The funding experience survey

#HowYouFundMatters

Introduction

[The Institute for Voluntary Action Research](#) (IVAR) and more than 100 independent grantmakers (who have signed up to be more [Open and Trusting](#) in how they make and manage their grants) want your views on how they can improve your funding experience. What behaviours, processes and practices help to reduce the wasted time, effort and stress of fundraising and funding relationships? What changes could they make, and which of these matters most? This survey will take 10-15 minutes to complete – and your view WILL have a direct influence because:

- These grantmakers have committed to using the results of this survey to improve what they do
- You can be part of our work on holding them to account for this promise
- Your replies are completely anonymous, so you can give honest feedback without any worries
- We will publish the results and work with all our networks to persuade many more funders to take your feedback on board
- We will send you the results of the survey, so you know what the sector thinks (if you choose to share your contact details with us)

Please tell us ONLY about your experience of applying for funding from independent grantmakers and NOT about what it's like applying to public bodies like your local authority, health authority or central government.

If you would like to read the questions before you start the survey, you can find a PDF copy of the questionnaire here. Please submit your answers using this online survey.

Prize Draw
All participants who complete the survey can opt-in to a prize draw to win one of 10 prizes of £100 for their organisation. You are eligible if your organisation is one of the following:
- Charity registered with the [Charity Commission for England and Wales](#), [OSCR](#) or the [Charity Commission for Northern Ireland](#)
- Community Interest Organisation (CIO)
- An 'Exempt Charity'
- A Community Interest Company (limited by guarantee without share capital)

You can enter into the prize draw at the end of the survey.

This survey has been created by IVAR (the Institute for Voluntary Action Research). We work with charities, foundations and public agencies to strengthen communities across the UK through action research. Find out more about us on our website: www.ivar.org.uk/about-us . If you choose to share personal data (e.g. name and email address), this will be treated in accordance with our [Privacy Policy.](#) All insights or comments shared publicly will be anonymised, and we will not publish anything that could identify you.

Background

Please tell us a little bit about your organisation's income and funding.

1. What was your organisation's income in your last financial year? Please tick one. [single code]
   a. Up to £10,000
   b. More than £10,000 up to £100,000
   c. More than £100,000 up to £1m
   d. More than £1m up to £10m
   e. More than £10m up to £100m
   f. More than £100m+

2. Approximately, what proportion of your funding comes from independent grantmakers? Please tick one. [single code]
   a. None
   b. Less than 10%
   c. 10-50%
   d. Over 50%
   e. All of our funding comes from independent grantmakers
   f. Don't know

When you are applying for a grant

The following four questions ask you about your experience of **applying for grants from independent grantmakers.** There is space at the end of this section if you want add comments on any of your answers

3. Deciding whether to apply and what to ask for

To what extent do you agree or disagree with these statements on **deciding whether to apply for a grant?** [Likert scale where 1 is 'Strongly disagree' and 5 is 'Strongly agree']

Statement	1	2	3	4	5
Most grantmakers do not give clear enough information about their funding priorities and what matters most to them in making their decisions – so it is hard for us to judge our chances of success					
I prefer it when grantmakers have a simple first stage application form and only ask for more detail if we are invited to their second stage					
I would find it helpful if grantmakers told us what percentage of applications get through each stage of their application process					
I wish all grantmakers would let us pick up the phone and ask questions before we decide whether to apply for a grant					
If a grantmaker says that we can choose to apply for project funding or for core costs, I usually go for project funding because I think it gives us a better chance of success					

4. Making an application

To what extent do you agree or disagree with these statements on **making an application?** [Likert scale where 1 is 'Strongly disagree' and 5 is 'Strongly agree']

Statement	1	2	3	4	5
I prefer an application form that allows me to write about our work and why we need a grant in a way that makes sense to me instead of having to answer lots of very specific questions					
I prefer grantmakers to ask a lot of specific questions in their application form because it makes me feel more confident that I have given them all the information they want					
Grantmakers shouldn't ask for detailed information – like an activity plan or a monitoring and evaluation plan – until they know there is a good chance that they are going to fund us					
Grantmakers ask a lot of questions about our financial position, our policies and how we are managed, but it isn't clear to me what they are looking for in this information and how it influences their decisions					
I think most grantmakers have no idea of what it's really like running a charity like ours and of how we manage to keep going					
I don't think grantmakers can get a real idea of what we do from an application form – I prefer them to speak to us or visit (when that's safe and possible) before making a final decision					

5. Waiting for a decision and getting feedback

To what extent do you agree or disagree with these statements on **waiting for a decision and getting feedback?** [Likert scale where 1 is 'Strongly disagree' and 5 is 'Strongly agree']

Statement	1	2	3	4	5
Grantmakers usually take a reasonable amount of time to make decisions about our applications for funding					
Grantmakers should always tell us why they have turned us down for a grant. Otherwise we can't learn how to make better applications					
Sometimes it feels like grantmakers hide behind computers. Being able to have an honest conversation, even if we've been told our application is unsuccessful, is the sign of a good funder					
In my experience, most grantmakers prefer to make grants to organisations they already know					

6. What matters most to you when you are applying for a grant?

This is a list of what independent grantmakers within the Open and Trusting community are doing to **improve the way they make grants**. Please choose the **four** that would make the most difference to you.

Publishing clear information about their funding priorities, how decisions are made and your chances of success	
Working to reduce the time and effort organisations have to put in to applying until they have a reasonable chance of being successful	
Answering questions and giving advice to organisations before they decide to make an application	
Designing application forms that are clearer and easier to fill in	
Cutting down the amount of detailed information they ask for	
Being more transparent about how they think about risk and how it affects their decisions	
Publishing clear timetables and deadlines for funding programmes and making sure busy organisations have a realistic amount of time to apply	
Making decisions about grants within a timescale which is reasonable given the size and urgency of the funding	
Opening up their decision-making so that more lived experience and more diverse voices are heard in decisions about grants	
Giving meaningful feedback to organisations when their applications are unsuccessful	

If you want to say more about any of your answers so far, please use this space. Otherwise, please skip to the next question.

After you have received a grant

The following four questions ask you about your experience of independent grantmakers **after you have received a grant.** There is space at the end of this section if you want add comments on any of your answers

7. Types of funding

To what extent do you agree or disagree with these statements on **types of funding**? [Likert scale where 1 is 'Strongly disagree' and 5 is 'Strongly agree']

Statement	1	2	3	4	5
We need more grantmakers who trust us to spend their money well on what is most needed and don't tie us down to detailed project plans or budgets in advance					
Giving us unrestricted funding – money that we can spend on anything within our charitable objects – would make a huge difference to our ability to respond to changing circumstances and the things that matter most to our community/cause					
Getting more multi-year funding is really important to the stability of my organisation and our work					

More grantmakers should be willing to give grants to help us pay for professional help with our fundraising					

8. Funding relationships

To what extent do you agree or disagree with these statements on **funder relationships**? [Likert scale where 1 is 'Strongly disagree' and 5 is 'Strongly agree']

Statement	1	2	3	4	5
Most of our grantmakers are very clear about the relationship they want to have with us					
Most of our grantmakers respond quickly if we have any questions or need their input					
Even when it's not a priority for me, I find it hard to turn down requests for feedback, invitations or offers of support from grantmakers in case it affects our chance of future funding					
I feel that most of our grantmakers are genuinely interested in our work, understand the challenges we are facing and want to support us as best they can					
It is hard to give critical feedback to grantmakers unless we can be sure our comments are completely anonymous					
I'm confident that most of our grantmakers use our feedback to improve how they do things					
Grantmakers tend to communicate with us using clear and concise language					

9. Monitoring and progress reports

To what extent do you agree or disagree with these statements on **monitoring and progress reports?** [Likert scale where 1 is 'Strongly disagree' and 5 is 'Strongly agree']

Statement	1	2	3	4	5
I don't think many grantmakers understand how much time and energy it takes to respond to all their different monitoring requirements					
Very few grantmakers are flexible about how we report to them on our progress or the deadlines they give us					
It would make a big difference if we could produce one report every year on our progress and outcomes as an organisation and send it to all our funders instead of individual reports					
I know that most of our grantmakers read and make use of the progress reports we send them because they give us feedback					

10. What matters most to you?

This is a list of what independent grantmakers within the Open and Trusting community are doing to improve the way they **manage their grants and grant relationships**. Please choose the **four** that would make the most difference to you.

Giving unrestricted or flexible funding so that organisations can make their own decisions about how best to respond to changing priorities and needs	
Giving grants for more than one year	
Agreeing with funded organisations what each can expect from their relationship – including type of contact and how often they will keep in contact with each other	
Trusting organisations to manage and deliver their work well and not getting involved in micro-managing activities or budgets	
Respecting the pressure on organisations' time – being realistic about their expectations and only asking for information and reports that they really need and will use	
Wherever possible, accepting monitoring, progress or outcome reports that organisations produce for their own use or for other funders	
Putting more emphasis on having conversations about outcomes and what organisations have learned than on formal written reports	
Offering organisations choices about how, how often and when they report	
Giving feedback on the reports that they ask funded organisations to send	
Asking organisations for feedback on their own performance as a grantmaker and telling them the changes they have made as a result of what they have heard	

If you want to say more about any of your answers about **your experience of receiving grants** from independent grant makers, please use this space. Otherwise, please skip to the next question.

And finally …..

11. Do you have experience of being funded in a way that feels open and trusting? Yes/No/Not sure

12. In one sentence, please tell us the biggest difference being funded in an open and trusting way makes to your organisation. [Open]

Background

Please tell as a little bit more about your organisation to help us understand how different kinds of organisation experience independent grantmakers.

13. Is your work …. ? Please tick all that apply:

    a) Local
    b) Regional
    c) National
    d) International

14. Where is your organisation's registered address? Please tick one:

    e) East Midlands
    f) East of England
    g) London
    h) North East
    i) North West
    j) South East
    k) South West
    l) West Midlands
    m) Yorkshire and Humberside
    n) Scotland
    o) Wales
    p) Northern Ireland
    q) Outside the UK
    r) N/A- please specify

15. Is your organisation led by any of the following groups (50% or more of leadership and trustees identify with this group)? Please tick all that apply:

    a. Black or minoritised communities
    b. Faith communities
    c. Migrants
    d. Deaf or disabled people
    e. Women
    f. LGBT+ people
    g. People who are educationally or economically disadvantaged
    h. Another group not listed here (please specify)
    i. Not applicable / none of the above / prefer not to say

Stay in touch

16. Would you be happy for us to stay in touch with you? If you choose to share your details, please be reassured that they will not be linked to your survey response in any way. If you would like to be entered into the prize draw, you will need to select 'yes' at this question and provide us with your details. Yes/No

17. (If yes) Please enter your details:
   - Name:
   - Organisation:
   - Email Address:

18. Please select the ways in which you're happy for us to get in touch [tickbox-multi code]:
   - Hear about the results of this survey and what we are doing next
   - Help us to hold funders to account – we'll be resourcing and training charity professionals to review the progress of our 100 *Open and Trusting Grantmakers*
   - Institute for Voluntary Action Research newsletter – we share events, updates and research insights which we hope are practically useful to charity leaders and professionals, roughly every quarter
   - Enter into the prize draw for a chance to win one of 10 prizes of £100 for your organisation

19. Would you like to be entered into the prize draw for a chance to win one of 10 prizes of £100 for your organisation? Yes/ No

20. (If yes) To be eligible for the prize draw, you must be registered as one of the below organisations. Please select which option applies to your organisation:
   - Charity registered with the Charity Commission for England and Wales, OSCR or the Charity Commission for Northern Ireland
   - Community Interest Organisation (CIO)
   - An 'Exempt Charity'
   - A Community Interest Company (limited by guarantee without share capital)
   - None of the above

Thank you for taking part in this important survey! We really appreciate you taking the time to respond to this survey and look forward to reviewing your feedback and comments.

If you would like to get in touch with a member of the research team regarding this survey and your involvement in future research, please email Keeva Rooney at keeva@ivar.org.uk, and for any comms or general enquiries, please contact Natalie Corlett at natalie@ivar.org.uk.