



Foundation
Scotland

2023

Stakeholder Feedback



Contents

- 01** Introduction
- 02** Applicant Survey
- 03** Donor Survey (Philanthropy)
- 04** Donor Survey (Community Benefit Funds)
- 05** Panel/Board member Survey
- 06** Conclusion

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 2022. We contacted grant applicants (both successful and unsuccessful), fund donors and community panel/board members.

One particular area of interest to us was the user experience of new technology we had adopted prior to issuing this survey, namely the launch of new online portals offering donors and fund applicants instant access to their accounts, and log-ins for panel members involved in fund assessment. The results of the surveys are summarised in this report.

This report contains analysis of feedback from:

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

2. Applicant Survey



This survey was sent to all organisations that had applied for funding since summer 2021. The survey went out to 3029 applicants, and the results are based on the responses from 342 (11%).

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 on areas of improvement, particularly with the new grantee portal and application detail. Based on this feedback, we were able to identify some areas where we can further enhance and strengthen our services.

Our Learning

While some respondents found the application process straightforward, others felt that some of the information required was not relevant to their application, or that the application form was too onerous for smaller funding requests.

Some applicants told us that, while they were getting used to the online portal, there were still some technical challenges that they felt needed to be addressed.

Although some applicants were unable to complete online applications without support from Foundation Scotland staff, that support was rated highly and made the process easier.

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

Some grantees were unclear on why we request grant monitoring forms, or that they required too much information in proportion to the size/scope of grant.

Our Actions

We will review our application processes in line with feedback and provide support where needed.

We will continue to 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 continue to review the user experience of our portals, improve their functionality and provide online workshops to support applicants.

We will continue to keep our own staff training up to date, and deliver live and recorded application webinars where necessary.

We will ensure as much as possible that we provide timely, 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, and offer any support necessary.

Key stats from applicant survey

86%

found the pre-application advice and support useful

77%

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

82%

said they were happy with the application process overall

71%

were satisfied with the new grantee portal

80%

were satisfied with the end of grant reporting process

20%

submitted unsuccessful applications, BUT **only 1%** said they would not apply again

 99%

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

Areas to improve the user experience of applying through our portal

- “ Maybe clearer signposting for how to get help if you're having an issue with it would be helpful. ”
- “ We experienced a couple of technical issues but the staff were very quick at responding and either fixing the issues with the systems or guiding us through how to bypass them. ”
- “ I found it a bit awkward but this is probably due to lack of computer knowledge. Another problem is it can be a while in between using it. I am sure I will improve. ”
- “ I expect that I will be fine with the portal when I get used to it. I have phoned up to get help and my query was sorted in a polite, helpful way. ”

Other comments about improving our grantmaking

- “ Great to talk to someone to confirm and go over the application after it was submitted - it is not always easy to have things explained online. ”
- “ I feel that the application process is a wee bit long for the level of funding available. It feels like the Foundation Scotland application could do with an overhaul to make it less onerous for organisations who are currently having to do even more funding applications than usual. ”

3. Donor Survey

Philanthropy



This survey was sent to individuals, families, and corporate and charitable organisations who donate funds for us to distribute on their behalf. The survey went out to 80 different donors, and the results are based on 25 responses (31.25%).

Our Findings

The results of our survey were positive overall, with easily identifiable areas for improvement. Engagement with our new donor portal has been challenging for some, and some donors were not fully aware of the range and functionality of the portal, for example being able to access information on all aspects of their funds. Donors also expressed the desire to have more information on the impact that their funds were having. We know that we need to be able to more fully illustrate the impact that funds make in a way that's engaging, illustrative and succinct.

Our Learnings

While some donors were very positive about the new portal, others found it clunky or difficult to navigate.

Donors would like more feedback, particularly information on and evidence of the impact from their giving.

Donors are interested in learning more about key issues. One donor suggested that we are more proactive in contacting them with ideas and charities that may benefit from their funds.

There was some feedback about Foundation Scotland doing more to enhance the profile of donors to eligible organisations

Some donors noted that seeing first hand how and where their funds were making a difference was extremely valuable.

Our Actions

We are continuing to improve the functionality and user experience of our donor portal, and will listen carefully to what donors say works best for them.

We are developing a new impact framework so that we are able to provide more meaningful and easily accessible evidence of impact to donors.

We will increase communication with donors on new funding opportunities and key areas where we see there are gaps/need. We are developing a thematic overview of funds in order to identify areas of opportunity.

We will ensure that we improve the promotion of funds to those organisations who could potentially benefit.

We will improve our facilitation of donor visits to projects who are receiving funds.

Key stats from donor survey

(Philanthropy)

100%

of donors are satisfied with the support received from their fund advisor

68%

of donors were satisfied with the overall functionality of the new donor portal

70%

of donors were satisfied with their experience of accessing real time financial information on their fund

60%

of donors were satisfied with the overall quality of information they received about their fund

4.5

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

76%

of donors who receive specific feedback on their giving/grants were satisfied



97%

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

Can you tell what has worked well for you?

- “...the ongoing partnership work we have with FS to ensure our grant monies go to those that meet our criteria and make a difference to the charities and those they support.”
- “The portal is a new and welcome development which will continue to develop with ongoing feedback.”
- “Visiting one of our grantees venues and having one to one conversations with those making our money work hard.”

Is there anything you think we can improve upon?

- “I am not convinced the new portal gives me enough detail on the impact reporting side.”
- “The only information we receive are grant applications. It would be helpful to have newsletters and also feedback on the impact of the funds on the organisations we support.”
- “Some of the information could be enhanced by either a sharper focus on what is important to us, or presented in a format that better suits our purpose.”

4. Donor Survey Community Benefit Funds



The survey was sent out to commercial donors whom we distribute community benefit funds on behalf of, in partnership with local communities. 46% of the Communities Team donors responded, which represents over 50% of the funds we hold.

Our Findings

Overall, our donors showed a high level of satisfaction across a number of areas, including the support they received from our staff, our processes and our expertise in community support. The main areas of improvement highlighted were in relation to the new donor portal, and communicating how their funds are making an impact within communities.

Our Learnings

There was some helpful feedback about communication outputs relating to fund activity, particularly a desire for more visual assets to demonstrate impact.

The only area where feedback included 'very dissatisfied' responses related to accessing real time information on grants awarded through the portal. However, there was also acknowledgement that the value of the portal will increase as it develops.

There was also feedback on the frequency of information being sent to donors, with a note that increased frequency would be appreciated.

There was some interest in learning more about how funds align with the UN Sustainable Development Goals (SDGs).

Our Actions

We will review how we communicate with grantees and how they report on progress, with support offered to provide more visual and anecdotal material in reporting.

The portal is still relatively new, and as such is still being reviewed. We will ensure that donor feedback helps to shape how the portal develops in the future.

We will review the frequency that information on new awards is provided to donors.

We are developing a new impact framework that will make it clearer how funds and outputs/outcomes align with the UN Sustainable Development Goals (SDGs).

Key stats from donor survey

(Community benefit funds)

100%

of donors said they were satisfied with the responsiveness of our staff

100%

of donors were satisfied with the feedback about their fund activity and spend

83%

of donors were satisfied with the overall functionality of the new donor portal

85%

were satisfied with the quality of information received regarding their fund

4.43

our score out of five from donors who believe their fund is making a difference in the community

83%

of donors were satisfied with their experience of accessing real time information on their fund

100% of donors said they would recommend us to others.

Is there anything you think we do really well?

- “Customer care, community knowledge, professionalism, due diligence, transparency. I feel that Foundation Scotland is a strong organisation with good services and principles.”
- “Excellent staff and an organisation with community development at their heart.”
- “The portal is great and allows quick and easy access to what we need.”
- “Your support in setting up a ground breaking fund on South Kyle has been extraordinary and I hope will result in transformative change for the area and maybe for Community Benefit funds in general.”

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

- “Increased contact about distribution of funds.”
- “Would encourage retrospective inclusion of fund information onto the portal when possible to track all fund data. Would also encourage clearer criteria for how projects/grants are aligned to SDGs, including the specific SDG targets.”
- “Really just want to be able to shout about the great things our funds are doing and feel the lack of collateral - e.g. film and photos is holding us back.”

5. 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 44 responses were received.

Our Findings

In general, our work with panels appears to be built on good foundations, with overall appreciation of support offered by Foundation Scotland staff. One of the main issues facing panel/board members is engaging fully with the online portal. The portal is designed to improve the ease of decision making, discussion and providing feedback, and hence to make life simpler and easier for volunteer panel/board members. There is clearly more needs to be done to address engagement, underpinned by the support we offer. We are also aware that there are very localised issues with broadband provision, and will continue to take that into account in how we ensure panel/board members feel that their needs are being met in the best way for them.

Our Learnings

Although our new online portal is still being fine tuned, over half of panel members (61%) have yet to engage with it. There is clearly more we can do to address this.

There is still very much an appetite for continued or increased meetings, including face to face.

There was feedback relating to panel balance, diversity and lack of new members, with some helpful suggestions as to potentially broadening recruitment.

Feedback showed that there was an appetite for training and learning opportunities, for example in relation to good grant making practice (using the IVAR principles) and exploring unrestricted funding.

Panel members felt the level of information provided to help inform decisions was 'about right', and we will continue to monitor this.

Our Actions

We will review the support we provide, with regular online portal training and better on-boarding for new panel members.

We will look at producing a user guide to make engagement with the portal as straightforward as possible.

We will continue to engage with panels as and when they say is useful to them, and at times when they may need more support.

We will review how we support panels to be more inclusive and with their recruitment processes in localised areas, taking into account their suggestions.

We will review training and learning opportunities available to panel members where they feel it would be of benefit.

Key stats from our panel survey

39%

of panel/board members have been in their role for more than 3 years

25%

of respondents chose 'being of service to my community' as the most enjoyable part of their role (from multiple choice)

4.23

the rating out of 5 on how effective panel/board members feel their panel is

34%

of those panel members who had used the online portal were satisfied with ease of use

25%

of those panel members who had used the online portal were satisfied with the tech support on offer

27%

of those panel members who had used the online portal were satisfied with the efficiency around decision making



89%

of panel members told us they were able to make informed decisions based on the information in assessment reports we provided

Can you provide any more feedback on your role as a panel/board member?

- “ There are difficulties with some panel members not being on line. ”
- “ I would like to learn more about what works well in other Boards to enable us to improve... ”
- “ The mixture of panel members needs to be broadened, whilst appreciating that the pool of people prepared to commit is small. I would encourage senior high school pupils to join for example, to give another perspective and opinion, perhaps as part of their curriculum. ”

Can you provide any feedback on Foundation Scotland?

- “ Foundation Scotland and our panel are working well together. I do think we could do with another round of meetings as with only two, it can be a long wait for applications to be put before the panel and decided on. ”
- “ Need to recruit our local representative - staff have worked extremely hard to support us, but it is undoubtedly better to have someone closer to us. ”
- “ Having such varied funds and applications makes the role more interesting. I have found staff at all levels to be extremely supportive and this has helped me to feel like part of the team. ”

6. 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, which are constantly under review.

Our new online portal is still in development, based on the feedback we receive, and we will endeavour to provide support, advice and training so that its full potential can be realised.

The response rate to this survey was higher than our last stakeholder survey, partly due to the longer period of dissemination. Where possible, we also alert stakeholders in advance of future surveys, so they know what to expect.

The staff at Foundation Scotland would like to thank everyone who took the time to complete our 2022 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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