

Applicant perceptions research: survey findings

Trustee debrief
20th September 2023

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Pilgrim
Trust



Research objectives

1. To explore grantees' and unsuccessful applicants' perceptions of The Pilgrim Trust, its role and core values.
2. To understand grantees and unsuccessful applicants' experiences of the application, monitoring and reporting processes and any 'pinch points'.
3. To understand and explore differences in perceptions among different groups across the above points.
4. To discover what grantees and unsuccessful applicants feel The Pilgrim Trust should be doing differently and identify others in the sector who it could learn from.

Summary of key findings

- The Pilgrim Trust is a respected funder that is seen as supportive, helpful and approachable. Applicants praised the Pilgrim Trust for working in areas that many other funders don't, for your support of early-stage projects, your UK-wide funding and your straightforward application process. Grantees, in particular, were very positive about how supportive Pilgrim Trust staff were – many recounted helpful phone conversations when considering their application, and a sense that you wanted to understand them and were on their side.
- 87% of grantees consider the application process to be excellent or very good – this is a very high level and compares very well to the benchmark. Unsuccessful applicants have a similar view to the benchmark – 25% consider the process excellent or very good.
- 94% of grantees believe the application process to be reasonable for the size of grant they were applying for, suggesting there are few concerns about the amount of time it takes to complete the application among grantees.
- Grantees and UAs believe the Pilgrim Trust is better than other funders in the areas of approachability, ease of the application process, information about the grants and the speed of the decision. The Pilgrim Trust scores less well on 'understanding us as grantees / applicants' and 'restrictiveness of grant programmes'. In these areas it is not that you are seen as worse than others, but more likely to be seen as 'about the same' as other funders.
- One of the main challenges the Trust faces is working with a number of smaller, often volunteer-led, organisations. These organisations struggle to find the time and do not have the experience of applying for funding. Many of these organisations see this as a barrier to applying for funds from the Pilgrim Trust.
- There were a number of comments about the Pilgrim Trust needing to boost its profile and the profile of its grantees. One grantee spoke about wanting to tag you in posts and another wanted to see you promoting their own work on your channels. There were also comments about the Pilgrim Trust promoting the heritage and conservation sector more broadly.

Methodology at a glance



Online survey of grantees and unsuccessful applicants



22nd May – 16th June 2023

Grantees

158

Emails sent

97

Responses

59%

Response rate

Unsuccessful applicants

127

Emails sent

33

Responses

26%

Response rate

- We have included a **‘benchmark average’** on some slides based on research conducted with **14** other funding organisations **since 2013**
- The sample size of the benchmark is approximately **10,800 applicants**, although this varies according to the question asked

John Ellerman
Foundation



The Wolfson*
Foundation

the
Tudortrust



01

Perceptions of the Pilgrim Trust

Words or phrases that come to mind when thinking of the Pilgrim Trust (Top 20 mentions)

Heritage	31	Caring / kind / compassionate	10
Supportive	26	Clear / concise / transparent	8
Helpful	24	Open to feedback / communication	8
Conservation / preservation	21	Professional	8
Approachable / accessible	20	Understanding	8
Friendly	14	Responsive to needs	7
Generous	13	Efficient	6
Focused / engaged	11	Reliable	6
Historic / established	10	Religious	6
Reputable / knowledgeable / expert	10	Fair / fairness	5



What does the Pilgrim Trust do well? (1)

Vital support for the sector

“Identify unique and important heritage projects, within exemplar institutions, that are at risk of not being supported, and that have long-term wider positive impacts for the sector.”

Grantee, £10m - £50m, Museums

“Does support some very worthy causes where there might not be other support.”

Unsuccessful applicant, £26k - £50k, Historic buildings and monuments

“Supporting early-stage projects - the ones who need help and support the most.”

Grantee, £1m - £5m, Historic buildings and monuments

“Make its funding available across the country. As a charity on a very remote area, we felt we were given a very fair chance and were delighted when the Chairman visited in advance of the grant decision being made.”

Grantee, £251k - £500k, Historic buildings and monuments

Clear, efficient communication

“I've found the Pilgrim Trust to be very responsive to queries. All the staff seem to genuinely want to help support grantees to make applications and secure funds.”

Grantee, £1m - £5m, Museums

“Communication was excellent, particularly as our project was adversely affected by Covid and the grant offer was due to expire before we could commence the work. Pilgrim worked closely with us to understand what our situation was, and to find a solution.”

Grantee, £101k - £250k, Historic buildings and museums

“My experience is far too limited to comment, but I did appreciate a speedy response to the application. And they did give a response even if it was negative. They also suggested a different route.”

Unsuccessful applicant, £11k - £25k, Historic buildings and monuments



What does the Pilgrim Trust do well? (2)

Supportive staff who want to help and understand applicants

“The **support and encouragement** I received from my first telephone conversation and onwards **was very helpful**. I felt as if the **Trust was really interested in our plans** and would assist if it could, as it did. It was clear in what was required.”

Grantee, less than £10k, Historic buildings and monuments

“Providing support where it is needed, not creating additional work streams to fund. **Good support, willingness to visit live projects that they fund.**”

Grantee, less than £10k, Historic buildings and monuments

“Clearly, **gives individual attention to applicants; wants to learn of their work, their challenges and opportunities.** Being available to encourage and support.”

Grantee, £51k - £100k, Museums

“Connections / relationship / trust - without overburdening grantees. **This, to me, is 'peak excellence' for funders.** We want to be in touch - we LOVE funders to understand us and what we do - we do want to be trusted (and we are transparent!) - we don't want to have onerous reporting. Our experience has been that the **Pilgrim Trust has done this.** Also - process - it's straightforward, timings are clear and very well outlined, a two-stage process is REALLY good, and claiming is easy.”

Grantee, £251k - £500k, Historic buildings and monuments

Straightforward application process

“**Online application process is one of the best.** Open criteria for grant applications.”

Grantee, £26k - £50k, Historic buildings and monuments

“Provide early-stage funding for projects. Focus on funding support for addressing key issues - options work, design work, business planning, governance. **Make the application process relatively simple and fast, the Stage 1 application process in particular is great!**”

Unsuccessful applicant, £251k - £500k, Historic buildings and monuments



Where might the Pilgrim Trust need to improve? (1)

Diversify and lengthen grants

“Variety of funds, make more available for smaller organisations (£10k-£100k funds)”

Grantee, £501k - £1m, Libraries and archives

“More ongoing/multiyear funding so we can plan ahead.”

Grantee, £1m - £5m, Museums

“More substantial funding on a continuing basis for heritage organisations which are often limited by the other funding partners they have to work with (and who slow things down considerably)”

Grantee, £11k - £25k, Historic buildings and monuments

Simplifying process for smaller orgs and providing feedback to UAs

“Bit more flexibility about reasoning given on the application and recognition that they are dealing mainly with volunteers”

Unsuccessful applicant, less than £10k, Country park

“Make the grant application process particularly the finance questions easier for amateurs”

Unsuccessful applicant, £26k - £50k, Historic buildings and monuments

Increase visibility of the Pilgrim Trust / projects

“Maybe greater presence across all the social media platforms rather than just one or two, so we can tag you more.”

Grantee, £101k - £250k, Heritage crafts

“It would be good to raise the profile of more projects funded by the Pilgrim Trust on its website.”

Grantee, £251k - £500k, Museums

“Promotion of itself and its grantees’ projects”

Grantee, £1m - £5m, Historic buildings and monuments

Release funds faster

“I think it would be helpful for grants to be paid in advance in line with most funders, rather than need to claim it back later.”

Grantee, above £50m, Historic buildings and monuments

“By donating the funding straight away - as the only fundraiser and only working 7 hours a week, it is sometimes hard to do all the follow up”

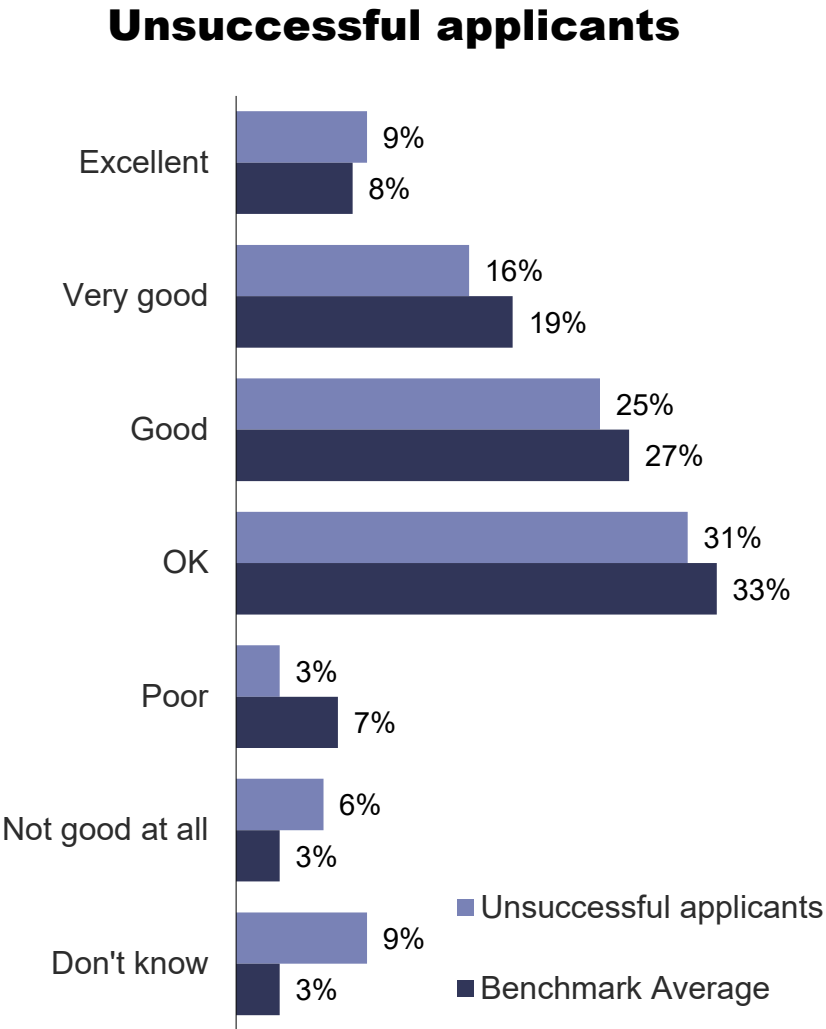
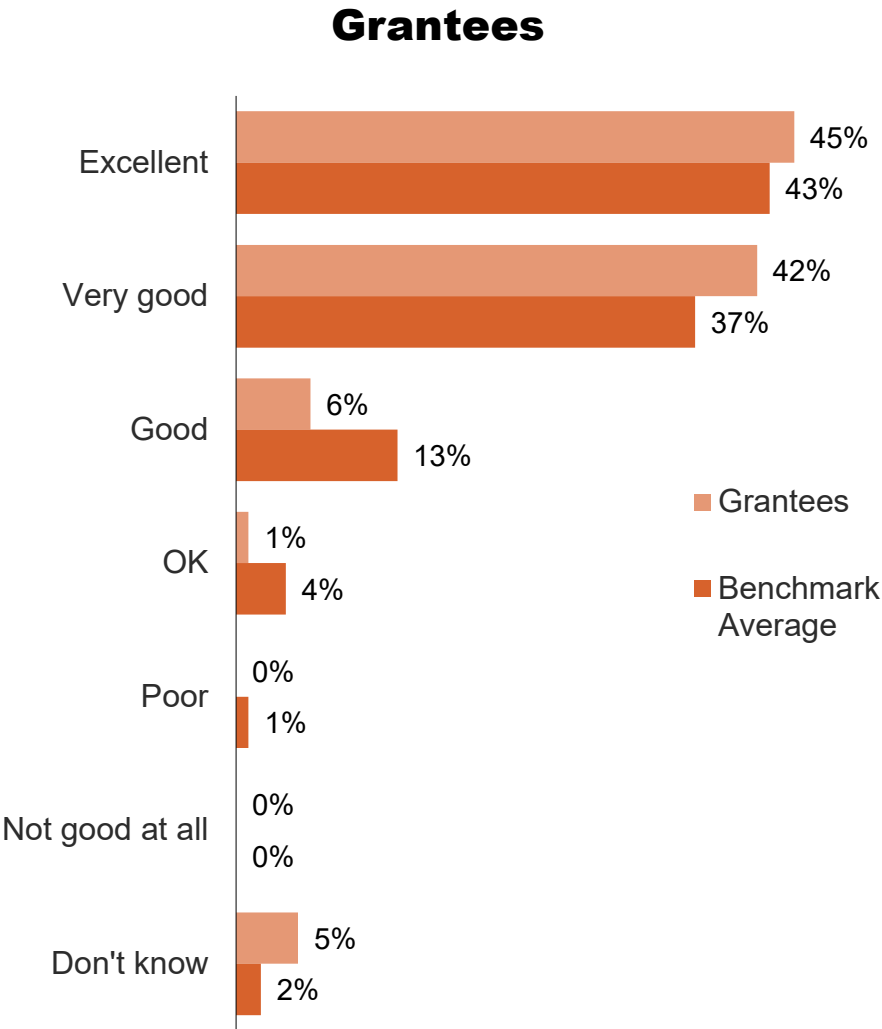
Grantee, £1m - £5m, Industrial, maritime and transport

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The application process

87% of grantees consider the application process to be excellent or very good

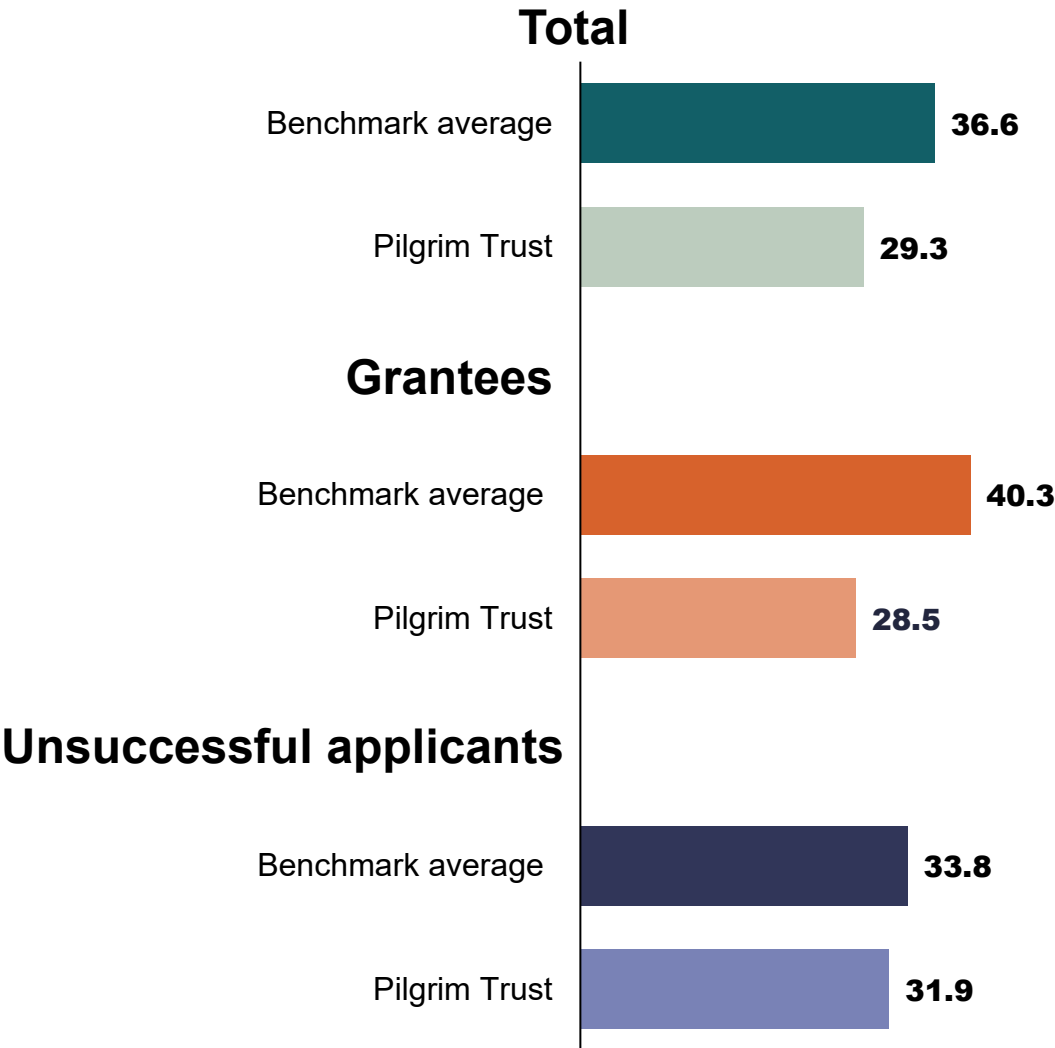
“How would you rate your experience of the application process?”



Both grantees and UA's spend less time on their applications than the benchmark average

“How many hours would you estimate you spent on the following aspects of your funding request / grant application to the Pilgrim Trust?”

Average number of hours (total)

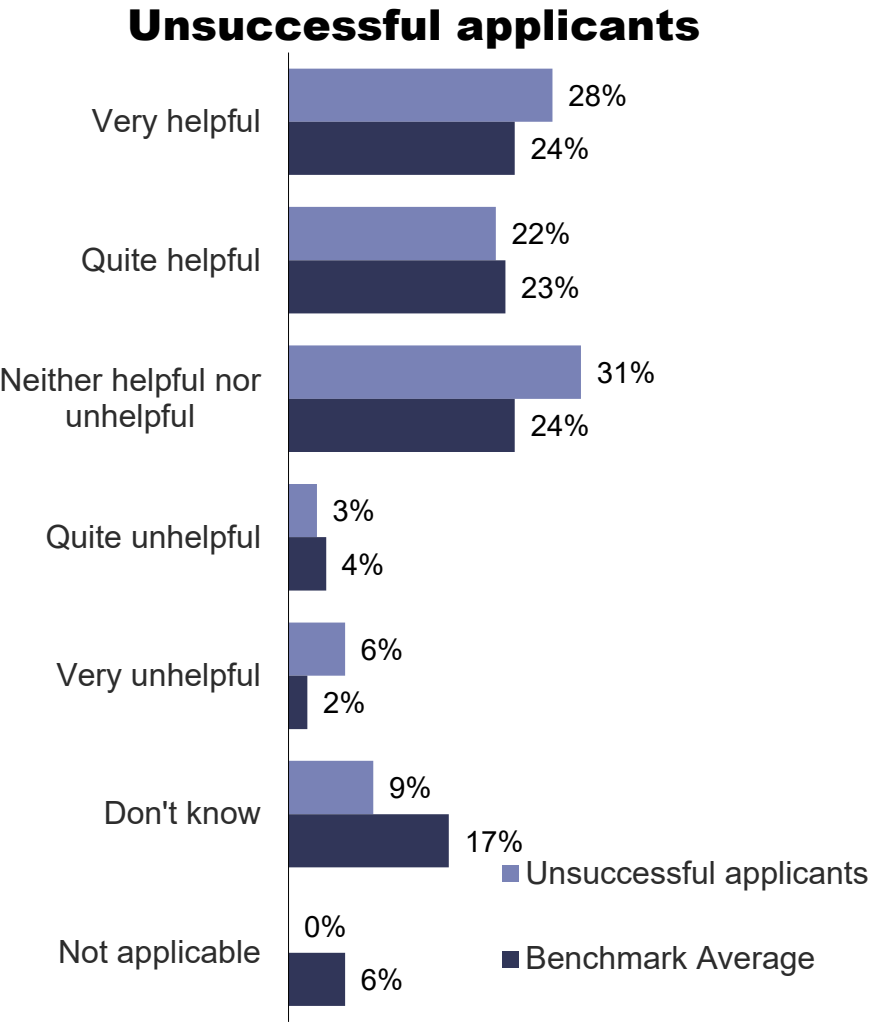
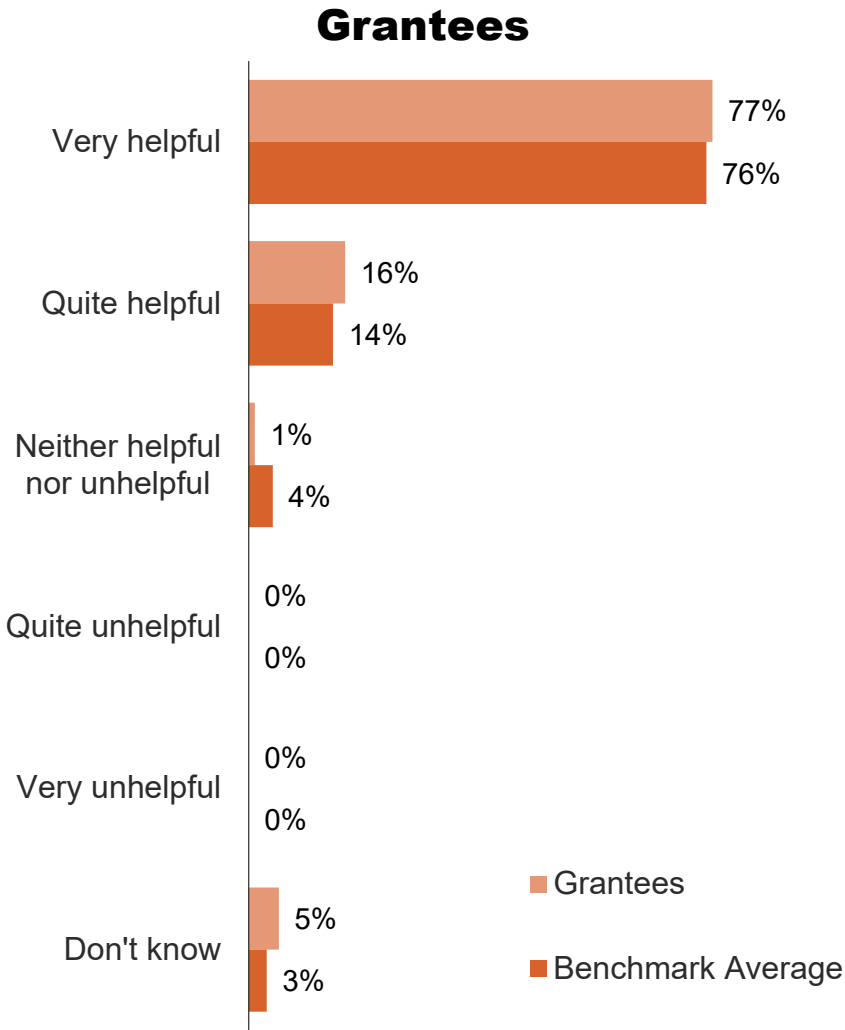


Source: nfpResearch survey June 2023 | Base: 10882 respondents

Source: nfpResearch survey June 2023 | Base: 32 to 97 respondents 16+, Great Britain

The Pilgrim Trust staff are seen as helpful by grantees; UAs found staff to be more ‘neither helpful nor unhelpful’ compared to the benchmark

“How helpful were Pilgrim Trust staff while making your application?”

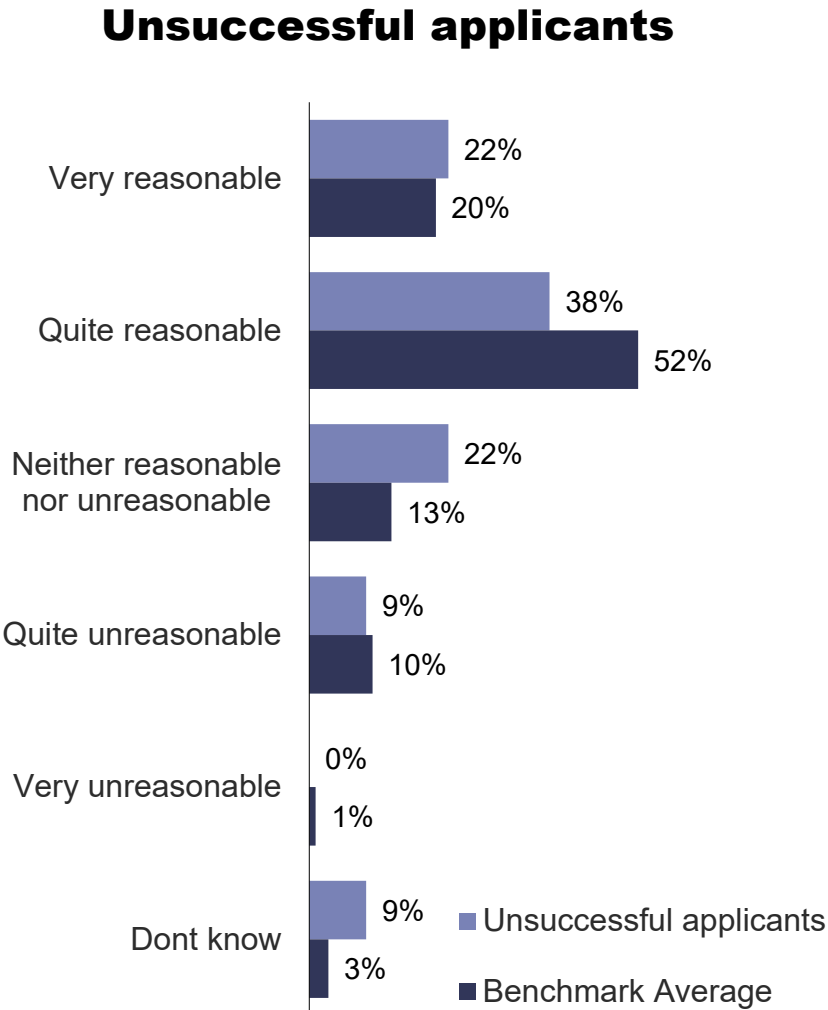
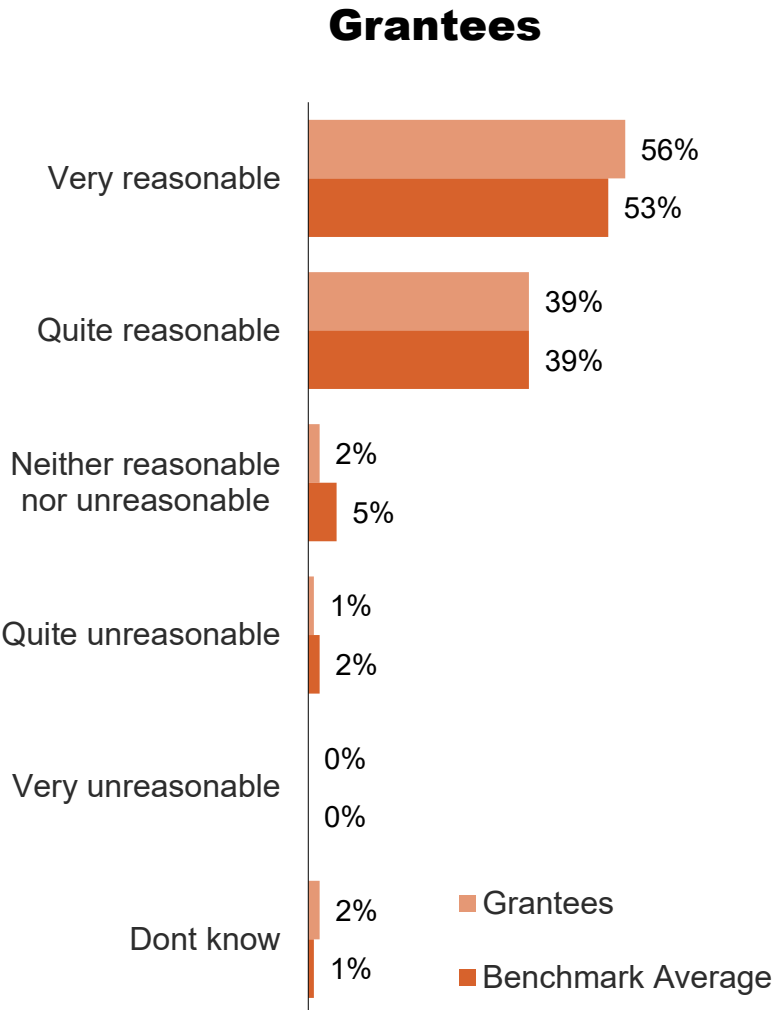


Source: Grant maker benchmark, nfpResearch | Base: 8,637 applicants

Source: nfpResearch survey June 2023 | Base: 32 to 97 respondents 16+, Great Britain

Grantees found the application process to be more reasonable and mostly in line with the benchmark averages

“How reasonable did the application process feel for the size of grant you were applying for?”



Source: Grant maker benchmark, nfpResearch | Base: 7,045 applicants

Source: nfpResearch survey June 2023 | Base: 32 to 97 respondents 16+, Great Britain

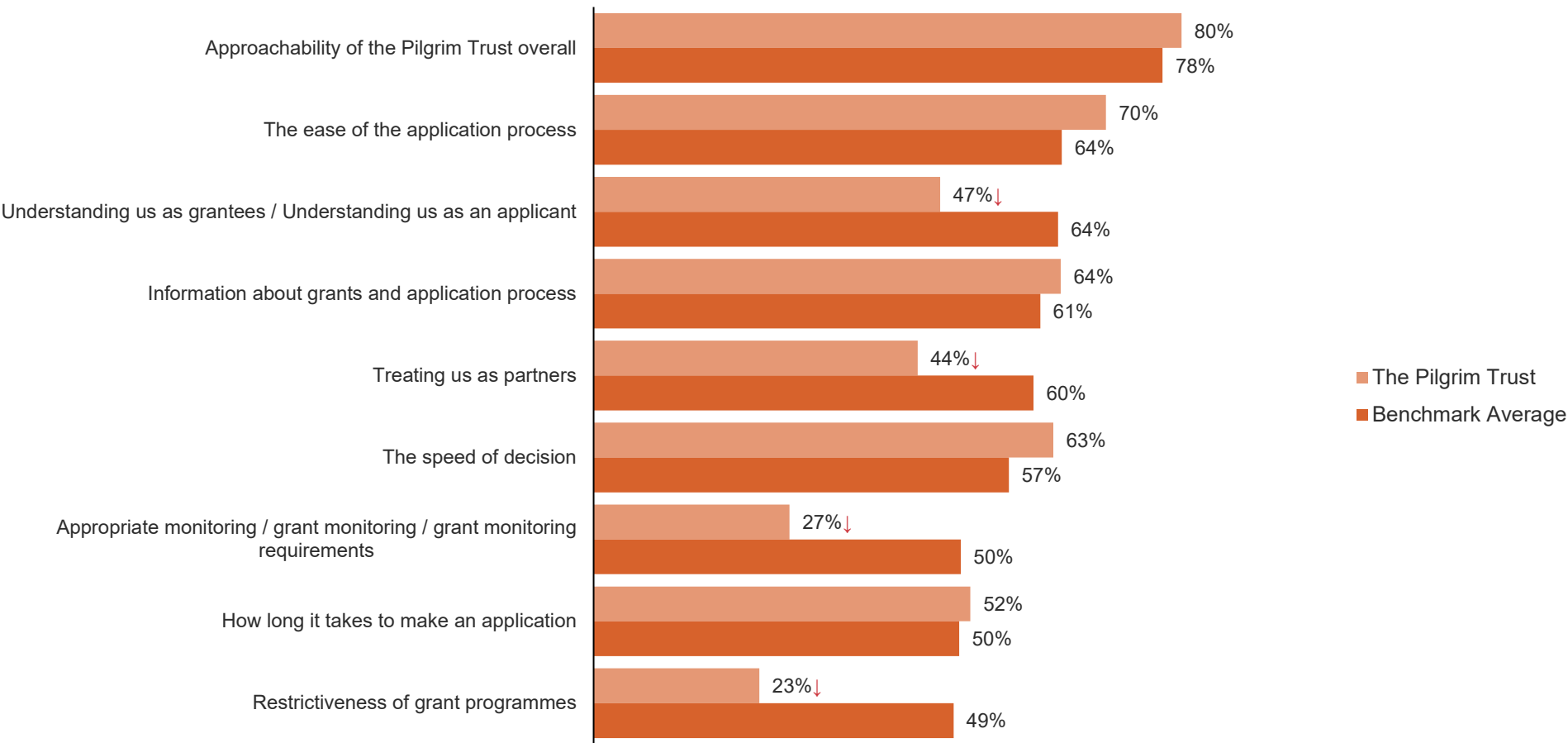
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Grantees' perceptions

You are performing well in most areas for grantees but could be better in the monitoring of grants and restrictiveness of programmes

"When you think about your experience of applying for and getting a grant with the Pilgrim Trust how would you say they compare with other grant-makers?"

Much better + Better

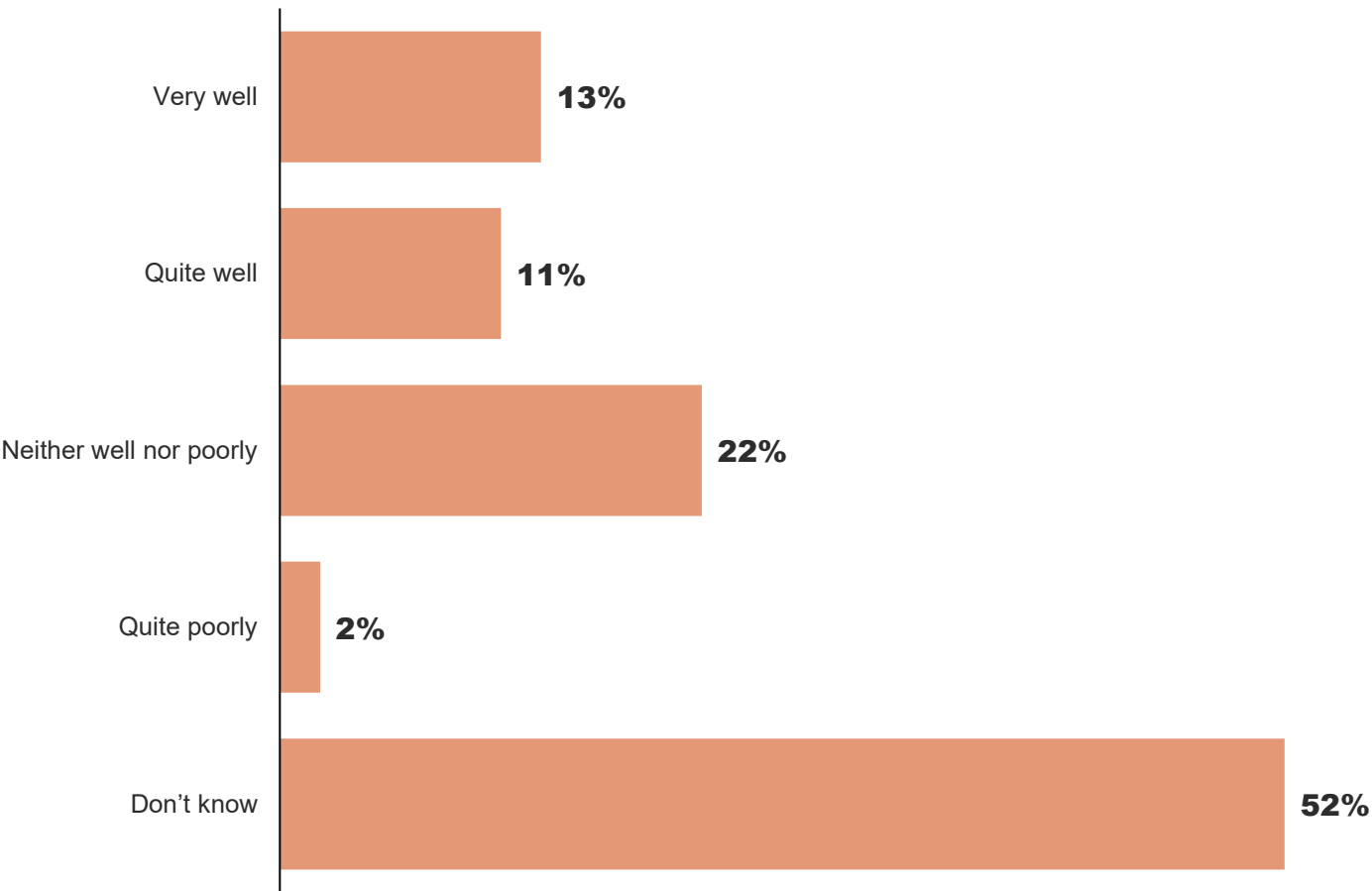


Source: Grant maker benchmark, nfpResearch | Base: 6,601 applicants

Source: nfpResearch survey June 2023 | Base: 97 respondents 16+, Great Britain

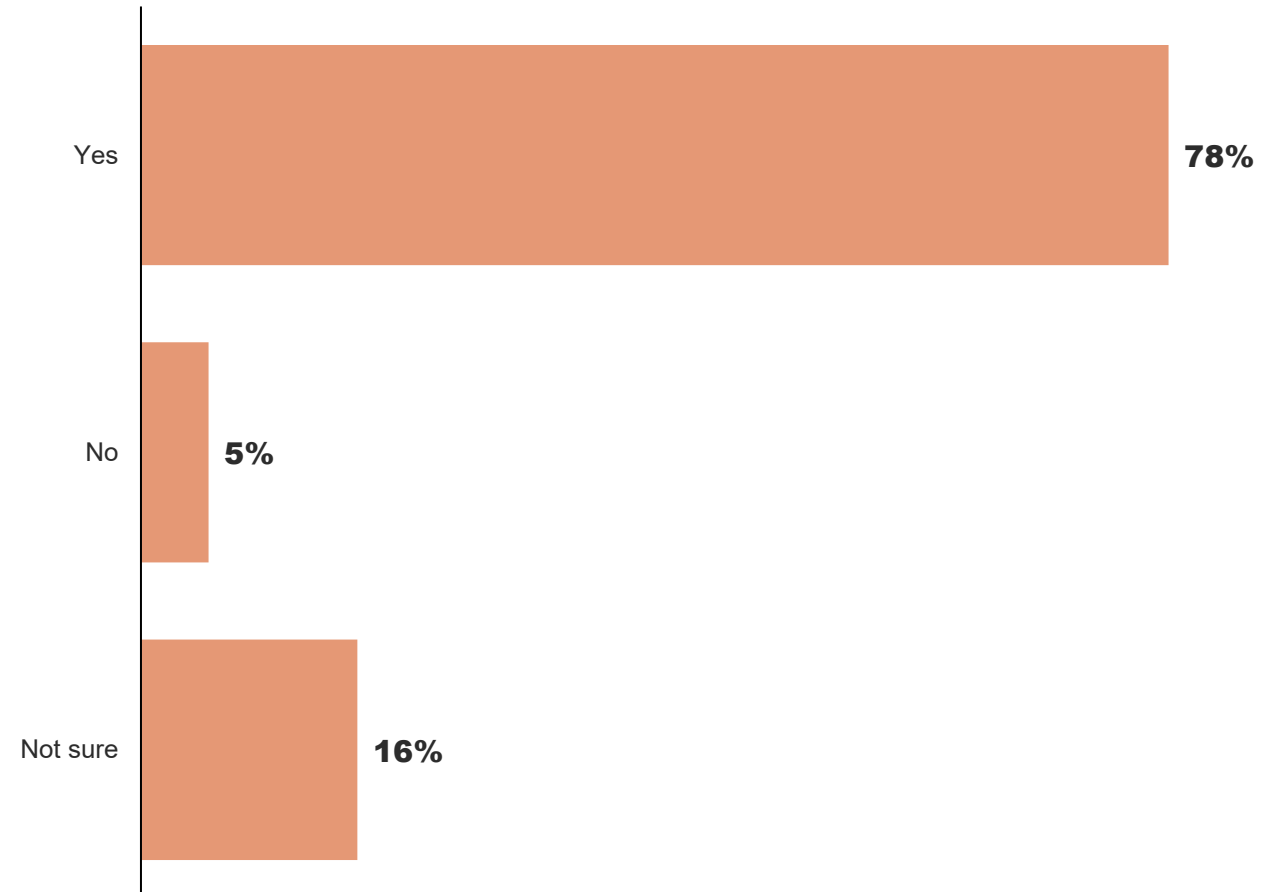
Just under a quarter (24%) of grantees felt the Pilgrim Trust shared grant news/success online well – 52% didn't know

"How well did the Pilgrim Trust share your grant news/success online?"



But 4 in 5 grantees think it is important for funders to promote the work of grantees online

"Do you think it's important for funders to promote the work of its grantees online?"



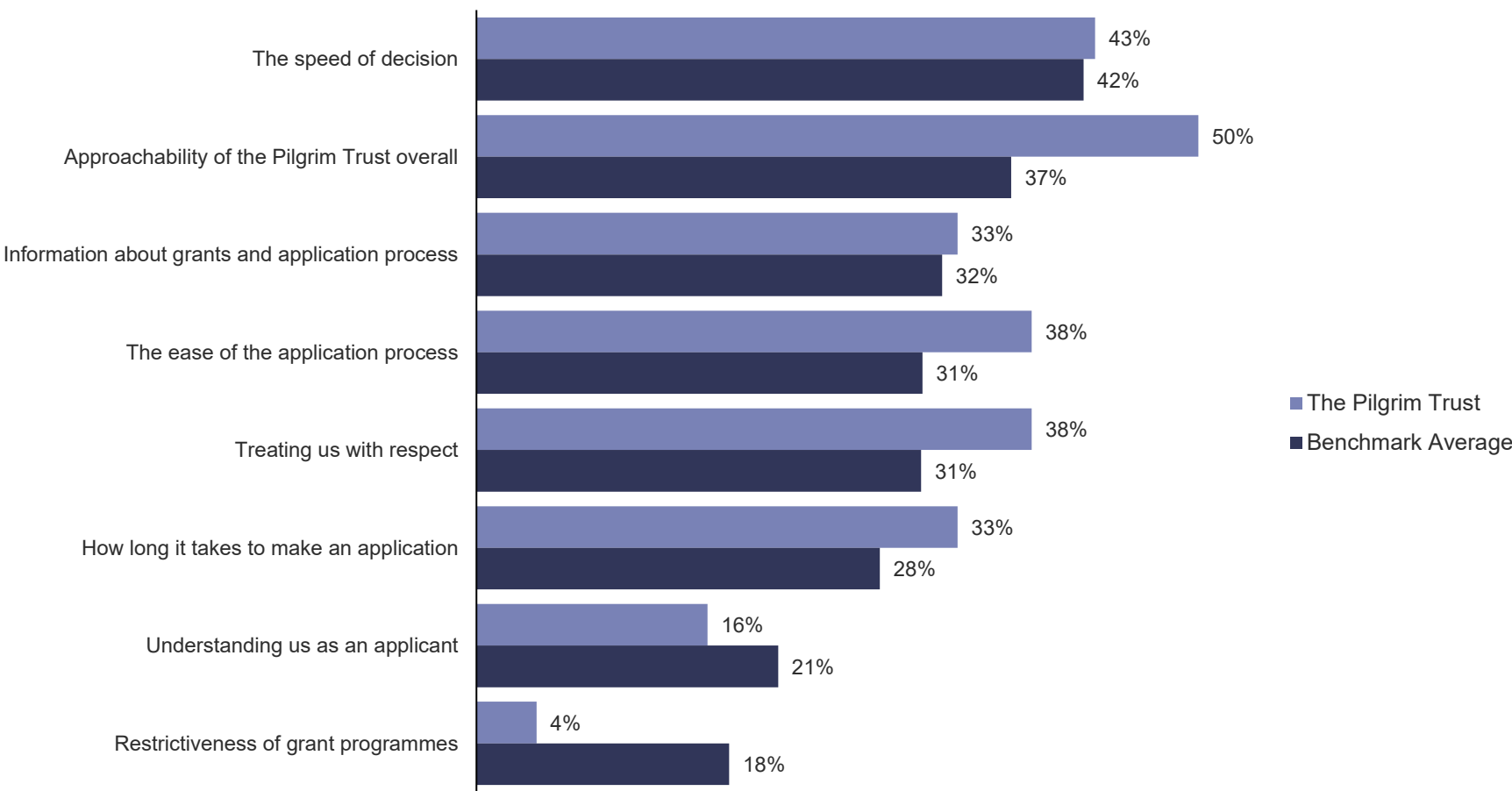
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Unsuccessful applicants

Areas where you outperform the benchmark for UA's are overall approachability, ease of the application and treating UA's with respect

"When you think about your experience of applying for and NOT getting a grant with the Pilgrim Trust how would you say they compare with other grant-makers?"

Much better + Better

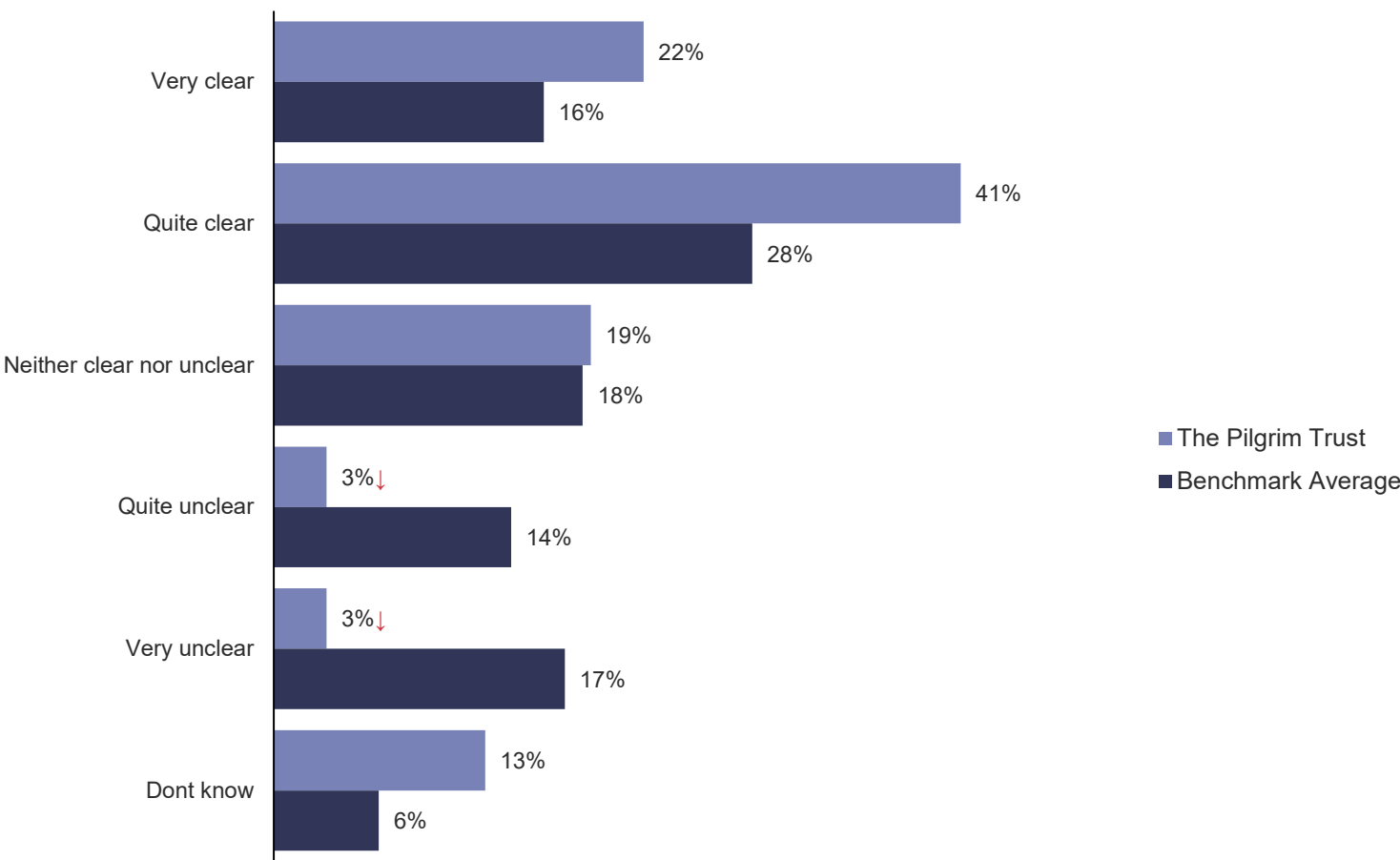


Source: Grant maker benchmark, nfpResearch | Base: 3,935 applicants

Source: nfpResearch survey June 2023 | Base: 32 respondents 16+, Great Britain

63% of UA's felt the basis for the decision to decline the application was clear; just over a fifth felt it was 'very clear' – compared to just 16% in the benchmark

"How clear was it why the Pilgrim Trust declined your application?"

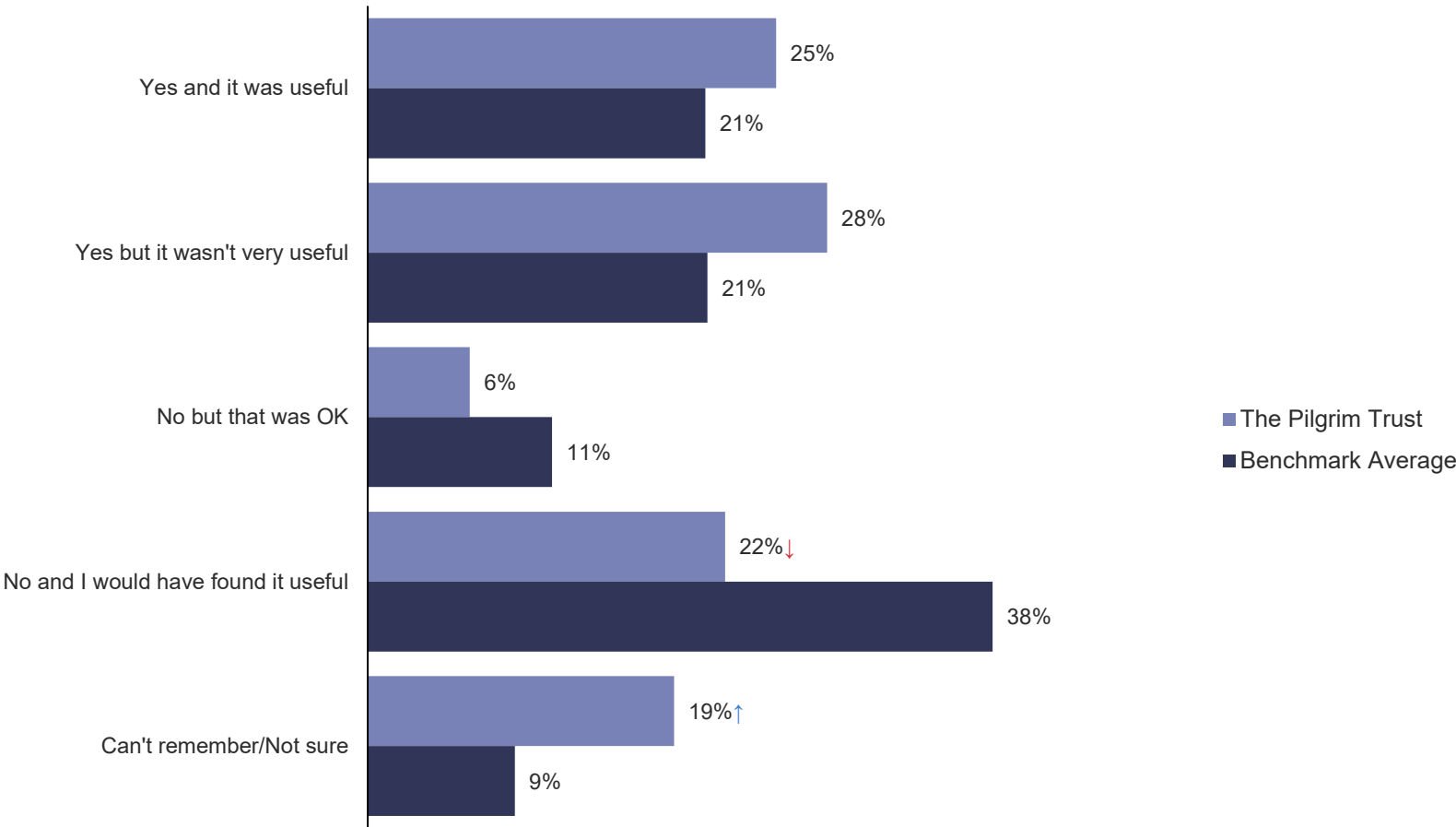


Source: Grant maker benchmark, nfpResearch | Base: 3,607 applicants

Source: nfpResearch survey June 2023 | Base: 32 respondents 16+, Great Britain

A quarter had useful on their application, 28% had feedback that wasn't useful. 28% didn't receive feedback at all.

"Did you receive any feedback on why your proposal was unsuccessful?"



Source: Grant maker benchmark, nfpResearch | Base: 3,600 applicants

Source: nfpResearch survey June 2023 | Base: 32 respondents 16+, Great Britain

Thank you.



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