

# Lloyds Bank Foundation

Grantees and applicants research 2021

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March 2022



# Methodology at a glance



Online survey of grantees and unsuccessful applicants



10<sup>th</sup> November – 3<sup>rd</sup> December 2021

## Grantees

589

Emails sent

377

Responses

64%

Response rate

## Unsuccessful applicants

569

Emails sent

234

Responses

41%

Response rate

- We have included a **'benchmark average'** based on research conducted with **9** other funding organisations **since 2013**
- The sample size for the benchmark average is approx. **7,000\***



John Ellerman Foundation

The Wolfson\*  
Foundation

the Tudortrust



LLOYDS BANK  
FOUNDATION  
England & Wales



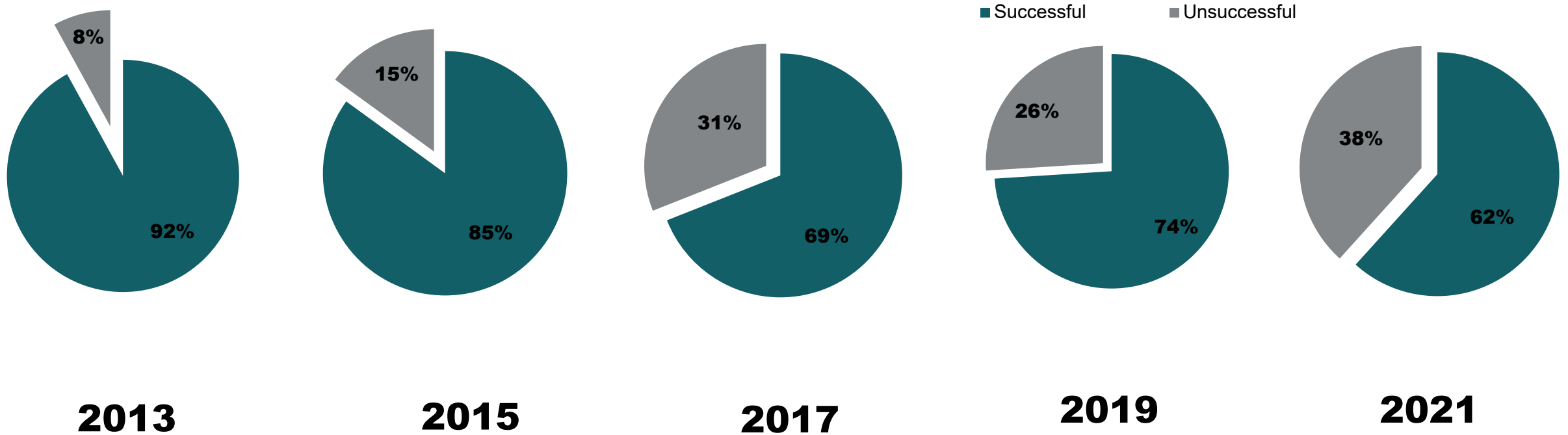
THE CLOTHWORKERS'  
FOUNDATION

\*Sample size can vary according to the question asked

# Key findings

1. There are two stories at play here – the grantee experience of working with the Lloyds Bank Foundation continues to be very positive, and in many cases better than ever. For unsuccessful applicants some metrics are at their lowest point since 2013.
2. Grantees continue to highly rate the LBF application process, with more rating it excellent/very good than in 2019, and better than the grant maker benchmark. When grantees compare you with to funders, the majority feel you are better or much better on all aspects of the grant experience. 85% say that LBF treats them as partners better, significantly higher than the benchmark average.
3. Slightly fewer unsuccessful applicants (UAs) rate the process as excellent/very good compared to previous years. A higher proportion of these applicants did not receive feedback with a lower number of UAs who had received it saying it was useful. UAs are also less likely to see Lloyds regional managers as helpful compared to previous years. Open ended responses also suggest that they feel LBF is too restrictive in what they can fund, while also expressing a desire to expand sector knowledge.
4. The DEI breaks highlight that unsuccessful applicants are more likely to be led by disabled people than grantee. UAs are also more likely to be supporting disabled people and LGBTQ+ than grantees.

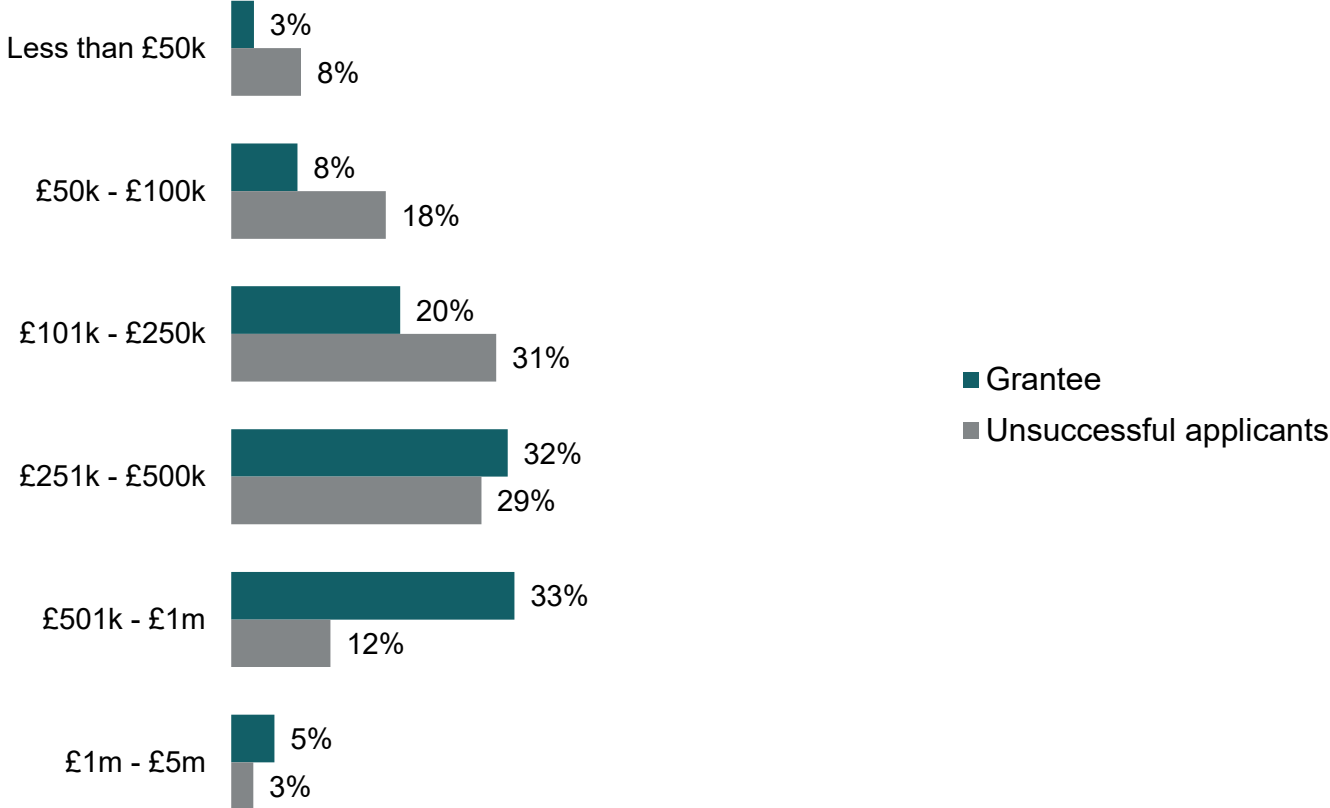
# Higher proportion of unsuccessful applicants in the sample



*"Were you successful with your most recent grant application?"*

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

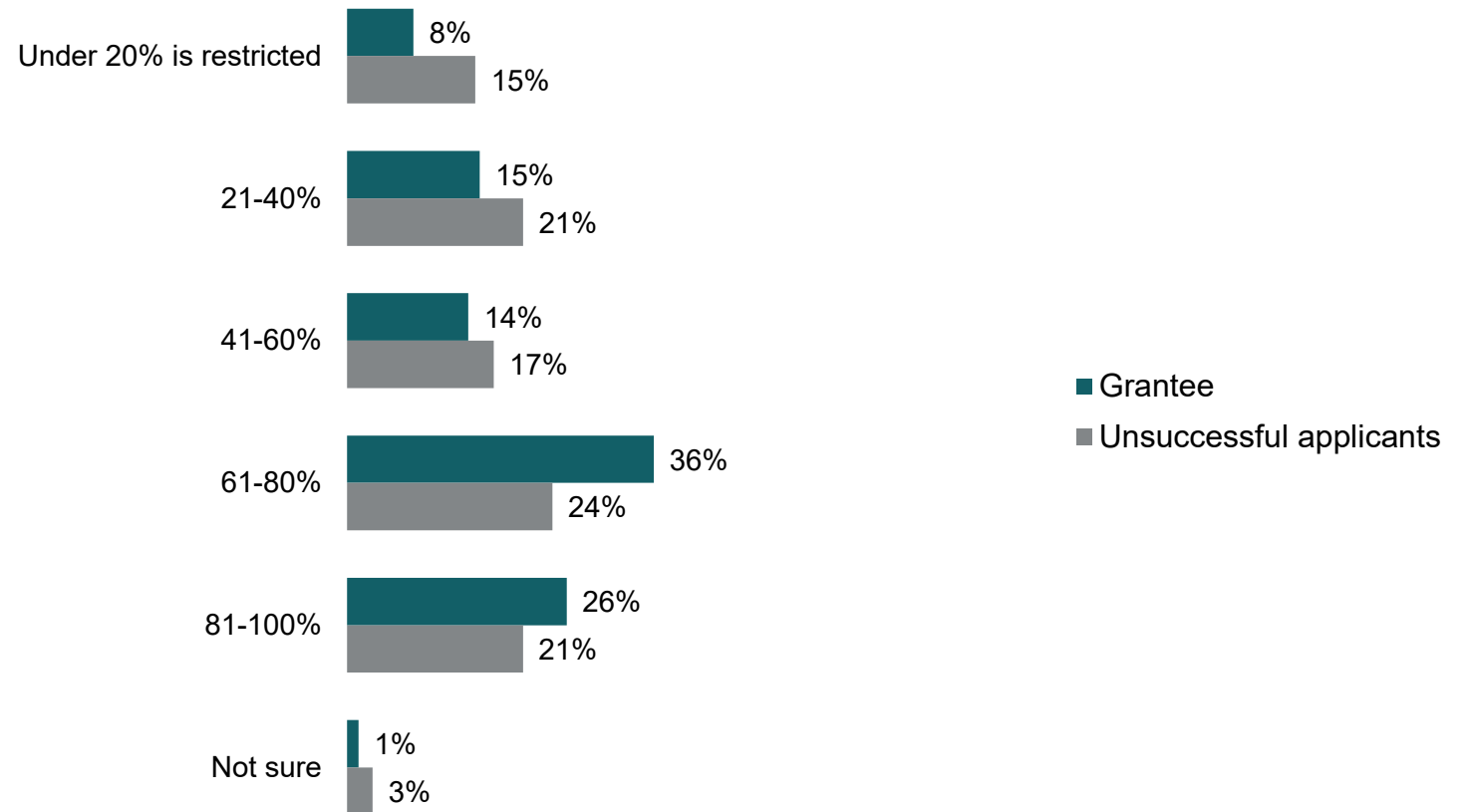
# A third of grantees had an income between £501k and £1m



“What is your organisation’s total annual income (approximately)?”

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

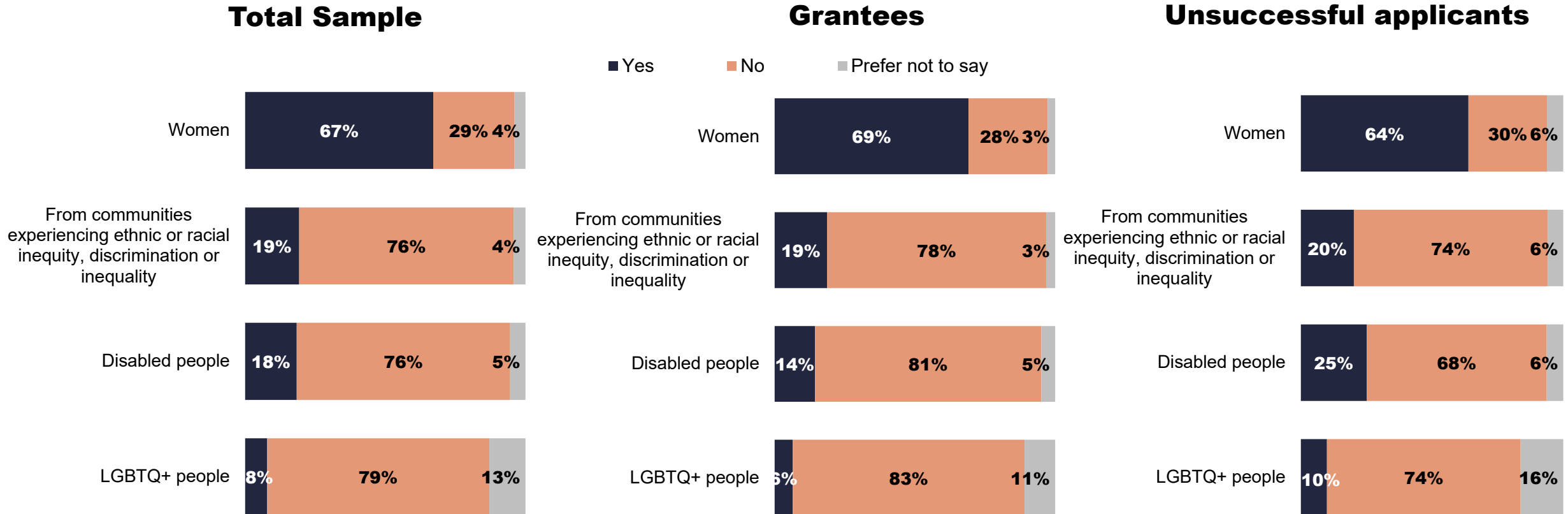
# Over 6 in 10 grantees said that over 60% of their income is restricted



*"What percentage of your income would you estimate is restricted in some way (e.g. funds a specific project or service)?"*

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

# Grantees are less likely to be led by disabled people than unsuccessful applicants

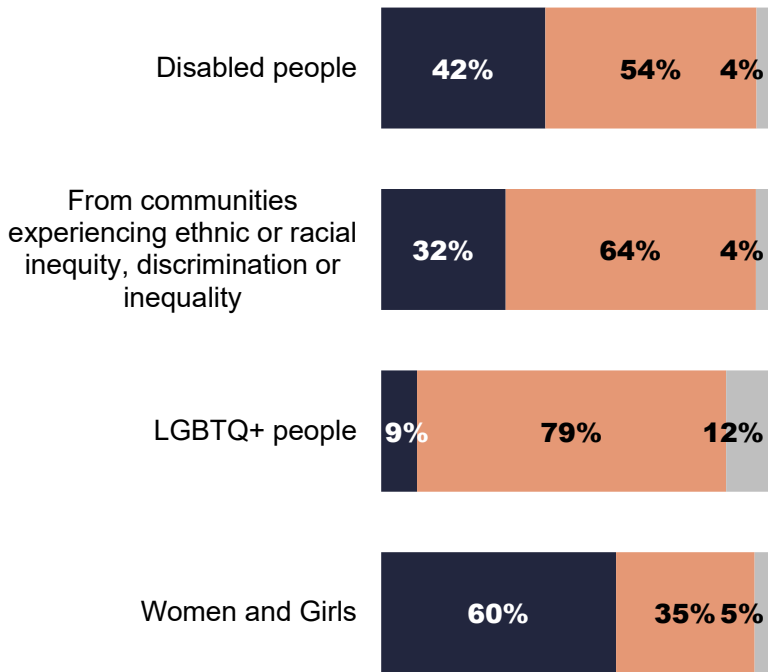


“Are the majority of your board and senior management from the following? By majority we mean that 50% or more of your Trustees and senior management are from this background. If your trustees and senior management belong to more than one group it is okay to answer 'Yes' to more than one category.”

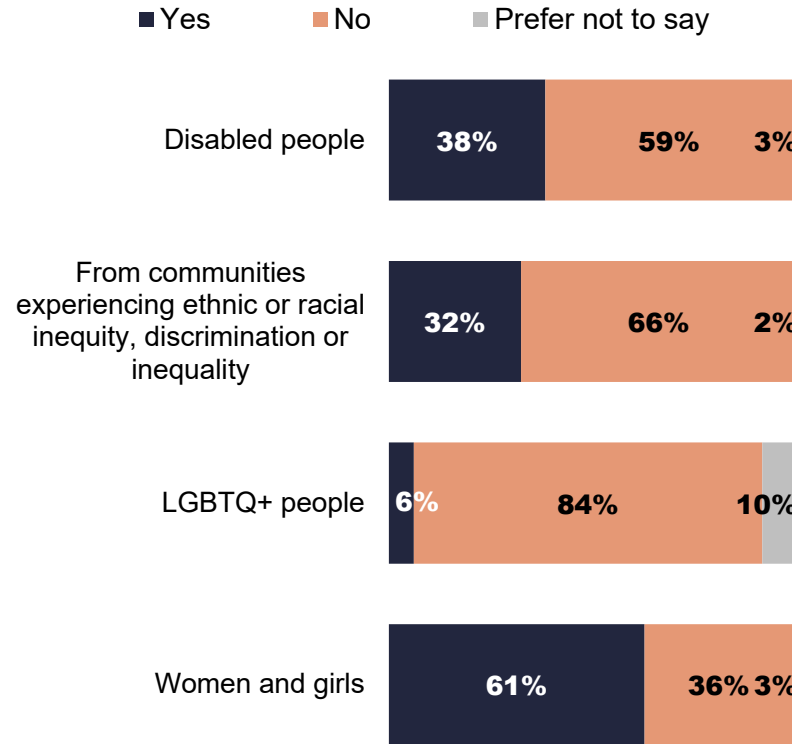
Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

# UAs more likely to be supporting disabled people and LGBTQ+ than grantees

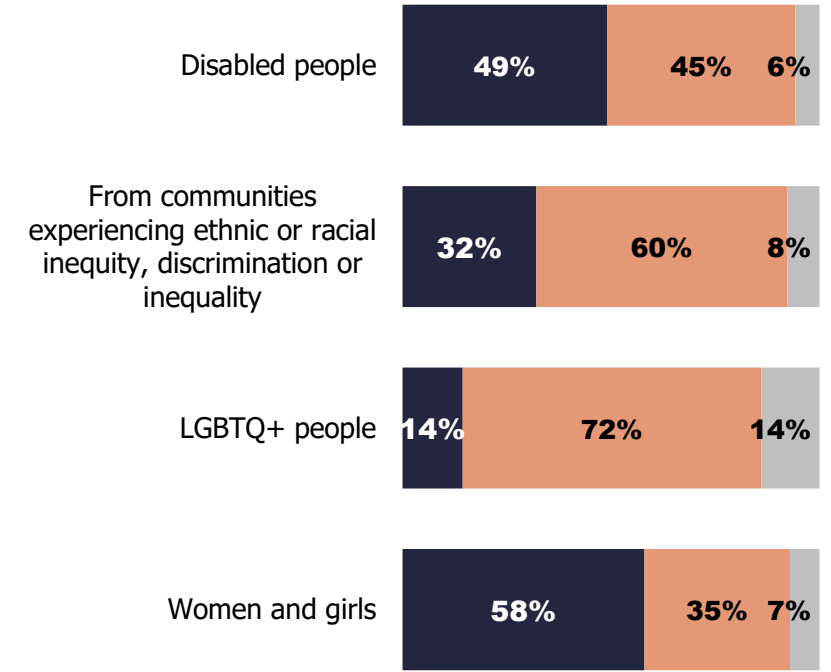
## Total Sample



## Grantees



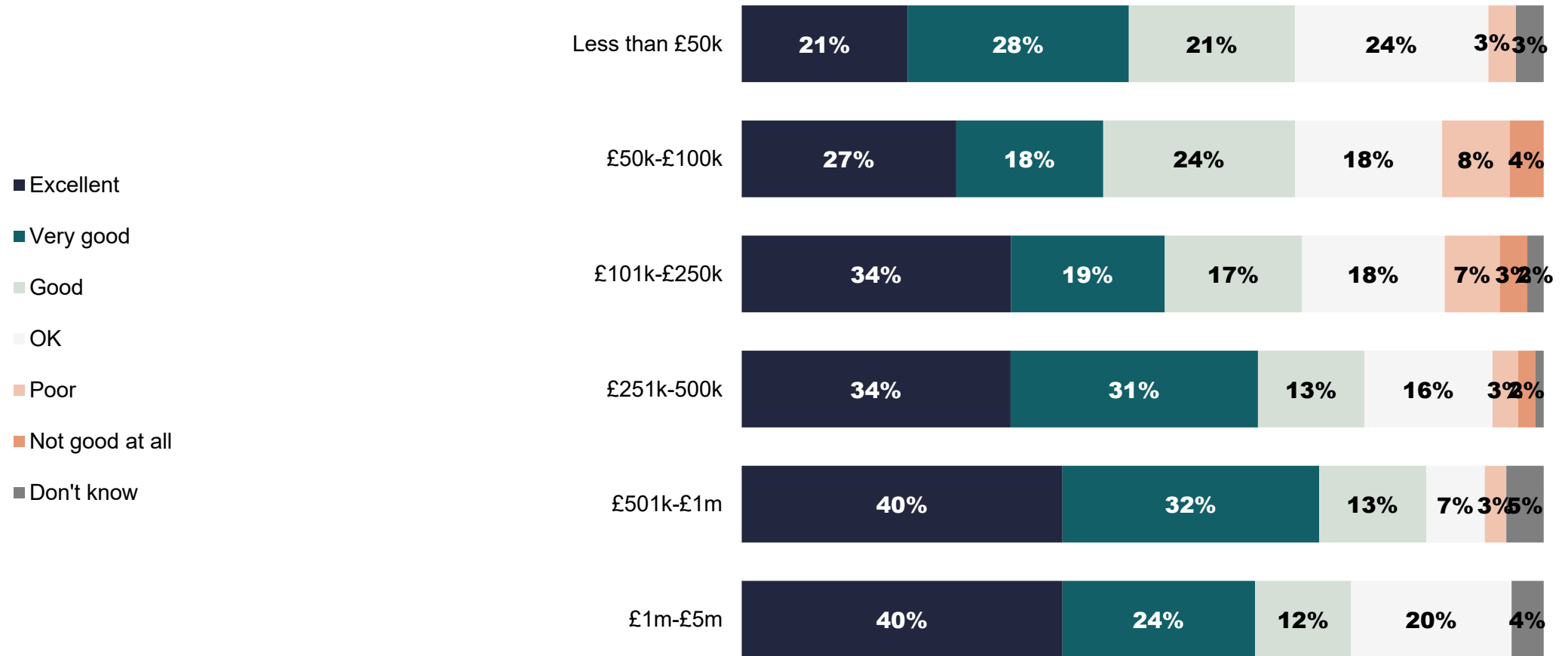
## Unsuccessful applicants



"Here we want to ask about the backgrounds of the people you support, whether they are the characteristics targeted by your organisation or not. If 50% or more of the people you support as a charity are from one particular group, then please answer 'Yes' in the questions below. The people you support may come from more than one group and it is okay to answer 'Yes' to more than one category. Are 50% or more of the people you reach?"



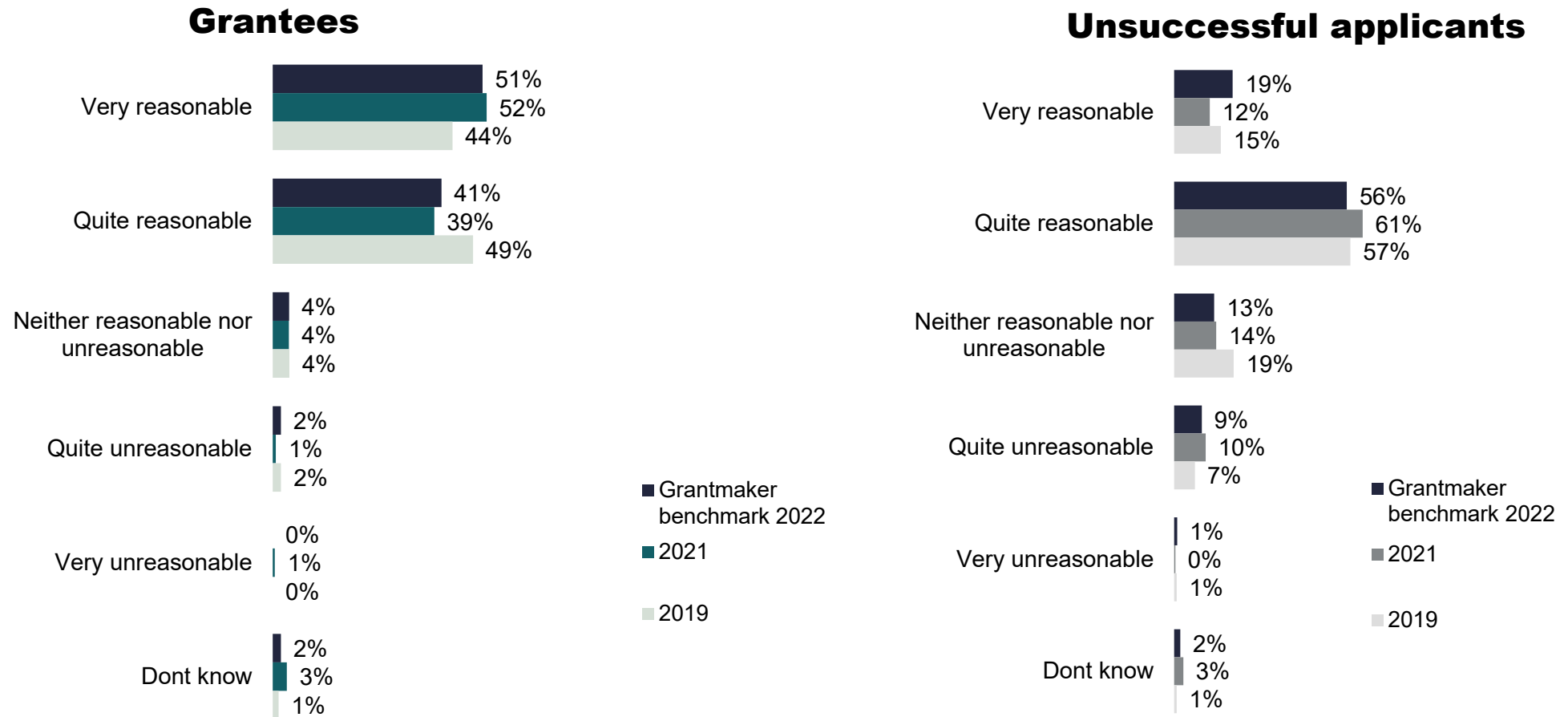
# Higher income organisations more likely to rate the process as excellent or very good



"How would you rate your experience of the application process?" By income

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

# Grantees and applicants feel that the process is reasonable, comparable to benchmark average



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

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBFEW applicants, Nov/Dec 21, nfpResearch. Base: 7,000 grantees/applicants across 9 grant-makers | Source: Grant makers benchmark, Dec 21, nfpResearch

# Comments generally positive about application process, especially staff, though some smaller organisations still felt process was too onerous

For those who had interaction with staff, broadly very positive

"We found this extremely helpful and accessible. **Staff were helpful and innovative** in helping us find solutions and in navigating the process."

*Domestic abuse, £50k-£100k, Grantee*

Some terminology was confusing

"We were told that Lloyds were looking for **more of a "Holistic Approach"** to our charity to receive funding. We ticked the boxes enough to get through to the next stage but felt this was slightly false hope as we explained what service we provided in the application."

*Learning disability, £101k-£250k, Unsuccessful applicant*

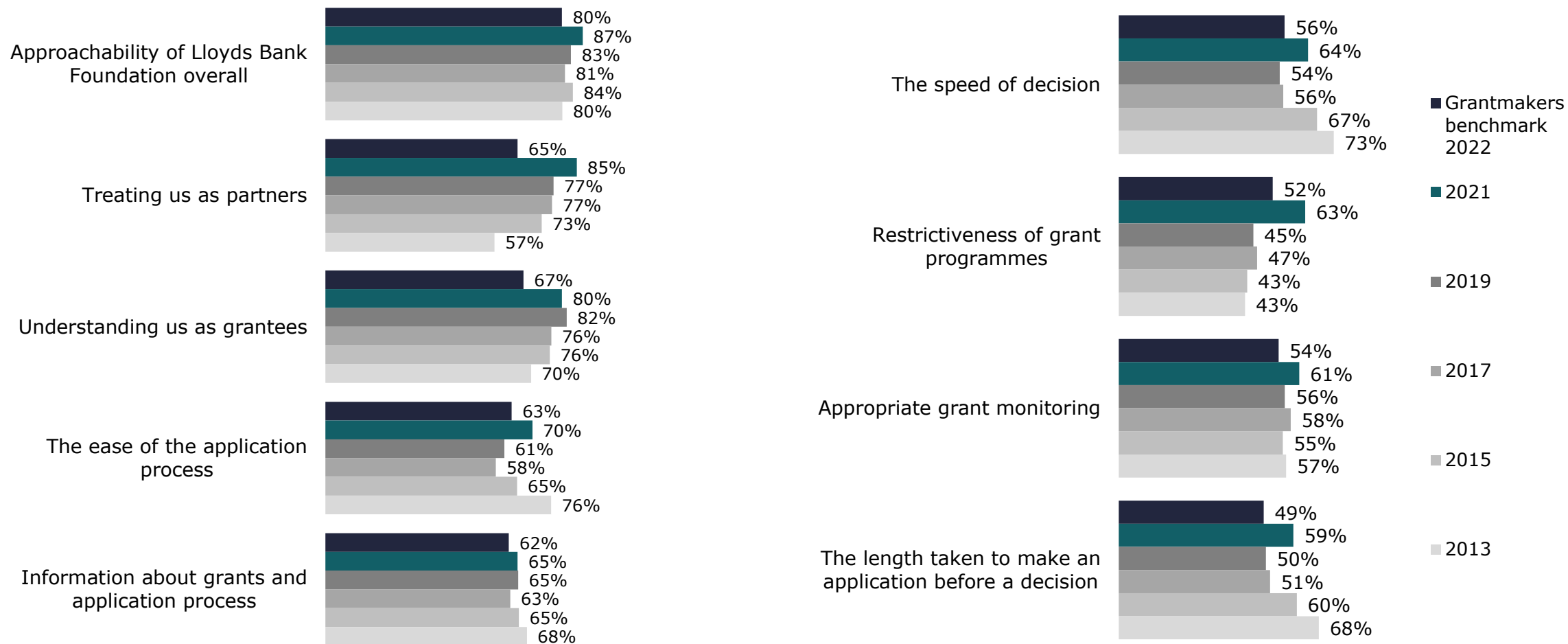
Process still too onerous for some smaller organisations

"I'm going to shoot from the hip here and give it to you straight ok? Smaller charities have precious few resources to spend on grant applications, so charitable **organisations like National Lottery and The Scottish Power Foundation are the ones to copy**. Why? Because they offer significant grant amounts for hassle-free and short application forms. That is a God-send for tiny charities like ours that spend almost every penny on the frontline. Time really is money, so please consider making your application process shorter ok?"

*Employment support, £101k-£250k, Unsuccessful applicant*

"How accessible and easy to understand was the application process for your organisation? What would have made the process easier for your charity, if anything?"

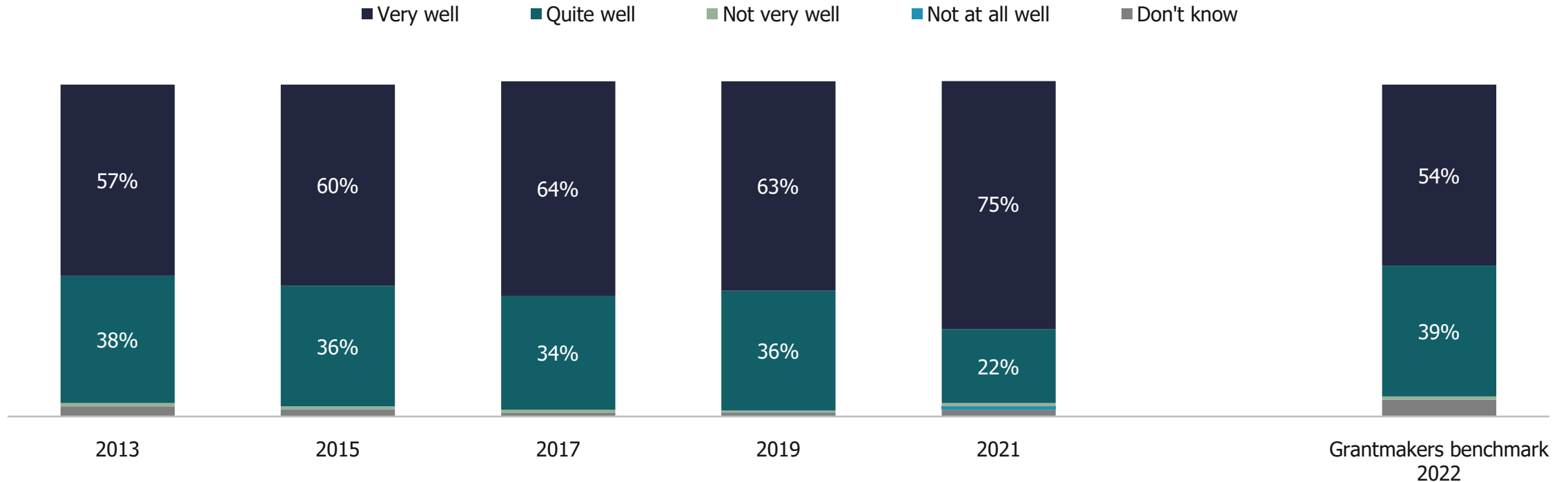
# Amongst grantees comparing you to other funders, LBF outperforms the grant-makers benchmark on every issue



“When you think about your experience of applying for and getting a grant with Lloyds Bank Foundation how would you say they compare with other grant-makers?” **Much better & Better combined**

Base: 377 grantees | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

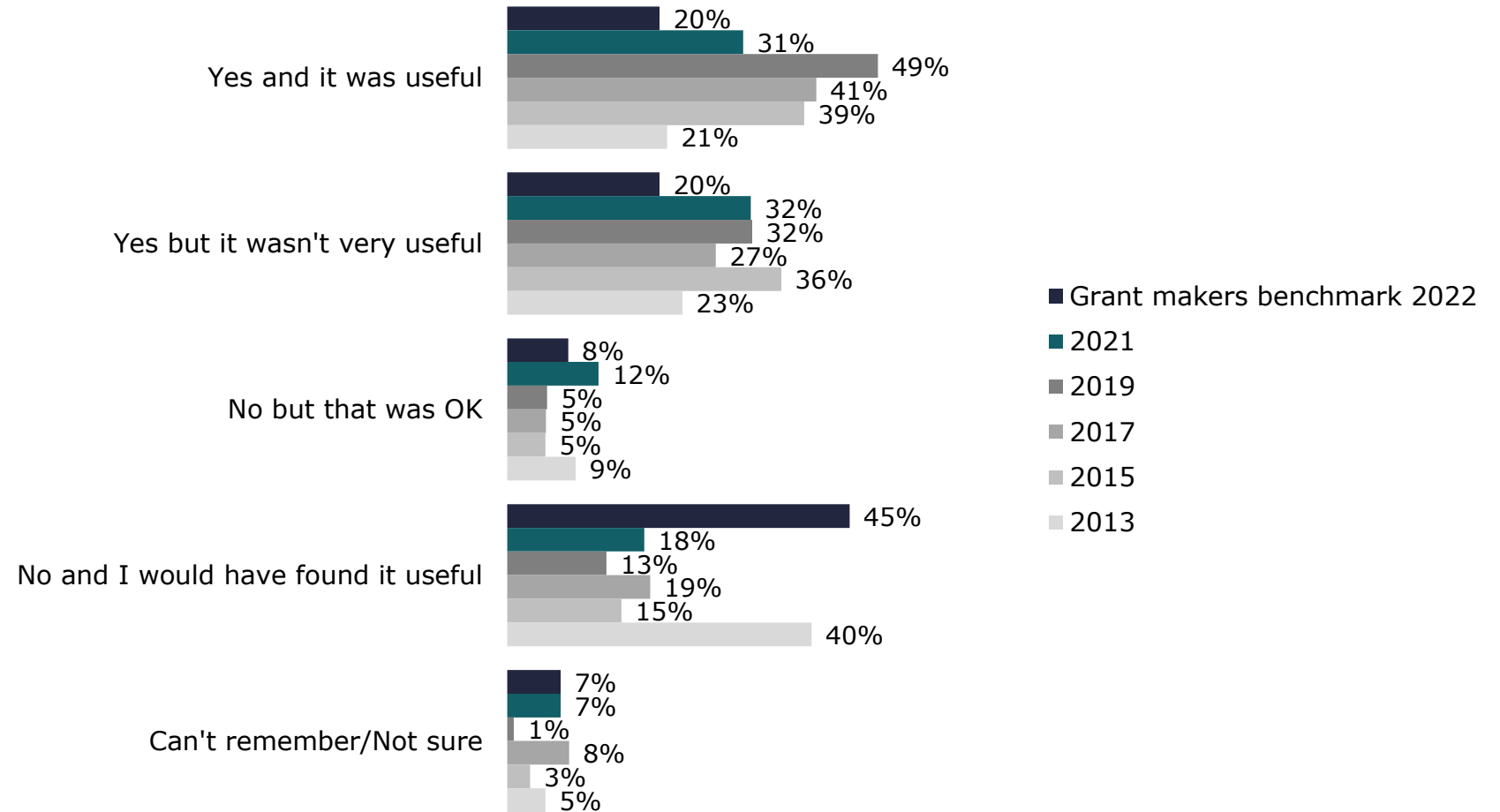
# Lloyds Bank Foundation compares favourably to the grant maker average in how well you understand grantees



“How well do you feel Lloyds Bank Foundation understands your organisation and its aims?”

Base: 377 grantees | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

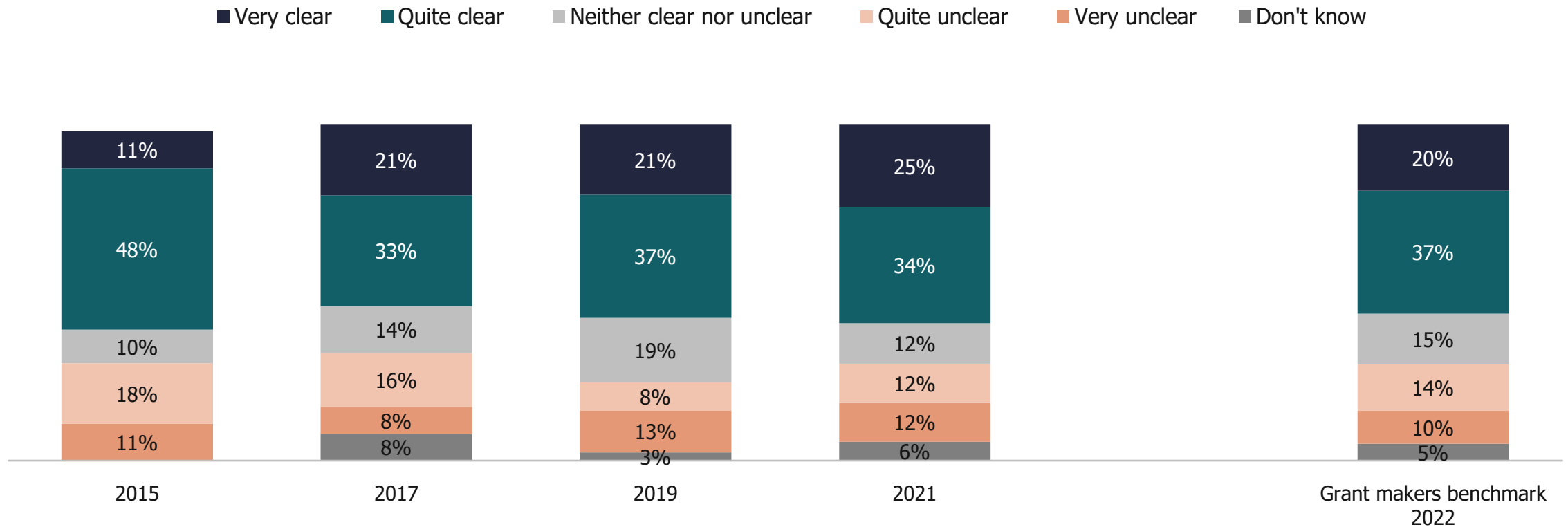
# Feedback on unsuccessful proposals perceived to be more useful than average grant maker, but down on previous years



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

Base: 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch / Base: 2,700 unsuccessful across 9 grant makers

# Majority of unsuccessful applicants are clear as to why their application was declined comparing favourably to benchmark



“Was it clear why Lloyds Bank Foundation declined your application?”

Base: 234 unsuccessful applicants | Source: Survey of LBFEW applicants, Nov/Dec 21, nfpResearch

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# Open perceptions of Lloyds Bank Foundation



# LBF commended for it's straightforward, engaging and supportive approach

## Areas of strength – straightforward, engaging application process & supportive staff:

“LBF has one of the most engaging and accessible application processes and should be held up as an example of good practice.”

*Children & young people, £101k-£250k, Grantee*

“The contact I had with staff via telephone was amazing. So supportive with guidance and actually very kind which I'm really grateful for so thank you.”

*Carers, £101k-£250k, Unsuccessful Applicant*

“We consider Lloyds to be one of the most progressive funders - straight forward application process, good communication with a named person, supportive approach, funding that is not tightly restricted, good backup.”

*Other – Women, £251k-£500k, Grantee*

*“Are there any comments you would like to add in relation to any of your answers on the application process?”*

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBFEW applicants, Nov/Dec 21, nfpResearch

# LBF's supportive culture, whether through relationships or various programmes it provides comes through strongly

## Supports small charities

"Works and totally understands local smaller discrete charities and champions their development with advice and support which is absolutely relevant to them."

*Sexual abuse or exploitation, £101k-£250k, Grantee*

## Monitoring

"Lloyds Bank Foundation is head and shoulders above any other grant making body in terms of monitoring/reporting requirements. LBF asks for reasonable monitoring that is realistic and not too onerous or time consuming to complete. This makes a HUGE difference to us."

*Domestic abuse, £501k-£1m, Grantee*

## Support Programmes

"Lloyds' support programmes [enhance etc.] provide support for staff and the infrastructure of the charity in a way that funding alone would not do. Investment in our people [staff - both paid and volunteer] with resources, programmes and other support is an essential part of the Lloyds programme and this has had a most significant impact on the charity and our growth over the years we have had association with Lloyds through grant funding."

*Substance abuse, £501k-£1m, Grantee*

## Responsive

"Understanding our needs and supporting the needs of the sector. Funding that is responsive to those needs, especially core/unrestricted funding. Research and evaluation in collaboration with other funders/organisations. Communication. The non-financial support is superb."

*Sexual abuse or exploitation, £251k-£500k, Grantee*

## Relationship

"Lloyds bank foundation really get to know the organisations they support and develop a support package solely based around their needs."

*Learning disability, £251k-£500k, Grantee*

*"What does Lloyds Bank Foundation do well?"*

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

# More flexibility in terms of areas funded and eligibility desired by grantees and applicants

## Funding length

“Provide funding for more than 2 years would be helpful. 5 year unrestricted funding would enable a small charity to develop significantly.”

*Mental health, £50k-£100k, Grantee*

## Flexibility on funding areas

“Being more flexible in allowing charities to apply for funding to cover all the areas of need that they provide services for; instead of having to pick one area.”

*Housing and homelessness, £101k-£250k, Unsuccessful Applicant*

## Challenge for small charities

“Recognise that small charities may not have the resources or capacity to access the support they offer or make a strong application; which in turn means that they struggle to do well with the application process (which requires a lot of time and resources); which then means that they don't succeed in obtaining funding to increase resources and capacity, thus perpetuating the cycle.”

*Sexual abuse or exploitation, £101k-£250k, Unsuccessful Applicant*

## Eligibility criteria

“Consideration of income. Some charities may have over £1million as a result of covid and demand and this makes them ineligible.”

*Domestic abuse, £1m-5m, Grantee*

## Feedback

“Feedback and support to non successful applications ...so they can address sustainability of their charity through other trust and grant applications ...especially in the context of reduced availability of such funding and increased competition.”

*Mental health, £501k-£1m, Unsuccessful Applicant*

“Where might Lloyds Bank Foundation need to improve?”

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch

# There is an appetite for LBF to lead and work in partnership with other funders

## Longer / more sustainable funding

“Look to supporting the core foundation of charities for a minimum of three years at a time. Without security, we cannot have flexibility or agility.”

*Sexual abuse or exploitation, £50k-£100k, Unsuccessful Applicant*

## Widen focus beyond one area

“Support all areas - to have an limited area of focus means many organisations don't get a chance to apply. Address a social issue yes, but don't limit how that social issue can be resolved, supported or improved.”

*Housing and homelessness, £251k-£500k, Unsuccessful Applicant*

## Use influence LBF has in the sector

“Influencing other funders to adopt a more flexible (unrestricted) grant making approach. Keep up the good work of lobbying and campaigning for policy change as this has a direct impact on the people we work with and therefore on us as charities.”

*Refugees & migration, £101k-£250k, Grantee*

## Adapt further to challenges of pandemic

“Accessibility, it is good to be specific but I think **Lloyds have gone too specific** and **charities are now responding to people with a whole range of issues as a result of the pandemic**. I always thought of children in need etc as very difficult funding to get as it was too specific and showed a lack of understanding of the nature of the charitable sector, I now feel this about Lloyds and it is not a funder I would immediately go to even though we have received funding previously as you put a lot of work into an application and, with Lloyds now, little hope of success”

*Mental health, £101k-£250k, Unsuccessful*

“Working in **partnership with other Trust and Foundations** to develop some consistency in reporting etc.”

*Sexual abuse or exploitation, £1m-5m, Grantee*

“How else could the Lloyds Bank Foundation support you or the wider sector?”

Base: 377 grantees and 234 unsuccessful applicants | Source: Survey of LBF EW applicants, Nov/Dec 21, nfpResearch



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