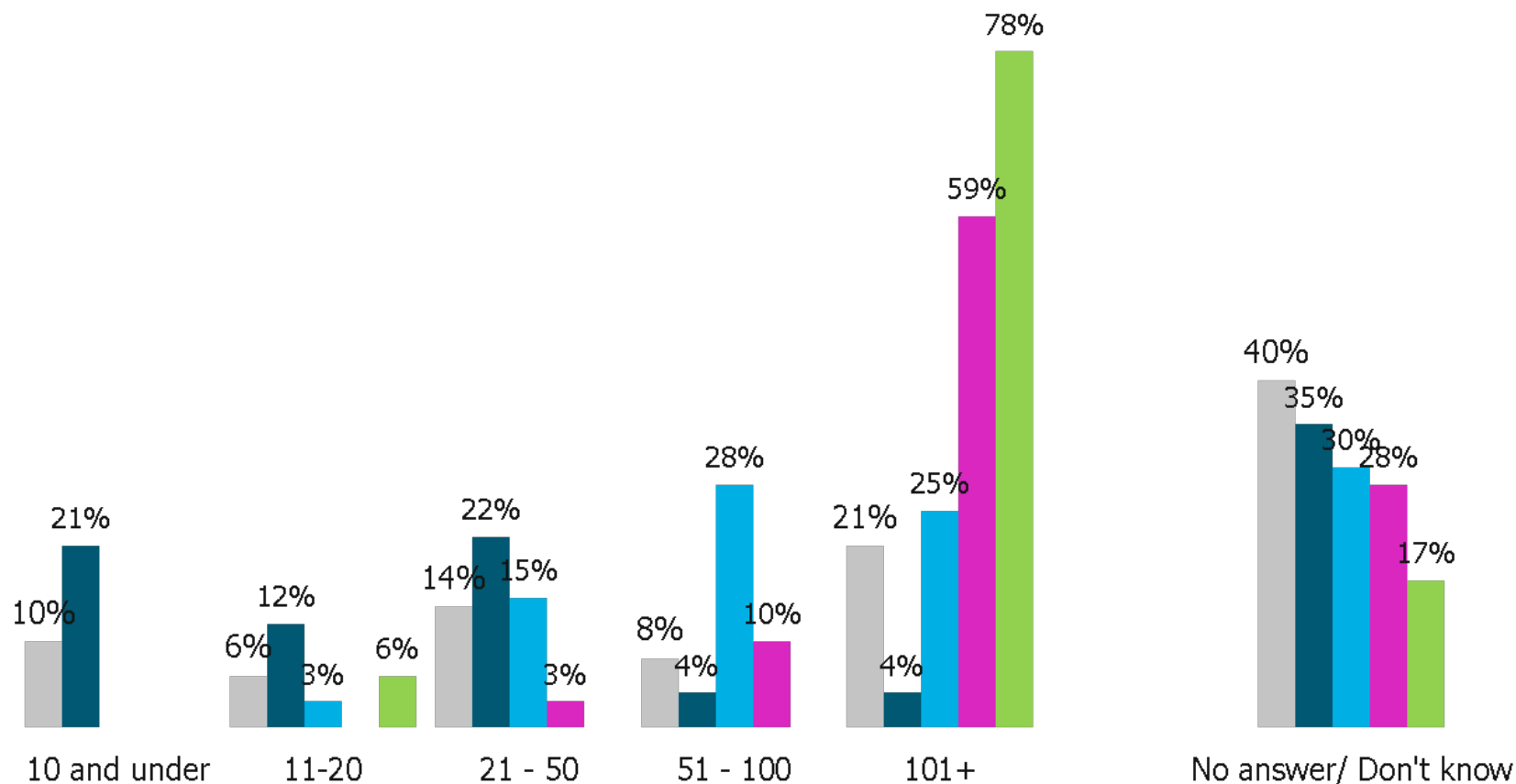
Base: 215 total respondents; 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Wide range in number of individuals reached

## Available funds to spend on grant giving:

■ Total 
 ■ <£50K 
 ■ £50K - £250K 
 ■ £250K - £1M 
 ■ £1M+

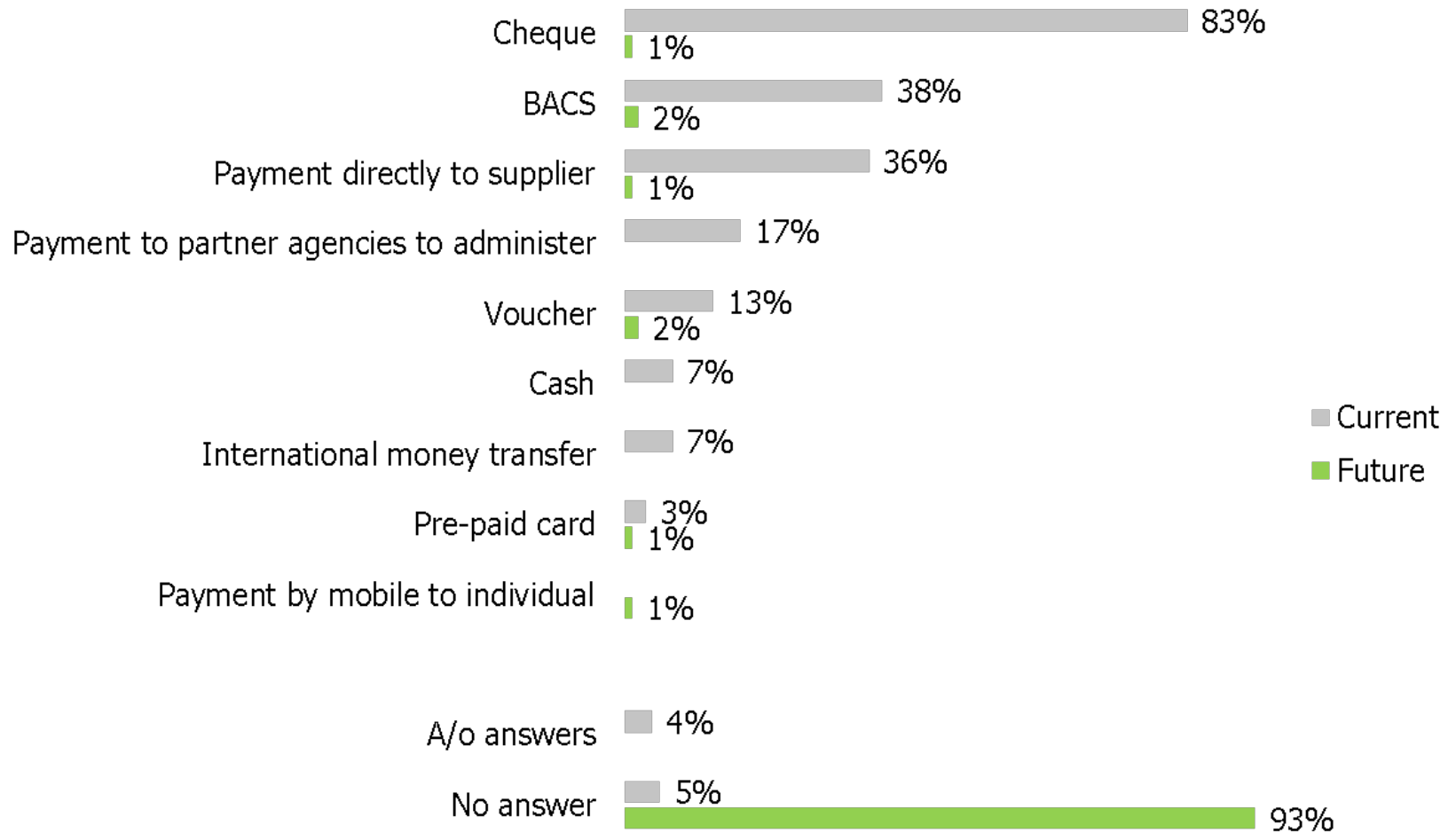


“How many individuals did your organisation provide with **financial support & items**, in your last financial year?”

Base: 215 total respondents; 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# High levels of traditional payment methods and few plan to introduce new methods

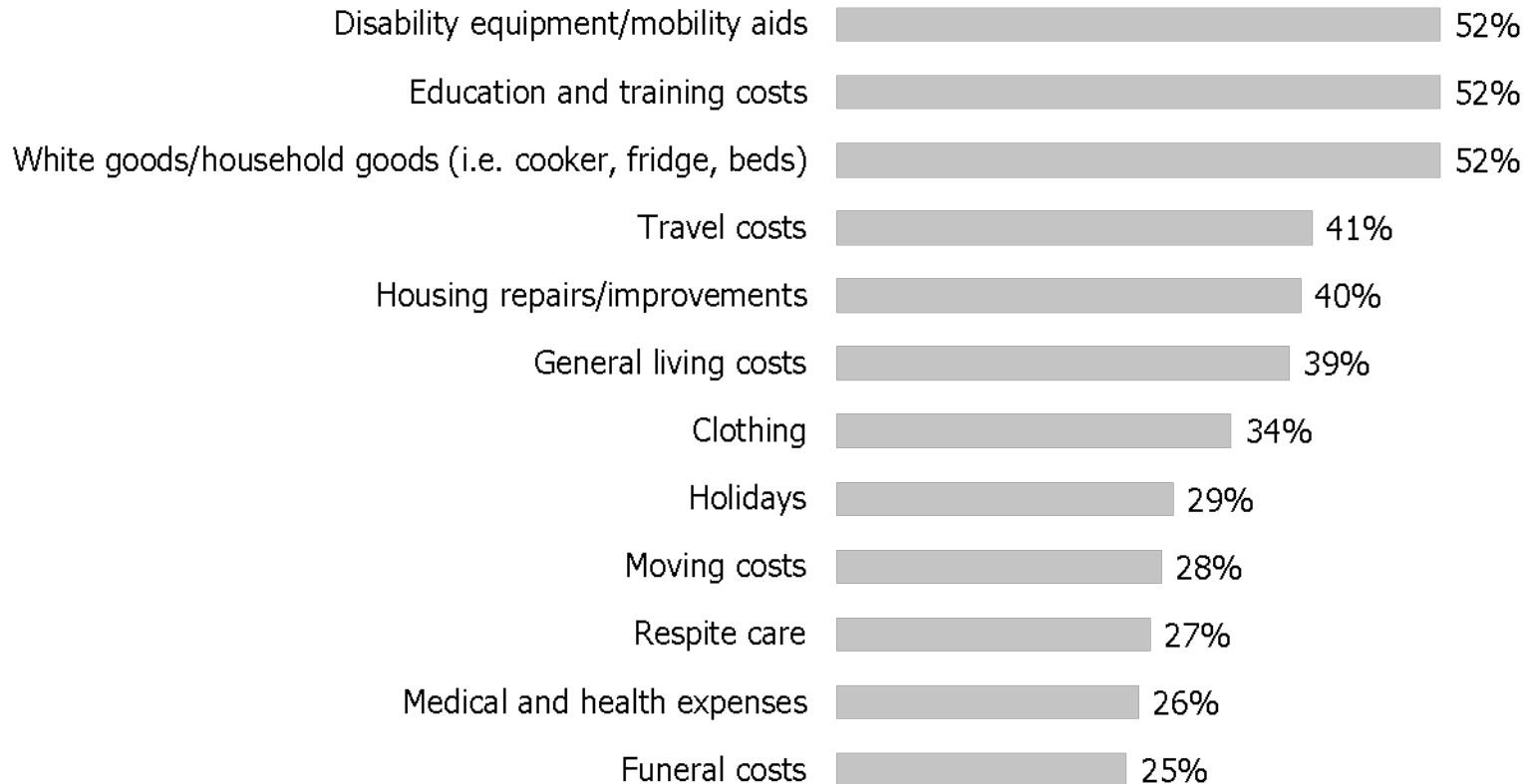


“How does your organisation make payments and how is it planning to make payments? Please select the payment systems currently used, and those it is looking to introduce.”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# A wide range of purposes of financial support; most commonly disability equipment, education costs, and white goods

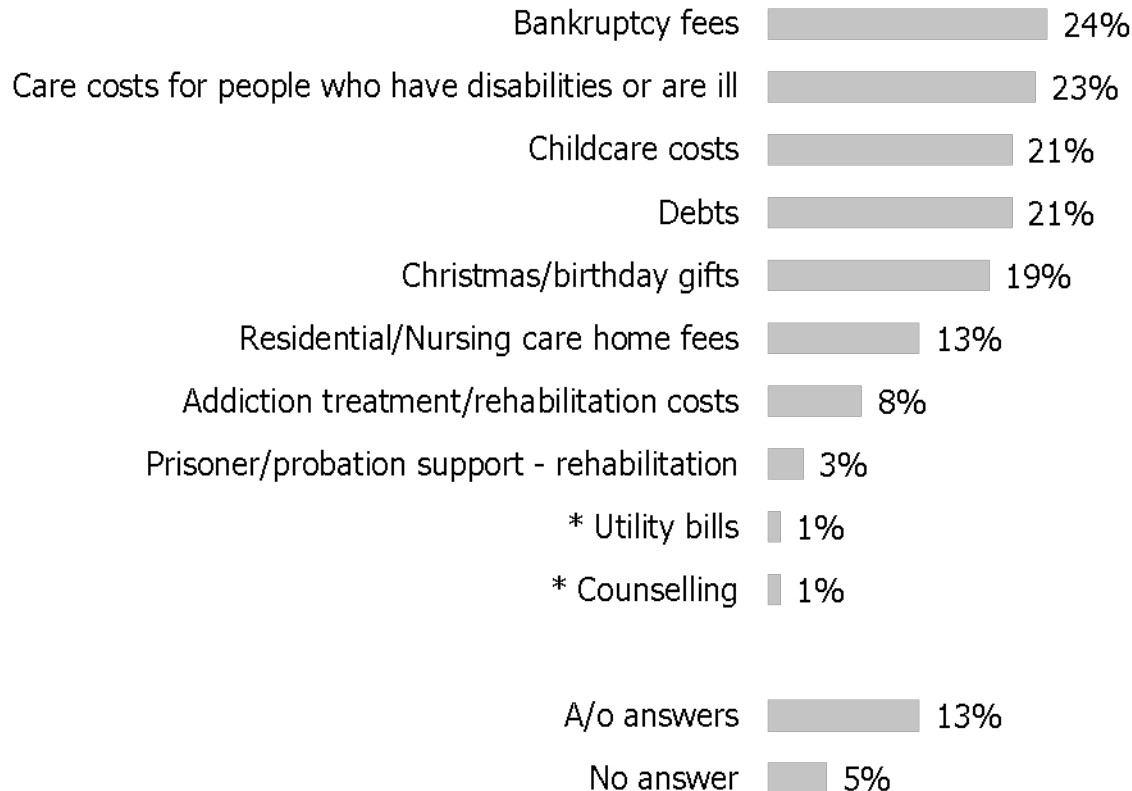


“For what purpose(s) does your organisation give financial support? Please tick all that apply”

Base: 224 funds, from 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct, nfpSynergy

# A wide range of purposes of financial support; most commonly disability equipment, education costs, and white goods



“For what purpose(s) does your organisation give financial support? Please tick all that apply” \*open ended, all other prompted

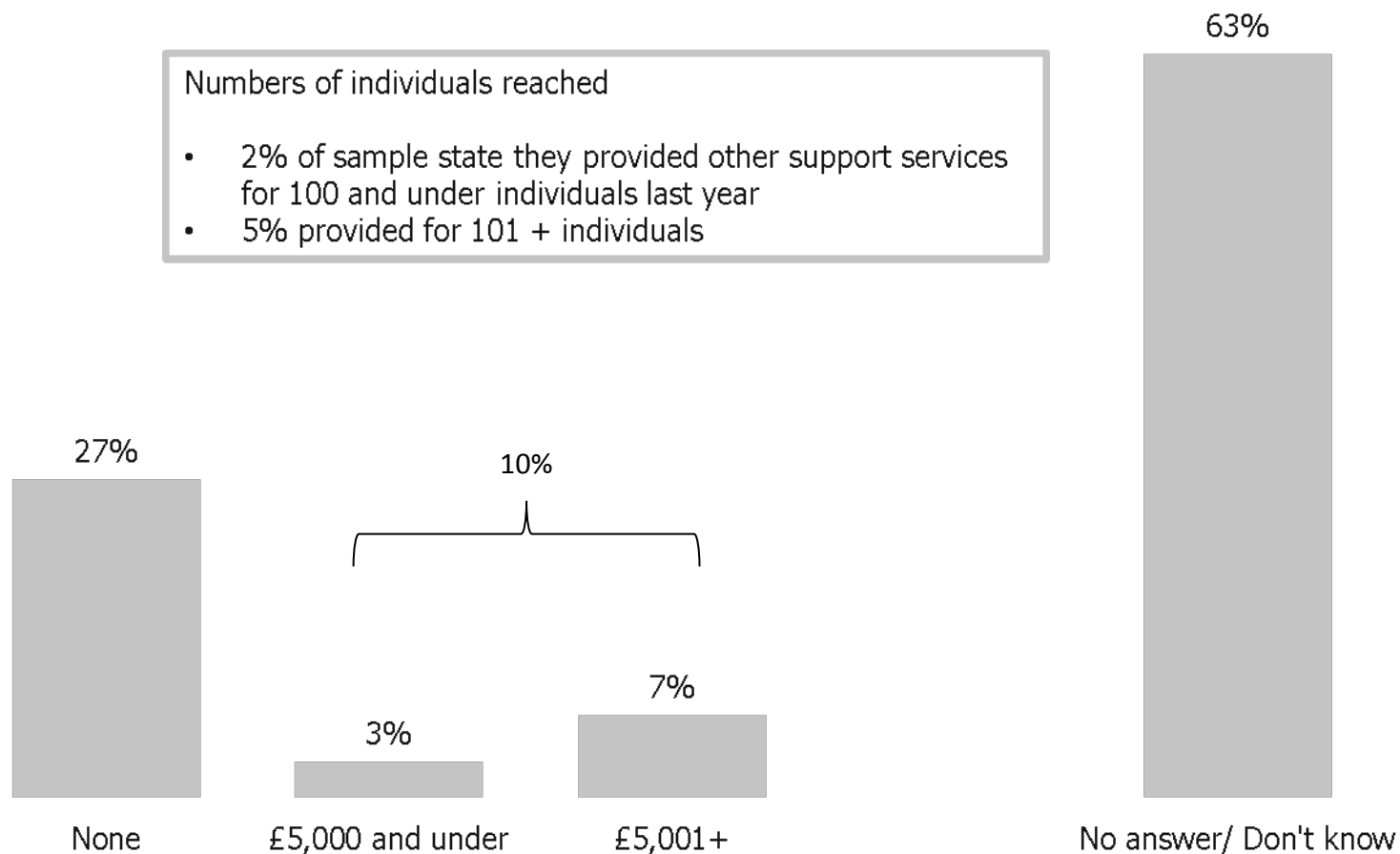
Base: 224 funds, from 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct, nfpSynergy



# Support Services

# Only 10% spend funds on support services

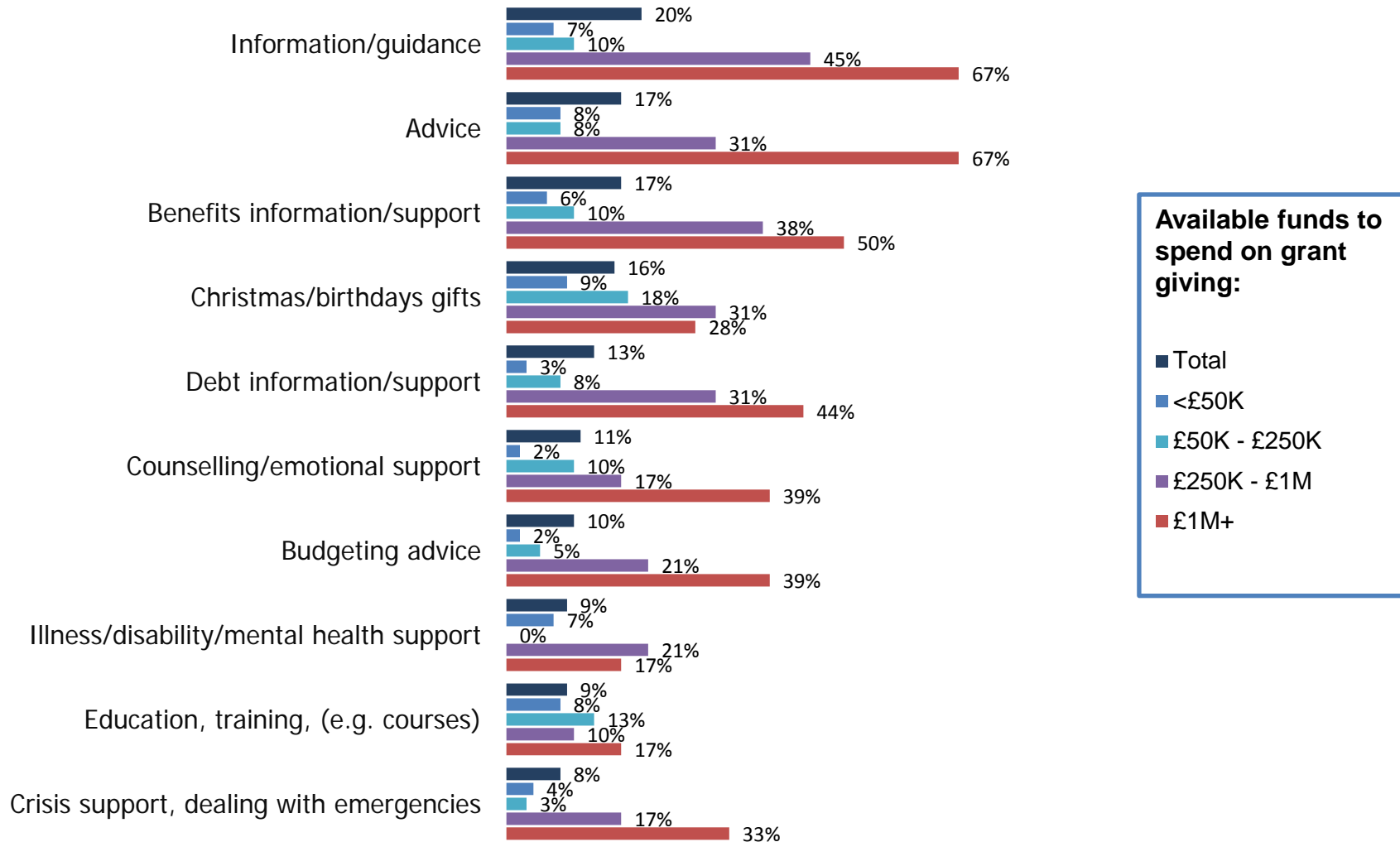


“How much did your organisation spend on **other support services** (including any provided through partnership arrangements) in your last financial year, gross (£)?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Organisations with more available funds more likely to provide support services

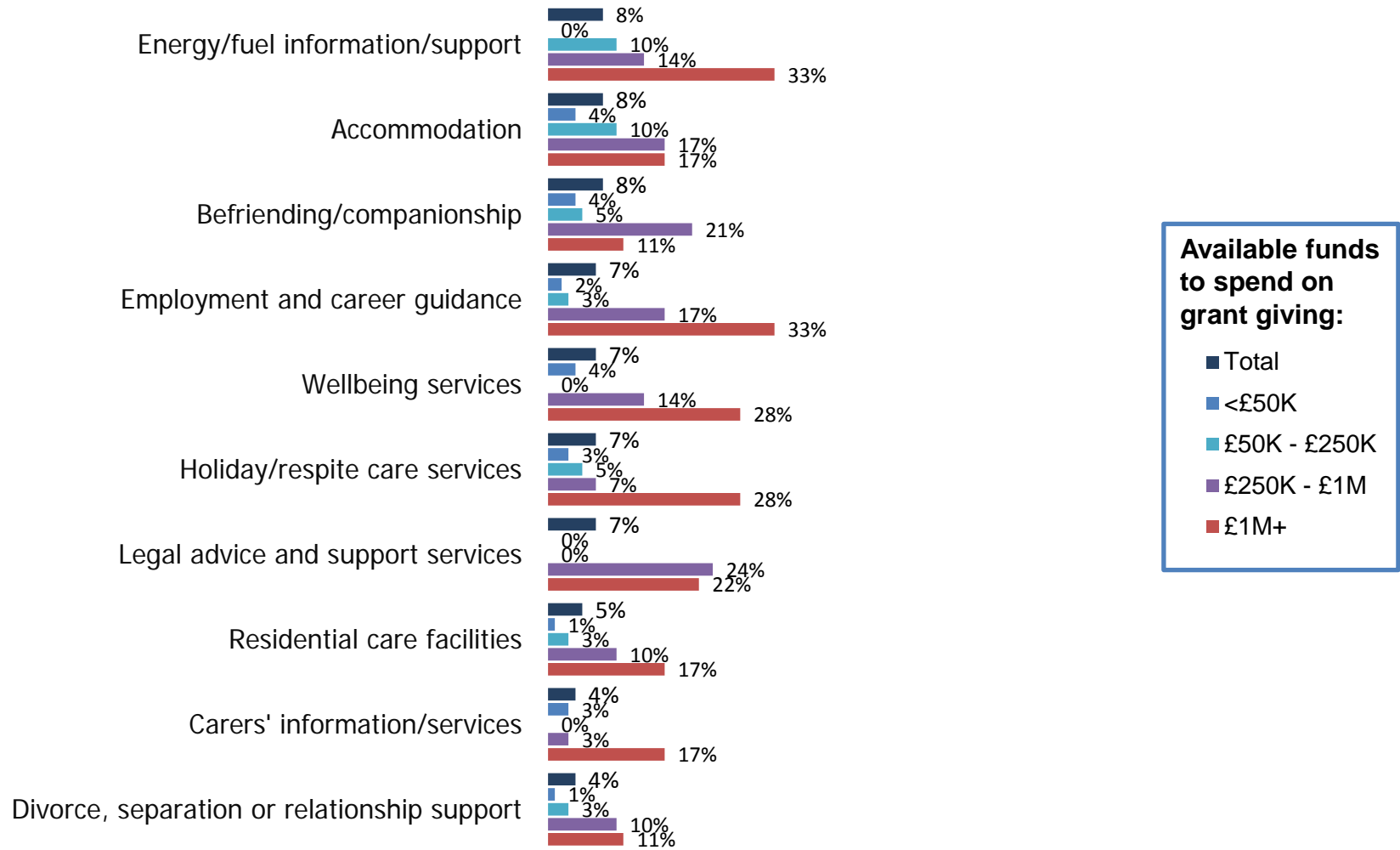


“Does your organisation currently offer any of the following support services to individuals and families (either provided directly by yourselves or paid for through partnership arrangements)?” All prompted, ranked by total

Base: 215 total respondents; 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Organisations with more available funds more likely to provide support services

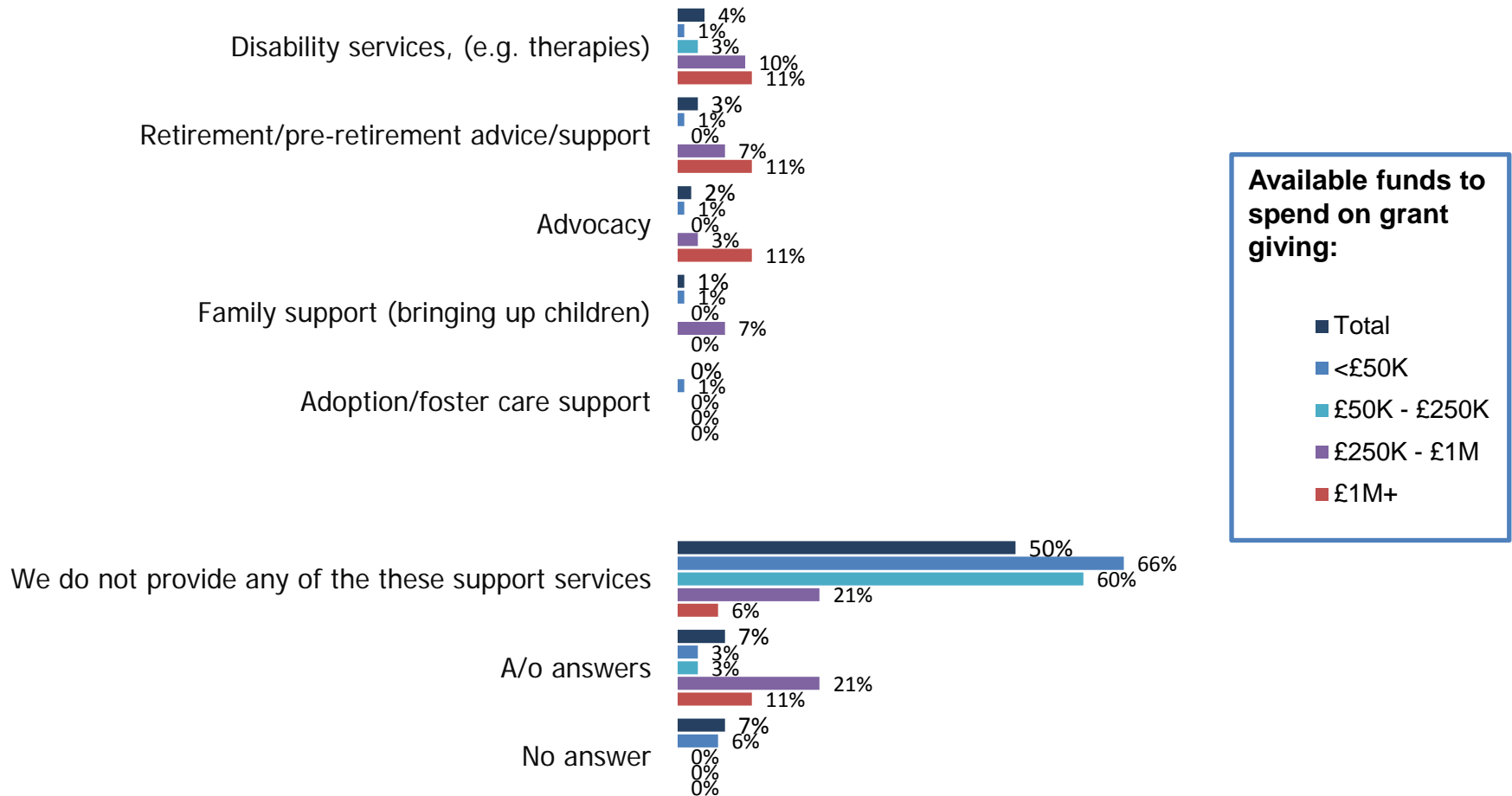


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Base: 215 total respondents; 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

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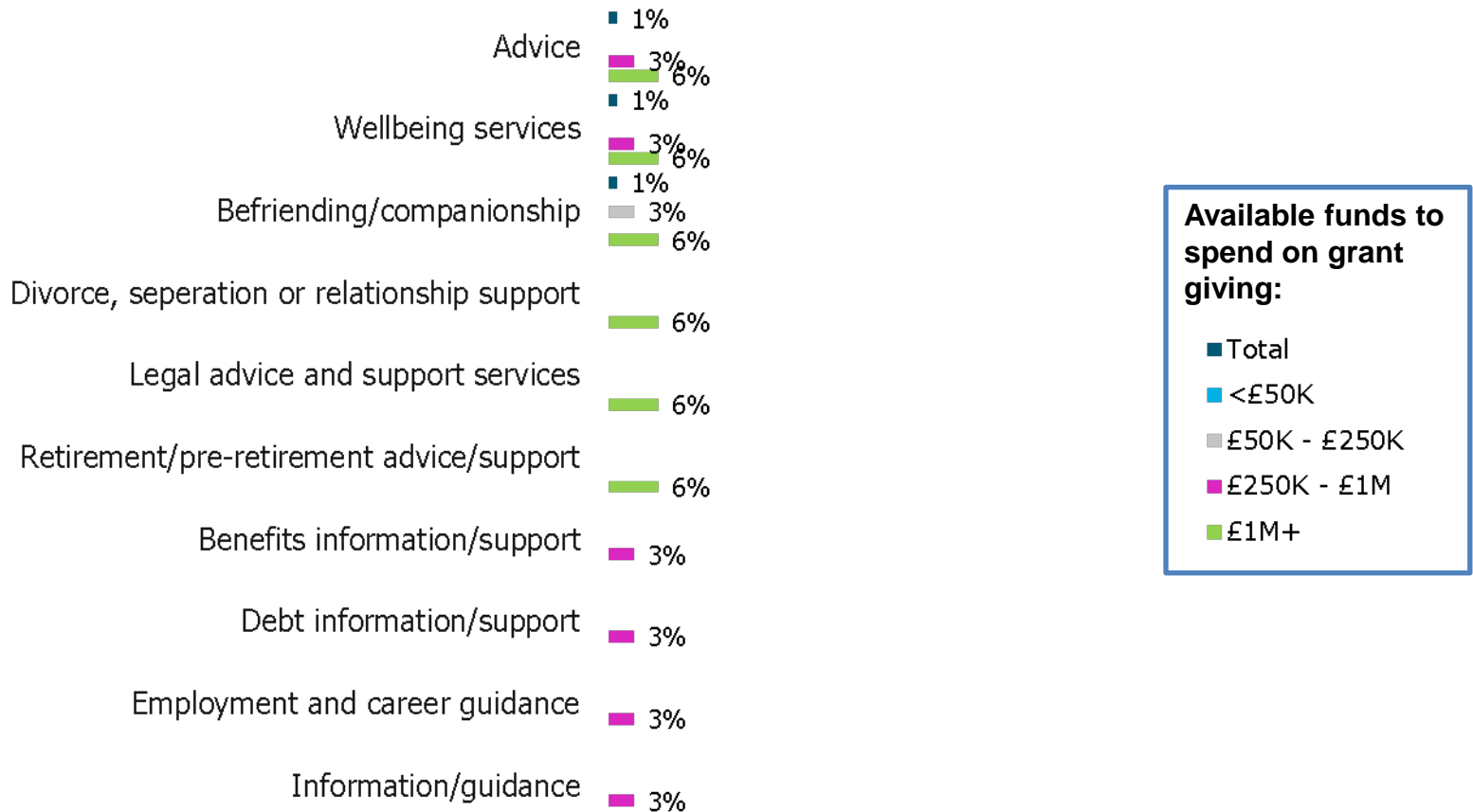


“Does your organisation currently offer any of the following support services to individuals and families (either provided directly by yourselves or paid for through partnership arrangements)?” All prompted, ranked by total

Base: 215 total respondents; 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

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# Few charities plan to offer support services in the next year

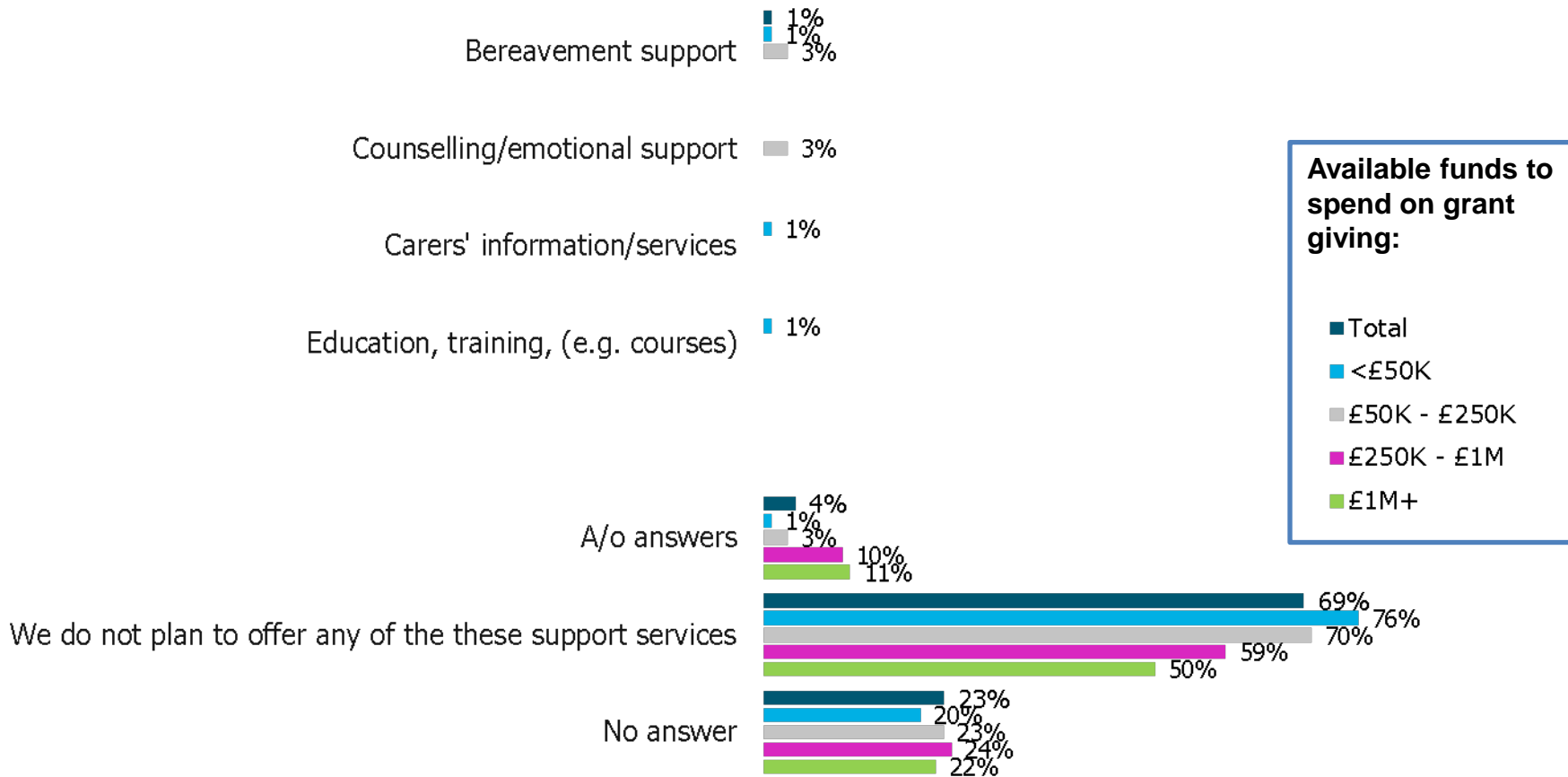


**Available funds to spend on grant giving:**

- Total
- <£50K
- £50K - £250K
- £250K - £1M
- £1M+

“Does your organisation have plans to offer any of the following new support services in the next year?” All prompted  
 Base: 215 total respondents; 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment  
 Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Few charities plan to offer support services in the next year



“Does your organisation have plans to offer any of the following new support services in the next year?” All prompted

Base: 215 total respondents; 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Support services - qualitative insights

## Case Study: The Royal Agricultural Benevolent Institution (R.A.B.I.)

- After the Foot and Mouth crises in 2001 and 2007, R.A.B.I. had the same farmers coming back year on year for financial help, due to the deficit created in many farmers' incomes. R.A.B.I. made a strategic decision to offer more support services:

“We have to consider how best to help when the same people keep returning to us time after time. We need to do something that’s more proactive, which helps people to help themselves.”

Welfare Team, R.A.B.I.

- R.A.B.I. set up partnerships with organisations who could best provide the support services. This included a partnership with IAGSA, the Institute of Agricultural Secretaries and Administrators, where a qualified representative is sent to work with farmers on getting their paperwork in order so that the farmer can submit their accounts themselves.



# Support services - qualitative insights

## Case Study: The Royal Agricultural Benevolent Institution (R.A.B.I.)

- Another support service offered is through a partnership with Farm Community Network - an organisation that R.A.B.I. believe to be better placed to provide farmers with emotional support.

“Our welfare officers offer practical support helping people to access state benefits and other services, as well as helping them to claim financial support from R.A.B.I. They also make at least annual visits to the people we support long-term. If people need help with emotional problems we will usually refer them to FCN (Farming Community Network) whose volunteers ‘walk alongside’ people who have problems and who may also be able to connect them to other local services that they might benefit from.”

Welfare Team, R.A.B.I.

# Support services - qualitative insights

## Case Study: MS Society

- Grant-giving charities are more frequently providing “assisted information” and working in collaboration with other charities to make sure individuals in financial need are receiving the benefits they are entitled to:

“It’s more than signposting which says ‘call the local authority’, it’s saying ‘Call the local authority and you might want to ask them about this, you might want to check out that, get something in writing about this’. So we’re not making any presumptions or giving them specific actual advice, we’re just helping to build their capacity to ask those questions, and we’ve had some significant successes with that. There was one particular person who had their income increased by £58 a week and they had a lump sum in back-pay.”

Grants Manager, MS Society

# Support services - qualitative insights

“A lot of other charities are going along the same lines [to a more holistic approach] because they recognise that it’s difficult just to give out money or grants. In the main this is because there’s just so much more benefit you can give to people at a very low cost which can quite often have just as much benefit, if not more.”

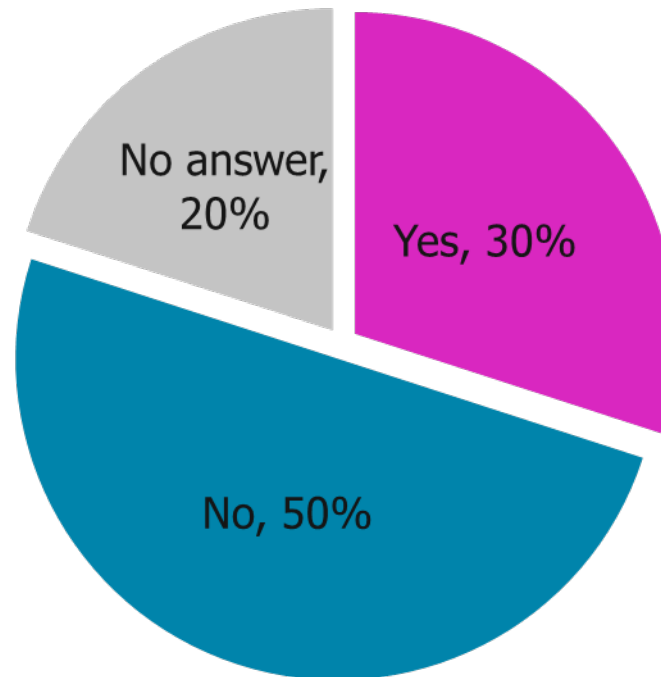
Charity Manager, Pharmacist Support

“I think there’s this idea that giving someone a grant financially is like a sticking plaster rather than helping them in a more holistic way, and it’s not enough just to give someone money. I’m not sure that that’s true in all cases because some people are okay, they just need some extra pounds to get them back on track, there’s nothing else that they need. But like I said, there are people with mental health issues and other personal problems that might benefit from a more holistic approach.”

Welfare Officer , The Queen’s Nursing Institute

# Emergency Support

# Almost a third provide emergency support



## Target turnaround time

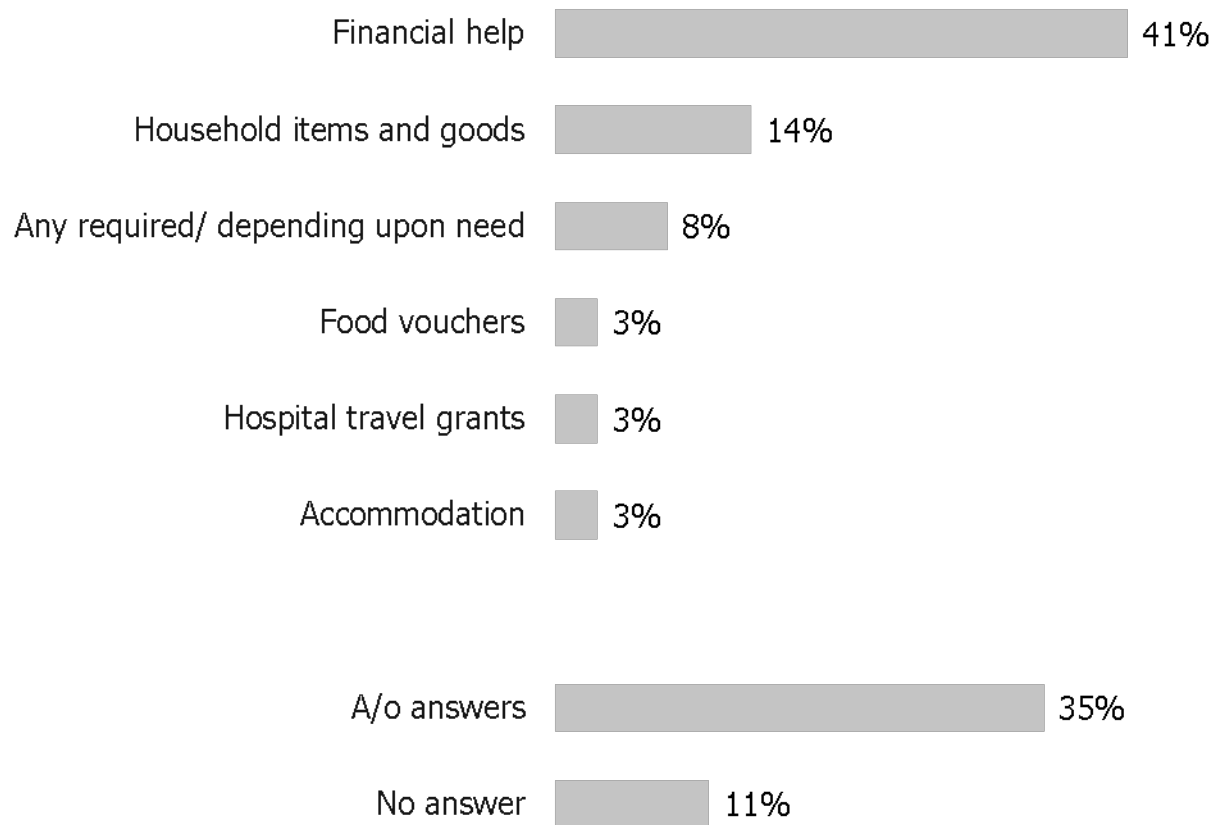
- 15% ASAP
- 34% 24 hours
- 15% 48 hours
- 17% 1 week

“Do you provide emergency help (e.g. homelessness because of fire, flood or family breakdown; repair or replacement of a household item for someone who would be at risk without it)?” and “If yes, what is your target turnaround time for an emergency application?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Emergency support mainly in the form of financial help



“What kind of emergency help do you provide?”

Base: 65 who provide emergency help of 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Emergency support - qualitative insights

- With such a diverse group of organisations, there was a range of definitions of emergency support and range of approaches to dealing with urgent cases.
- Organisations dealing with emergencies tend to handle them on an case-by-case basis. Personal contact (through phone calls or visits) was the most common method of establishing the severity of a case.
- Some larger organisations have systems in place to ‘fast track’ applications.
- Challenge for some organisations in defining who needs help the most, as all often have some basic need to be met.

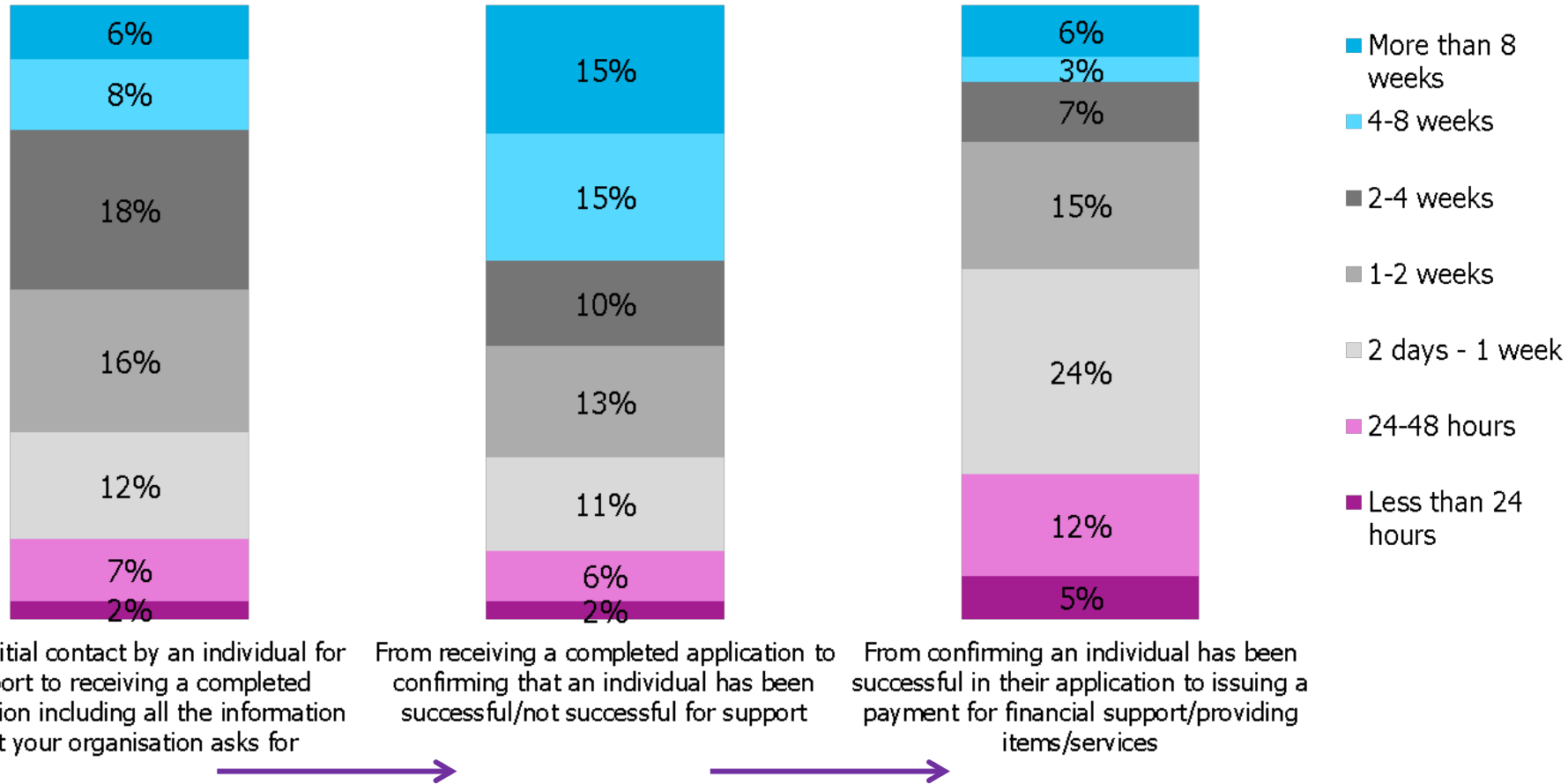
“If there is an emergency/time critical need, e.g. someone is coming out of hospital and there is nothing in place for them, it can be ‘fast tracked’, which means it will be an on-the-day decision and one-day emergency payment or 3 days. Or it might be someone who has been getting increasingly isolated whilst waiting for a decision.”

Grants Manager, MS Society

# Application Process



# Turnaround times for three stages in the application process



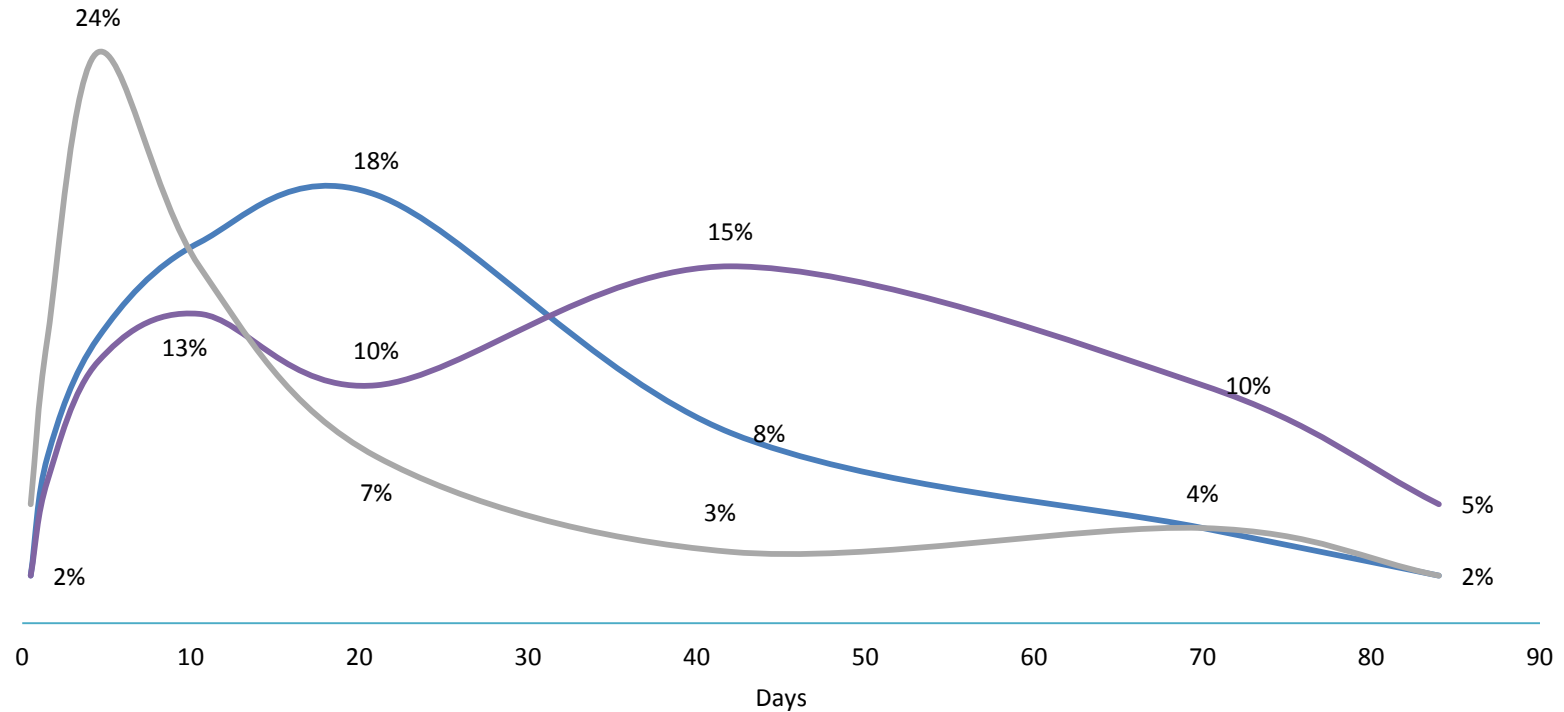
“How long, on average and excluding emergencies, do the following stages in the applications process take?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Turnaround times for three stages in the application process

- From initial contact by an individual for support to receiving a completed application including all the information that your organisation asks for
- From receiving a completed application to confirming that an individual has been successful/not successful for support
- From confirming an individual has been successful in their application to issuing a payment for financial support/providing items/services



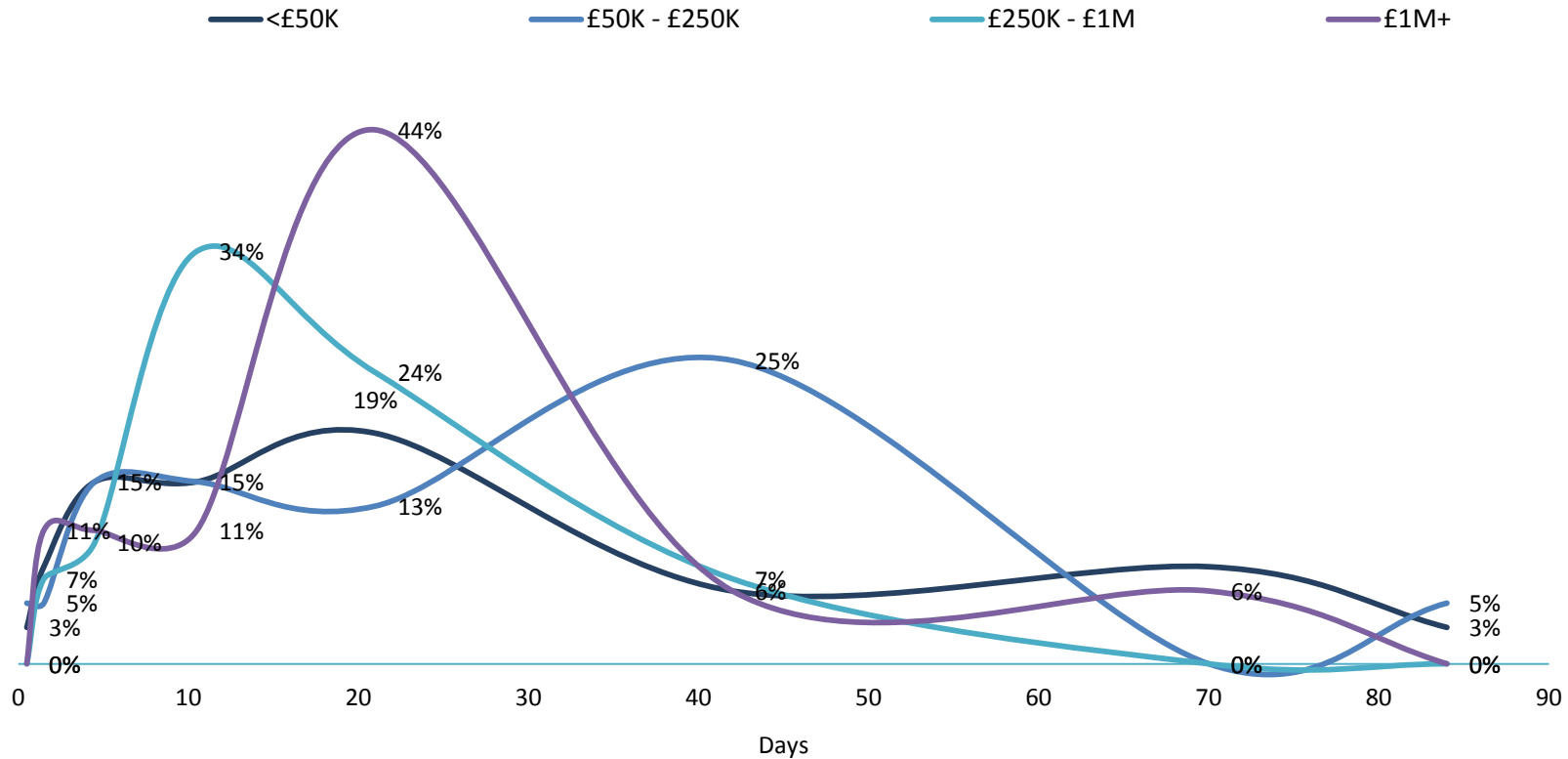
“How long, on average and excluding emergencies, do the following stages in the applications process take?”

Base: 215 respondents

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# Stage 1 by 'amount available' : From initial contact by individual to receiving completed application

Available funds to spend on grant giving:



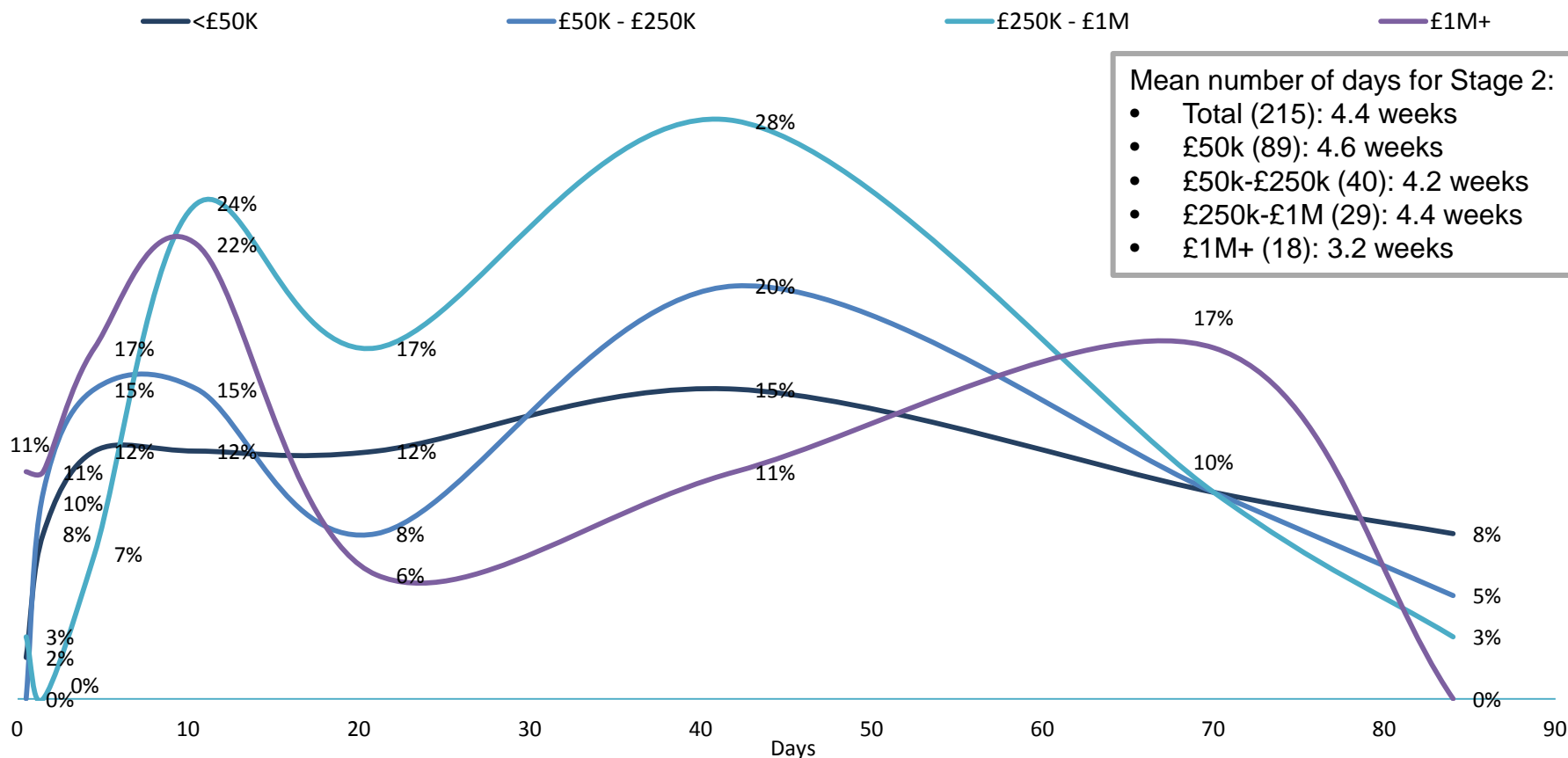
“How long, on average and excluding emergencies, do the following stages in the applications process take?”

Base: 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Stage 2 by 'amount available': From receiving completed application to confirming outcome

Available funds to spend on grant giving:



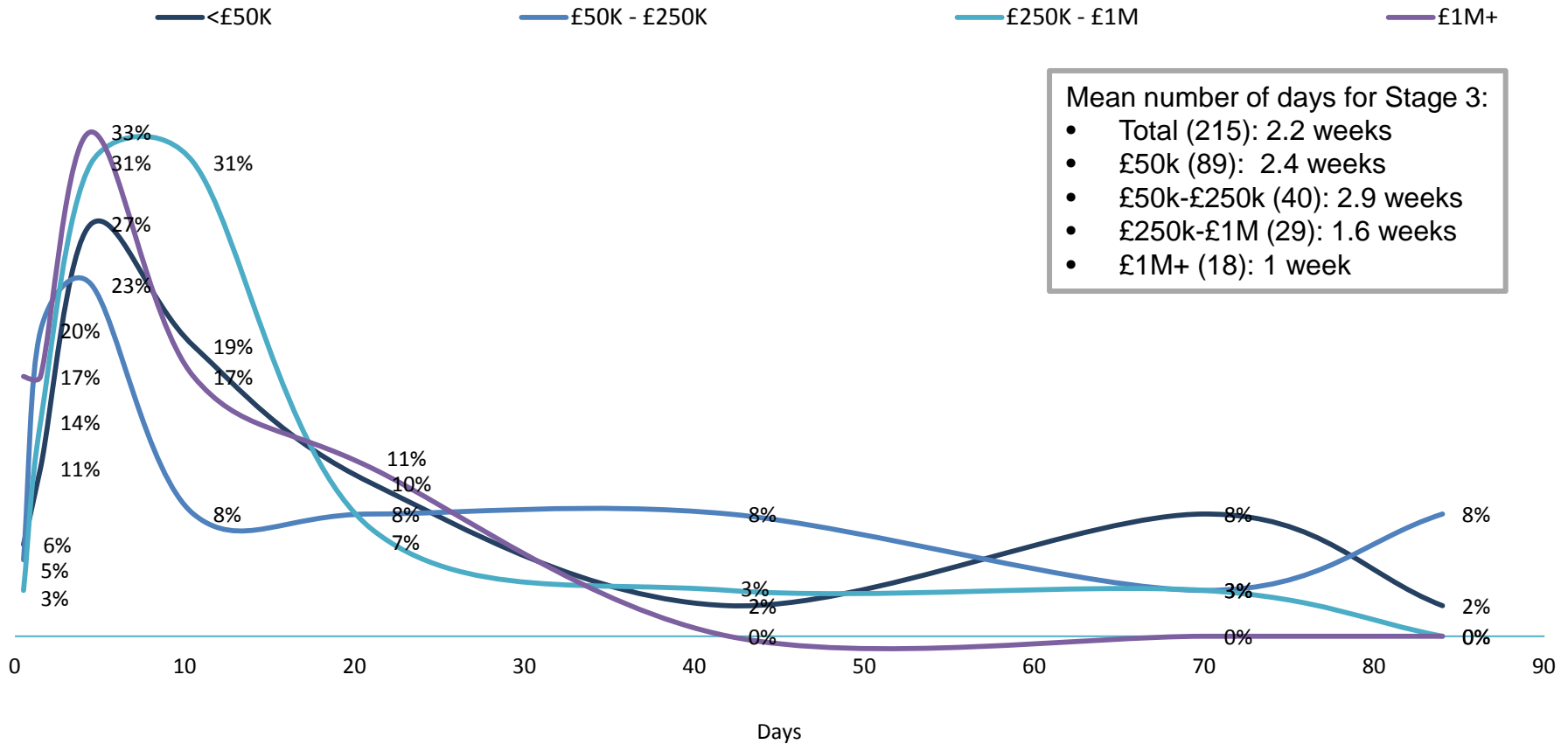
“How long, on average and excluding emergencies, do the following stages in the applications process take?”

Base: 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Stage 3 by 'amount available' : From confirming successful application to issuing payment

Available funds to spend on grant giving:



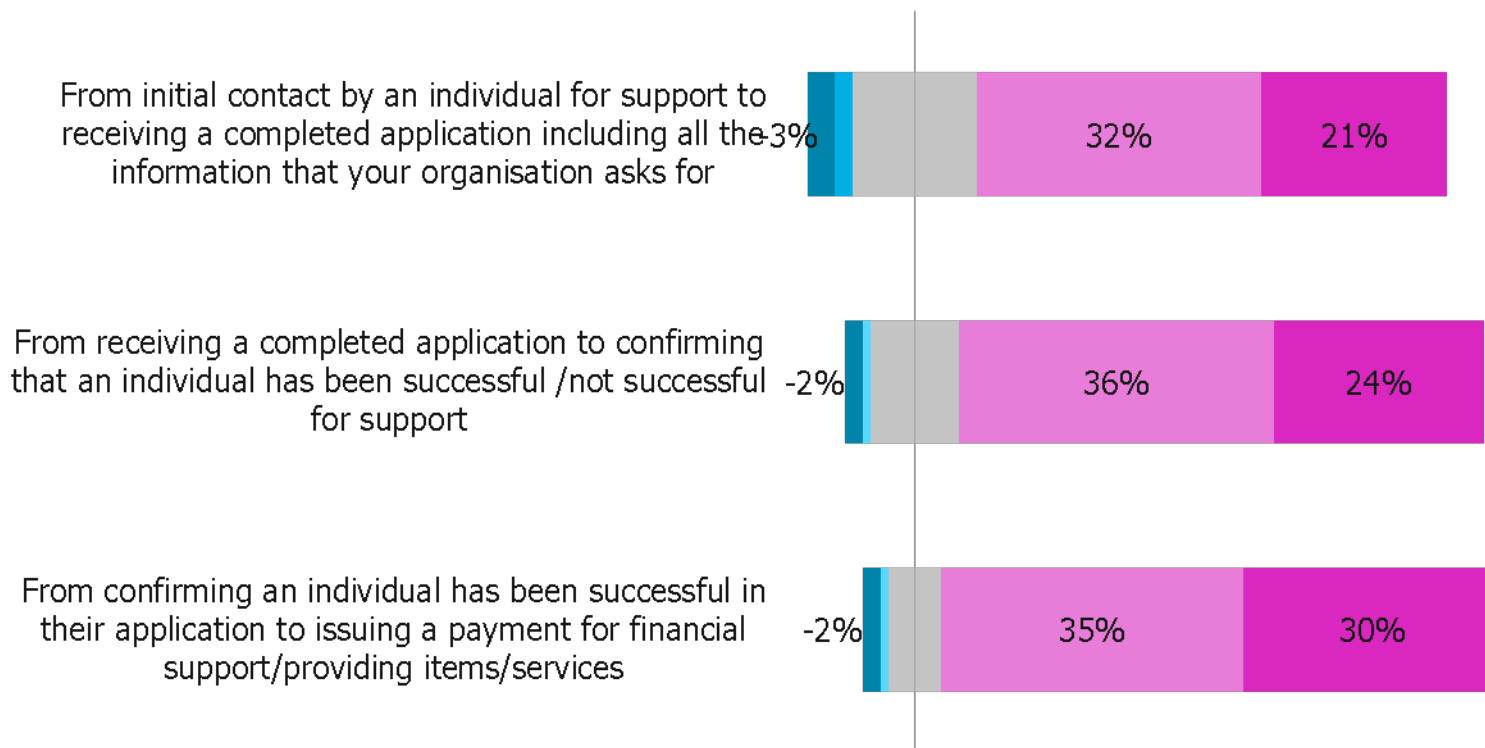
“How long, on average and excluding emergencies, do the following stages in the applications process take?”

Base: 89 (>£50K), 40 (£50K – £250K), 29 (£250K - £1M), 18 (£1M+) respondents per segment

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# At least half satisfied with turnaround times of application process

■ Very dissatisfied ■ Dissatisfied ■ Neutral/ not sure ■ Satisfied ■ Very satisfied

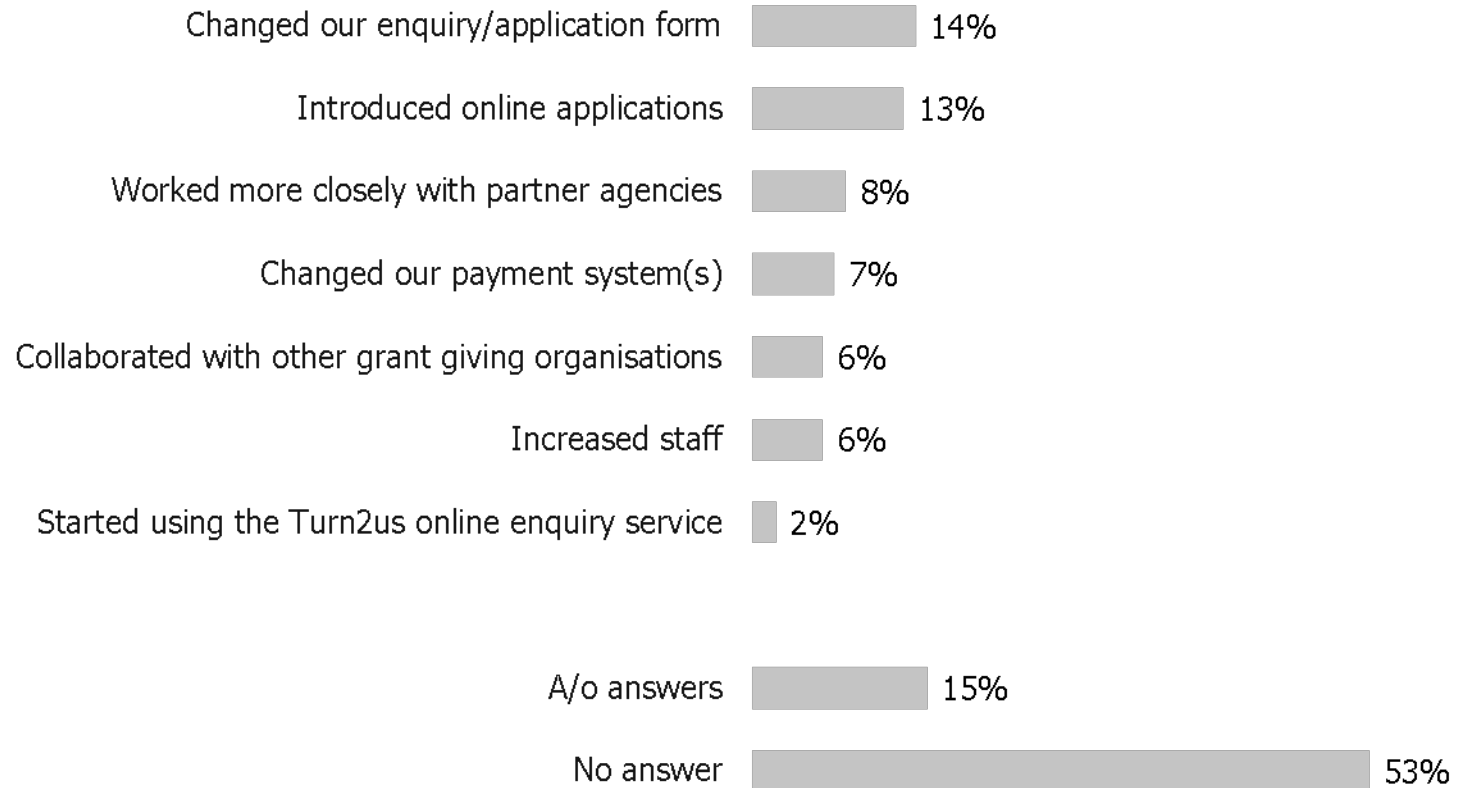


“How satisfied are you with the average turnaround times of each stage of the application process?”

Base: 215 respondents

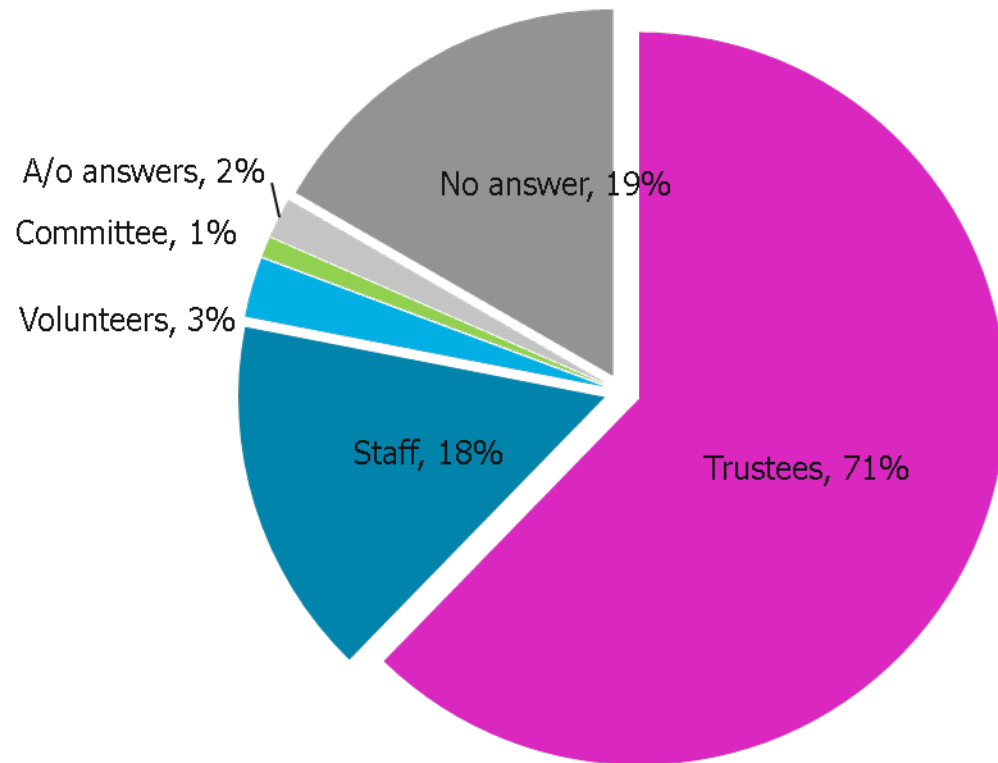
Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Methods to improve turnaround times for applications



“What methods have you used to improve turnaround times?” Prompted answers  
Base: 215 respondents  
Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Most application decisions made by trustees, largely on an ongoing basis



## Frequency of decisions

- 45% ongoing/as required
- 19% weekly-monthly
- 31% quarterly-annually

“Who makes the decisions to award a grant/support?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy



# Summary of turnaround times

- The mean average time taken from receiving a completed application to confirming the outcome is 4.4 weeks
- The mean average time taken from confirming a successful application to issuing payment is 2.2 weeks
- At least half are satisfied with turnaround times of the application process.
- Most application decisions made by trustees, largely on an ongoing basis. Turnaround times vary depending on size of team, and who has the authority to award the grant (e.g. trustee board or grants team).
- Methods to improve turnaround times focus on application part of the process.

“Our turnaround rate, I think is well above and beyond most charities. We work very quickly particularly when you consider the fact that we’ve only got one Grant Officer. In the main there are two staff who are involved in decision making, who work within the limits we have authorisation to approve. Our trustees work at a strategic level and don’t delve into the detail, and they feel content with the information reporting that comes back to them. We have very good policies that are constantly monitored and regularly reviewed, so everybody is content with the system that we have in place.”

Charity Manager, Pharmacist Support

# Application numbers have on average increased more than decreased

## Last 12 months

- Just over a third of charities saw an increase in applications
- One third saw no change
- One tenth saw a decrease
- One quarter didn't answer or didn't know
- Out of those who saw an increase:
  - Half attributed it to increased awareness of the help they provide
  - Many also said increased demand for help (often due to cuts in welfare provision) was a significant reason

## Future

- Projections for the future remain largely the same as the trends of the last 12 months.

“Have you seen an increase/decrease in the number of applications in the last 12 months? Do you expect an increase/decrease in the next 12 months?” and “If you have seen a **small/significant increase in current** applications, what is the reason for this increase?”

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

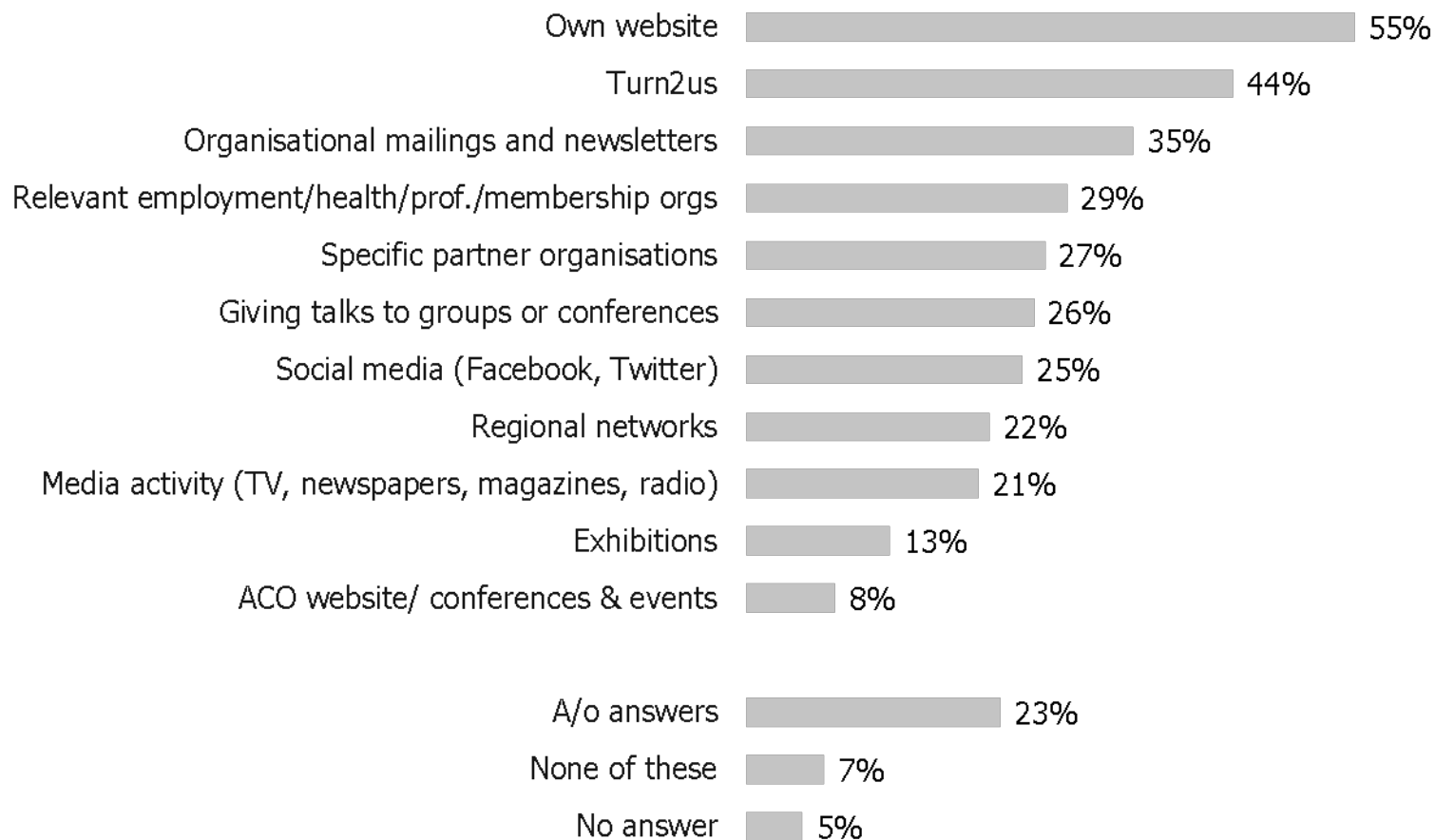
# Volume of applications - qualitative insights

- Increase in volume for many organisations, to the extent that some are considering reallocating staff time to dealing with incoming applications.
- Links to political, economic and social context, e.g. dealing with more cases of individuals being on the wrong benefits.
- In cases where the volume of applications is manageable, there has still been a noticeable shift to more complex cases, such as individuals with debt problems.
- Reduction in applications for some organisations where profile of grant scheme has dropped.

“We’ve definitely been picking up things like the effect of the bedroom tax and people having wrong benefits assessments”

**Triggers, marketing, referrals**

# Online methods key in raising awareness of organisations' work and the help offered

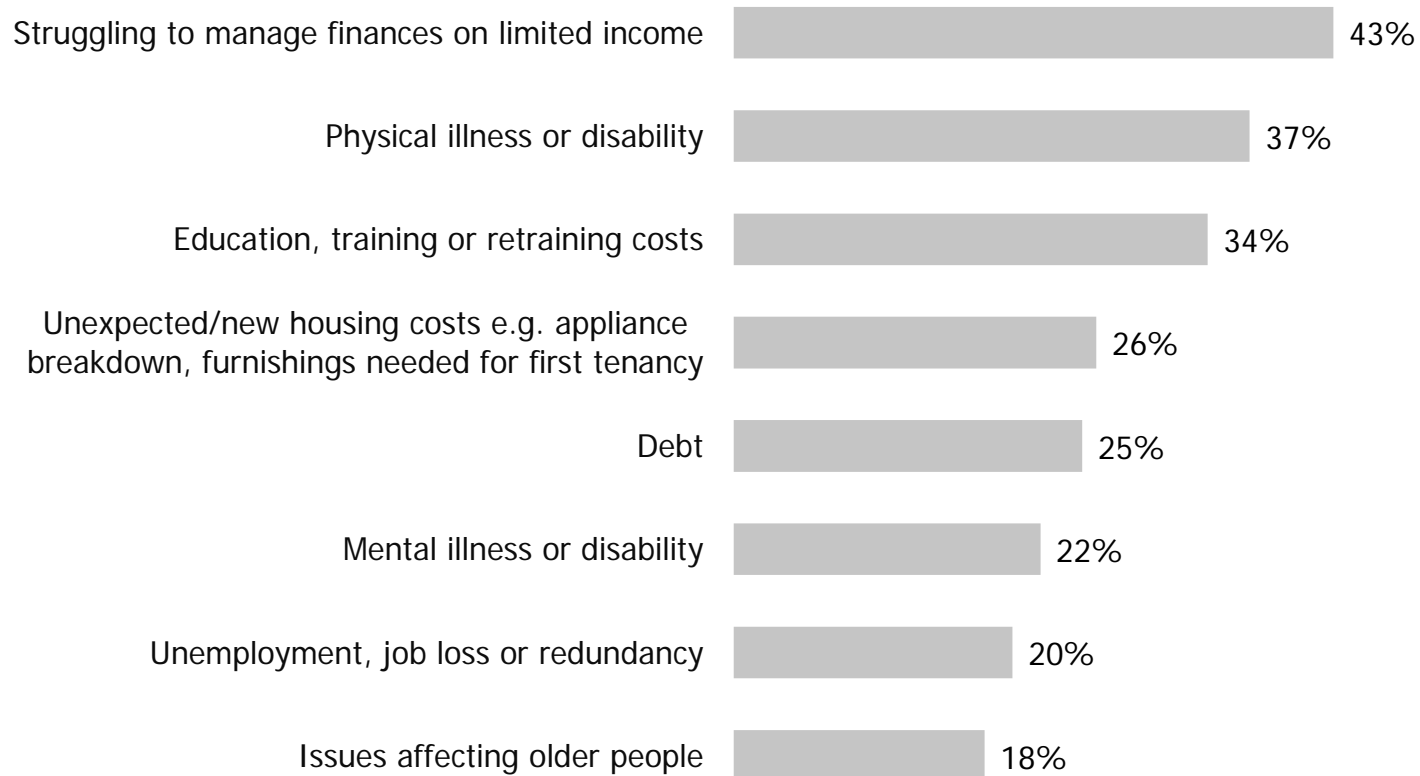


"What methods do your organisation use to raise awareness of its work and the help it offers?" All prompted

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct, nfpSynergy

# Most common triggers for needing financial help are limited income, physical illness/disability, and education/training costs

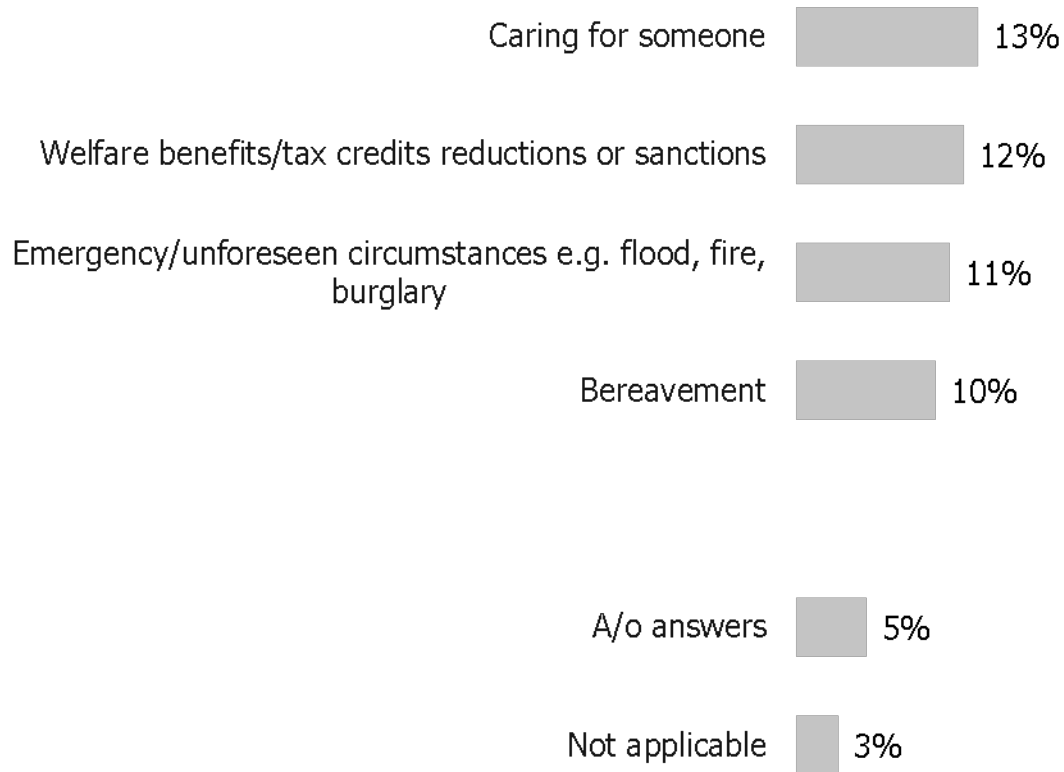


“From the list below, please select the top 5 most common 'triggers' that bring people to your organisation for support”  
All prompted

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Most common triggers for needing financial help are limited income, physical illness/disability, and education/training costs



“From the list below, please select the top 5 most common 'triggers' that bring people to your organisation for support”  
All prompted

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Eligibility - qualitative insights

- The charities interviewed found that ineligibility was rarely an issue, as they felt they have a clear target audience.
- Ineligibility tends to be encountered when means testing, i.e. an individual with significant savings or those experiencing cash flow problems.
- Using technology and online search tools also seen to reduce ineligible cases if kept accurate (such as Turn2us' keywords).
- Charities would signpost individuals to other organisations' funds in cases of ineligibility. Most organisations happy to take the time to refer on to other organisations, as this is a step to ensure the individual gets the best help and is regarded as a support service in itself.



# Changing profile of applicants- qualitative insights

The changing profile of charities' 'typical' applicants is linked to wider political, social and economic factors. Some of the examples cited in the research included:

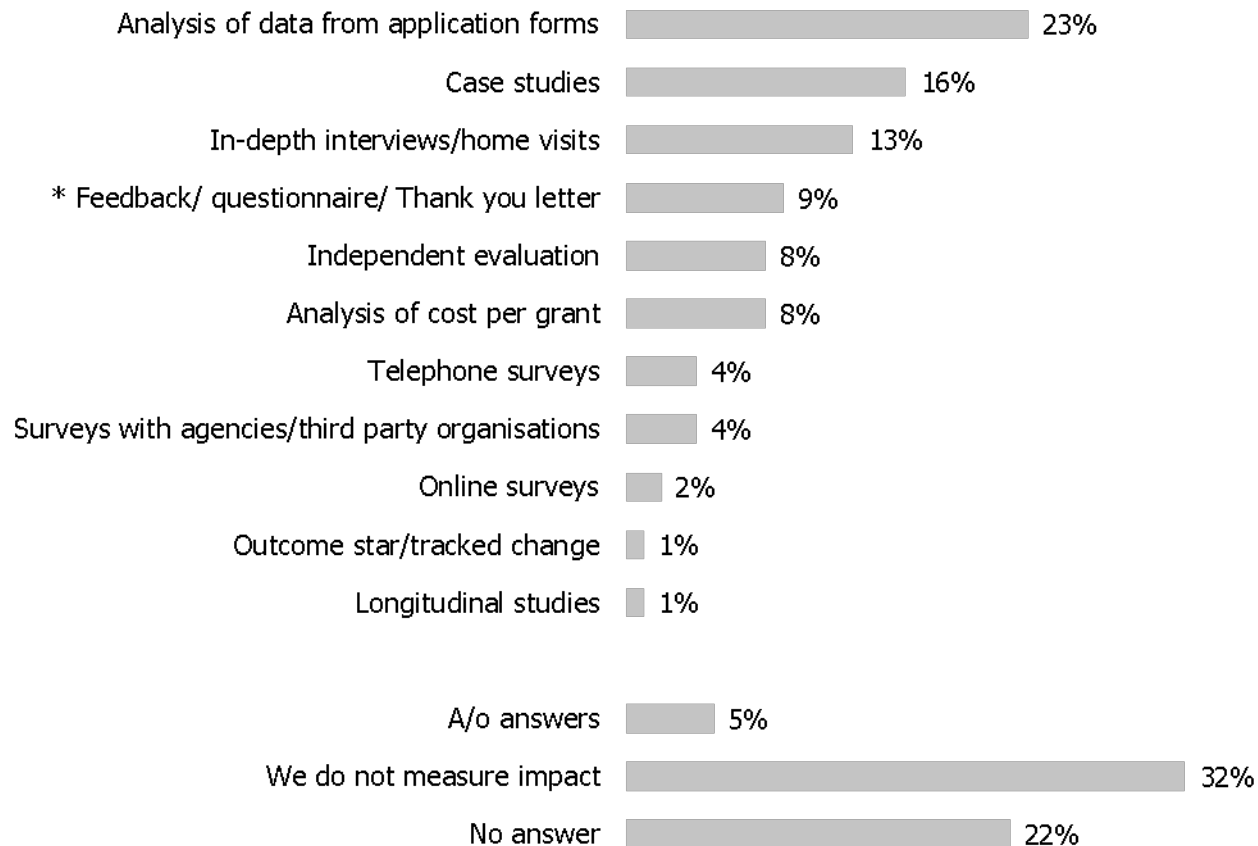
- More young healthcare professionals applying for grants after high competition for very few jobs
- More applications from the working age gap (60-62) who are not entitled to pensions
- More people getting into debt
- More online applications meaning a bias towards younger applicants

“We always say that we do not help with debt, that’s one of our exclusions, but in reality we do. I think, all the charities do now, so you can’t say that you don’t help with debt, as grants are awarded to help with other household expenses, which frees up funds for debt payments.”

Welfare Office, The Queen’s Nursing Institute

**Impact**

# Over half of charities use tools and processes to measure impact

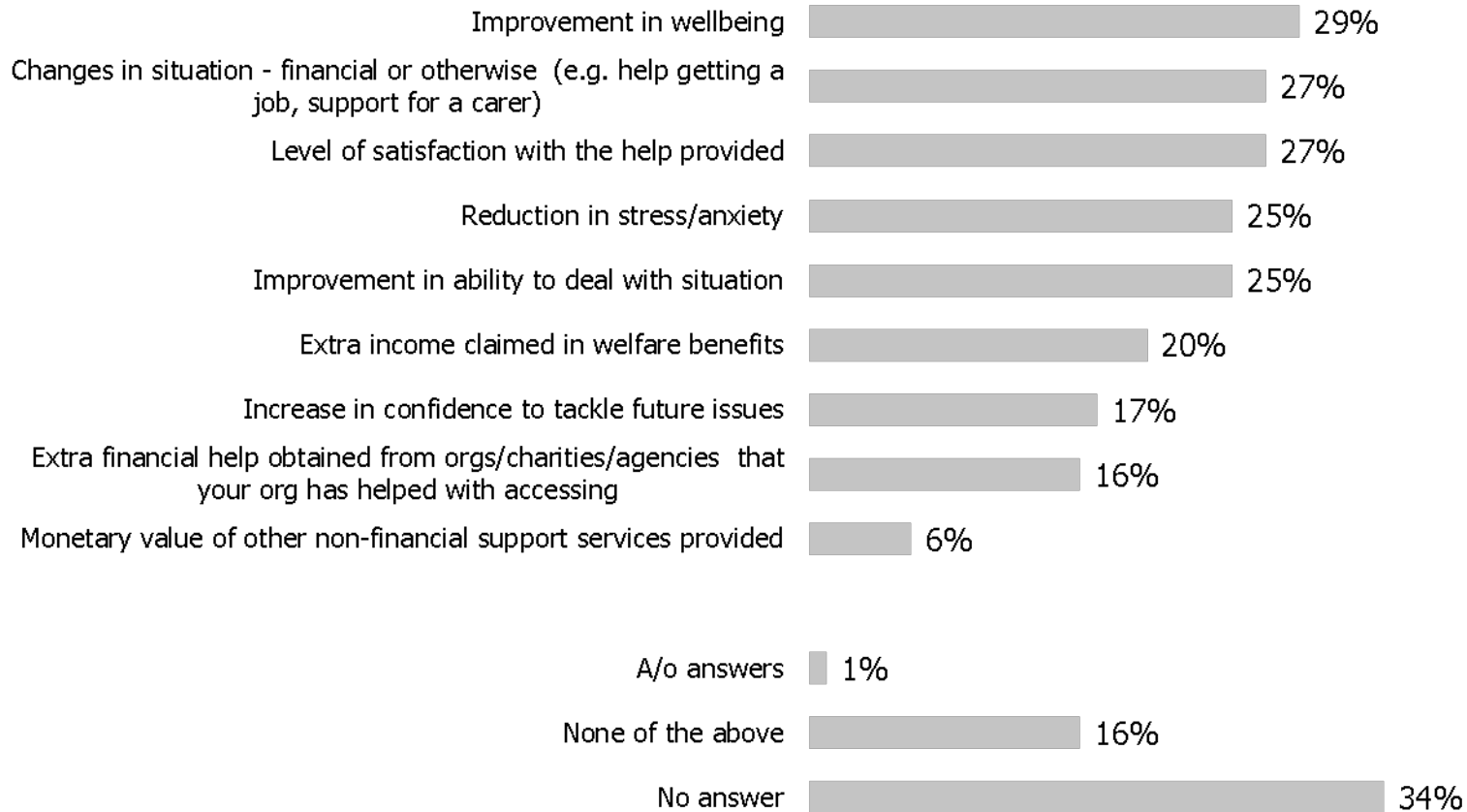


“What tools and/or processes does your organisation use to assess impact?” \*open ended response (all other responses prompted)

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Broad range of soft and tangible outcomes considered when assessing impact



“When assessing the impact of the help your organisation provides to people does it also take into account any of the following?” All prompted.

Base: Those who measure impact, 146, out of 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Widespread lack of formal targets for monitoring purposes

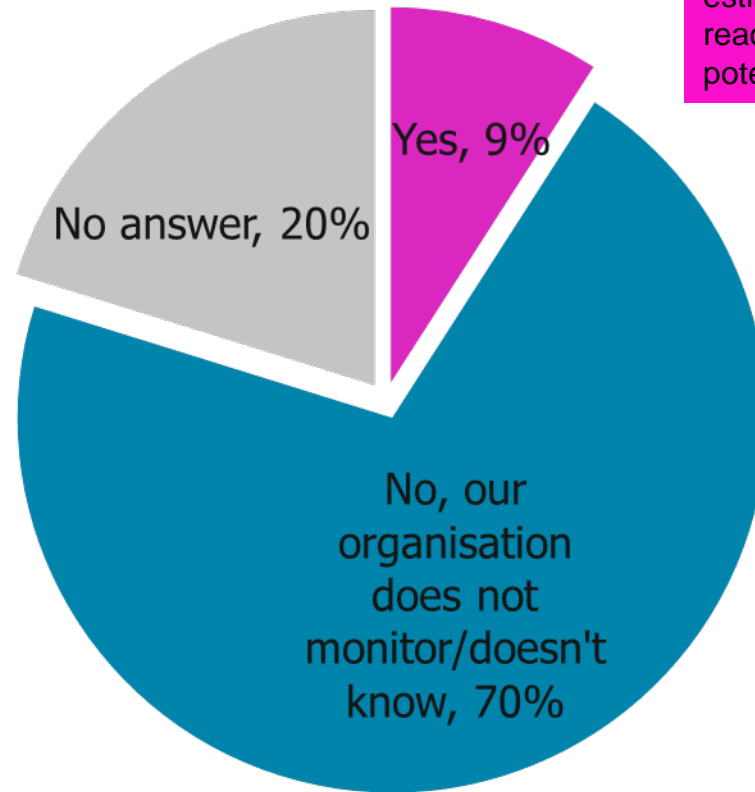


“For all those that you ticked in the previous question, does your organisation have targets that it uses to measure/monitor performance against on an annual basis? **If yes**, please provide the target that your organisation set for this current financial year.”

Base: 42 of 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Majority of charities do not know the % of potential client base currently being supported



Those who **do** know estimate on average reaching **a third** of their potential client base

“Do you know how much of your potential client base (the number of people who are eligible to apply and need your help) your organisation is currently supporting? “

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Measuring impact - qualitative insights

- Grant-giving charities generally see the importance of measuring impact, but many do not feel there is a current need to do so. Reasons given include that they are a small team (with nobody they currently have to report figures to), and that they are lacking the resources to create a more rigorous system.
- Collating thank you letters is a common informal mode of monitoring the outcome of their grants.
- Challenges to measuring impact include lack of resourcing, finding a way to evaluate a broad range of services that are offered, and issues of anonymity with some services (such as helplines).

# Measuring impact - qualitative insights

## Case study: MS Society and evaluation

- MS Society is currently measuring the impact of their services through a combination of numerical statistical data and anecdotal feedback. One innovation is to set up a standing reference group of people with MS/affected by MS in order to legitimise and improve the quality of what they are doing.
- The grants team monitors number-based outputs, and keeps records of “soft outcomes” (e.g. thank you cards), some of which are used in case studies and direct marketing campaigns.
- They have introduced equality monitoring forms to ensure equal opportunities in terms of who they are reaching and who they are not managing to reach.

“If you asked me the question ‘Well what’s the coverage amongst the potential client group?’ I’d say ‘Well I can tell you where people are based, I can tell you their gender and their age, but I can’t really tell you anything about their ethnicity or their sexual orientation’, so what we’ve introduced this year is an equality monitoring form, separate from the main form, to give us an idea of where the hot and cold spots are, and whether we need to do more work in an area.”

“I’ve been looking to introduce a standing reference group of stakeholders, predominantly people with MS, maybe carers. I’d like to make it a formal group, who we can ask to help us on different aspects of our work, to give us legitimacy around what we’re doing, and most importantly it’s going to be a better piece of work because people will think of things that we’ve not even thought of.”



# Future Support from ACO

# Sharing of good practice is a key area of additional support wanted from ACO



“Thinking about the Association of Charitable Organisations (ACO), in which three areas would you be keen to receive additional support?”

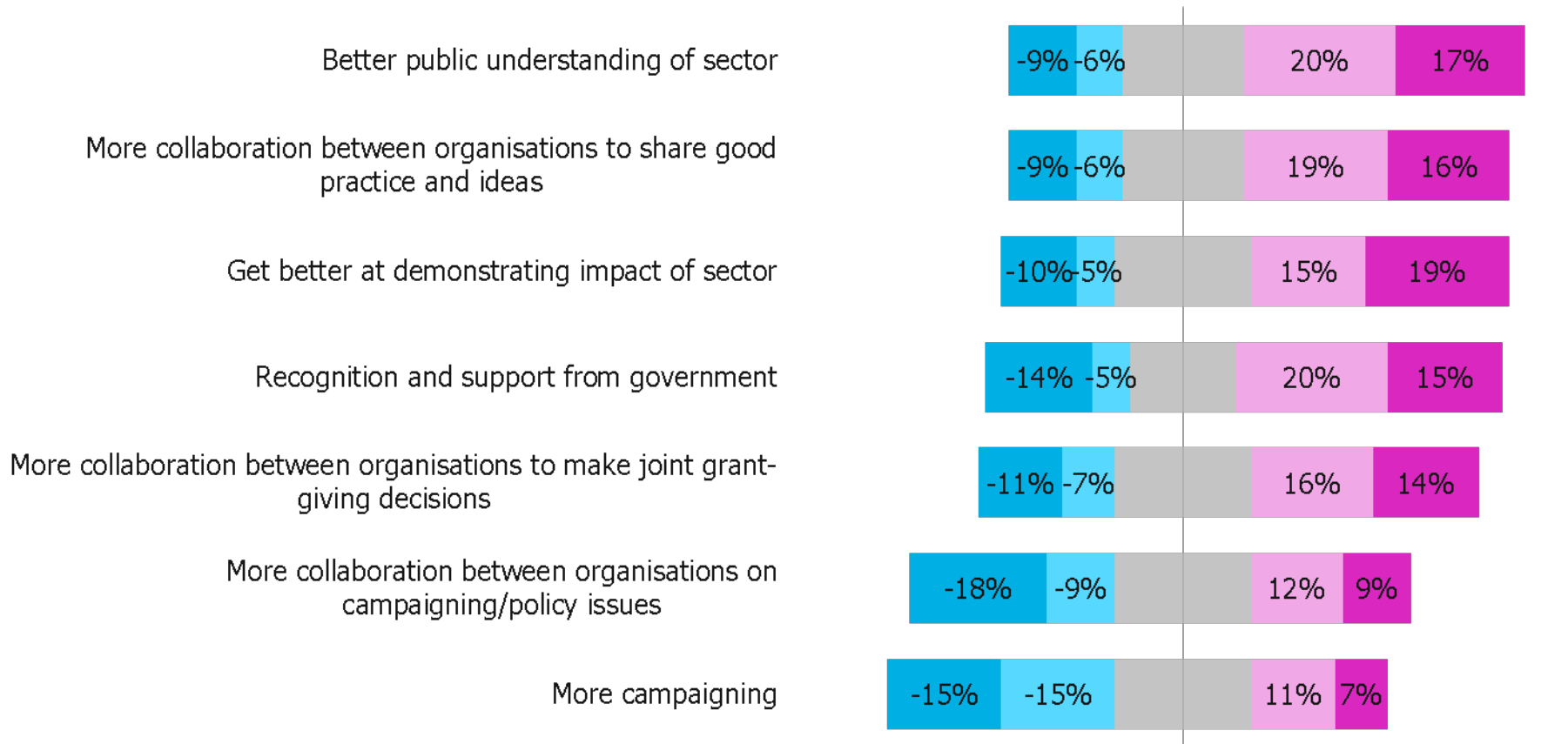
Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# The Grant-Giving Charity Sector

# Public understanding and collaboration most wished for, and low interest in campaigning

■ 1= Not important to develop ■ 2 ■ 3 ■ 4 ■ 5= Very important to develop

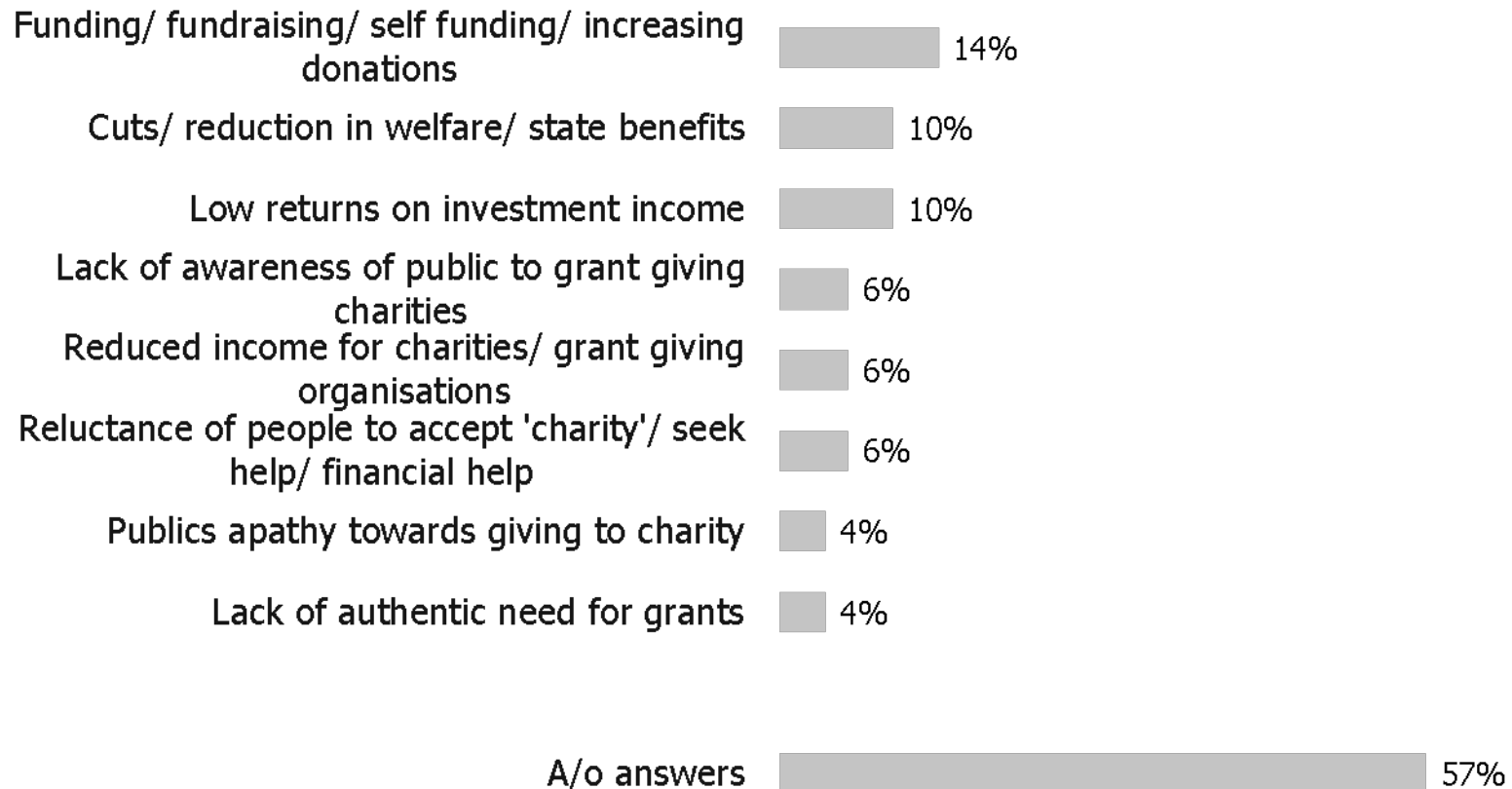


“How would you like to see the grant-giving sector develop?” All prompted

Base: 215 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Combination of decreasing funds and increasing demand is challenging the sector



“What other issues do you feel currently present major challenges to grant-giving for organisations?”

Base: 51 respondents

Source: Turn2us/ACO survey with Grant-Giving Charities, Sep/Oct 14, nfpSynergy

# Qualitative insights

- The grant-giving charities we spoke to are all interested in knowledge sharing and understanding best practice across the sector:

“We’re absolutely open to learning and we don’t think we’ve got all the right answers and we may go down some cul-de-sacs. So I’m really pleased to take part in this and the whole Turn2us research. We want to share our expertise and knowledge but also acknowledge that there’s no one organisation that knows it all and we’re learning all the time”.

Grants Manager, MS Society

# Acknowledgements

The project team for this research comprised:

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- Emma Lamberton, Turn2us Communications Officer
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