

Lloyds Bank Foundation

Applicant perceptions research 2023
Final report

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March 2024



- I. About the respondents /
operating context for Lloyds
Bank Foundation's applicants
- II. Perceptions of Lloyds Bank
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Bank Foundation

Report contents

About this research



Online survey of grantees and unsuccessful applicants



21st November – 21st December 2023

Grantees

531

Emails sent

292

Responses

55%

Response rate

Unsuccessful applicants

1,130

Emails sent

288

Responses

25%

Response rate

- We have included a **'benchmark average'** on some slides based on research conducted with **15** other funding organisations **since 2013**
- The sample size of the benchmark is approximately **13,000 applicants**, although this varies according to the question asked

John Ellerman Foundation

The Henry Smith Charity
founded in 1628



the Tudortrust



The Wolfson* Foundation



Community Foundation

NOMINET TRUST

Pilgrim Trust



Summary of key findings

- This is a very positive set of results for Lloyds Bank Foundation. Many applicants, particularly grantees, see the Foundation as a leader in the field of grant making. Lloyds Bank Foundation is described by applicants as supportive, helpful, trusting and collaborative.
- We've continued to see an increase in the proportion of unsuccessful applicants in the sample, with grantees and unsuccessful applicants now represented equally.
- Overall, Lloyds Bank Foundation's application process is rated well against the benchmark average. While perceptions of reasonableness have improved since 2019, the process is occasionally seen as too demanding. It is also more time consuming than other funders' processes according to our benchmark. A few applicants feel the clarity of the Foundation's guidance could be improved, and that the restrictiveness of the funding criteria is the biggest barrier to making a successful application.
- The Foundation's relationships with grantees continue to be among the strongest in the sector. More than 95% of grantees agree that the Foundation has a positive impact and would recommend them to someone else in their position. The Foundation scores higher than the benchmark average across all core metrics measured with grantees – most notably understanding them, treating them as partners, approachability and ease of reporting. Grantees also hugely value the development support on offer.
- For unsuccessful applicants, many metrics have improved since 2021. Overall, unsuccessful applicants are clearer on the reason for their rejection compared to the benchmark average, and the clearest they have been since we began asking this question in 2019. Lloyds Bank Foundation scores better than the benchmark average on approachability, treating applicants with respect and understanding them. The benchmark data also tells us that the Foundation is better at giving feedback to unsuccessful applicants compared to other funders, but there is more to be done to ensure that the feedback is useful for them.

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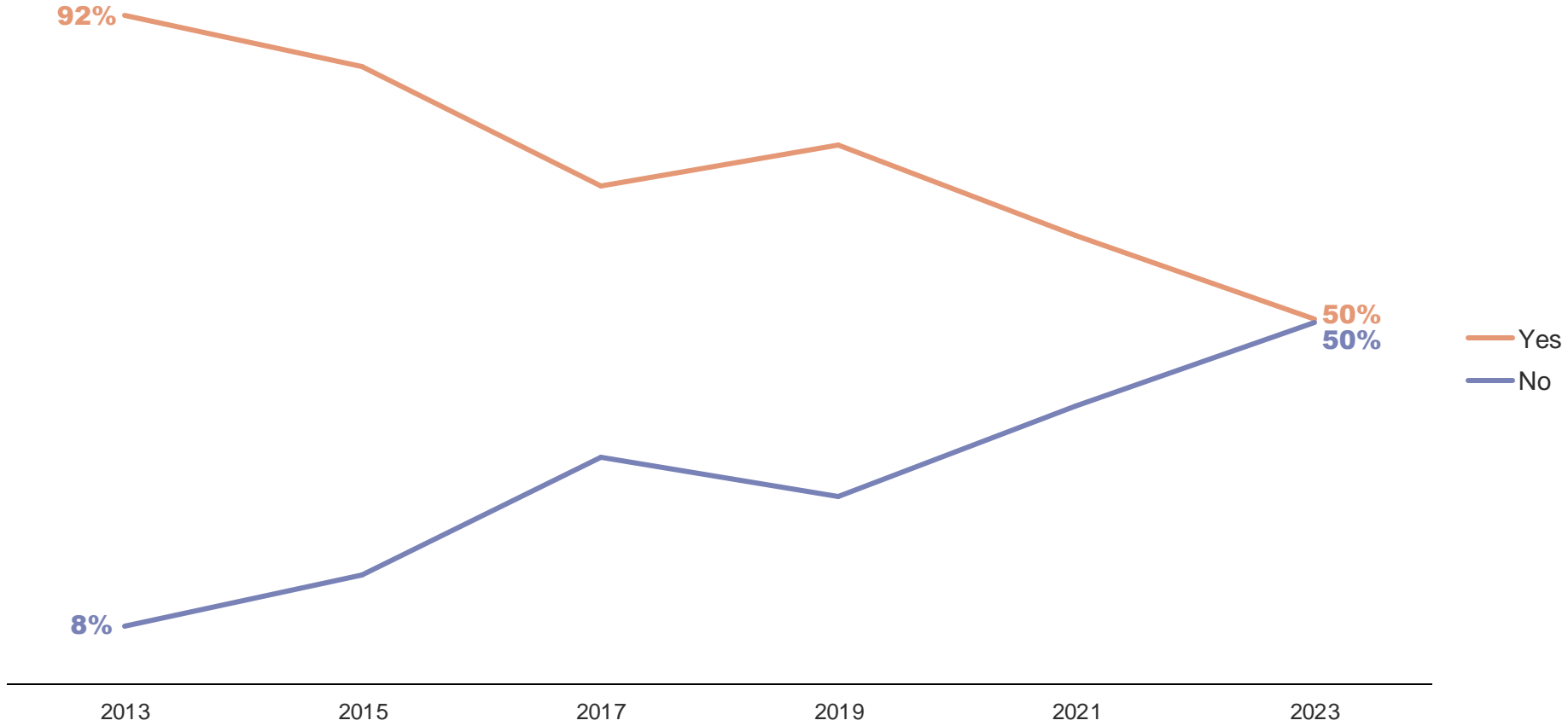
The respondents & their operating context

Key findings: the respondents & their operating context

- Since starting these biennial surveys of Lloyds Bank Foundation's applicants a decade ago, we've continued to see an increase in the proportion of unsuccessful applicants in the overall sample. In 2023 we've reached a point where grantees and unsuccessful applicants are represented equally in the survey.
- The proportion of grantees who have received funding from Lloyds Bank Foundation on a previous occasion has continued to grow over time. In 2023's survey, six in 10 grantees have received funding from the Foundation more than once. For 43% of unsuccessful applicants, their most recent application was their first; this contrasts with grantees, of whom only 26% were first time applicants.
- When we asked applicants about the representation of different DEI groups in the leadership of their organisation (namely women, those experiencing racial inequity, disabled people and people who identify as LGBTQ+), unsuccessful applicants were slightly more likely than grantees to be led by these groups. The difference is most prominent for disabled people, with 30% of unsuccessful applicants being majority led by disabled people, in contrast to 18% of grantees who say the same. This difference becomes more pronounced when we look at who applicants' organisations are seeking to support. While 30% of Lloyds Bank Foundation's grantees say a majority of the people they reach are disabled, this rises to 50% among unsuccessful applicants.
- Many of Lloyds Bank Foundation's applicants have been providing additional (and often essential) services as a direct result of the cost-of-living crisis. These services encompass a whole range of support for their beneficiaries, most commonly financial and social welfare advice. These additional services have been resourced by organisations in a number of different ways, but most often through new grant applications.

The proportion of grantees and unsuccessful applicants in the sample continues to shift

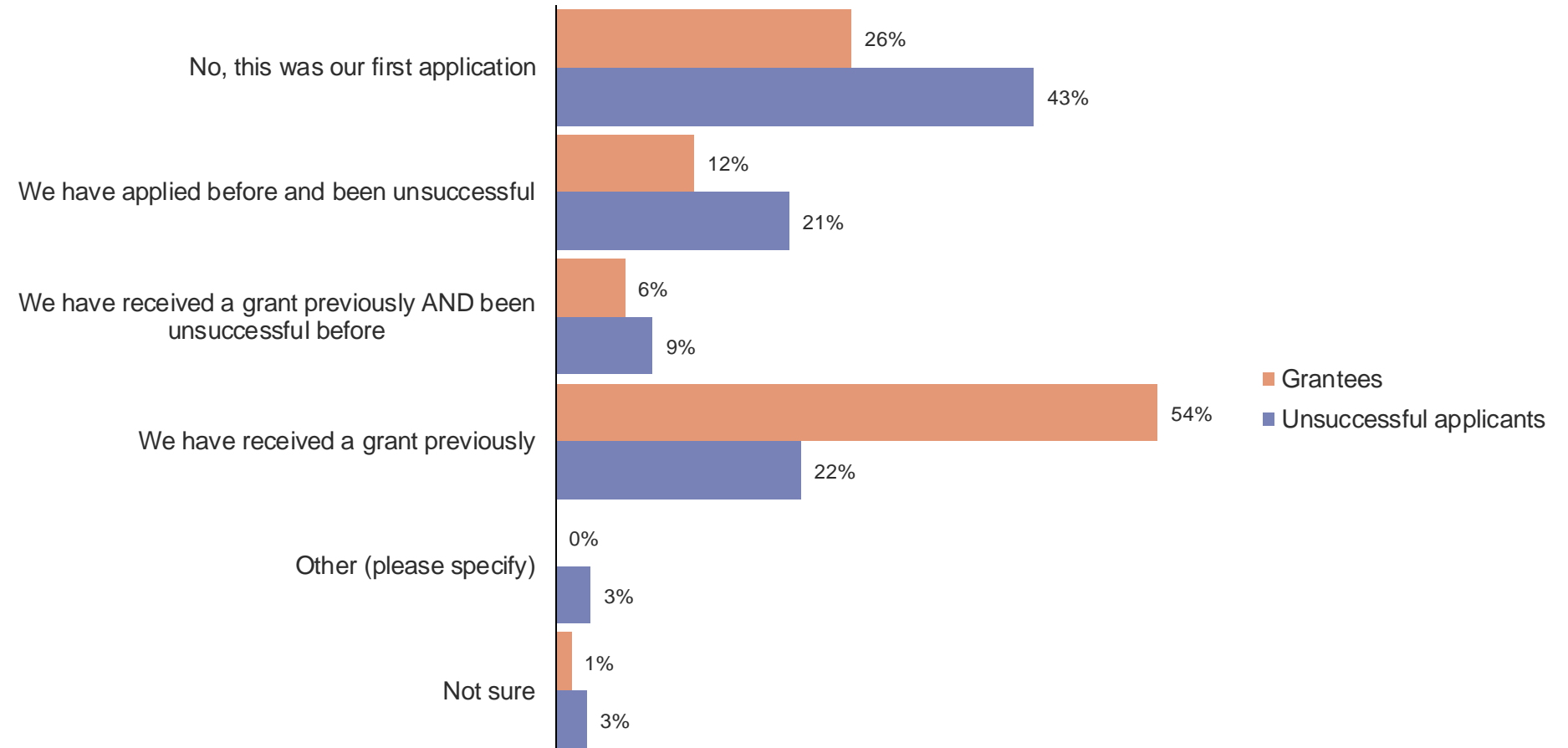
"Were you successful in your most recent grant application?"



Source: Lloyds Bank Foundation applicant surveys 2013 to 2023 | Base: 3403 respondents

60% of grantees in the sample have received a grant on more than one occasion

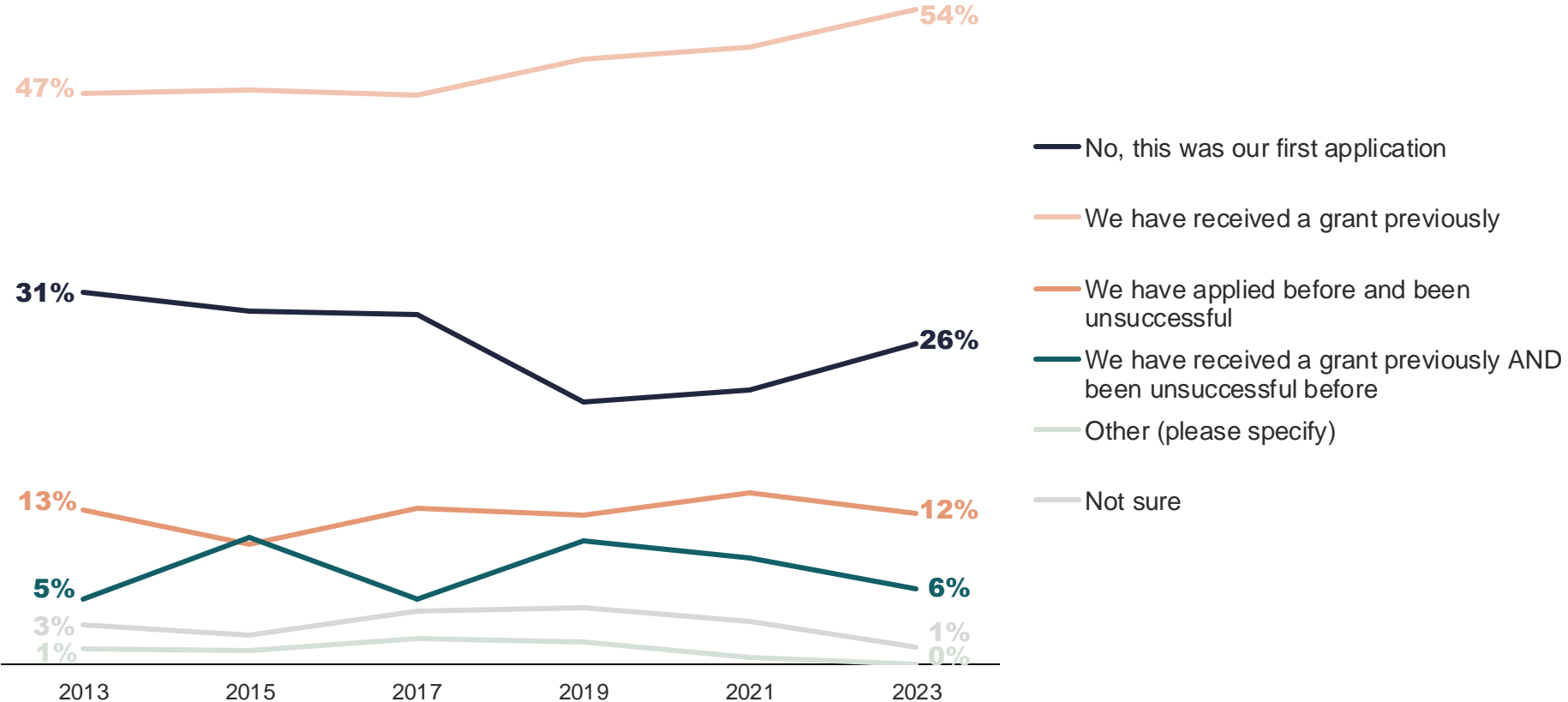
"Have you applied to Lloyds Bank Foundation previously?"



The proportion of repeat grantees in the sample continues to grow; a quarter are first time applicants

"Have you applied to Lloyds Bank Foundation previously?"

Grantees

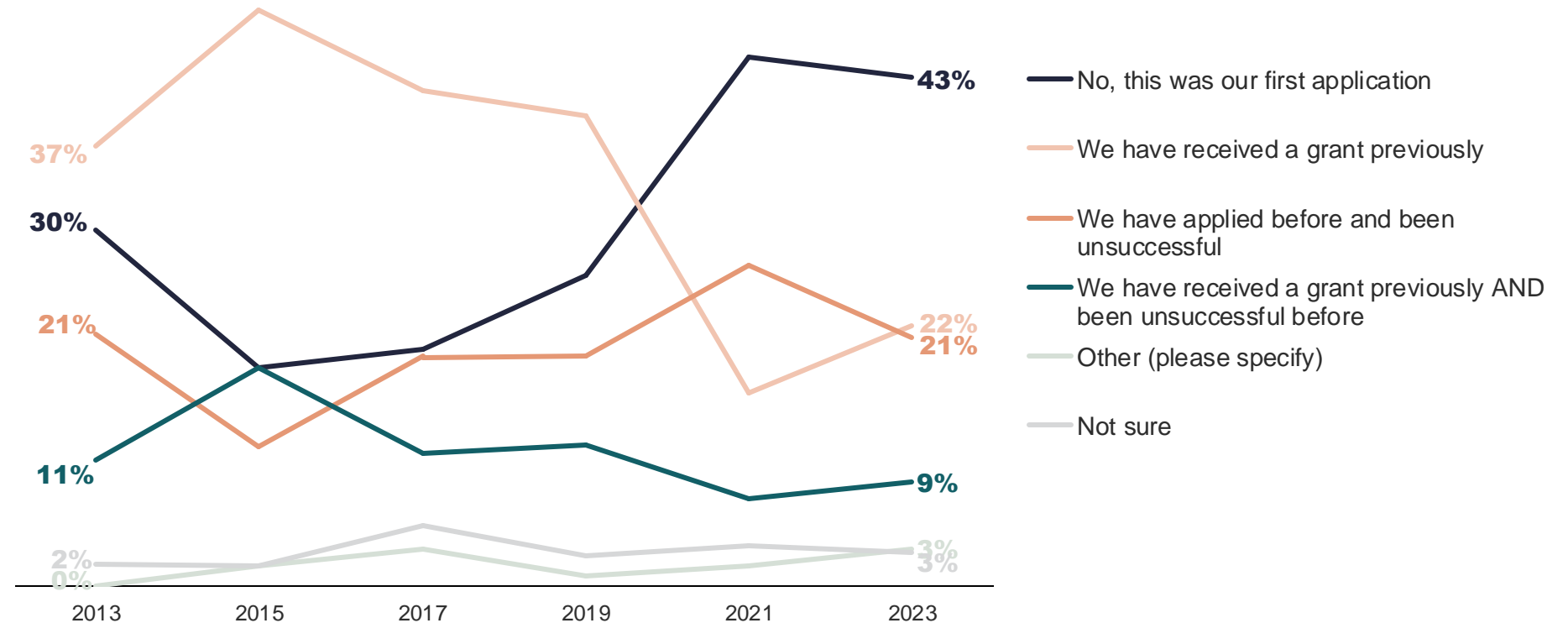


Source: Lloyds Bank Foundation applicant surveys 2013 to 2023 | Base: 2443 respondents

For 43% of unsuccessful applicants, this was their first time applying

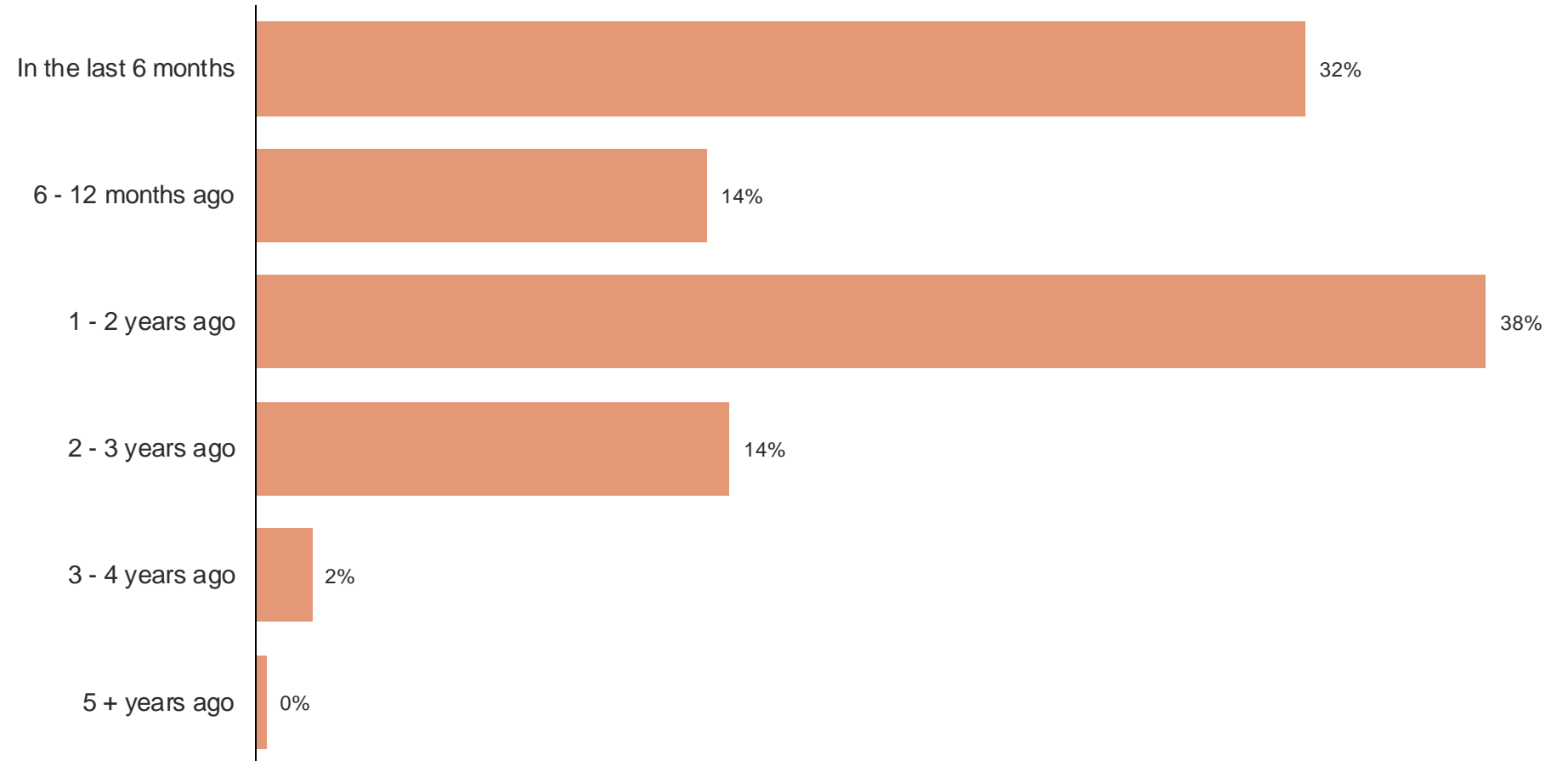
"Have you applied to Lloyds Bank Foundation previously?"

Unsuccessful applicants



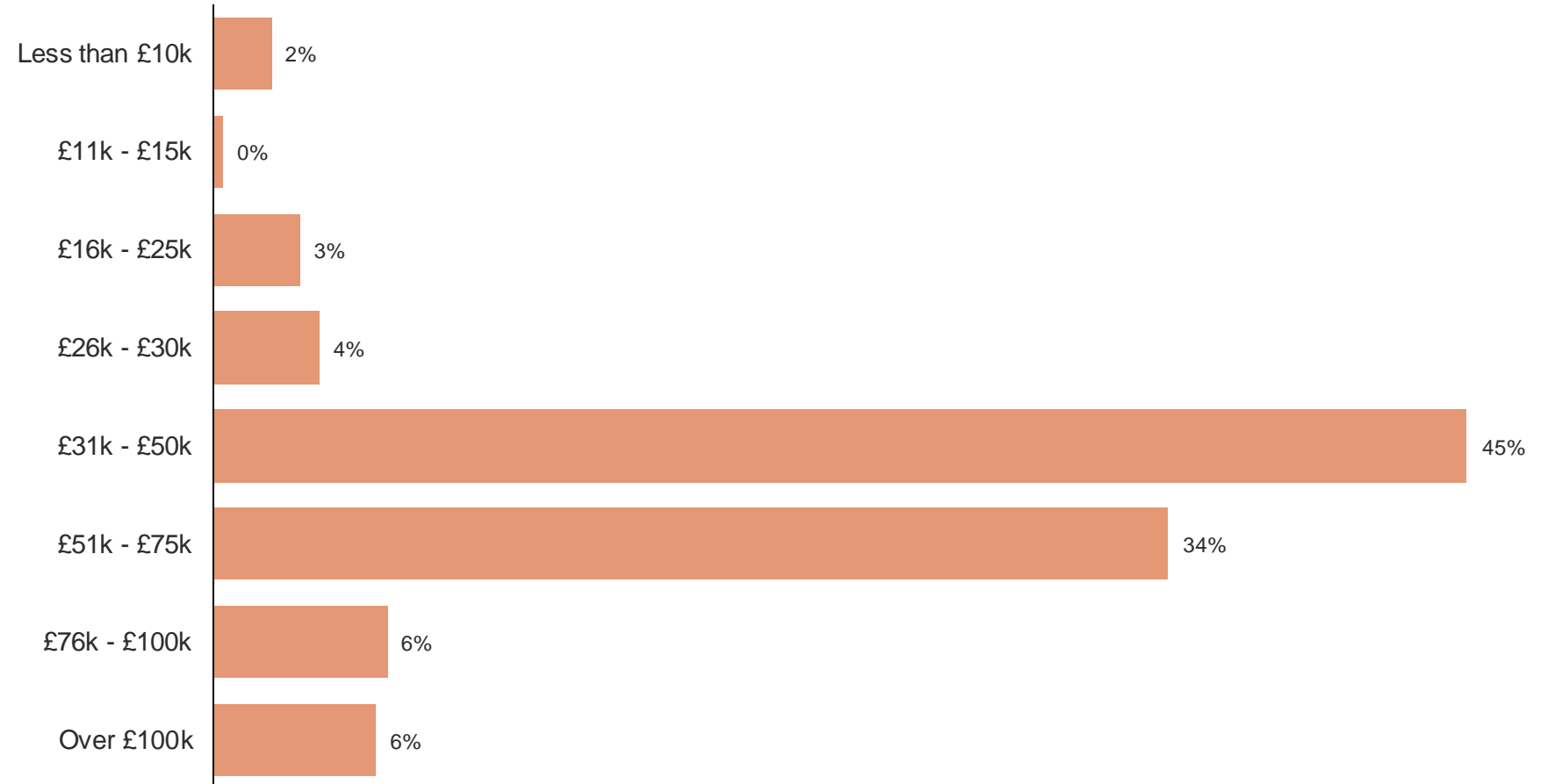
Most grantees in the sample were awarded their funding during the past two years

"When was your most recent grant from Lloyds Bank Foundation awarded?"



Most grantees in the sample hold a grant with a value between £31k and £75k

"What is the value of the grant in total over its lifetime?"



A majority of unsuccessful applicants in the sample were turned down at the first stage

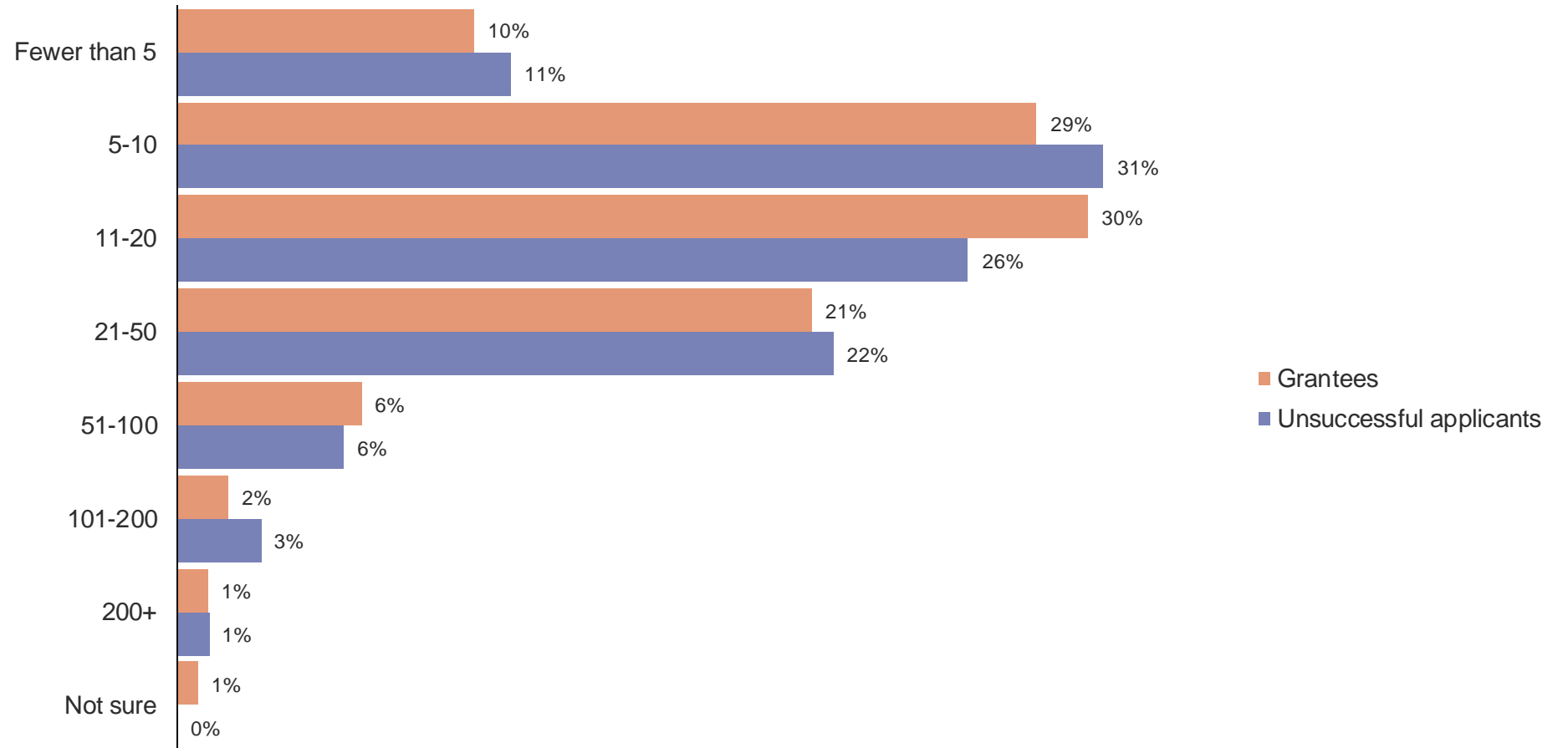
"At which stage was your application turned down?"



Source: Lloyds Bank Foundation applicant survey 2023 | Base: 288 respondents

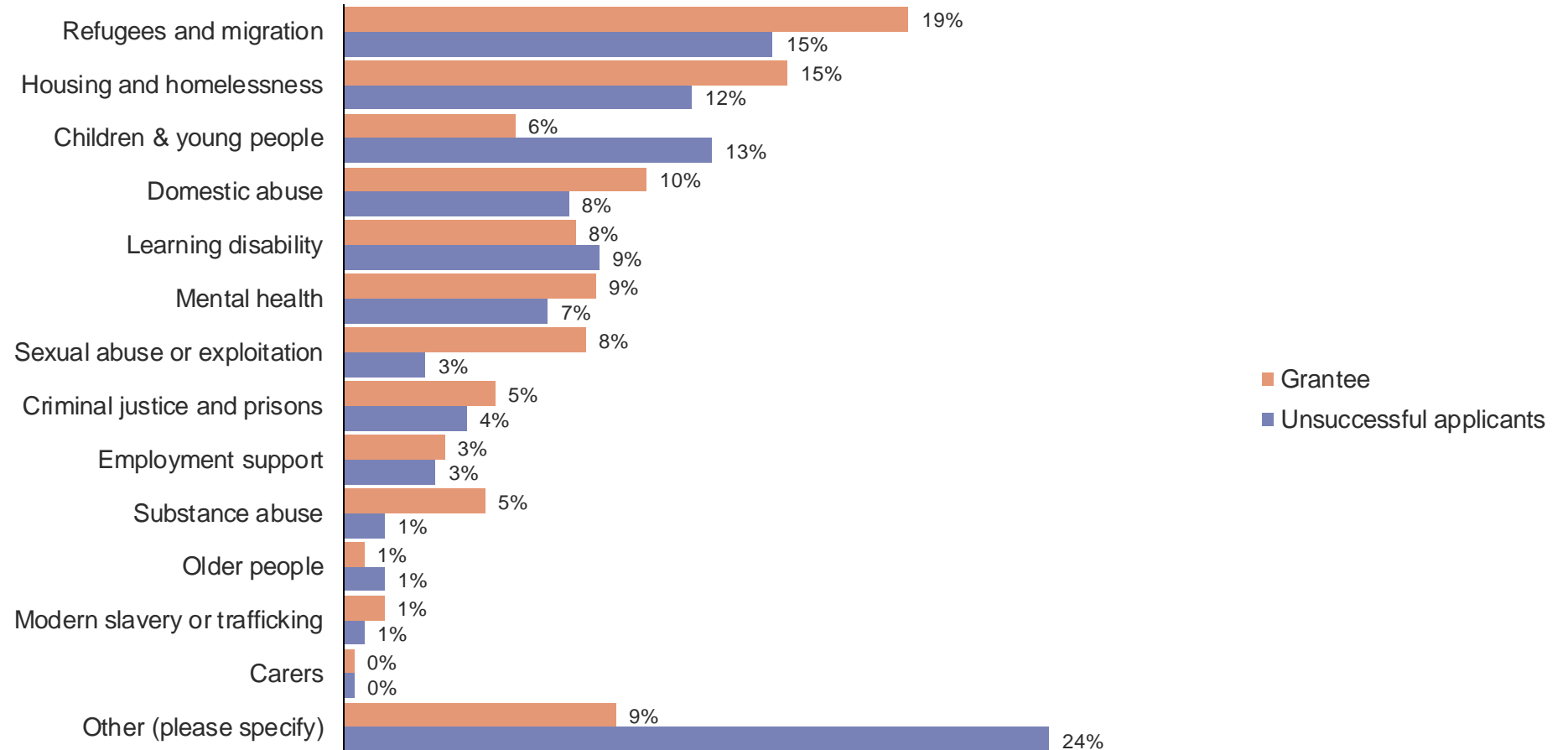
Grantees and unsuccessful applicants are making a similar level of grant applications per year

"How many grant applications, approximately, would you estimate your organisation makes per year?"



Respondents were most likely to work in the refugee and homelessness sectors

"Which sector does your organisation primarily operate in? Please select the most relevant option from the list below."



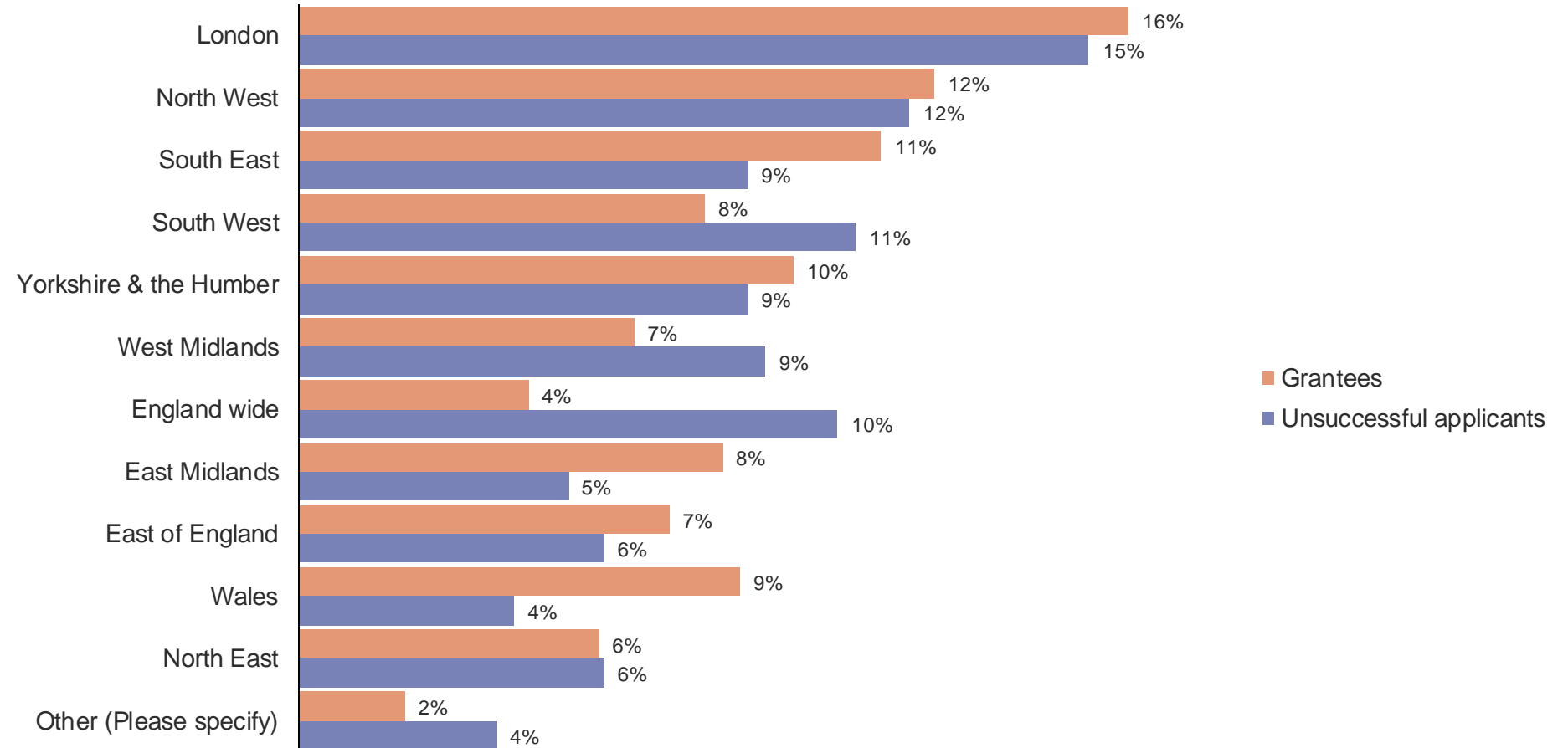
Which sector does your organisation primarily operate in?

Other answers with multiple mentions

Disabled People / Disability	13
Community Support	5
Race equality / Ethnic minorities	5
Deafness / Hard of Hearing	4
Social welfare / Education	4
Family Support	3
Visual Impairment / Blindness	3
Women / Women's rights	3
Advocacy and advice	2
Debt and money matters	2
Equality Diversity and Inclusion	2
Poverty	2

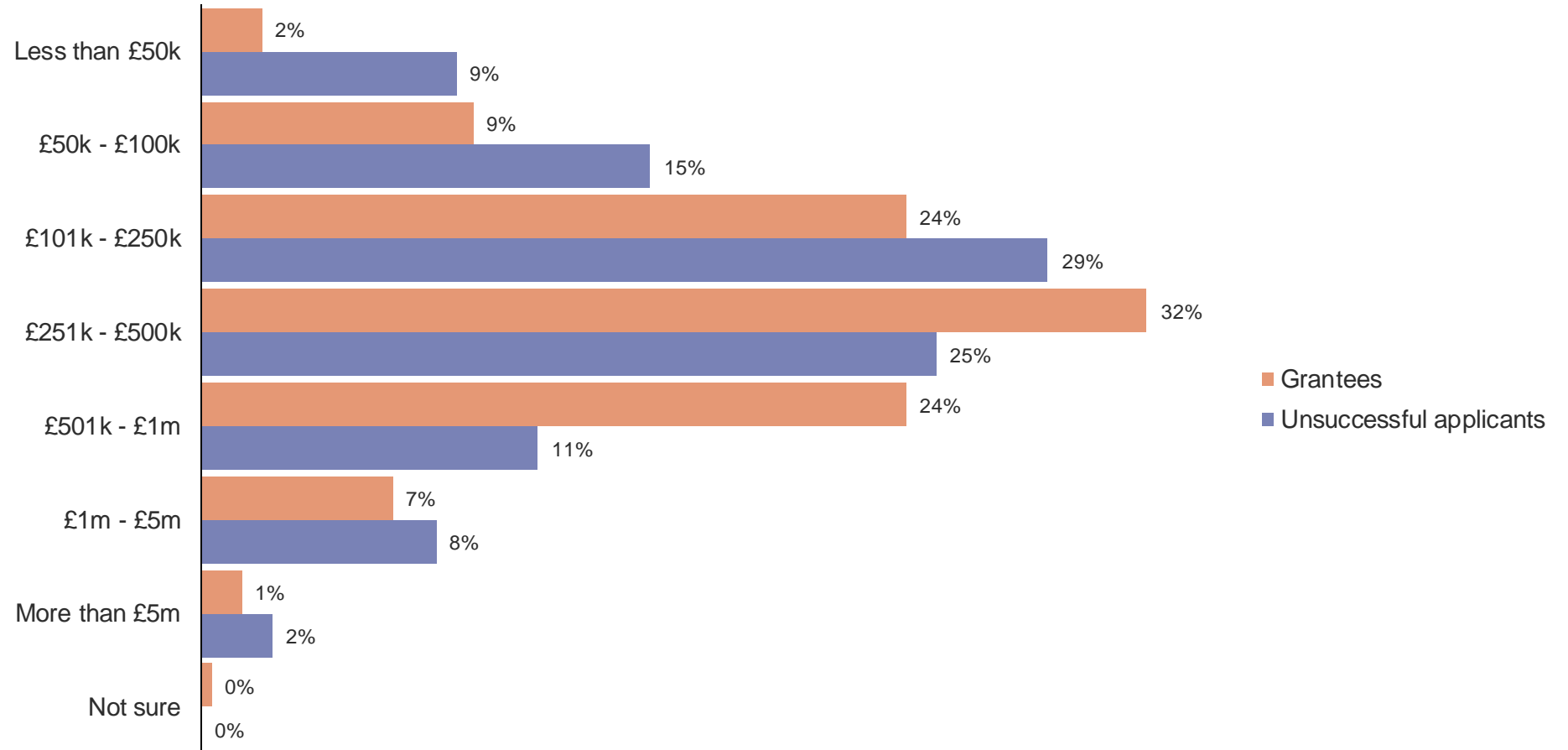
London is the most represented region in the sample

"Which region does your organisation primarily operate in?"



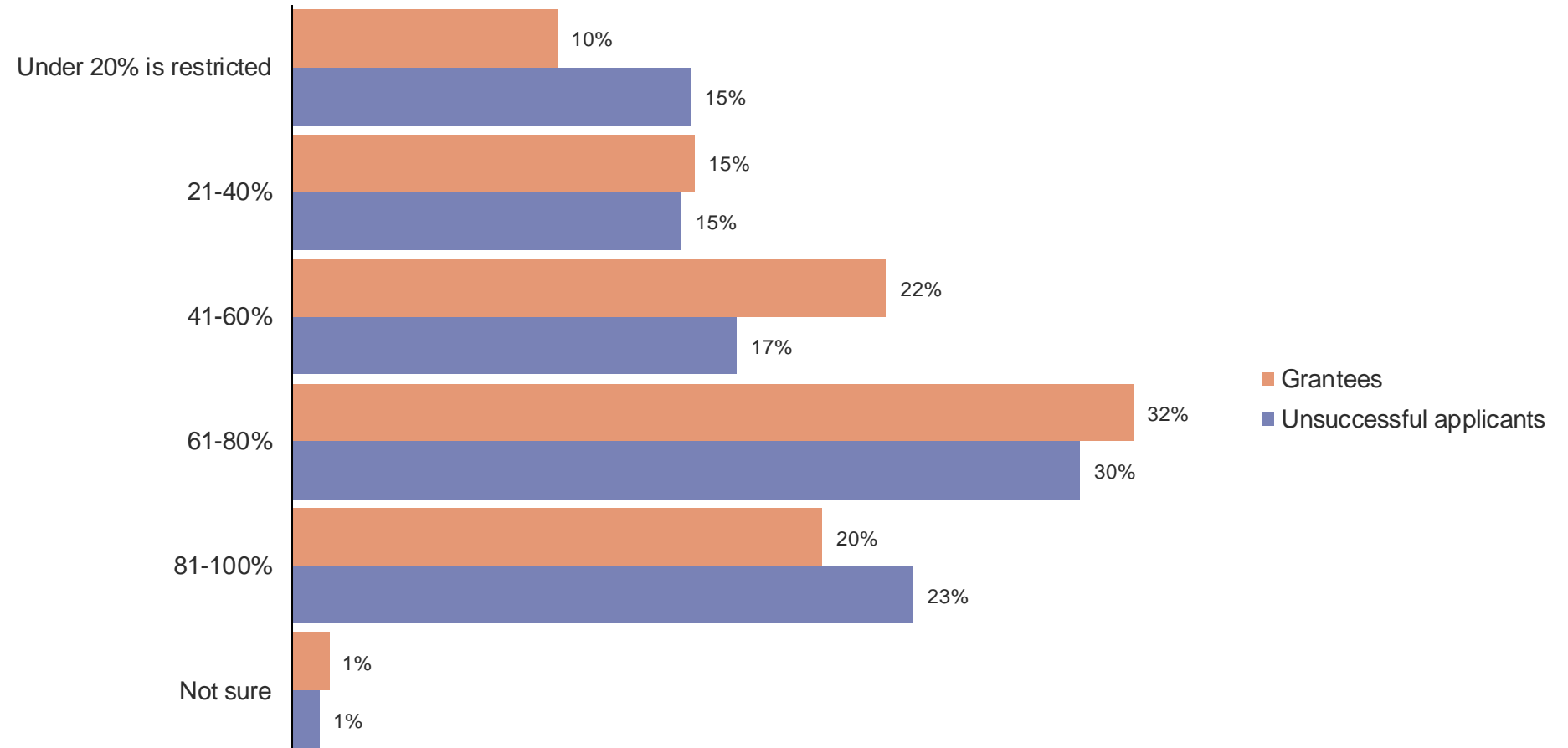
Unsuccessful applicants tend to have lower annual incomes

"What is your organisation's total annual income (approximately)?"



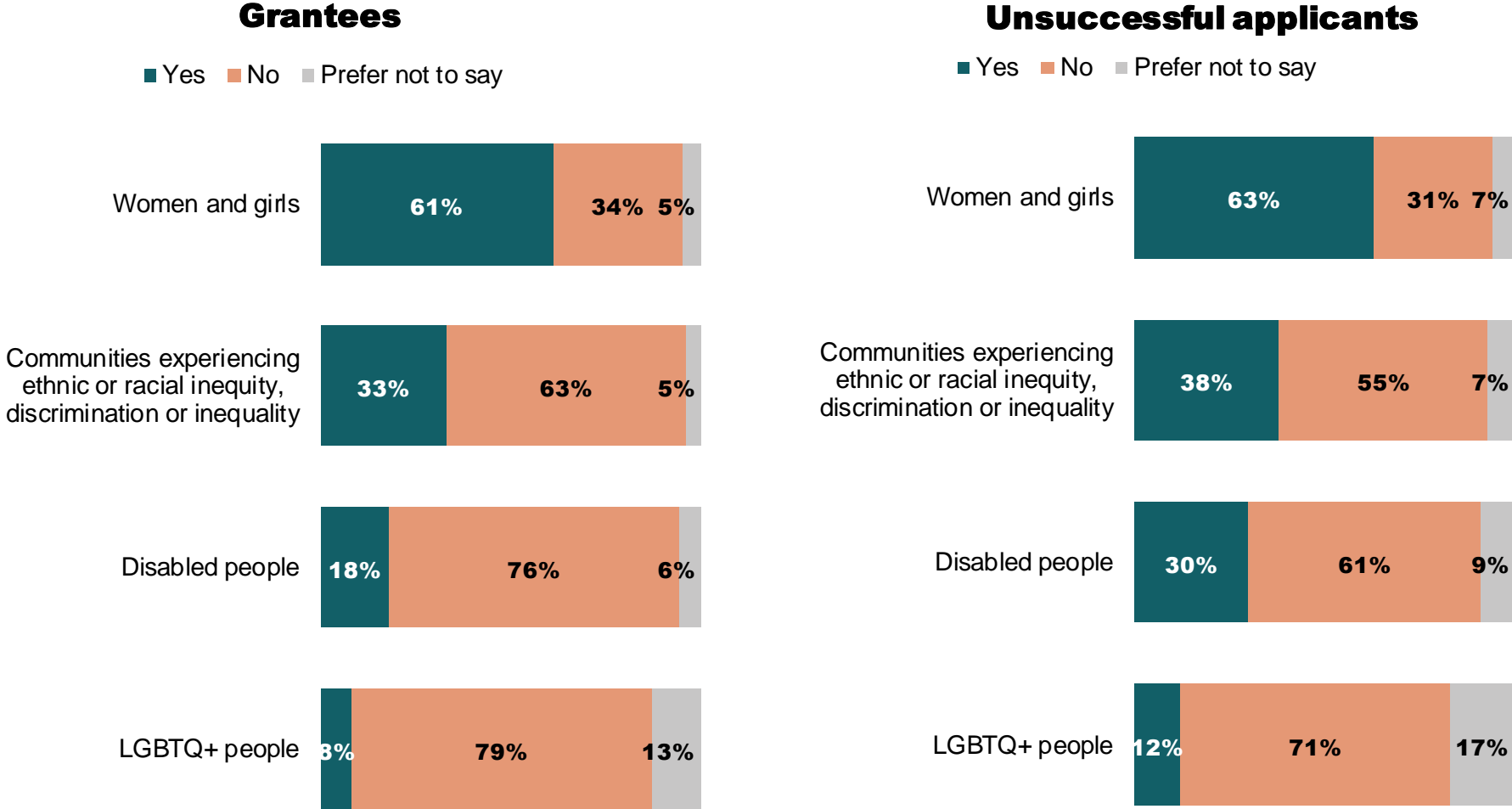
More than half of applicants say that above 60% of their income is restricted in some way

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



Unsuccessful applicants are slightly more likely than grantees to be led by DEI groups

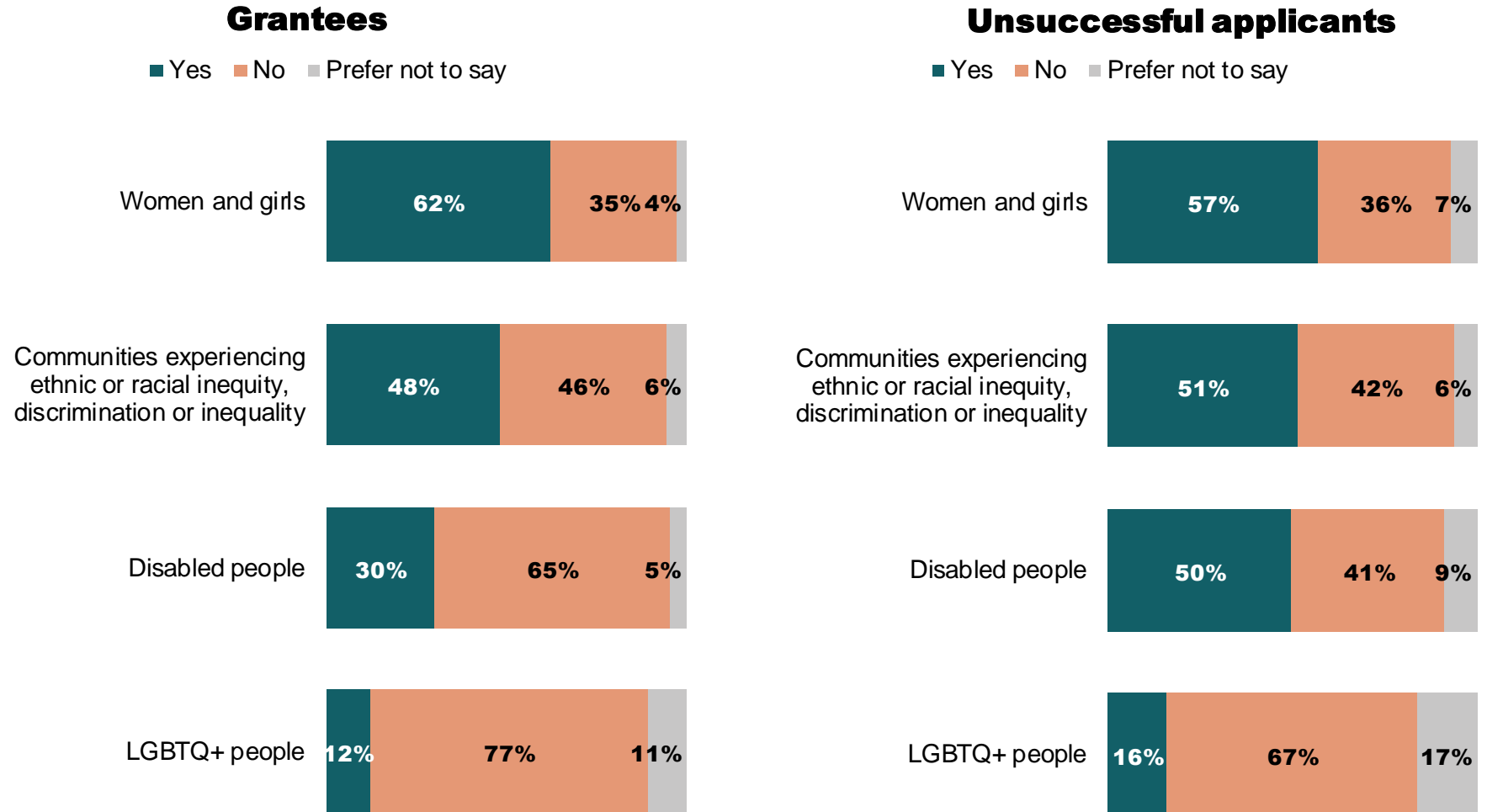
"Are the majority of your board and senior management..."



Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Unsuccessful applicants are more likely to say a majority of the people they reach are disabled

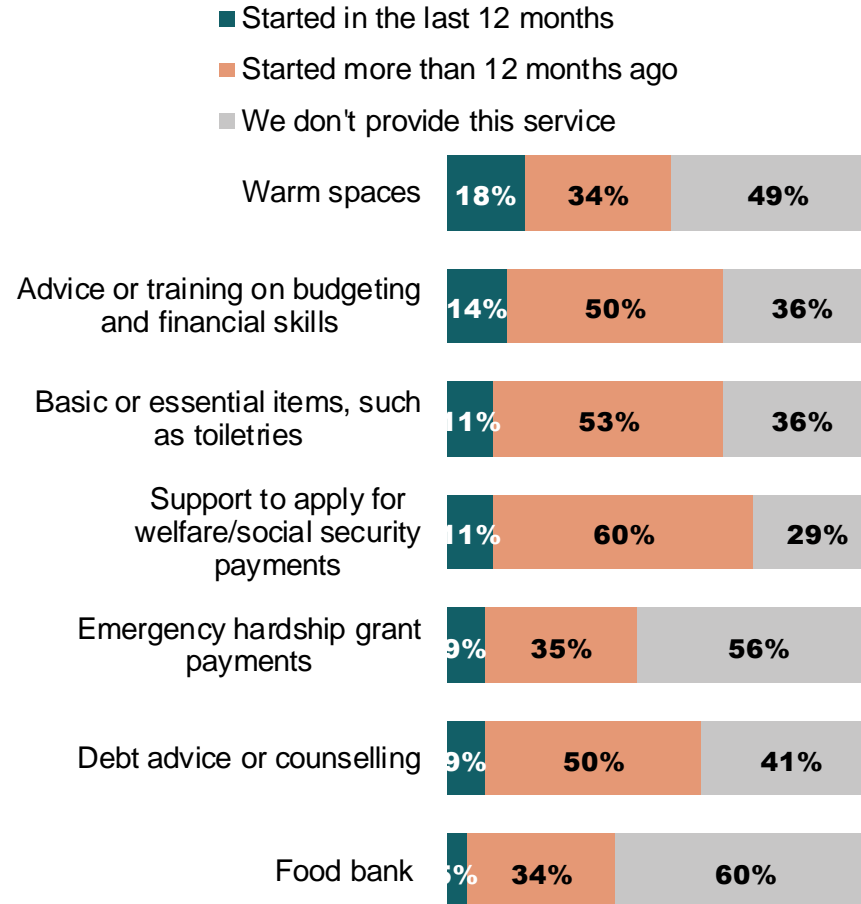
"Are 50% or more of the people you reach..."



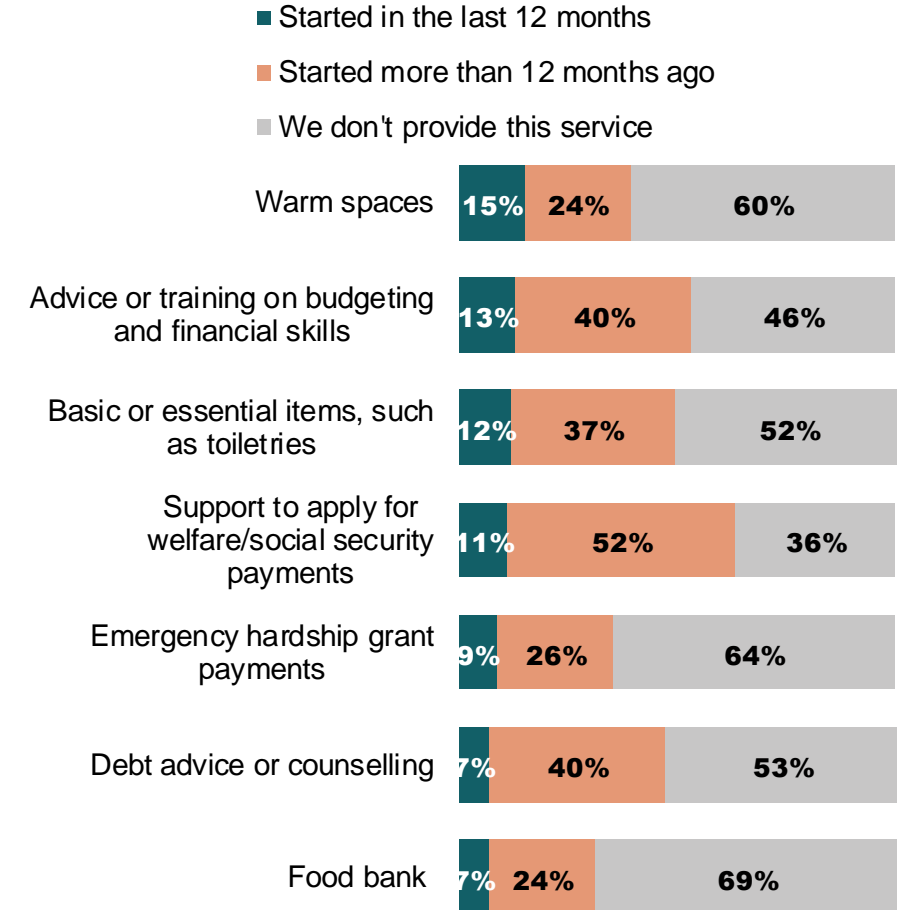
Many applicants have been providing additional services as a result of the cost-of-living crisis

"Has your charity started providing any of the following services in response to the cost-of-living crisis, e.g. to prevent destitution or other urgent financial pressures for the people or communities you support?"

Grantees

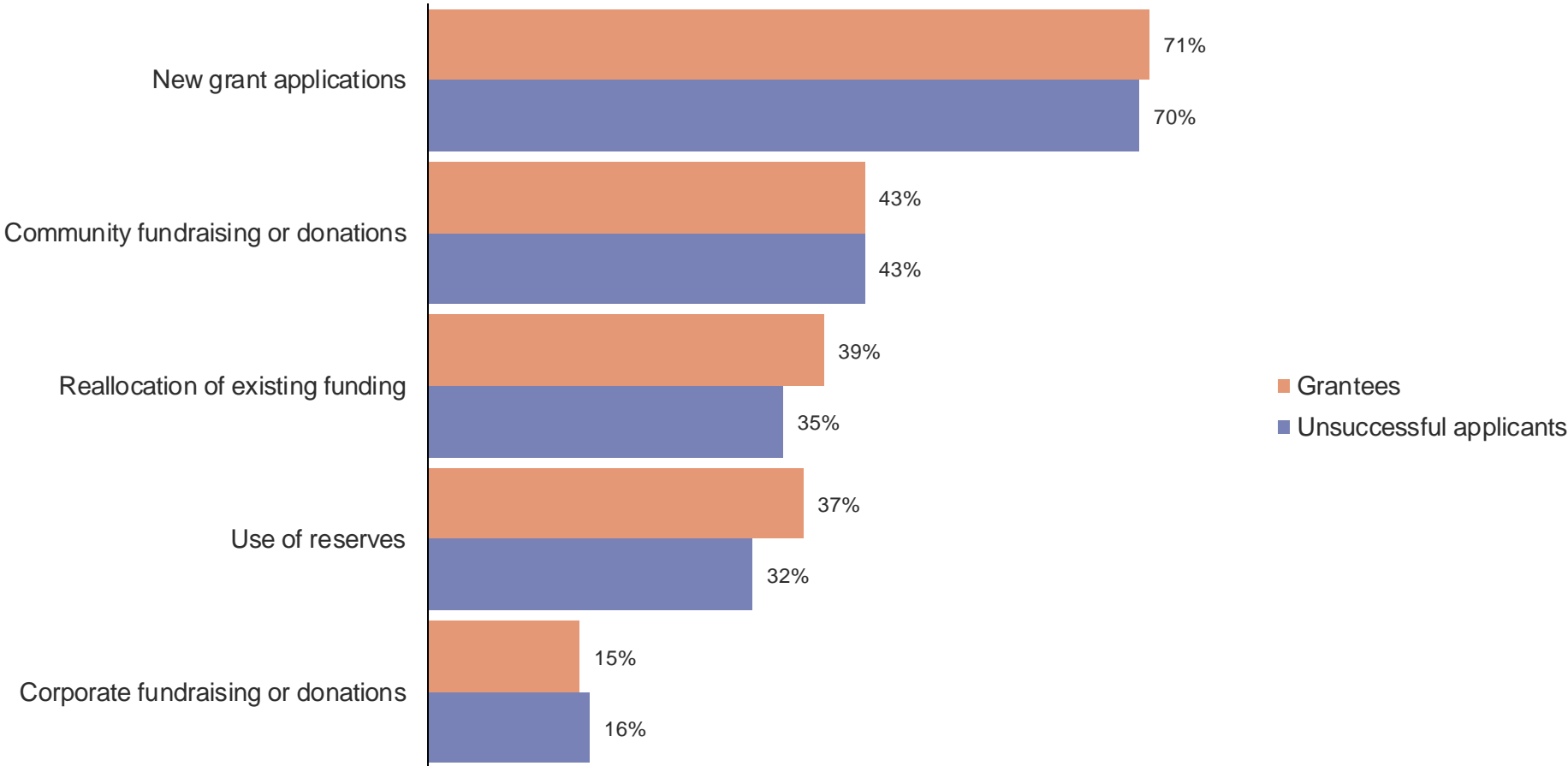


Unsuccessful applicants



These additional services have been resourced in a number of ways, but most commonly through new grant applications

"How have these new or additional services been resourced?"



Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

2

The application process

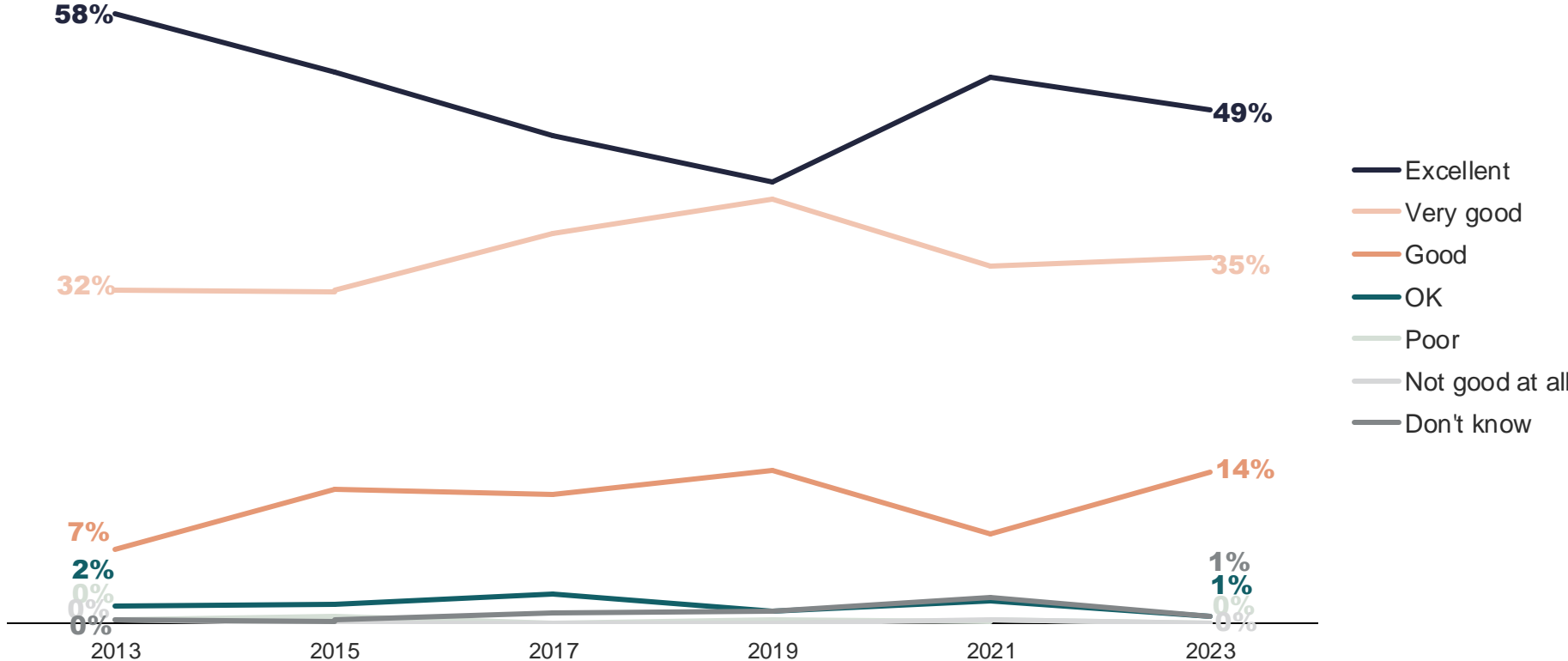
Key findings: perceptions of the application process

- Overall, Lloyds Bank Foundation's application process is rated well against the benchmark average. A majority of applicants felt the process was easy to understand and that the staff and resources they encountered while making their application were helpful. For many, the process is better in comparison to other funders.
- The proportion of grantees who feel the application process is 'very reasonable' has continued to grow since 2019; similarly, the proportion of unsuccessful applicants who say the process is 'very reasonable' has grown to its highest level in 2023.
- Despite these improvements, the process is occasionally seen as too demanding. It is more time consuming than other funders' processes according to our benchmark, with applicants spending more hours on average across all stages of the application process. Applicants are also less likely to feel the time they waited for a decision was 'very quick' compared to 2021.
- A few applicants feel the clarity of the Foundation's guidance could be improved, and that the restrictiveness of the funding criteria is the biggest barrier to making a successful application. The proportion of applicants who said they encountered barriers to accessing funding is higher than the benchmark average.
- A total of 238 respondents mentioned the application process using positive terms, including 'easy', 'straightforward', 'simple', 'accessible', 'clear', 'well-explained' and 'user-friendly'.
- Meanwhile, 42 respondents mentioned the application process using negative terms, such as 'difficult', 'challenging', 'complicated', 'hard', or 'confusing'.

The application process is viewed positively by grantees – it is more likely to be described as ‘good’ than ‘excellent’ compared to 2021

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

Grantees

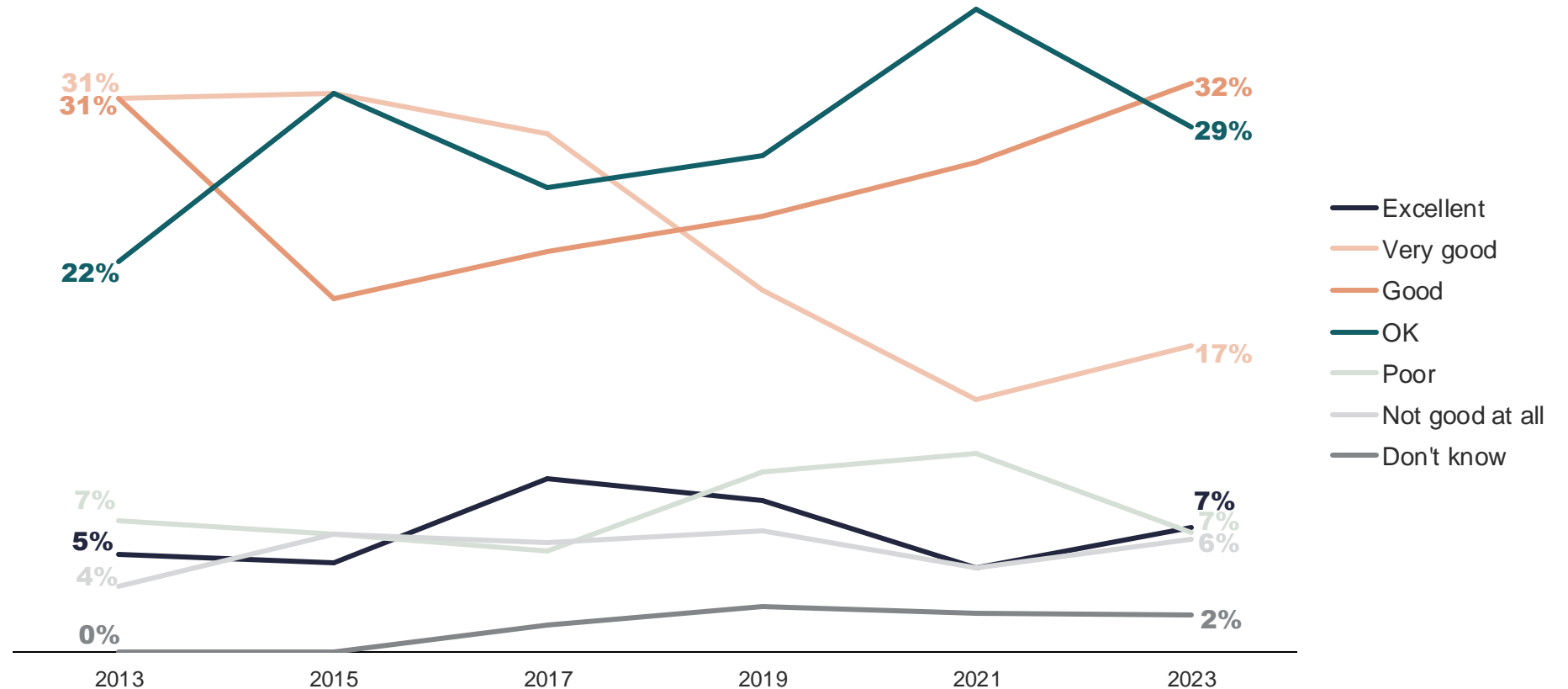


Source: Lloyds Bank Foundation applicant surveys 2013 to 2023 | Base: 2443 respondents

Unsuccessful applicants are more likely to view the application process as 'good' as opposed to 'OK', compared to 2021

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

Unsuccessful applicants



Respondents report spending more time on the Foundation's application process compared to the benchmark average

	Registering an enquiry	Phone contact	Assembling evidence and information	Developing funding proposal	Assessment meeting	Completing application	Post application clarifications and follow up
Lloyds Bank Foundation	2.6	1.7	8.5	12.0	3.0	10.6	2.7
Benchmark average	0.5	0.4	6.9	9.5	0.4	7.0	2.3
Grantee / UA							
LBF grantees	2.0	1.5	8.1	11.8	3.7	10.5	3.7
LBF unsuccessful applicants	3.1	1.9	8.9	12.3	2.4	10.6	1.6

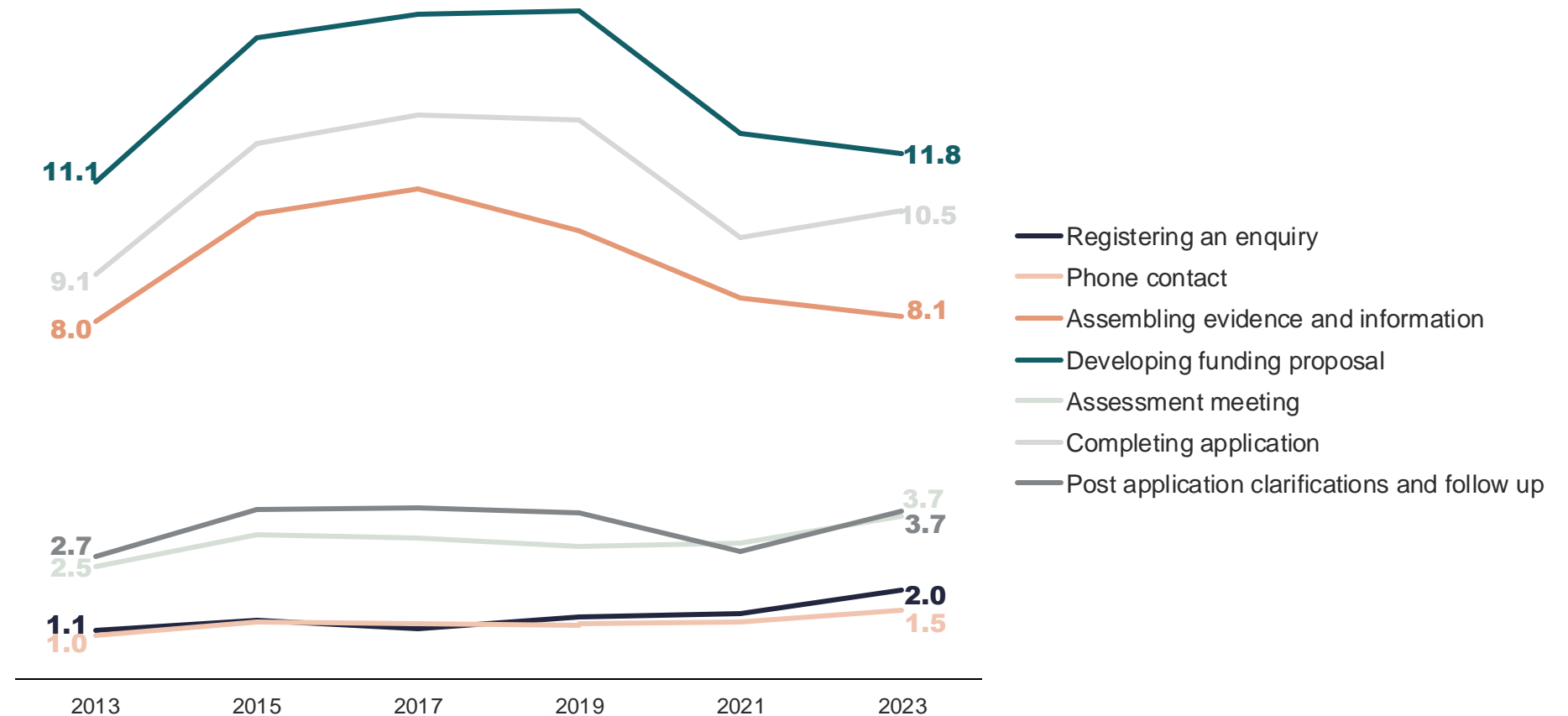
"How many hours would you estimate you spent on the following aspects of your funding request / grant application to Lloyds Bank Foundation?" Average number of hours

Base: ~13,000 applicants across 15 funders | Source: Grant maker benchmark, nfpResearch
Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Grantees are spending a similar number of hours on their applications as they were in 2021

"How many hours would you estimate you spent on the following aspects of your funding request / grant application to Lloyds Bank Foundation?"

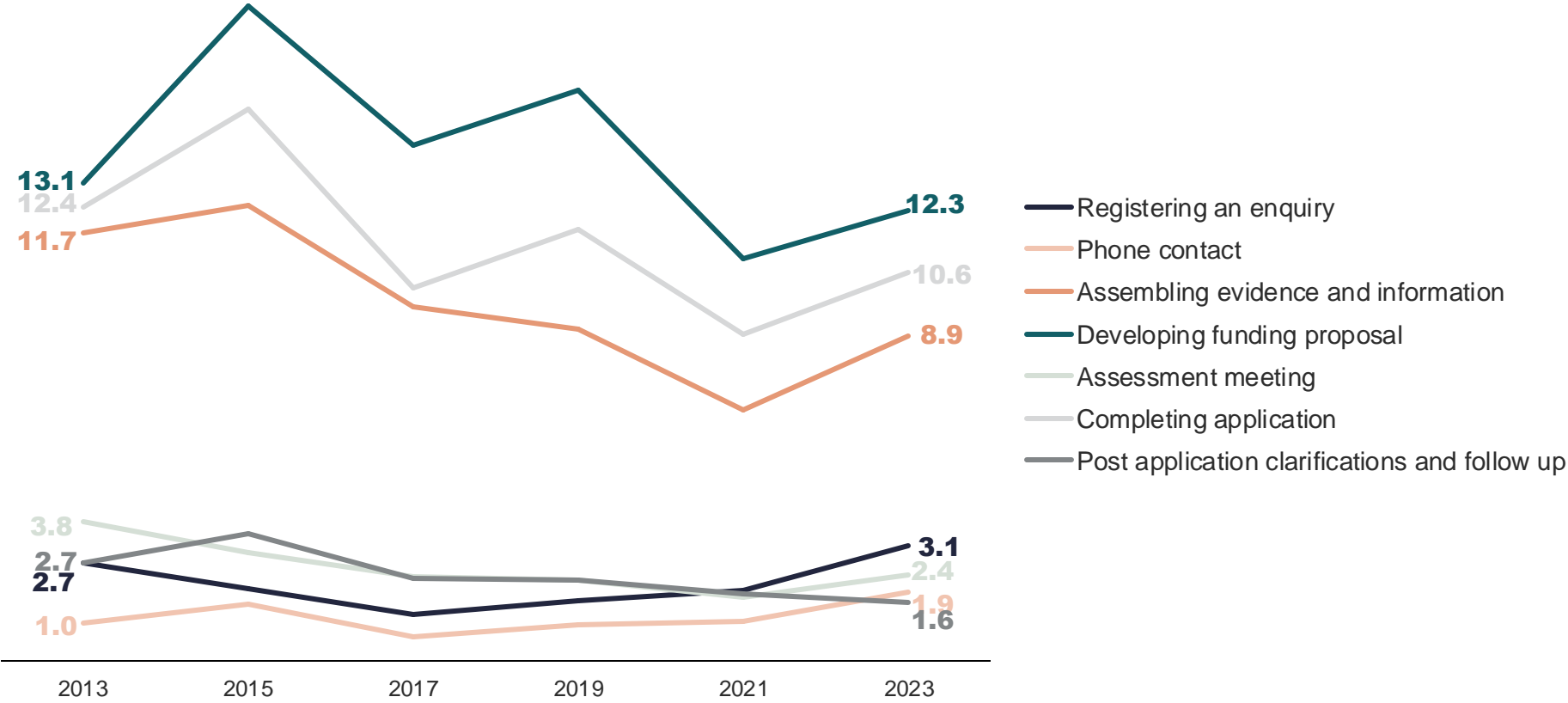
Grantees



The amount of hours unsuccessful applicants spend on their applications has increased slightly, following a drop in 2021

"How many hours would you estimate you spent on the following aspects of your funding request / grant application to Lloyds Bank Foundation?"

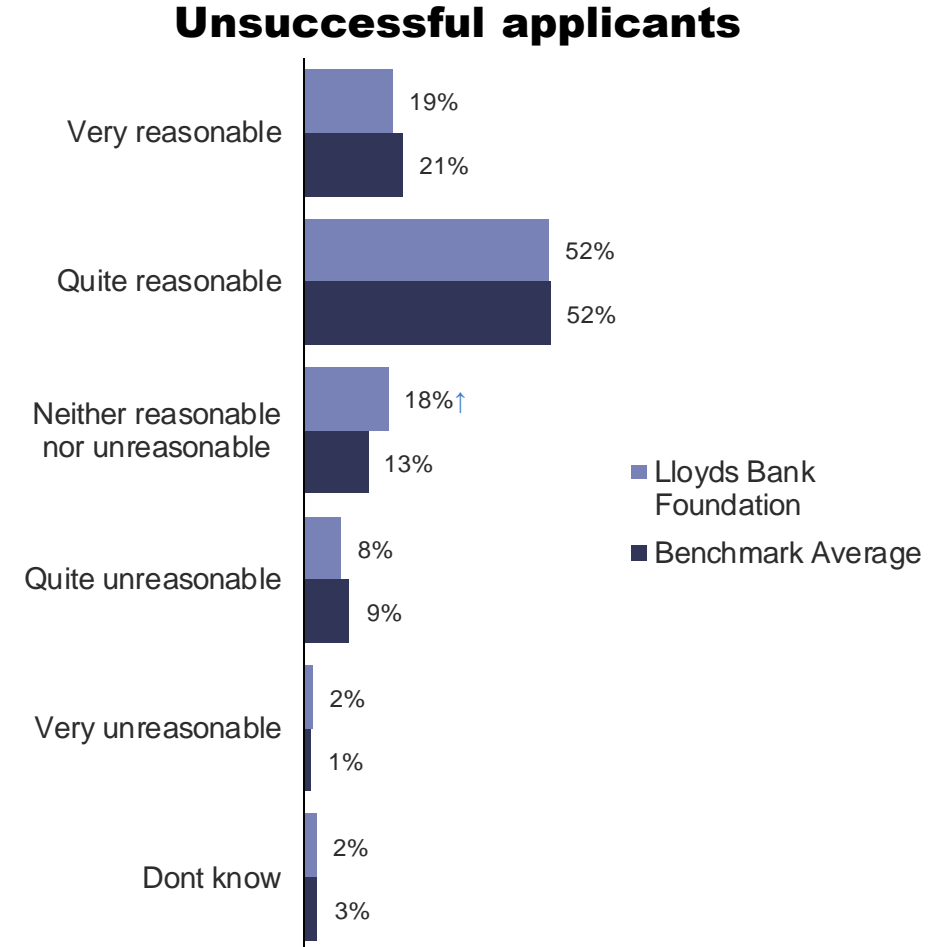
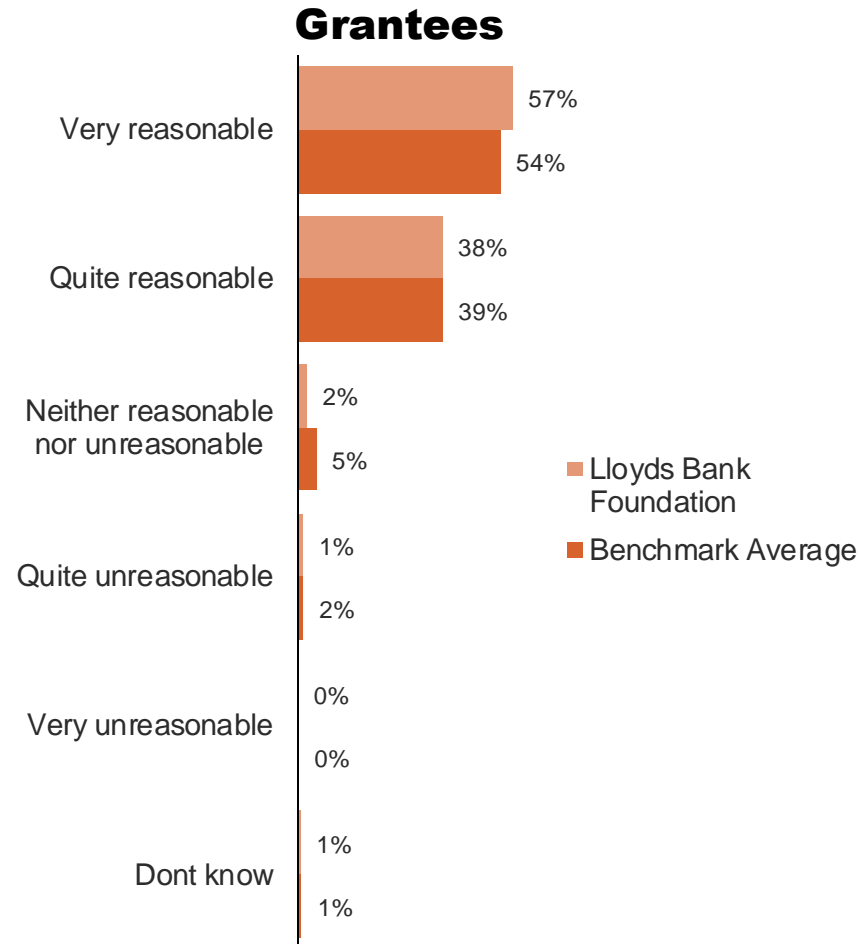
Unsuccessful applicants



Source: Lloyds Bank Foundation applicant surveys 2013 to 2023 | Base: 955 respondents

Perceptions of the reasonableness of the application process are in line with the benchmark average

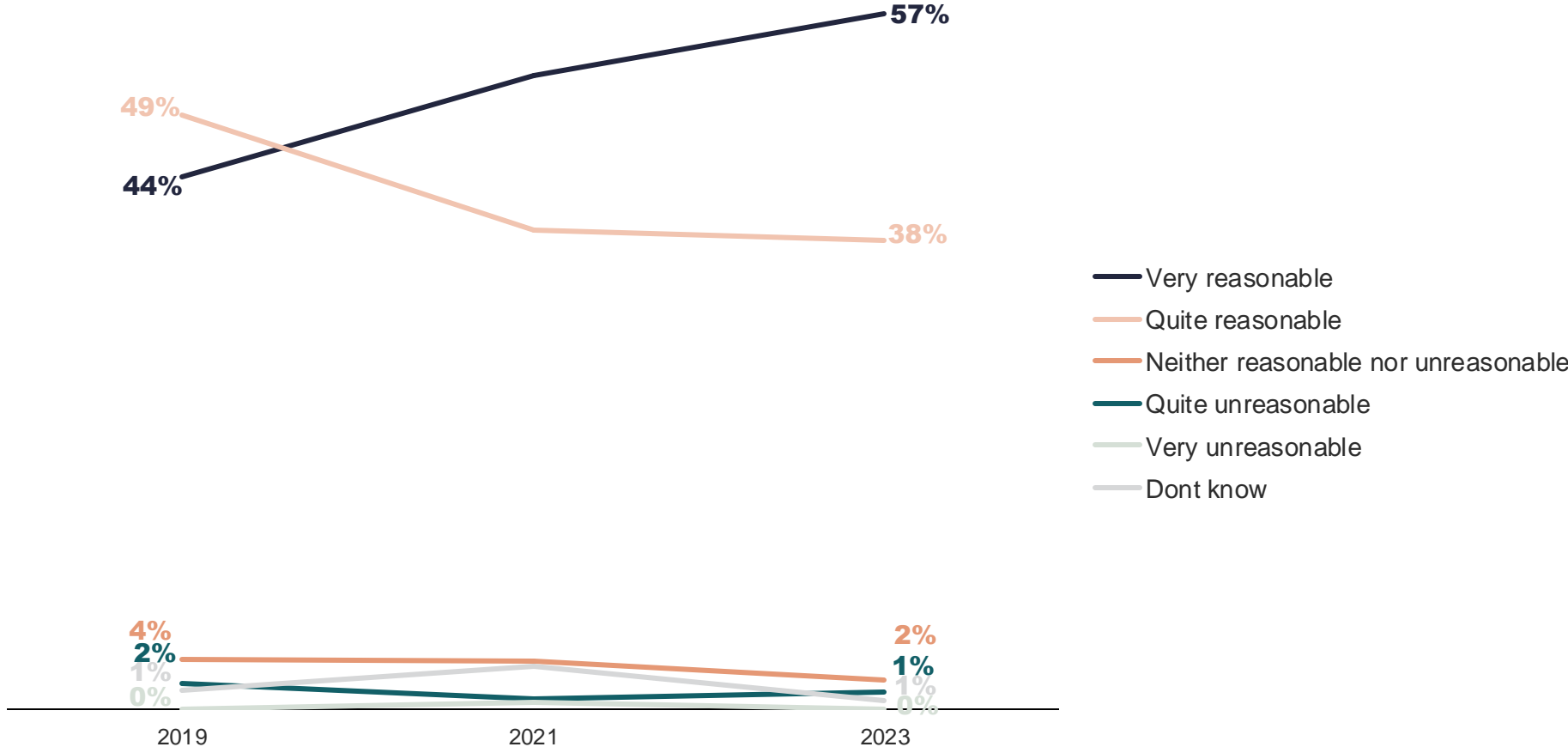
"How reasonable did the application process feel for the size of grant you were applying for?"



The proportion of grantees who feel the application process is 'very reasonable' has grown since 2019

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

Grantees

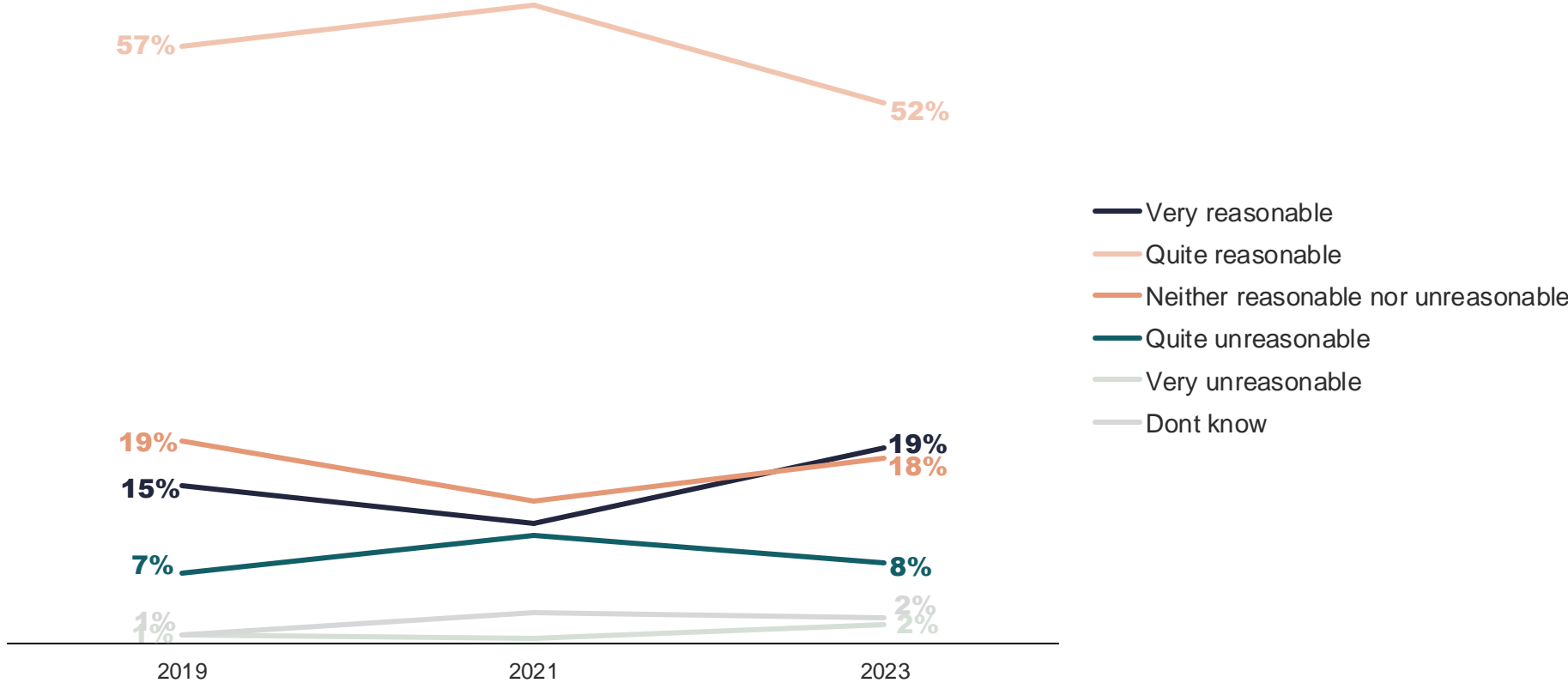


Source: Lloyds Bank Foundation applicant surveys 2019 to 2023 | Base: 1011 respondents

The proportion of unsuccessful applicants who say the process is 'very reasonable' has grown to its highest level

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

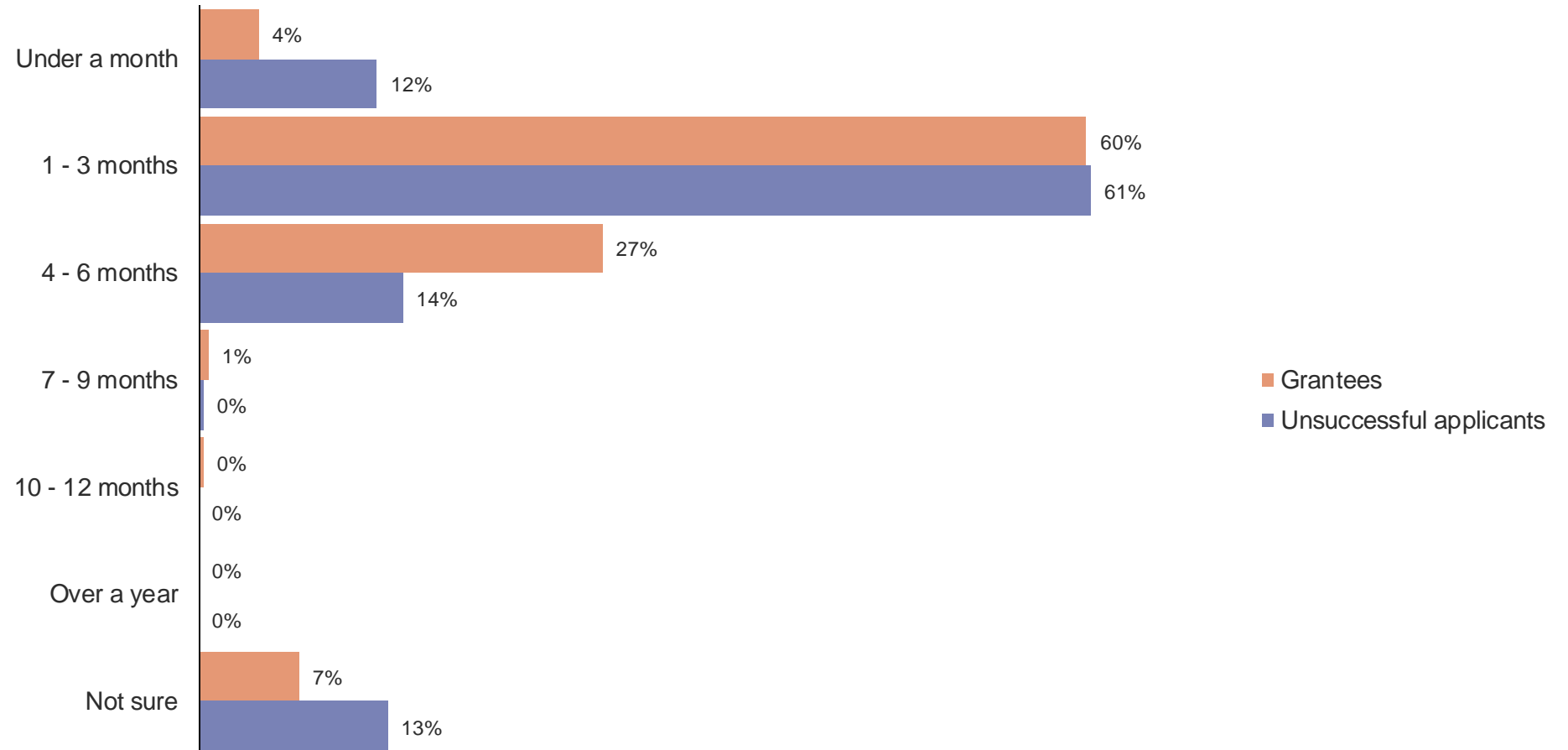
Unsuccessful applicants



Source: Lloyds Bank Foundation applicant surveys 2019 to 2023 | Base: 641 respondents

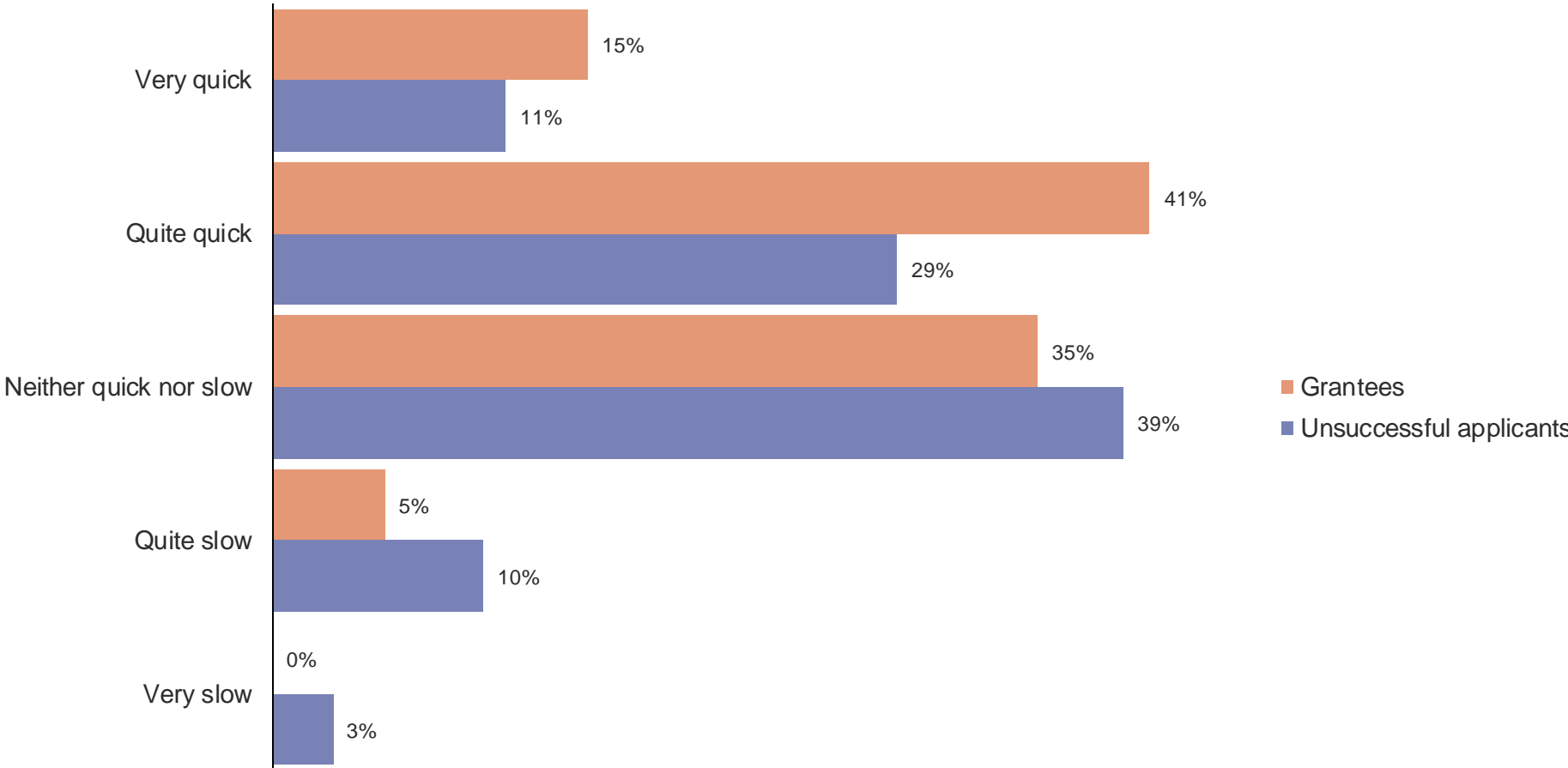
Most applicants wait between 1 and 3 months for a decision on their application

"How long did it take for a decision to be made on your funding request / grant application?"



56% of grantees think the decision time is very or quite quick, compared to 40% of unsuccessful applicants

“Would you consider this to be...”

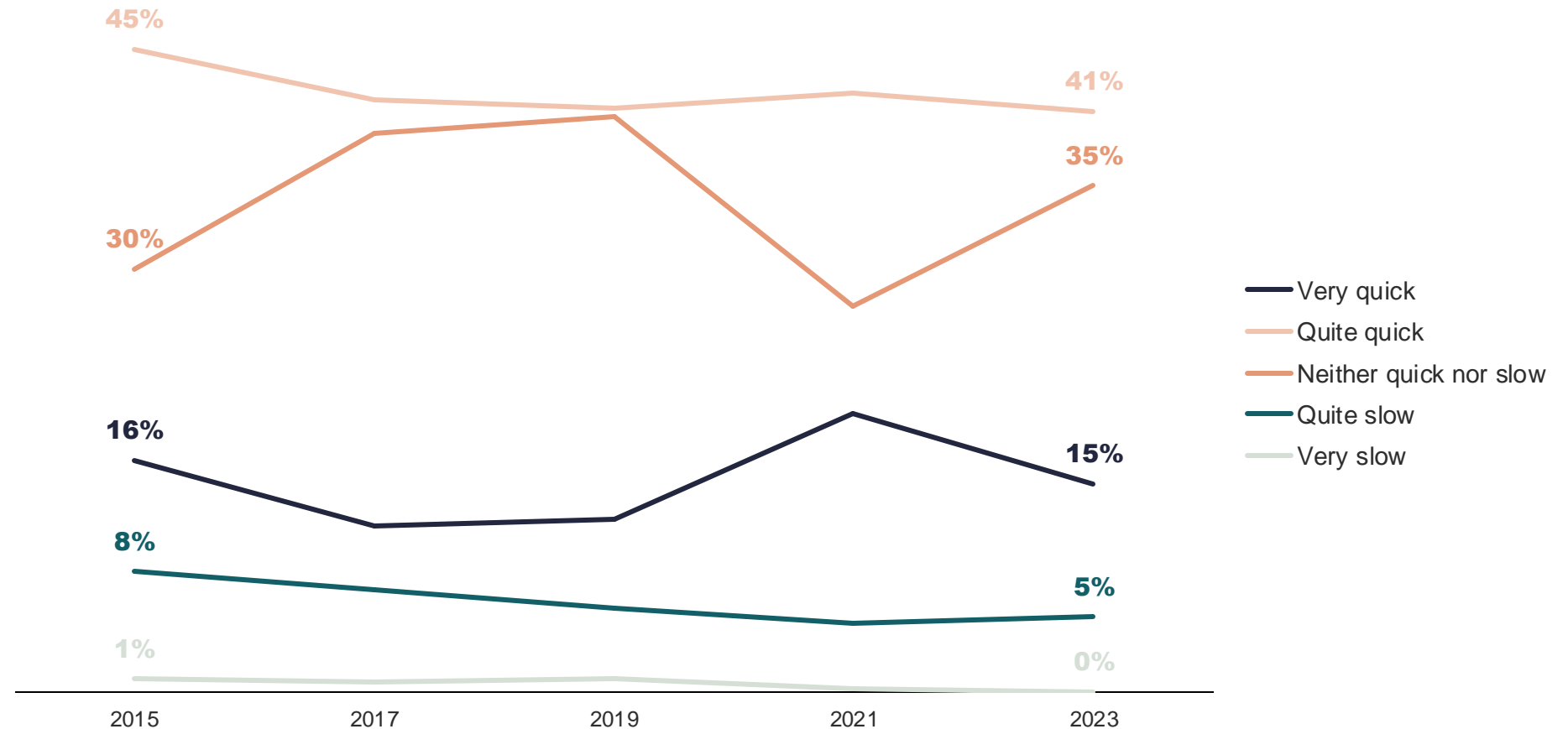


Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Grantees are less likely to consider the decision time 'very quick' compared to 2021

"Would you consider this to be..."

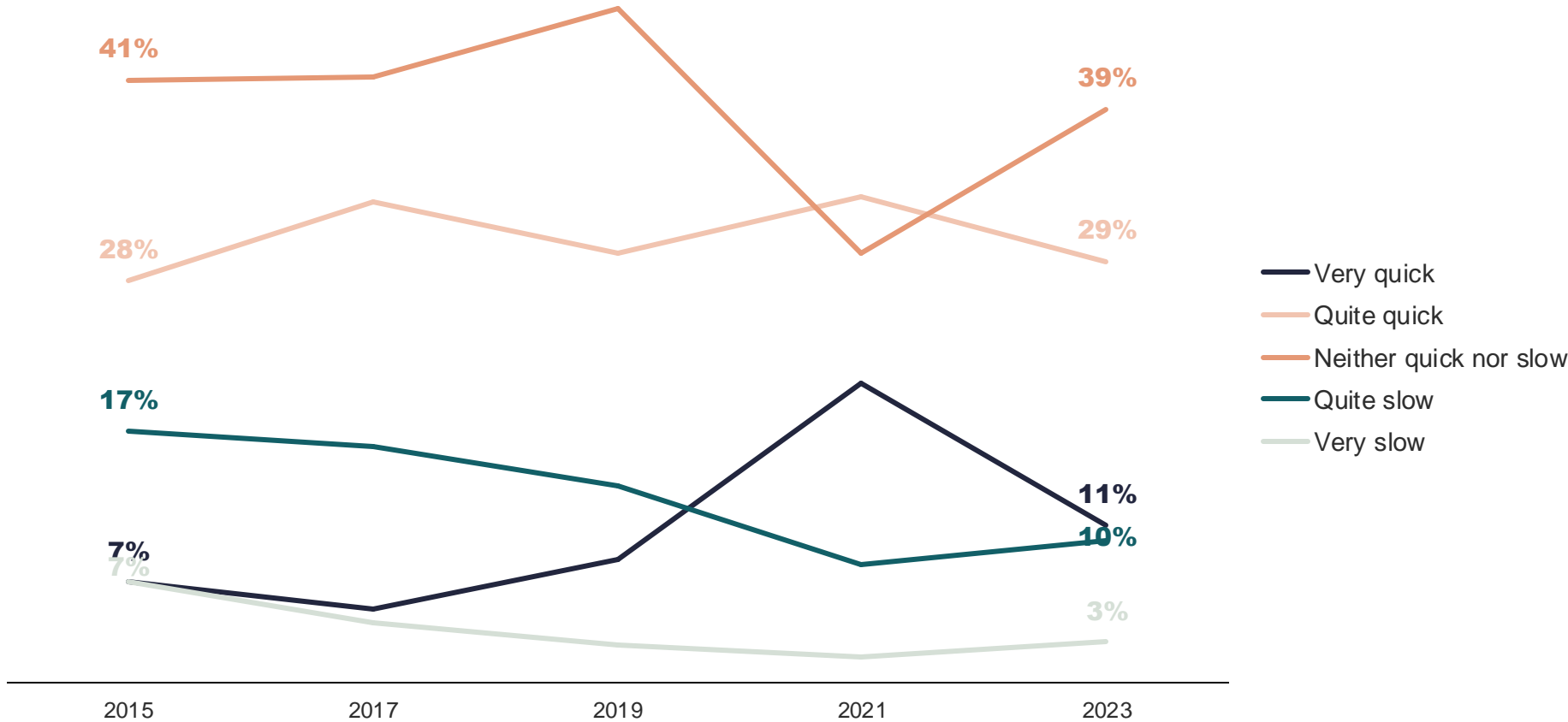
Grantees



Unsuccessful applicants are also less likely to consider the decision time 'very quick' compared to 2021

"Would you consider this to be..."

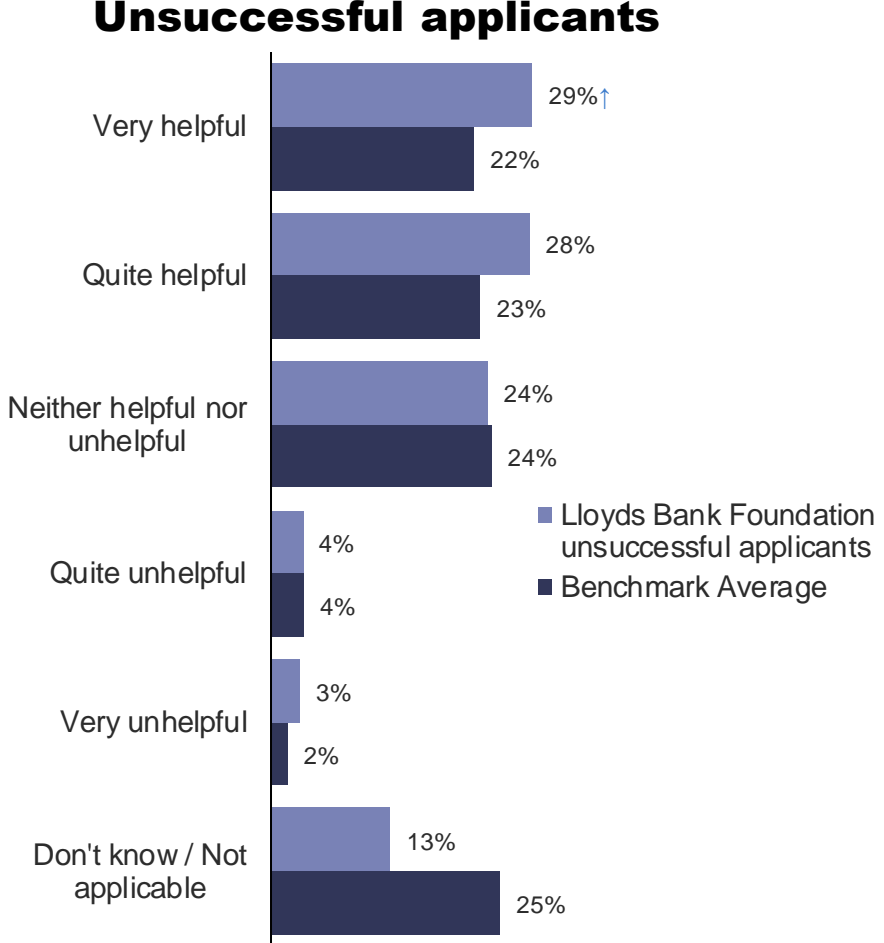
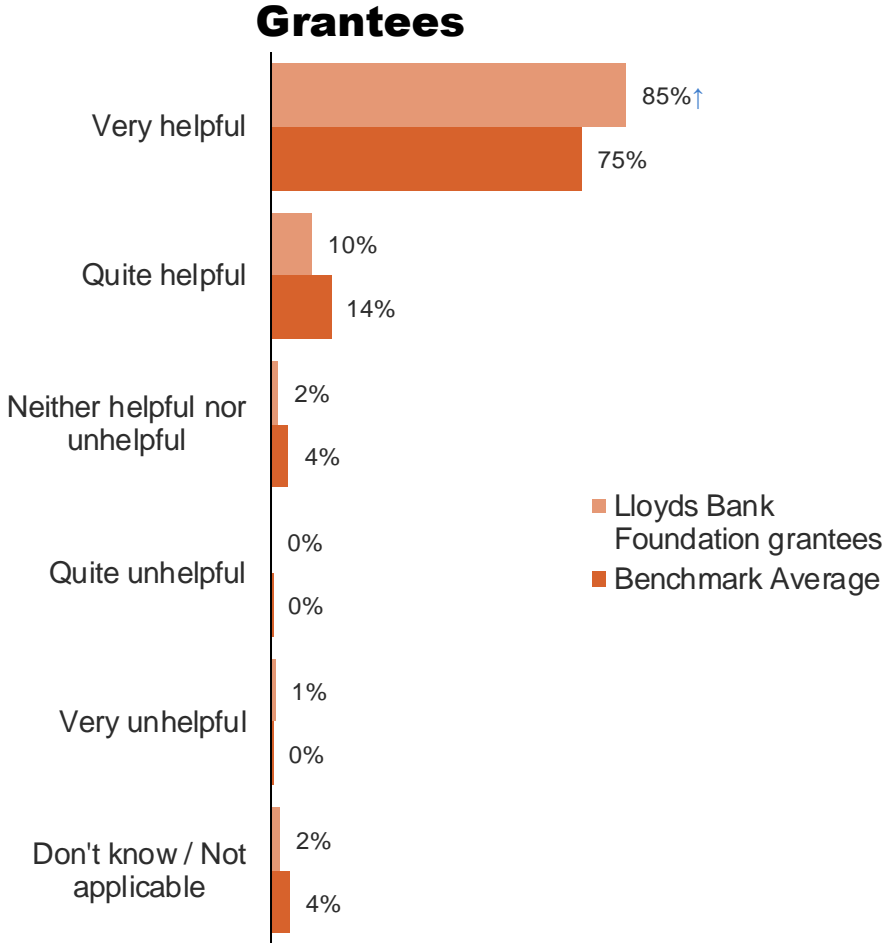
Unsuccessful applicants



Source: Lloyds Bank Foundation applicant surveys 2015 to 2023 | Base: 895 respondents

Both grantees and unsuccessful applicants found the Foundation's staff more helpful compared to the benchmark

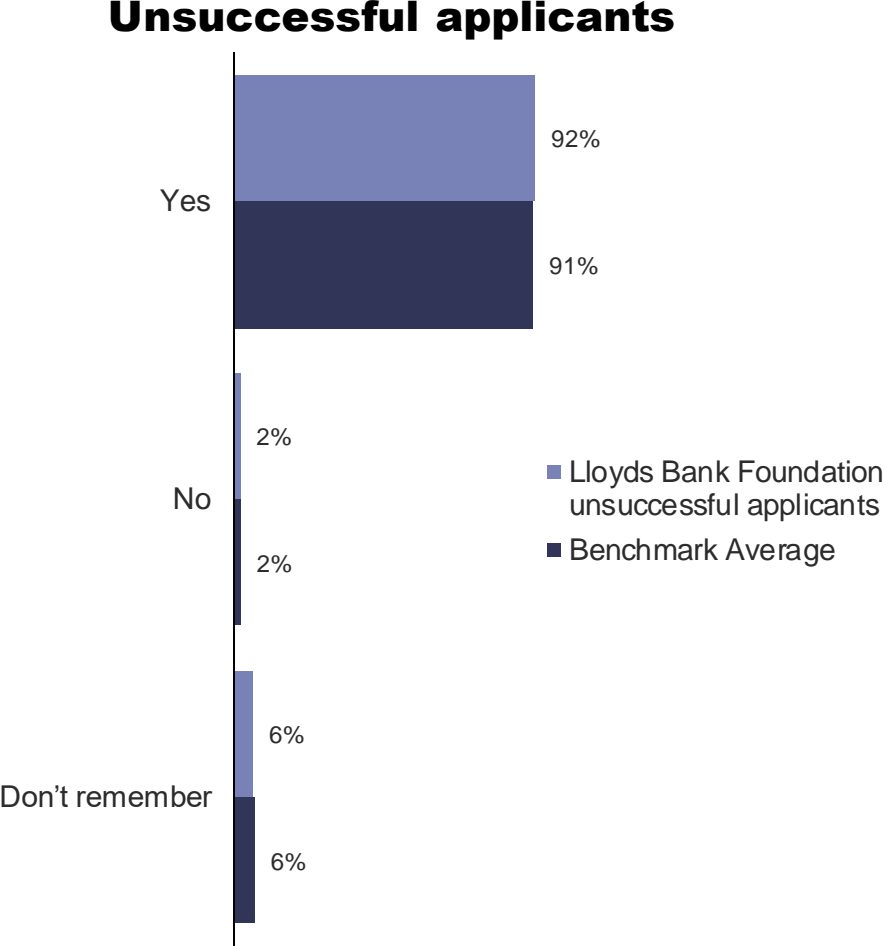
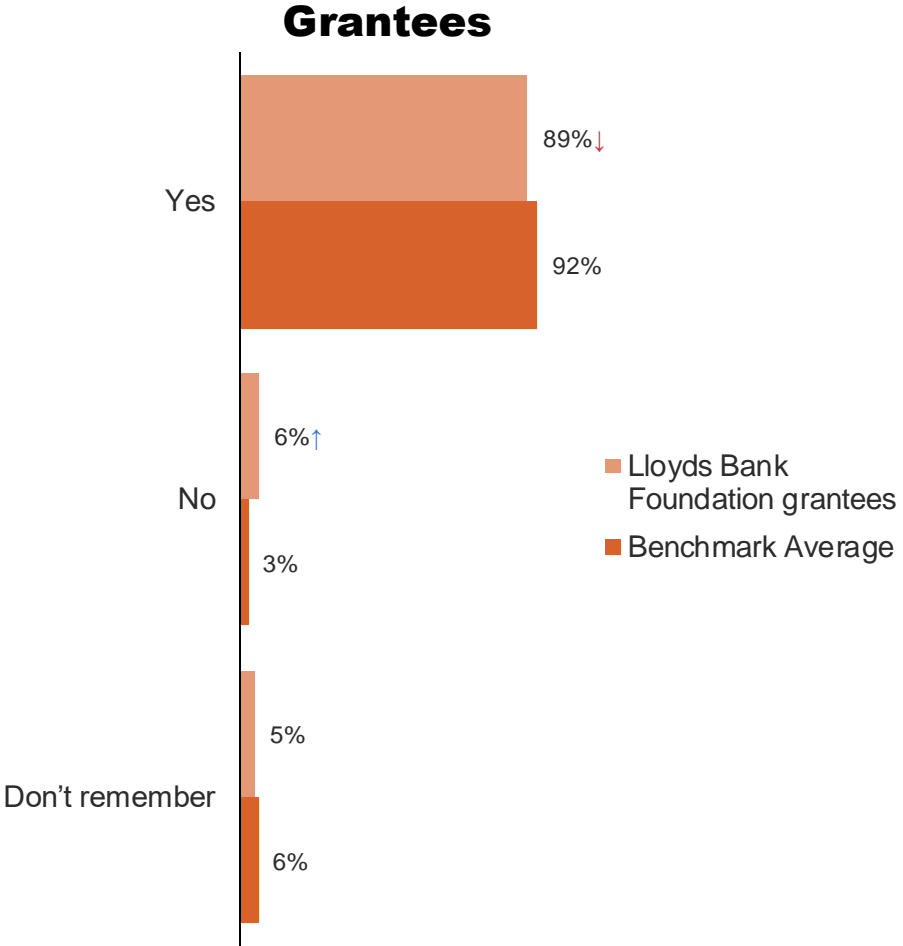
"How approachable and helpful were Lloyds Bank Foundation staff while making your application?"



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
 Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Around 9 in 10 applicants used the Foundation's website to help them with their application

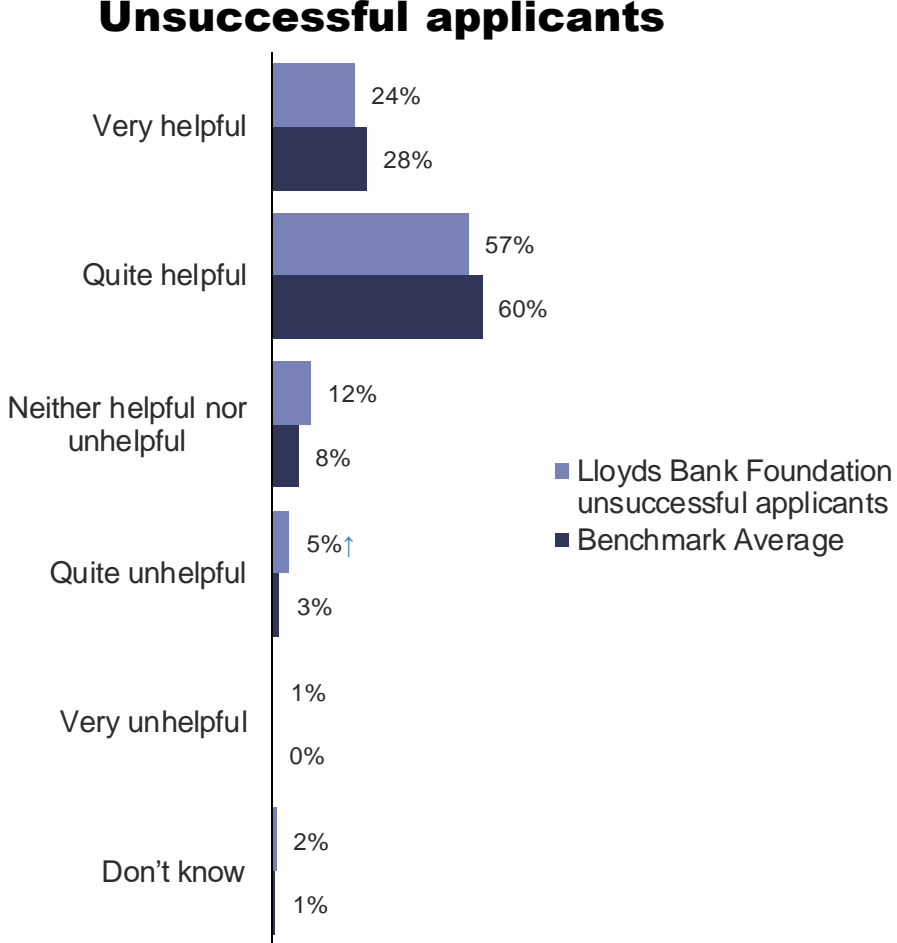
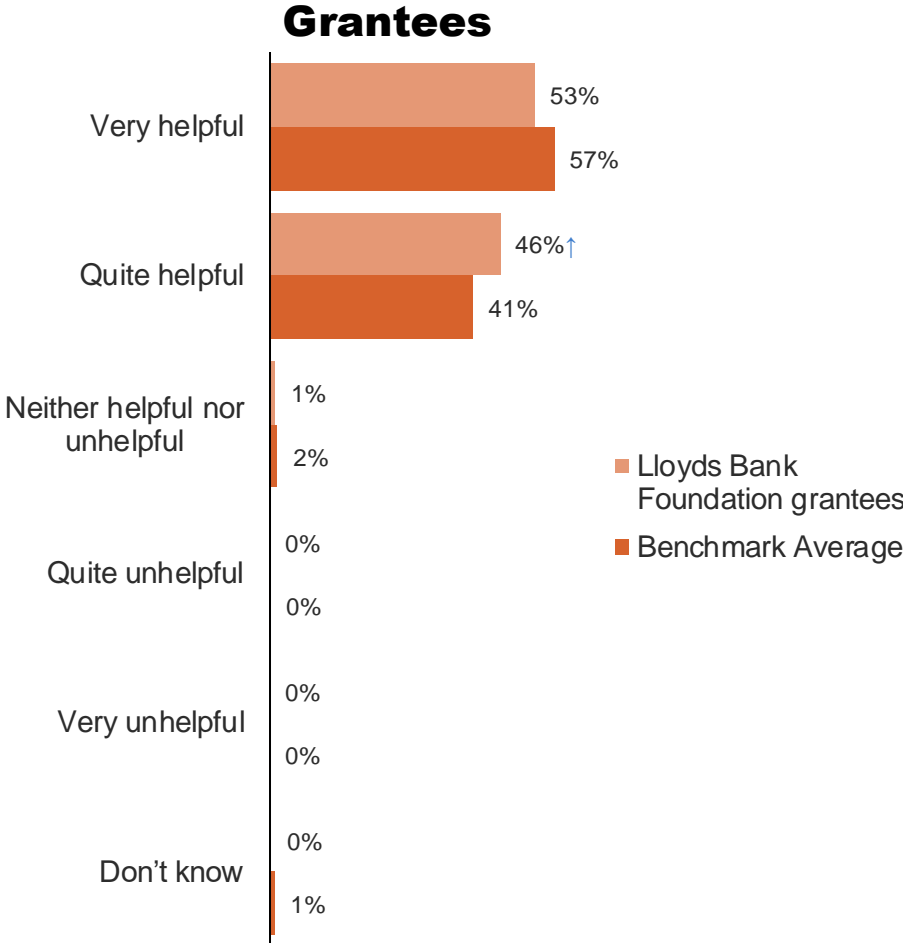
"Did you use the Lloyds Bank Foundation website to access information to help you with your application?"



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
 Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Among those who used it, the vast majority found the website helpful

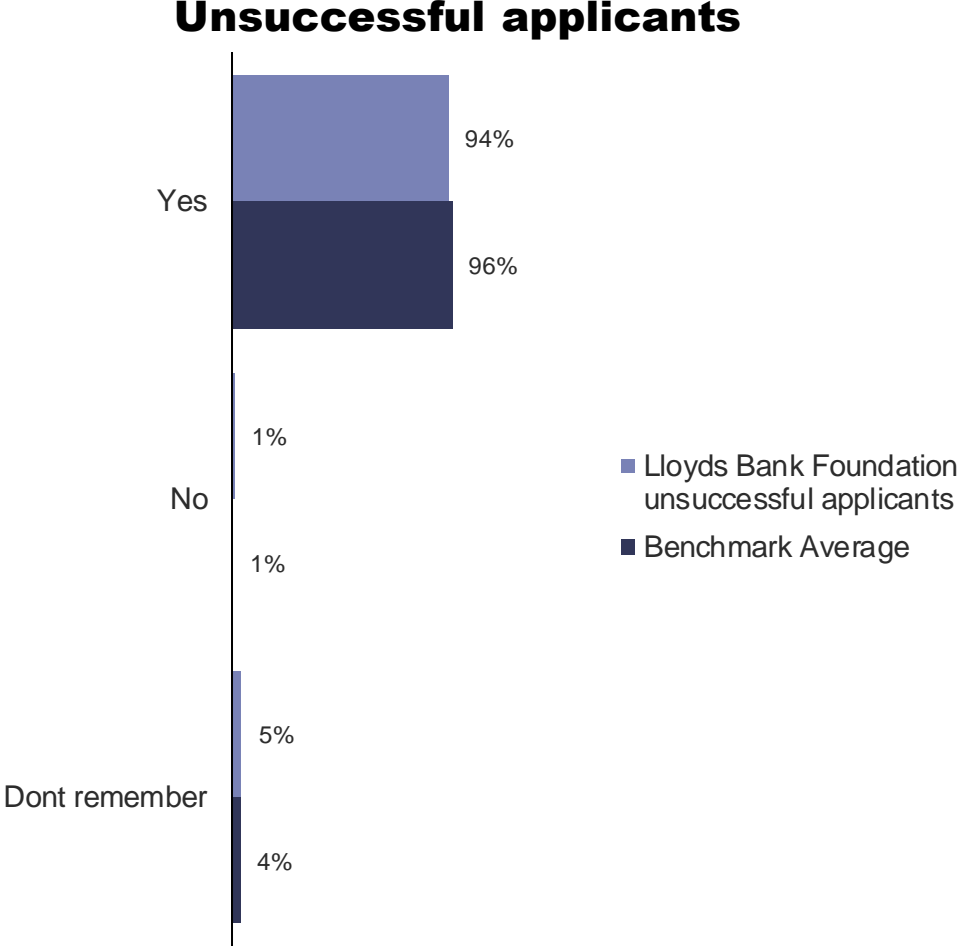
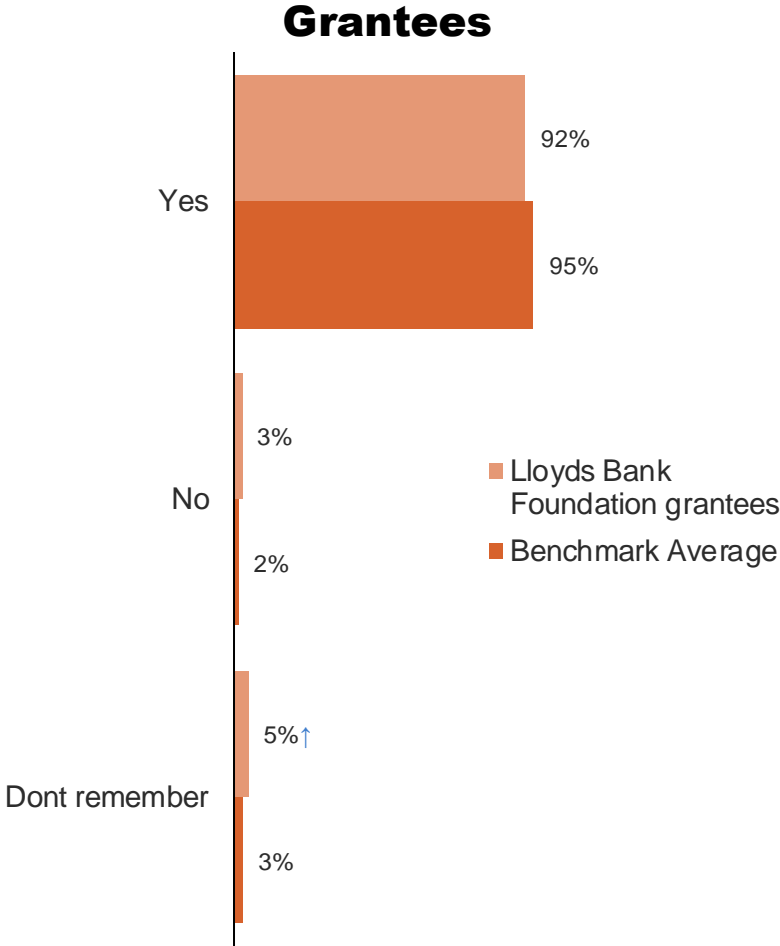
"How helpful did you find the Lloyds Bank Foundation website for accessing the information you needed to submit your application?"



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
 Source: Lloyds Bank Foundation applicant survey 2023 | Base: 525 respondents

The vast majority of applicants also used the Foundation's guidance documents

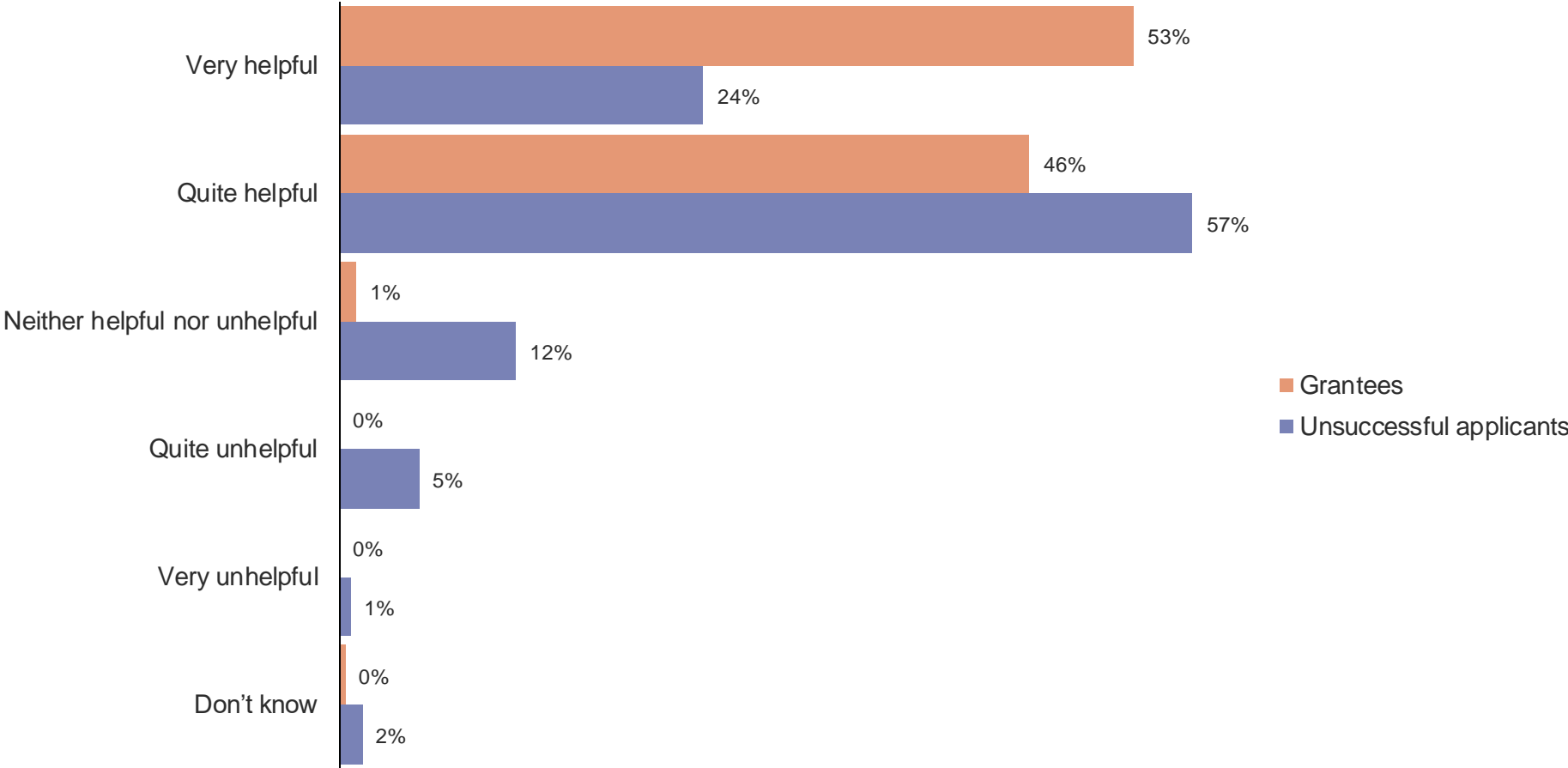
"Did you use the Lloyds Bank Foundation guidance documents to access information to help you with your application?"



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
 Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Grantees rate the guidance documents positively; 6% of unsuccessful applicants said they were unhelpful

"How helpful did you find the Lloyds Bank Foundation guidance documents in helping you to access the information you needed to submit your application?"





Clarity of criteria: occasionally, applicants said guidance was difficult to find or to follow

“The actual process was relatively straight-forward, but what was lacking was clarity on eligibility. We were turned down for an eligibility reason, which was not at the time listed on the website in the eligibility criteria, but it was tucked away in a document (maybe a pdf somewhere?). Shortly after we were refused, it was added to the eligibility on the website. As an applicant, this felt pretty disingenuous.” Unsuccessful applicant, Renew programme, £251k - £500k

“It was not easy to understand the guidance alone, because english was not our first language and we have had difficult to express and explain all the good work that we do for our community. we found very helpful talking to the staff / regional officer.” Grantee, Renew programme, £50k - £100k

“It was fairly straightforward. However, I did need to call your helpline for further clarification of eligibility criteria. We did find the information given over the telephone to be somewhat conflicting with the outcome of the grant application which was disappointing and frustrating.” Unsuccessful applicant, d/Deaf & disabled people's user-led organisations, £101k - £250k

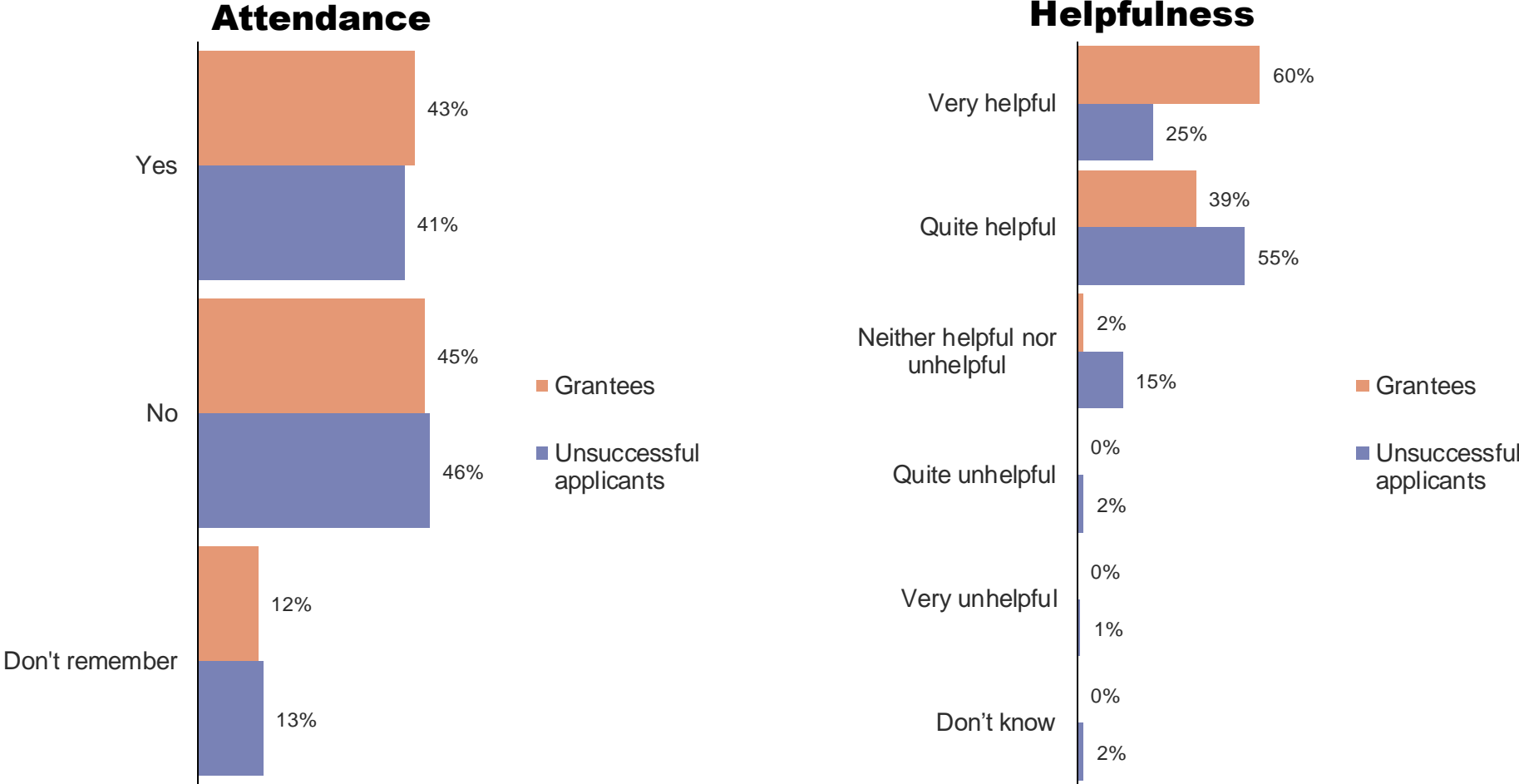
“The application process was extremely time consuming, but we have taken many positives from this as it has raised awareness of a number of systems and processes that needed to be reviewed. We were, however, disappointed by the lack of detail given in the feedback to help us to understand where we went wrong with the application. We also struggled with the 75% deaf led criteria as we are a small charity and only have 3 trustees on the board.” Unsuccessful applicant, d/Deaf & disabled people's user-led organisations, Less than £50k

“The website isn't so straight forward because of the different strands seemingly having quite different eligibility. What would be very helpful is more visual aids, different strands of funding in different columns with the differing criteria and a VERY clear [indication] of who and who is not eligible for the various funds and very clear criteria around the requirements relevant to charitable and CIC status.” Unsuccessful applicant, Racial Equity programme, £50k - £100k

Just under half of the sample watched a grants webinar and most found it very or quite helpful

"Did you attend or watch a grants webinar and Q&A by Lloyds Bank Foundation to get more information to help you with your application?"

"How helpful did you find the grants webinar and Q&A in helping you to access the information you needed to submit your application?"

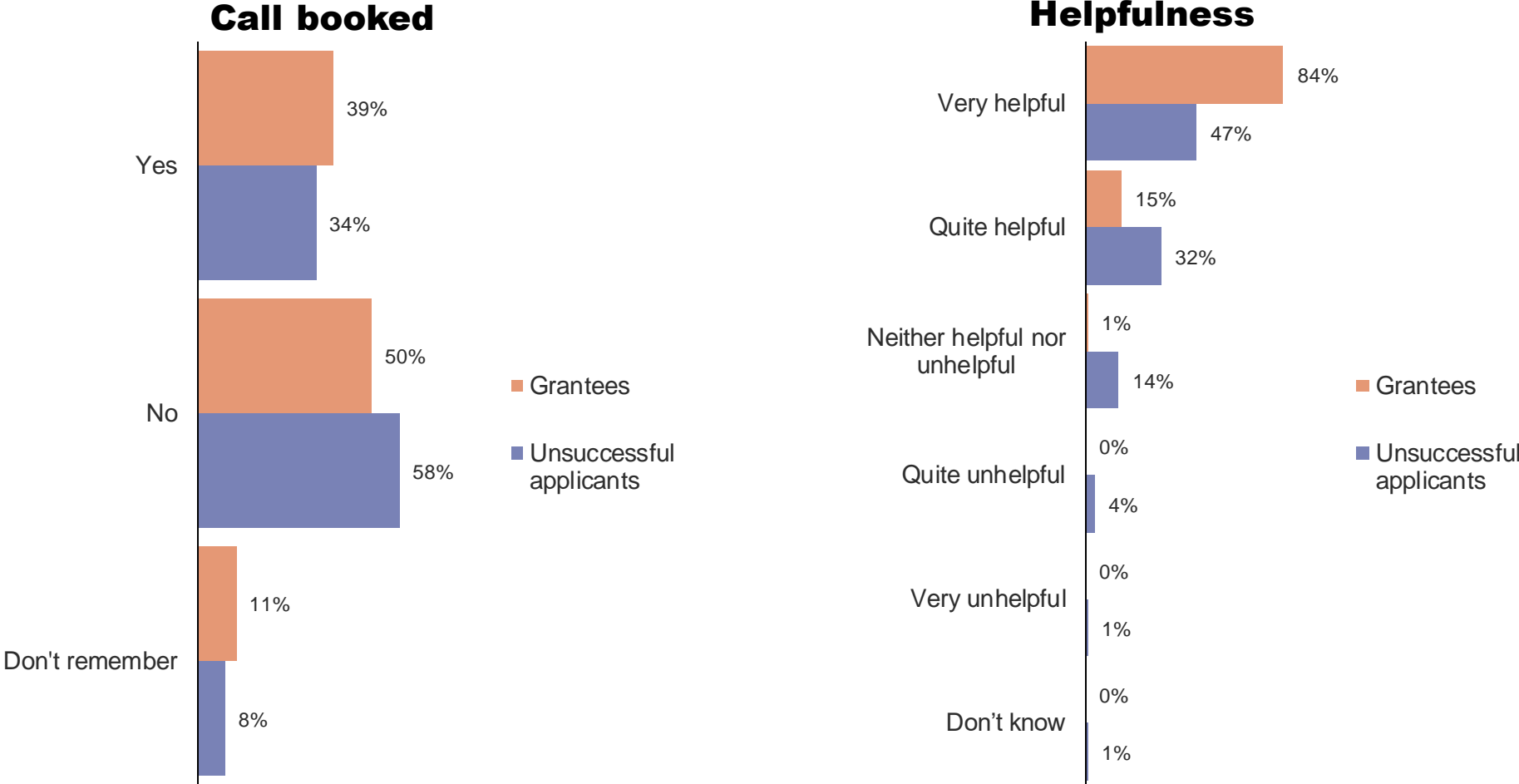


Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Just over a third of the sample booked a call with a member of staff, and grantees are more likely to say this was helpful

"Did you book a call to speak to a Lloyds Bank Foundation member of staff to help you prepare your application?"

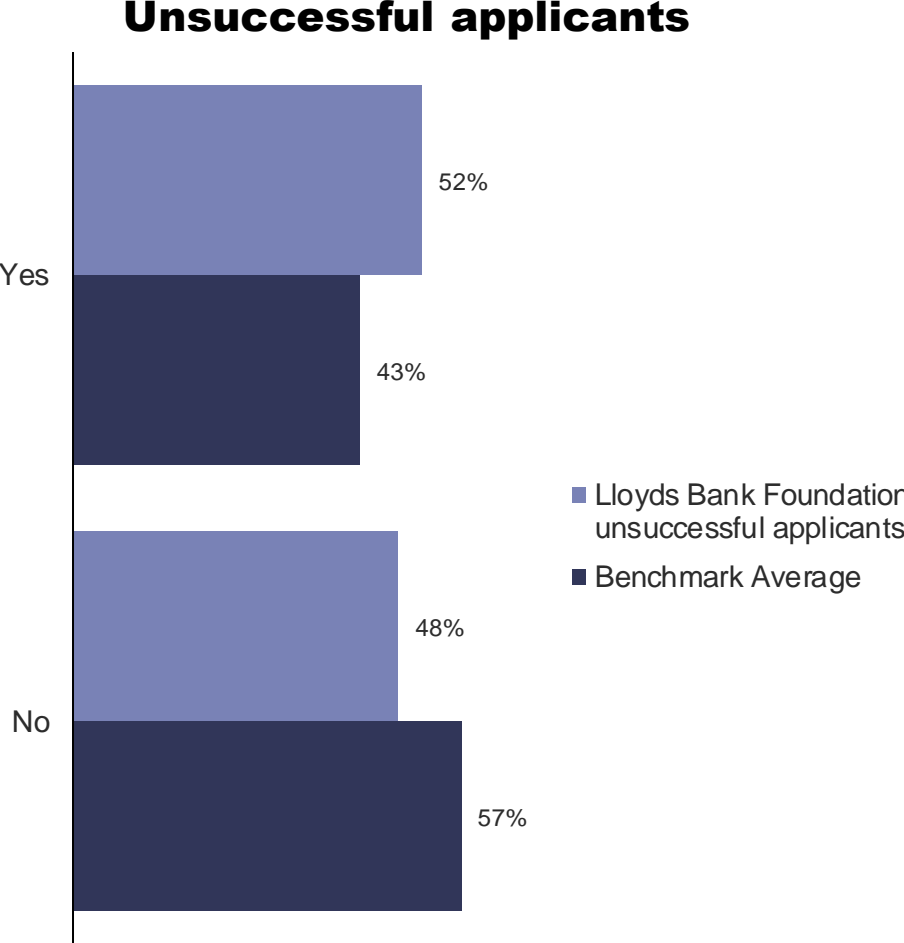
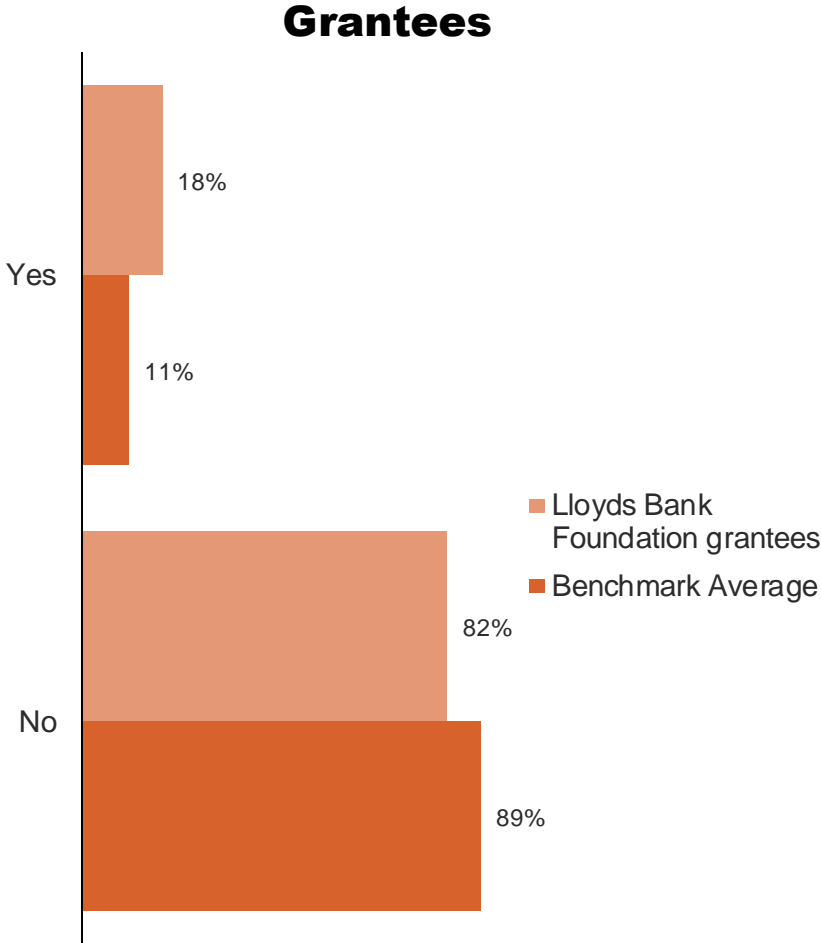
"How helpful did you find the call in helping you to access the information you needed to submit your application?"



Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

The proportion of applicants who said they encountered barriers is higher than the benchmark average

"Would you say that your organisation has experienced any barriers to accessing funding from Lloyds Bank Foundation?"



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents



Would you say that your organisation has experienced any barriers to accessing funding from Lloyds Bank Foundation? Please explain why you chose this answer:

Those who answered 'Yes' felt that funding criteria is too restrictive

“Recent changes in Lloyds' funding focus have meant that our work is no longer a good fit.”

Unsuccessful applicant

“The Foundation has become very sector specific and issue based. We are a holistic charity and no longer fit these criteria.”

Grantee

“We are no longer eligible due to our income exceeding £500K which is very disappointing.”

Grantee

“Your policy of only funding homelessness charities which engage in long-term relationships fails to recognise the value of local partnerships, putting pressure on small charities to try and do everything themselves.”

Unsuccessful applicant

Those who answered 'No' felt the process is accessible and supportive

“Whenever we don't understand something or struggle with our application, someone from the foundation will step in to support.”

Grantee

“Lot of support from experienced individuals who gave great advice and advocated on our behalf.”

Grantee

“Although English is not our first language, we had support from experienced staff, who helped us to shape the application accordingly and to get through.”

Grantee

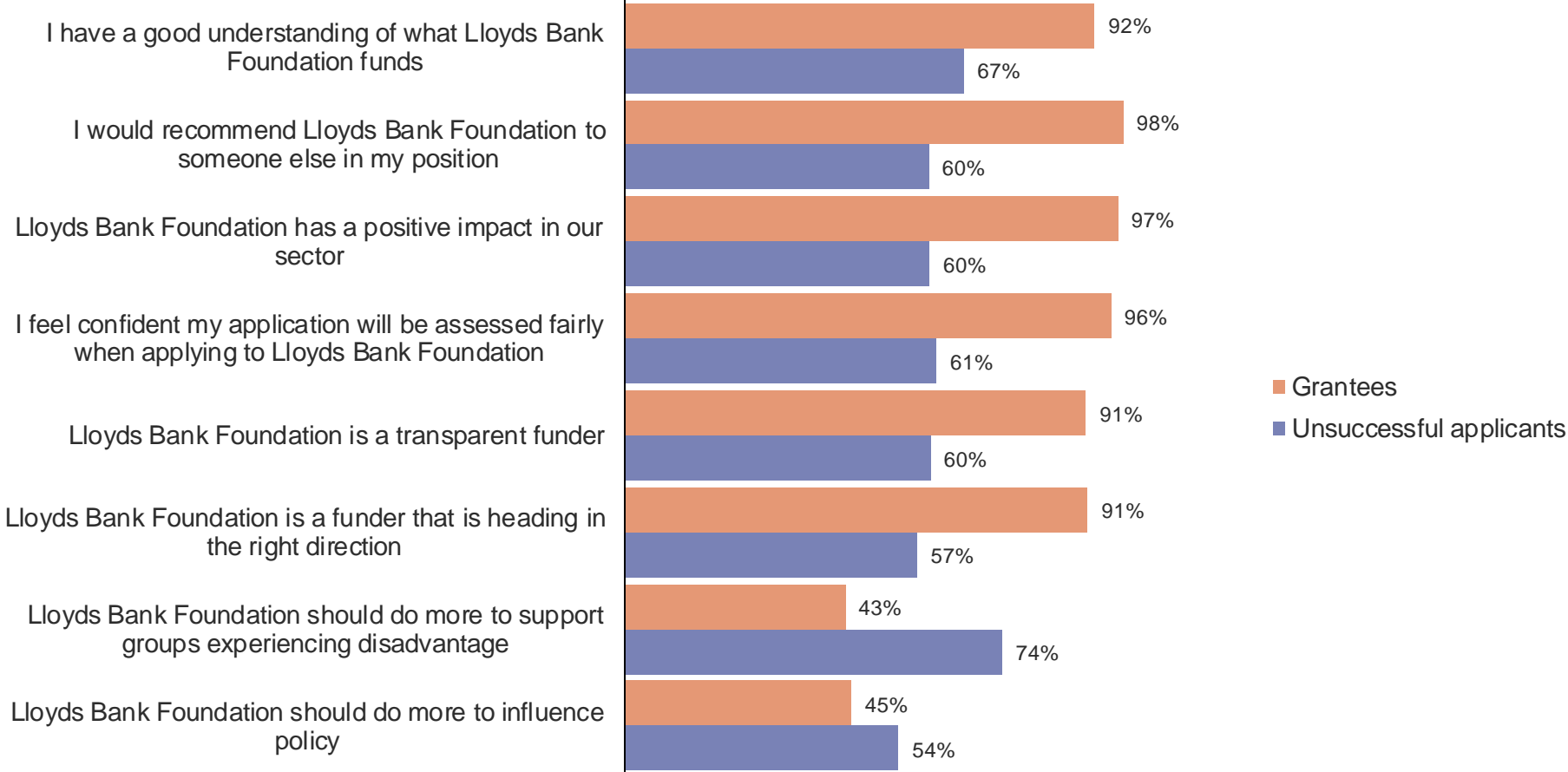
“There is a good range of funding available, and lots of support and guidance (if needed).”

Unsuccessful applicant

There is near unanimous agreement among grantees that they would recommend the Foundation to someone else in their position

"To what extent do you agree or disagree with the following statements?"

Strongly agree + Agree



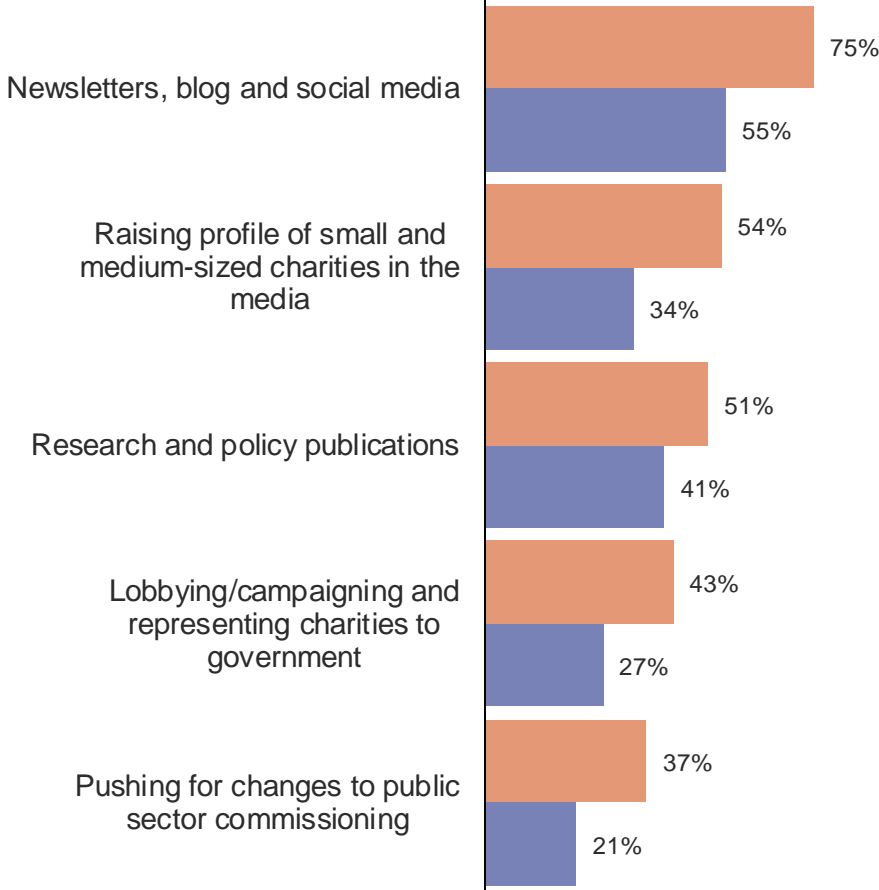
Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

Applicants who are aware of the Foundation’s national initiatives they tend to find them helpful

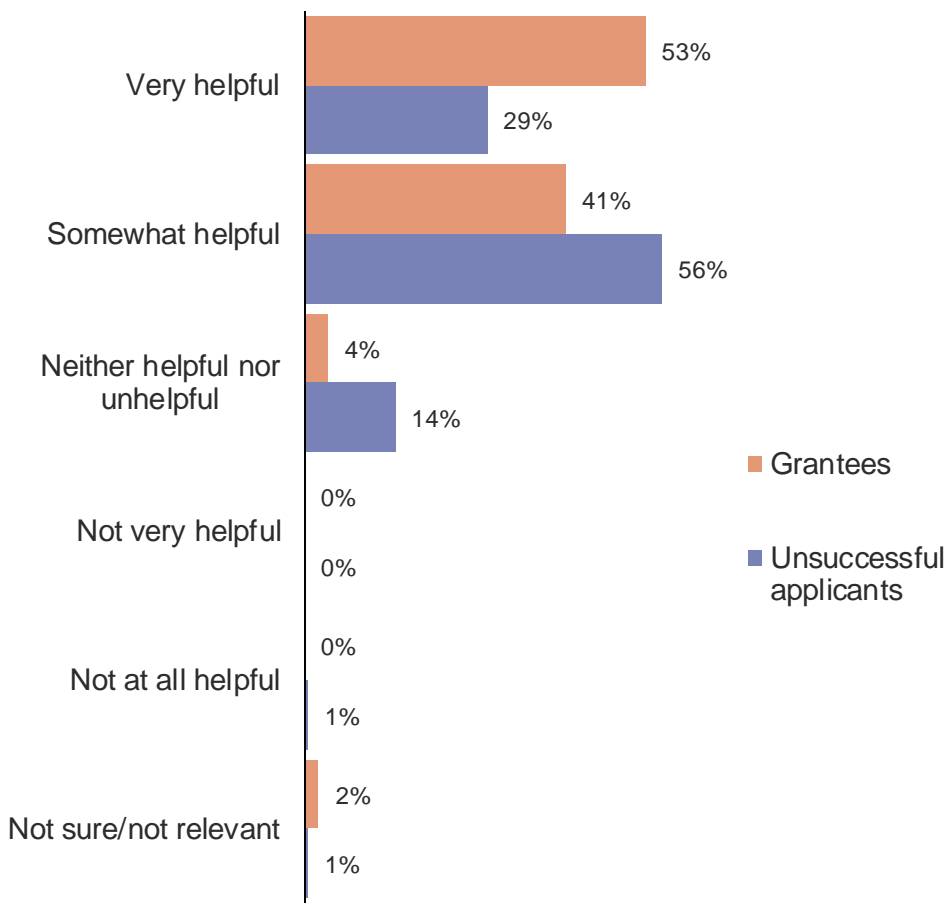
"Listed below are a number of national initiatives provided by Lloyds Bank Foundation for England and Wales. Please indicate your level of awareness of each one."

"You mentioned that you are aware of one or more of the Lloyds Bank Foundation’s communication channels. How helpful is the information shared on these channels?"

Awareness of initiatives



Helpfulness of initiatives (those aware)



3

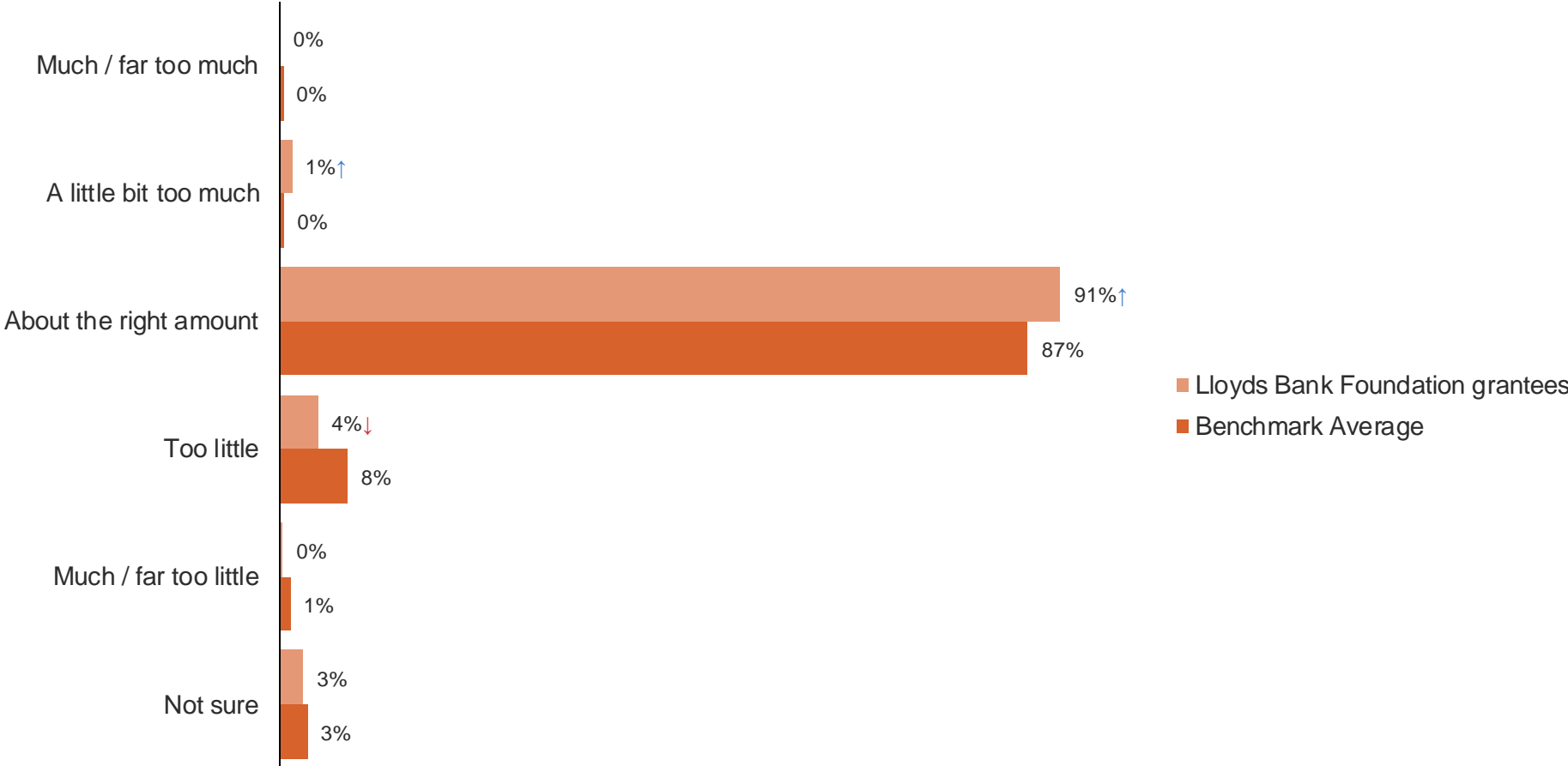
Grantees' perceptions

Key findings: the views of grantees

- Lloyds Bank Foundation's relationships with its grantees continue to be among the very strongest in the sector.
- The Foundation scores better than the benchmark average across all core metrics measured with grantees, most notably understanding them, treating them as partners, approachability and ease of reporting. Many of these areas have also reached an all-time high in the most recent round of research.
- Grantees tend to find Foundation staff very helpful when any interaction takes place. Testament to the strong relationship, most grantees would feel comfortable approaching the Foundation if a problem were to arise.
- The proportion of grantees who said reporting was 'not at all difficult' is at its highest level since 2013. Although if we were looking for a criticism, more could be done to align reporting requirements to their existing processes – 33% of grantees said reporting aligned 'a great deal' and 43% said 'somewhat'.
- One of Lloyds Bank Foundation's core strengths is the development support they offer to those they fund. Grantees hugely value this additional support, with very high levels of satisfaction among those who have taken up the offer.

Grantees tend to feel they have the right amount of contact with Lloyds Bank Foundation; this has remained consistent since 2013

"As a grantee, how much contact do you have with Lloyds Bank Foundation?"



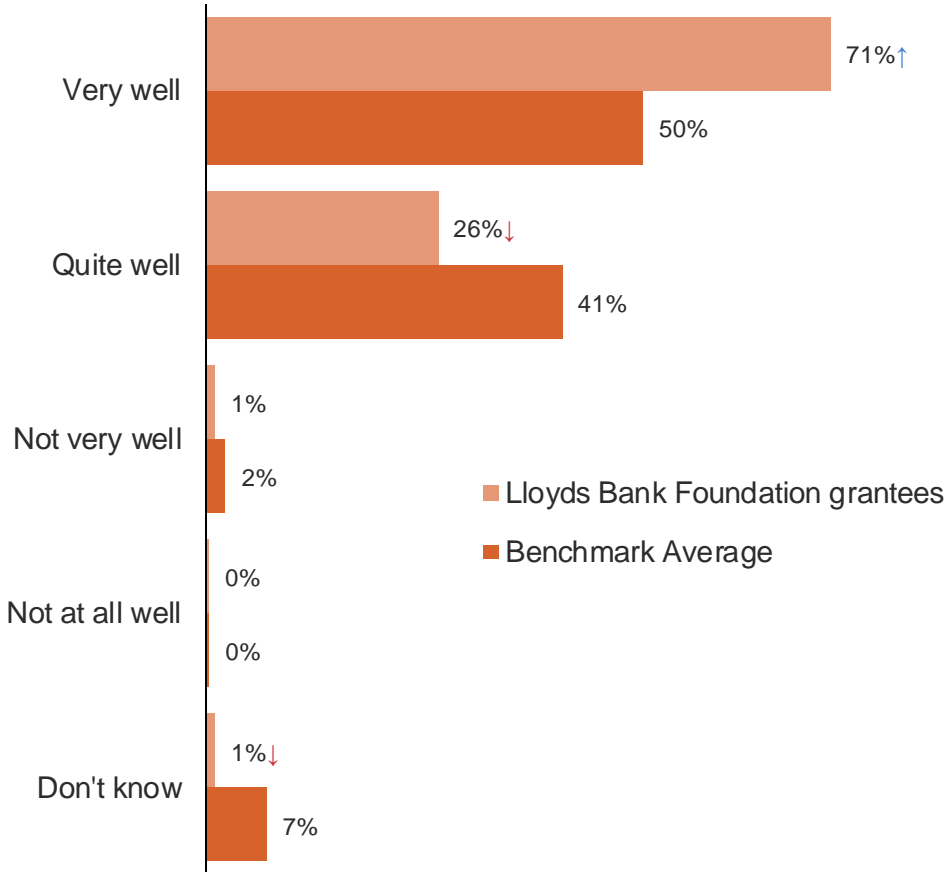
Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
Source: Lloyds Bank Foundation applicant survey 2023 | Base: 292 respondents

The Foundation's understanding of its grantees is significantly better than the benchmark average

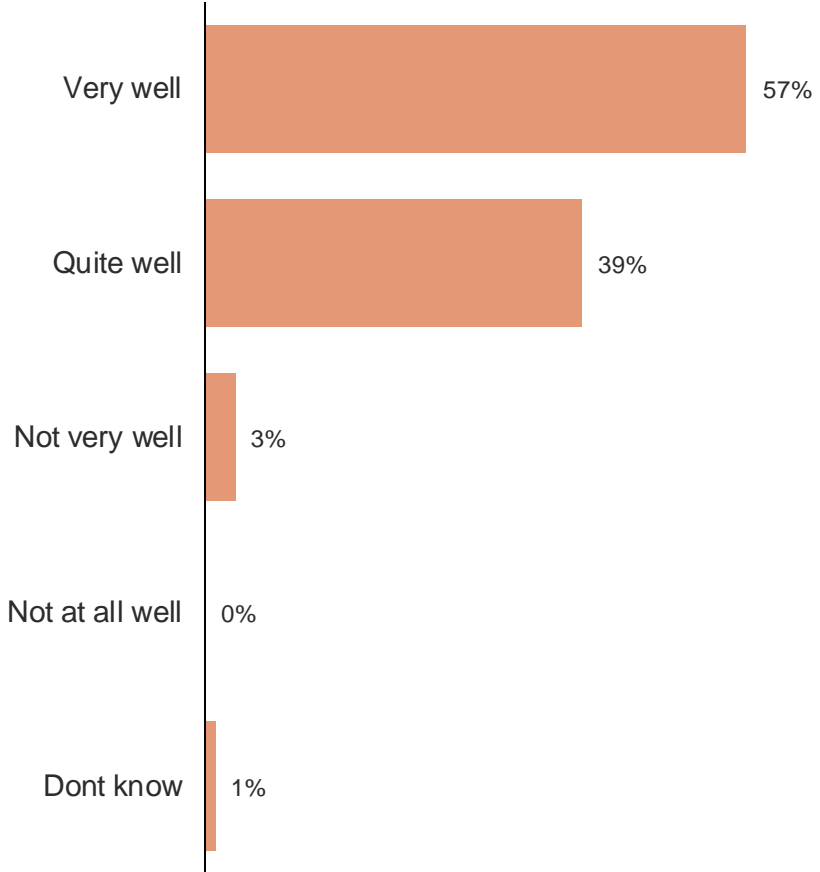
"How well do you feel Lloyds Bank Foundation understands your organisation and its aims?"

"How well do you think the Foundation understands the needs of the people you support or the communities you work with?"

Understands your organisation and its aims



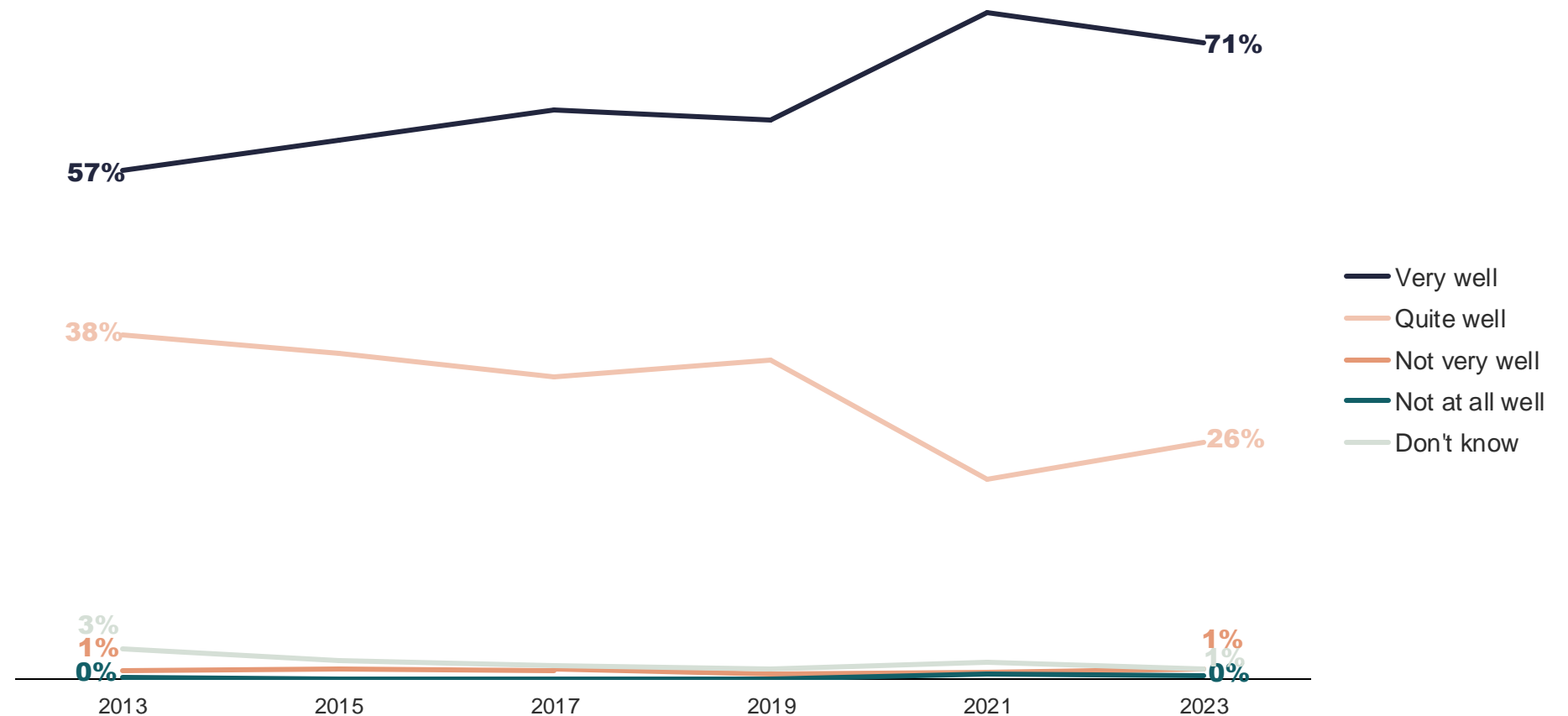
Understands the people you support



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
 Source: Lloyds Bank Foundation applicant survey 2023 | Base: 292 respondents

Understanding of grantees is relatively consistent with the levels seen in 2021

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

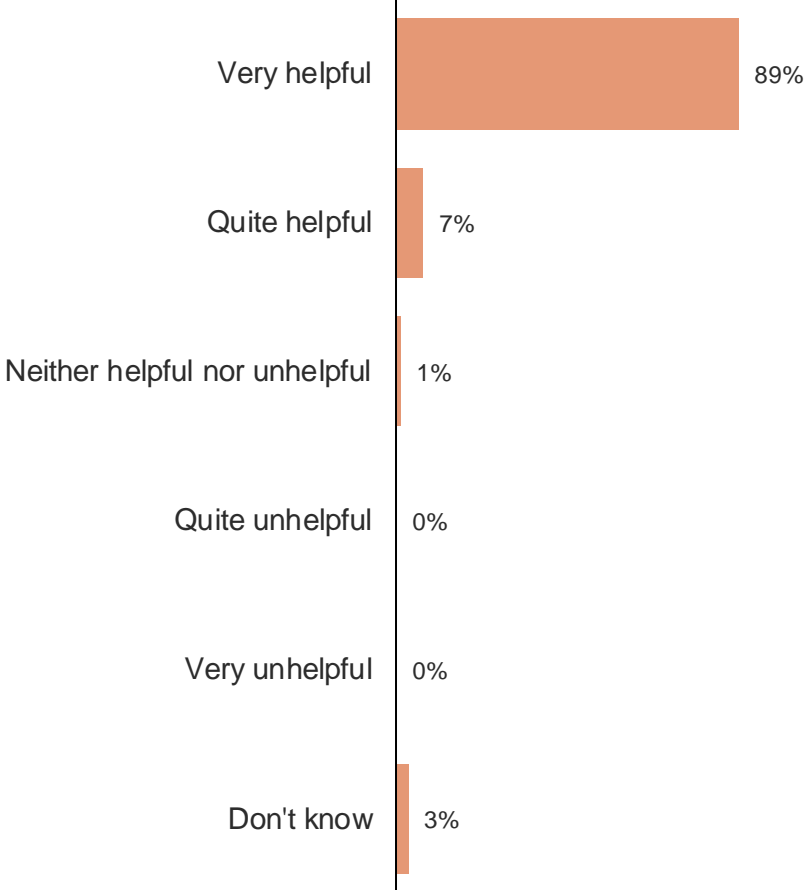


Grantees tend to find Foundation staff very helpful when interaction takes place

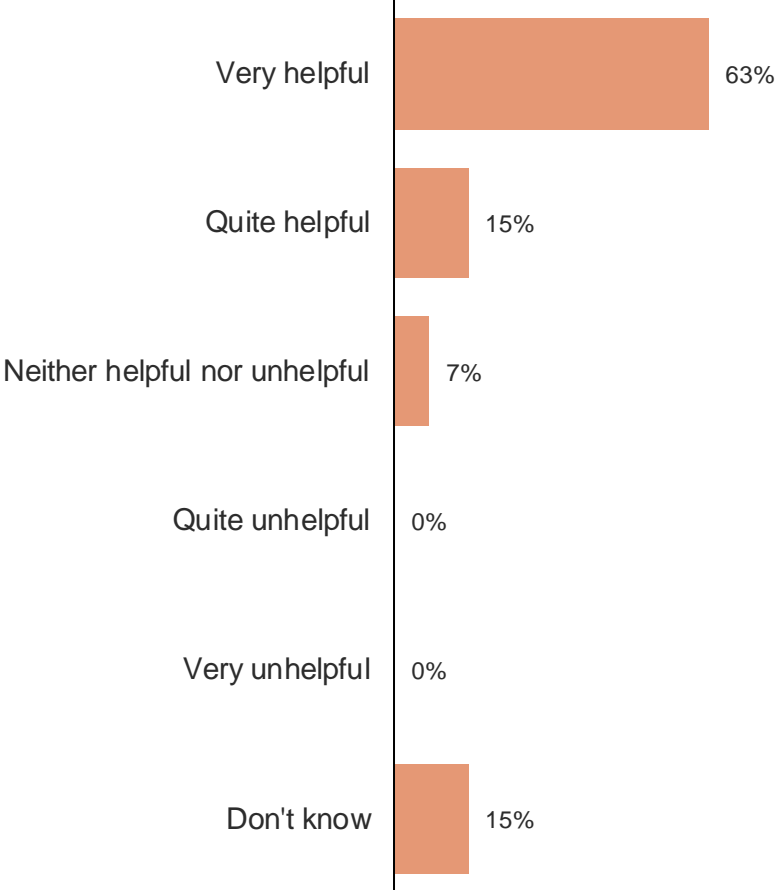
"How approachable and helpful was the Lloyds Bank Foundation Regional Manager after you received your grant?"

"How approachable and helpful were other Lloyds Bank Foundation staff after you received your grant?"

Regional Managers



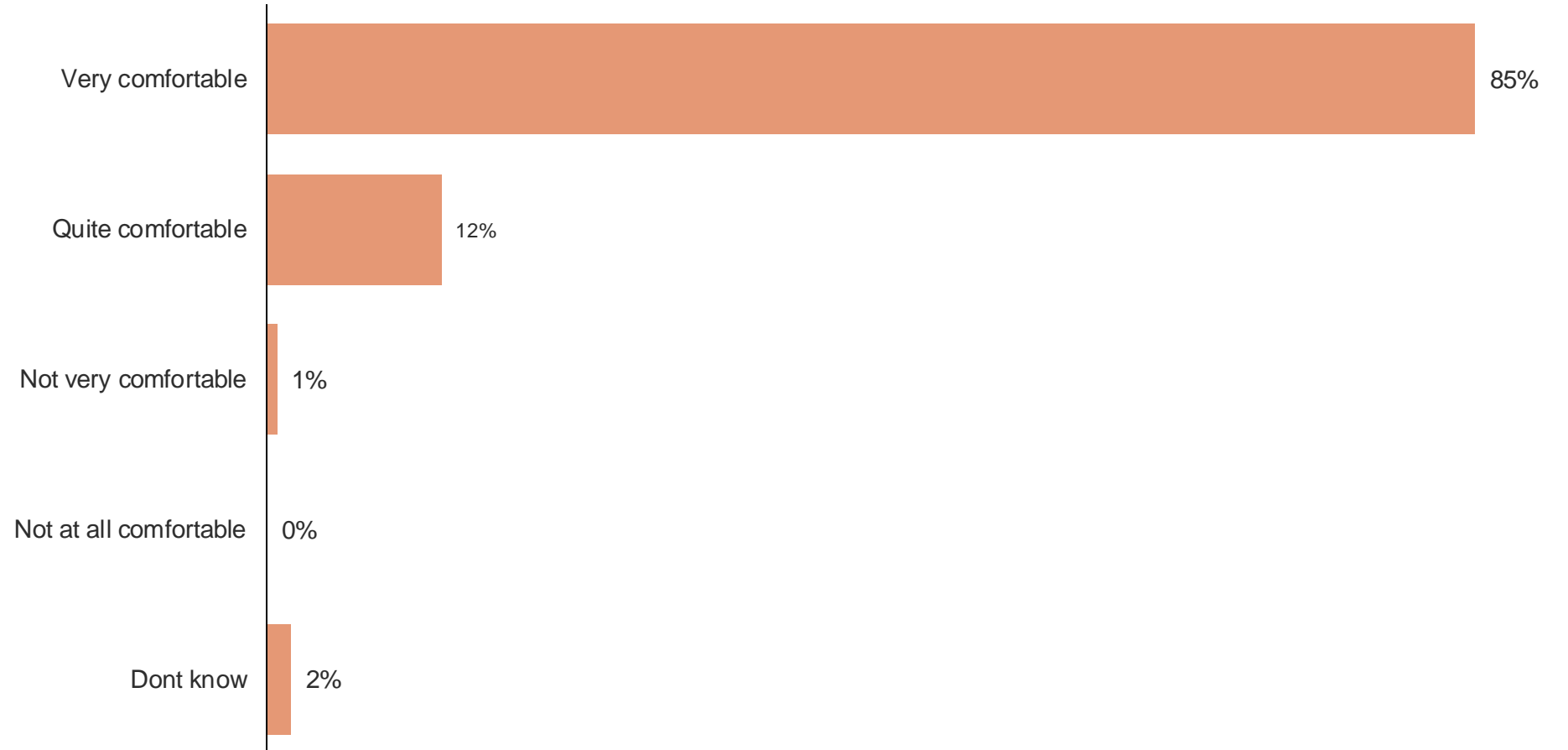
Other staff members



Source: Lloyds Bank Foundation applicant survey 2023 | Base: 292 respondents

Most grantees would feel comfortable approaching the Foundation if a problem arose

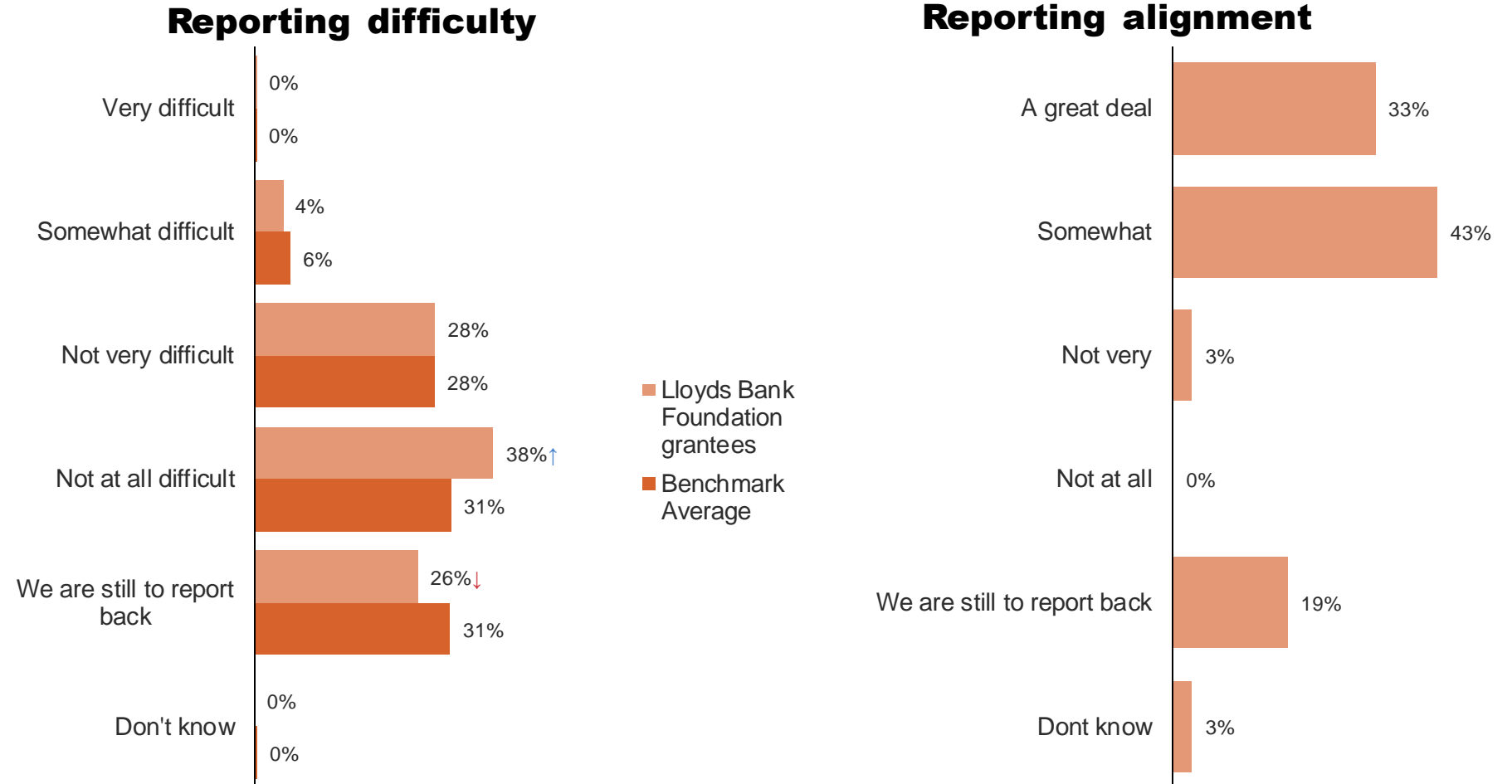
"How comfortable do you feel approaching the Foundation if a problem arises?"



Most grantees do not find reporting back difficult, but more could be done to align requirements to their existing processes

"How did you find the reporting back on the grant once it was awarded?"

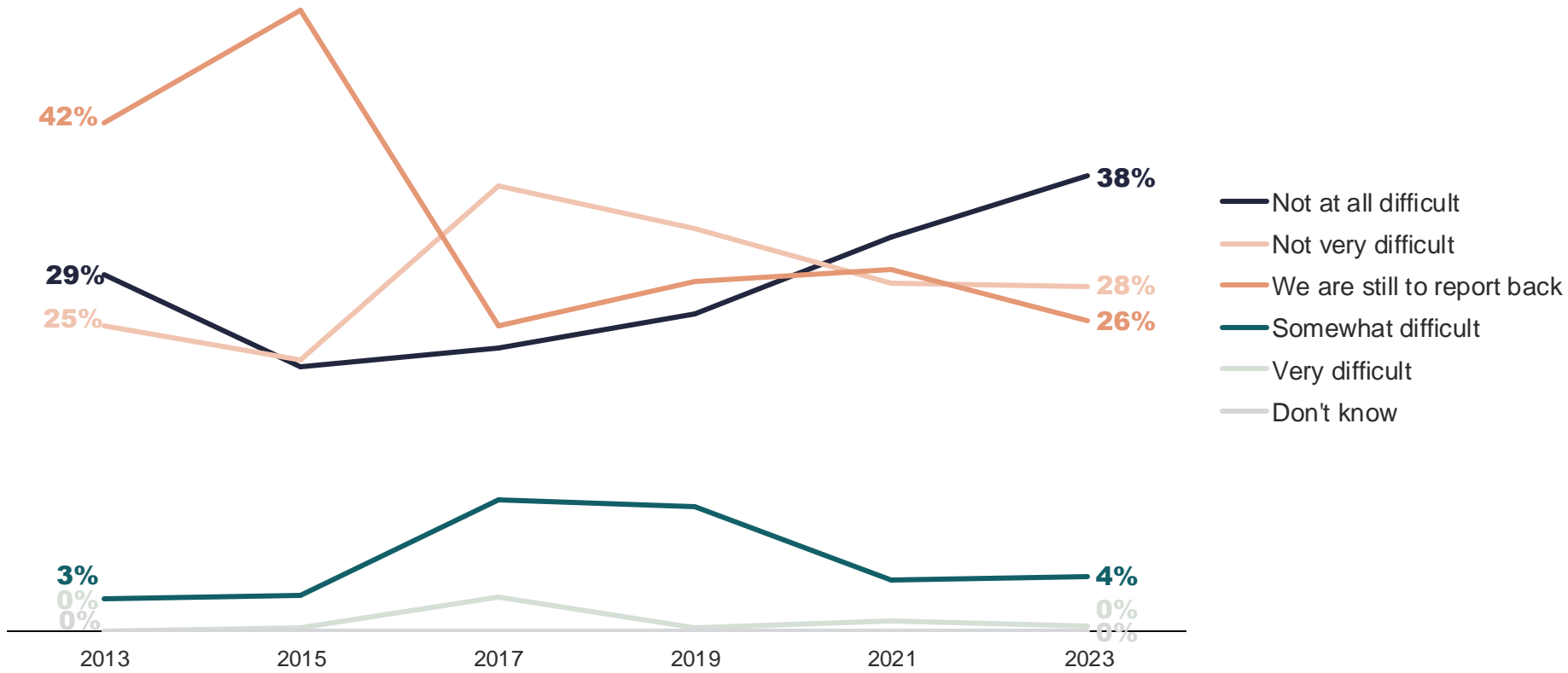
"To what extent were the Foundation's reporting requirements aligned to your charity's existing monitoring and evaluation systems?"



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
 Source: Lloyds Bank Foundation applicant survey 2023 | Base: 292 respondents

The proportion of grantees who say reporting was 'not at all difficult' is at its highest level since 2013

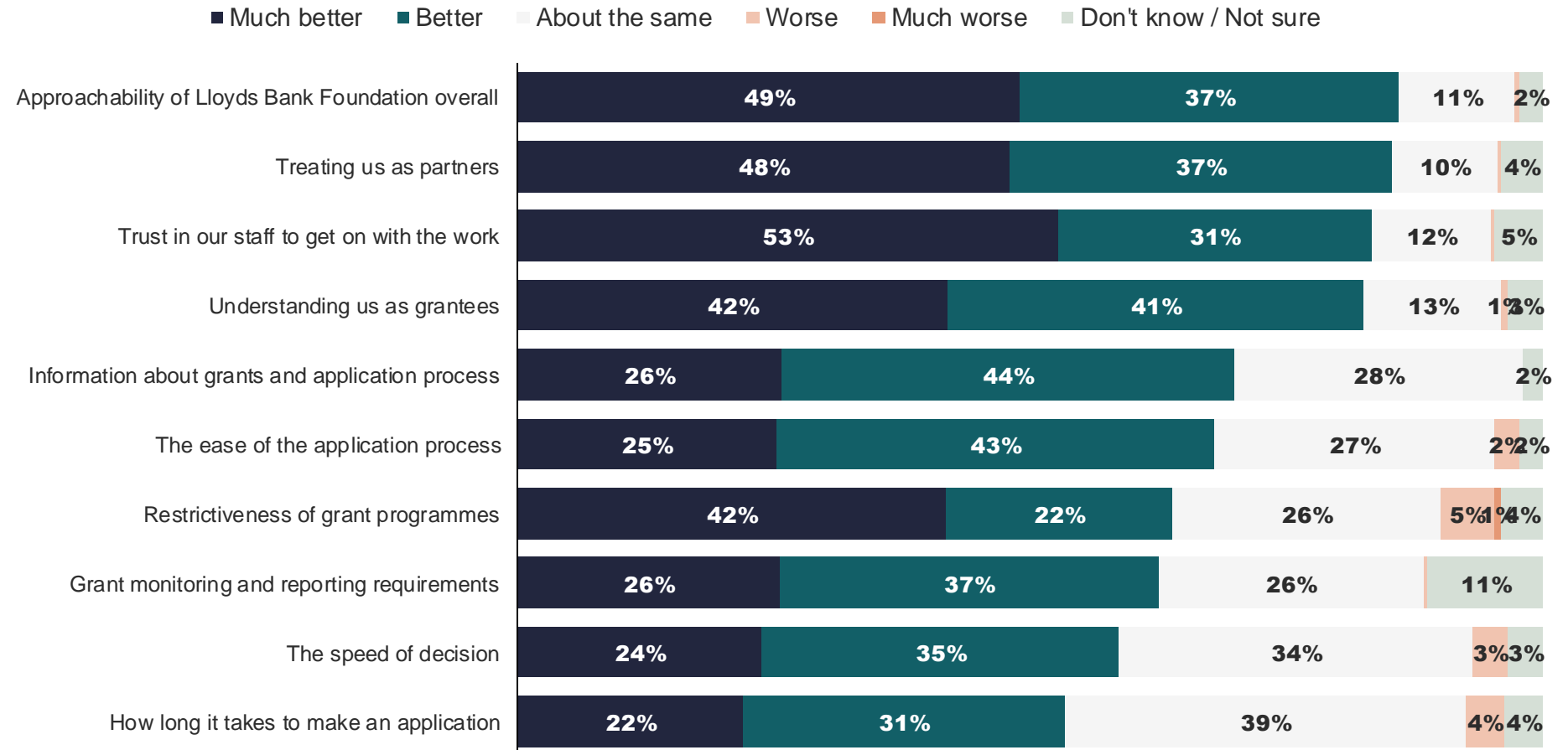
"How did you find the reporting back on the grant once it was awarded?"



Source: Lloyds Bank Foundation applicant surveys 2013 to 2023 | Base: 2443 respondents

Grantees think the Foundation is better than other grant-makers across a range of areas

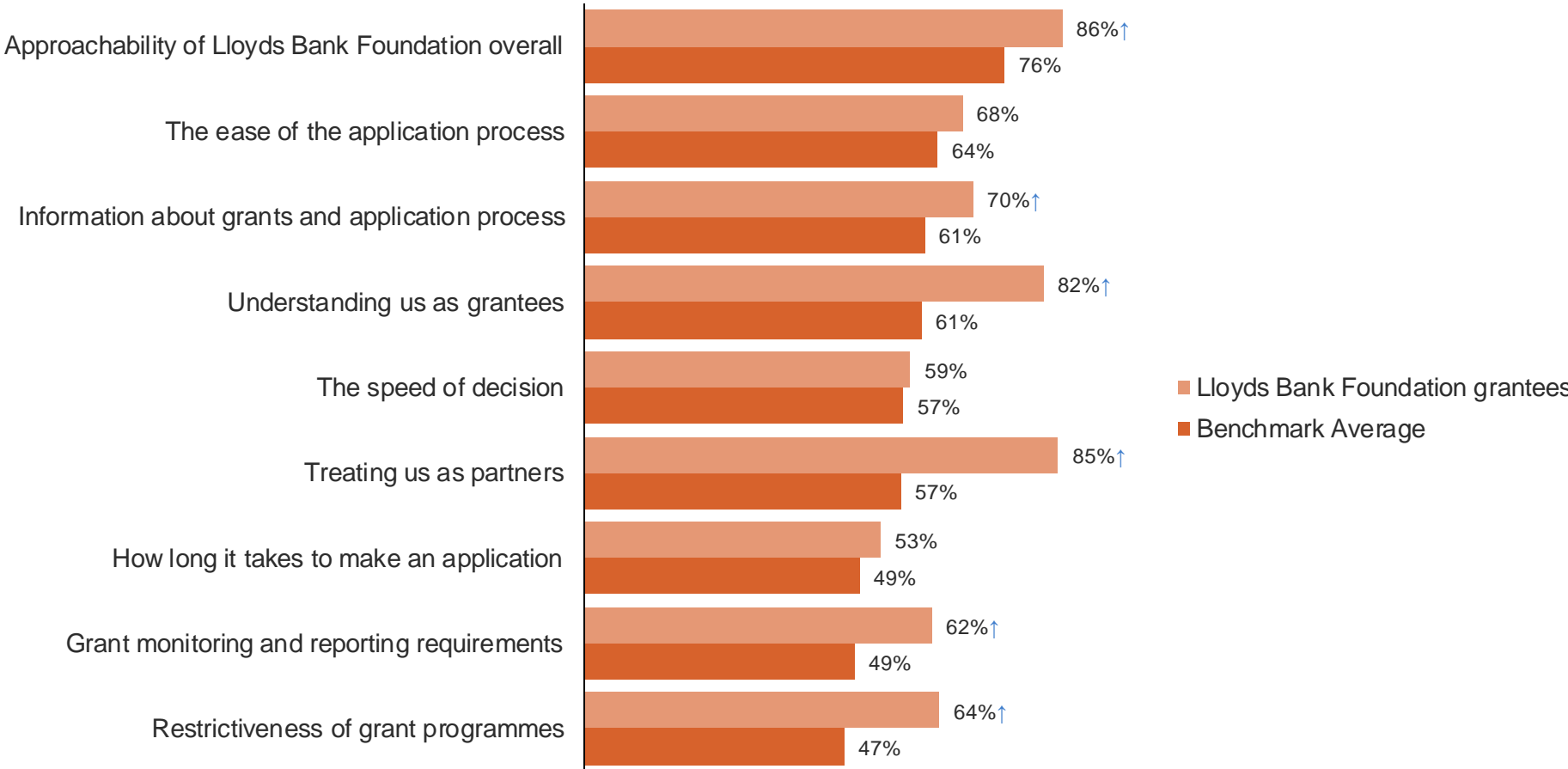
"When you think about your experience of applying for and getting a grant with Lloyds Bank Foundation how would you say they compare with other grant-makers?"



The Foundation outperforms the benchmark in a range of areas for grantees, most notably understanding and treating them as partners

"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

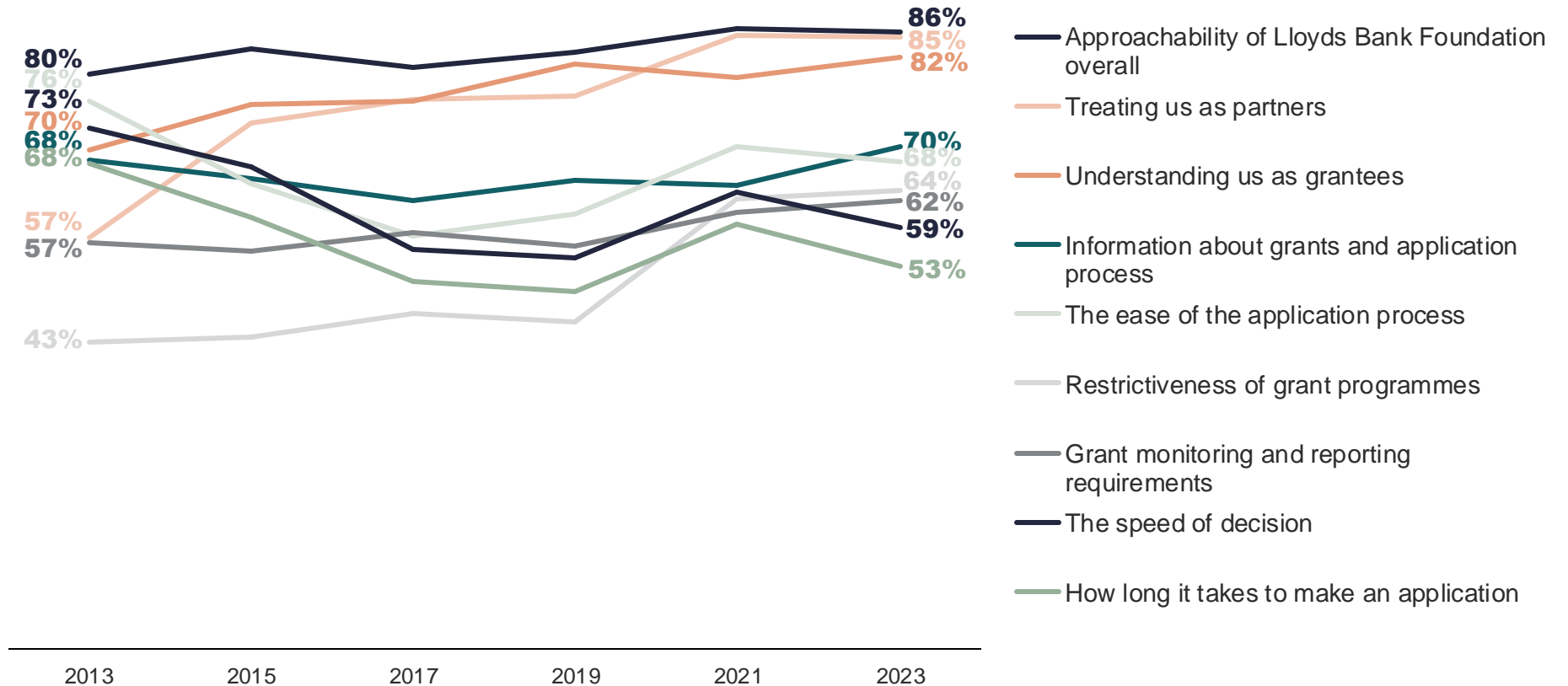


Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
Source: Lloyds Bank Foundation applicant survey 2023 | Base: 292 respondents

Many areas in this measure are at an all-time high for grantees

"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



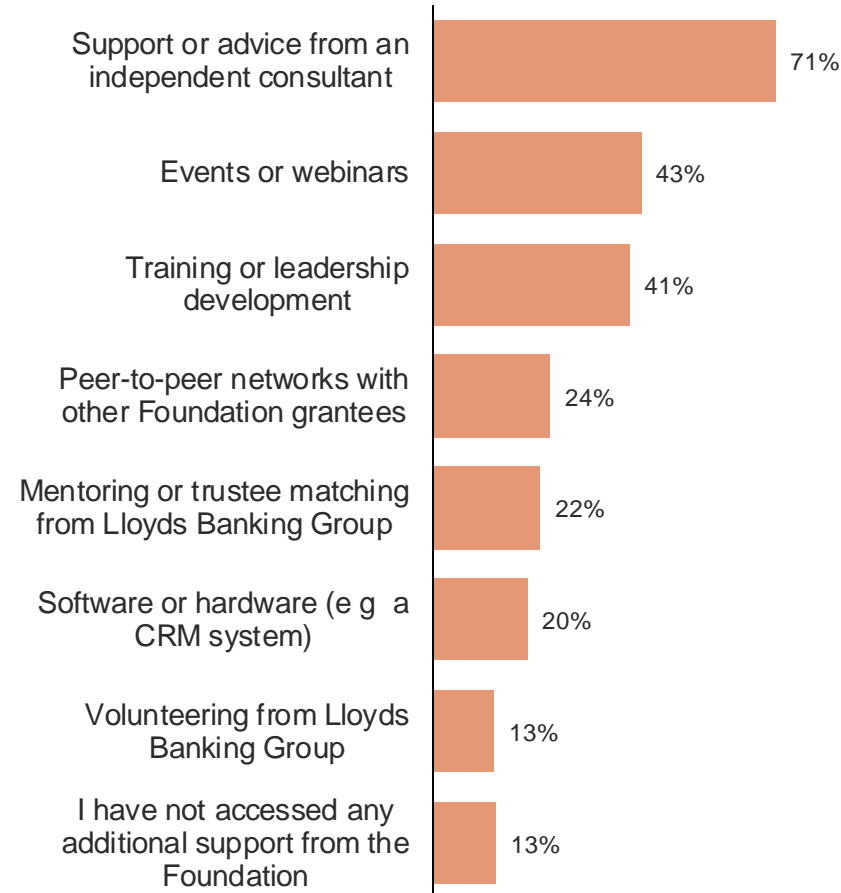
There are high levels of satisfaction with the development support offered to grantees

"Have you had any additional organisational development support from Lloyds Bank Foundation through the Enhance programme to strengthen your charity?"

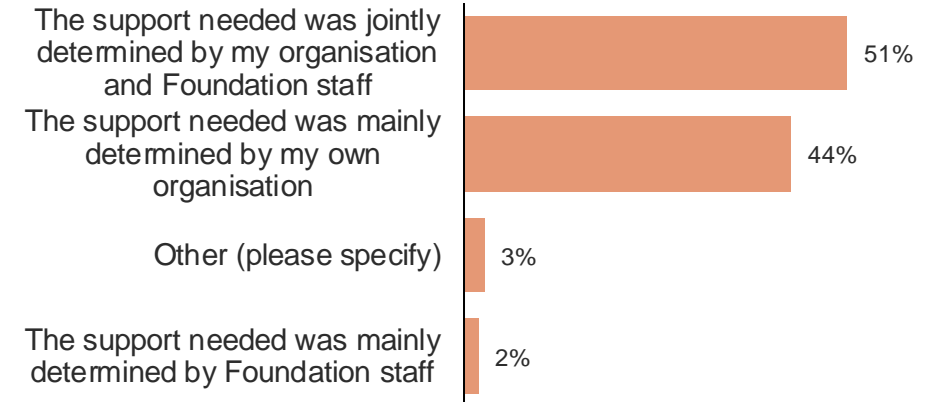
"If you received support from the Foundation to help strengthen your charity, who determined the specific support needs of your organisation?"

"How helpful has this development support been for your organisation, overall?"

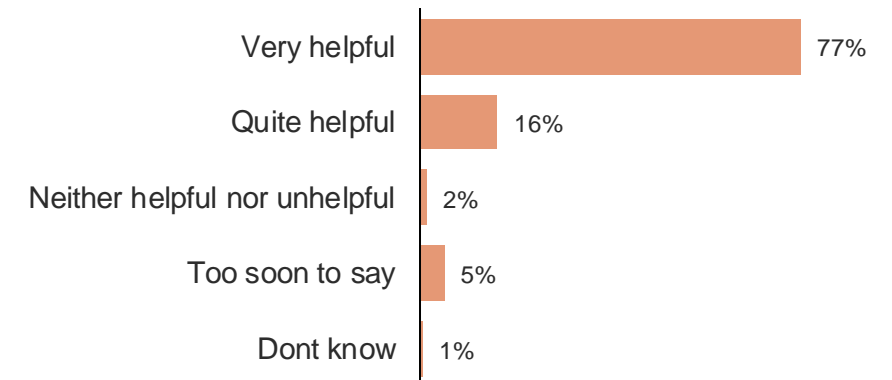
Type of support received



Who determined support needs



Helpfulness of support



Further reflections on additional support for grantees summarised from open ended responses

- Respondents' comments reveal strong appreciation for the additional support received. Many note it as some of the best support they've received from a funder, helping them grow, develop, and navigate challenges more effectively.
- Grantees appreciate the range, quality, and impact of the support, indicating that funding from Lloyds Bank Foundation significantly benefits their organisations beyond just financial assistance.
- Grantees praise the expertise, skills and knowledge of both Lloyds Bank Foundation staff and the consultants they encountered.
- They also highlight the tailored nature of the support, including effort made to personalise the support and match them to relevant consultants.
- Some express a desire for more direct, hands-on support, and tangible resources that they can use to guide their own development.
- While the additional support is generally viewed positively, some mention challenges related to accessing certain elements of support or balancing the opportunity to engage against the demands of their work.



Development support: comments from grantees with incomes under £250k

“The development support has been amazing, we have experienced consultants who genuinely listen and get to know what we need and make a real difference.” Renew programme grantee

“I’ve never met a funder who seemed to understand our sector, charity, concerns, beneficiaries in the way our Regional Manager did. It was like she’d been listening to all our team meetings! And she was open about that, willing to talk about the difficulties. That immediately made it safe for us to tell her about the issues we face. A breath of fresh air!” Specialist programme grantee

“We have been blown away by the quantity and quality of additional support available to us. It was not at all expected when we applied for the grant. We’re extremely grateful. The support we have accessed has been invaluable, especially the provision of a consultant. Thank you so much!” Renew programme grantee

“The support was tailored to meet our needs, the approach from partners providing support was very flexible. We have been enjoying the process very much and the partners genuinely seem to care about what happens to us as a charity.” Renew programme grantee

“It feels like a lot is being offered us that we are already doing, but it is quite time consuming to consider and refuse with justification each time. For example, we agreed to an initial conversation with a consultant, who assessed that we were doing all that they would have recommended even if they did a fuller assessment. There is a degree of pressure, rightly or wrongly, to accept this additional support.” Specialist programme grantee

4

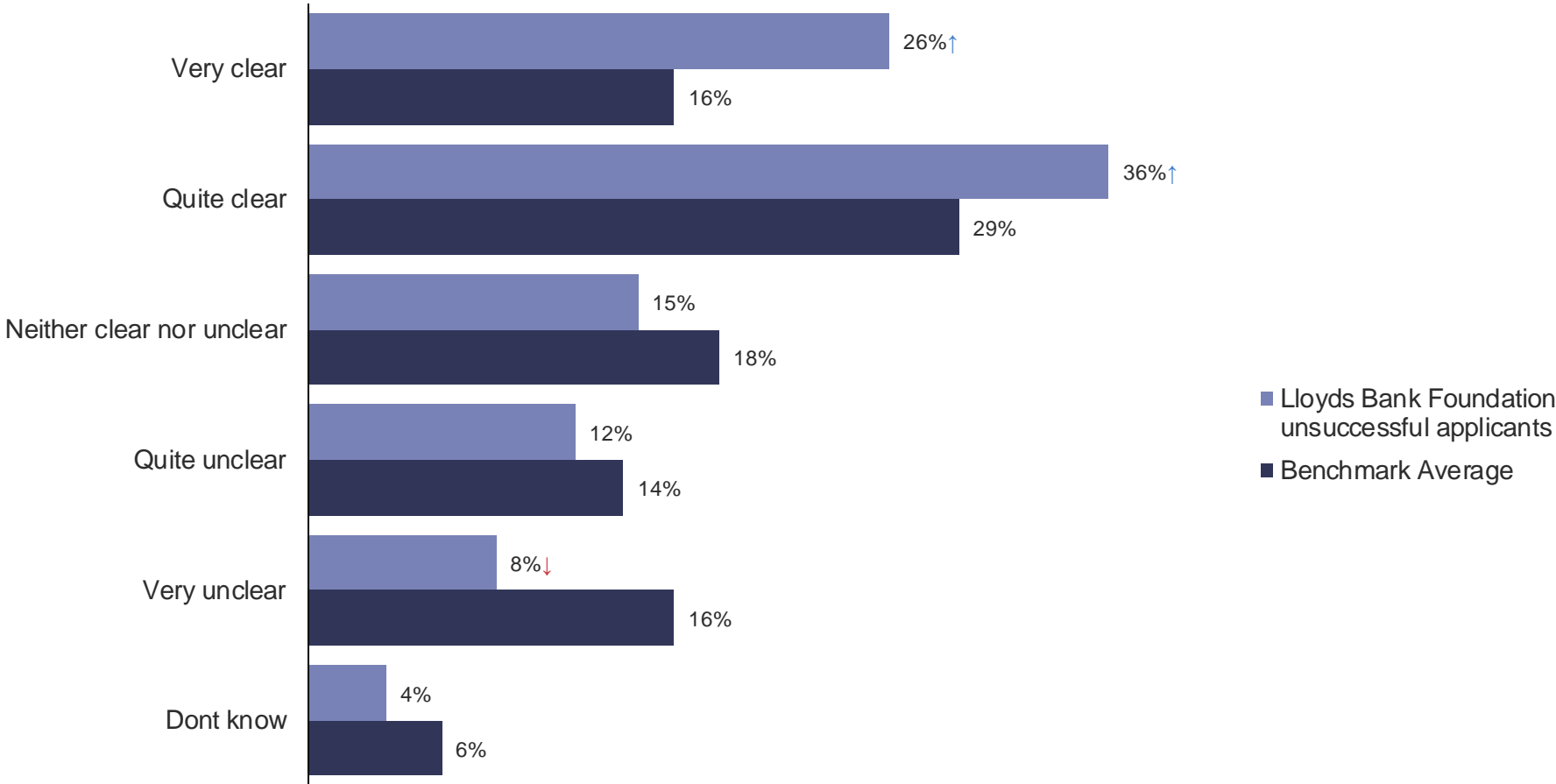
Unsuccessful applicants' perceptions

Key findings: the views of unsuccessful applicants

- Lloyds Bank Foundation scores better than the benchmark average on many areas for unsuccessful applicants, namely approachability, treating them with respect and understanding them. Many core metrics measured with unsuccessful applicants have improved since 2021.
- Overall, unsuccessful applicants are clearer on the reason for their rejection compared to the benchmark average, and the clearest they have been since we began asking them about this in 2019.
- The benchmark data also tells us that the Foundation is better at giving feedback to unsuccessful applicants compared to other funders, but there is more to be done to ensure that this feedback is useful for them. Around half of those who received feedback didn't find it useful, stating that they felt it was too generic and not actionable for their organisation.
- Demand for Lloyds Bank Foundation's funding is huge. Seven in 10 unsuccessful applicants would consider reapplying, with many highlighting the difficulties of the current funding landscape and that they can't afford not to try again. However, others recognised that changes to the Foundation's funding criteria would prevent them from applying again in future.

Unsuccessful applicants are clearer on the reason their application was declined compared to the benchmark average

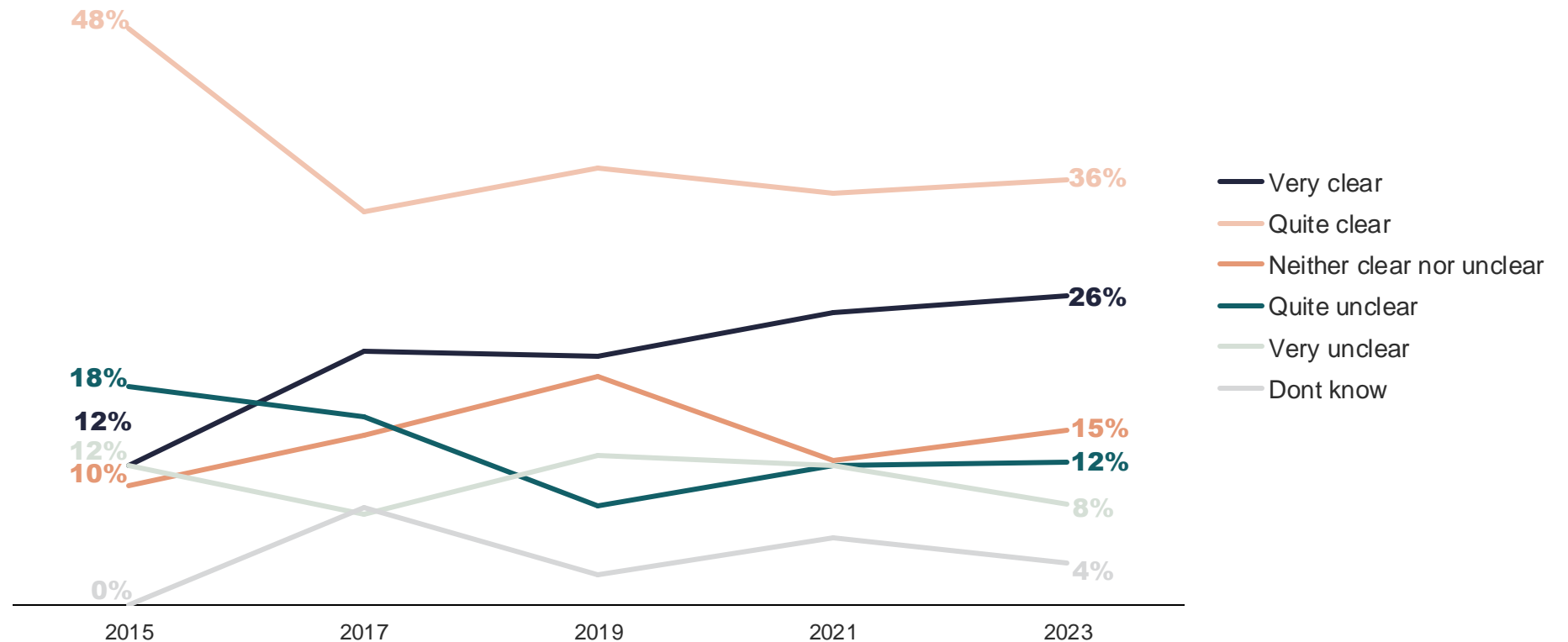
"How clear was it why Lloyds Bank Foundation declined your application?"



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
Source: Lloyds Bank Foundation applicant survey 2023 | Base: 288 respondents

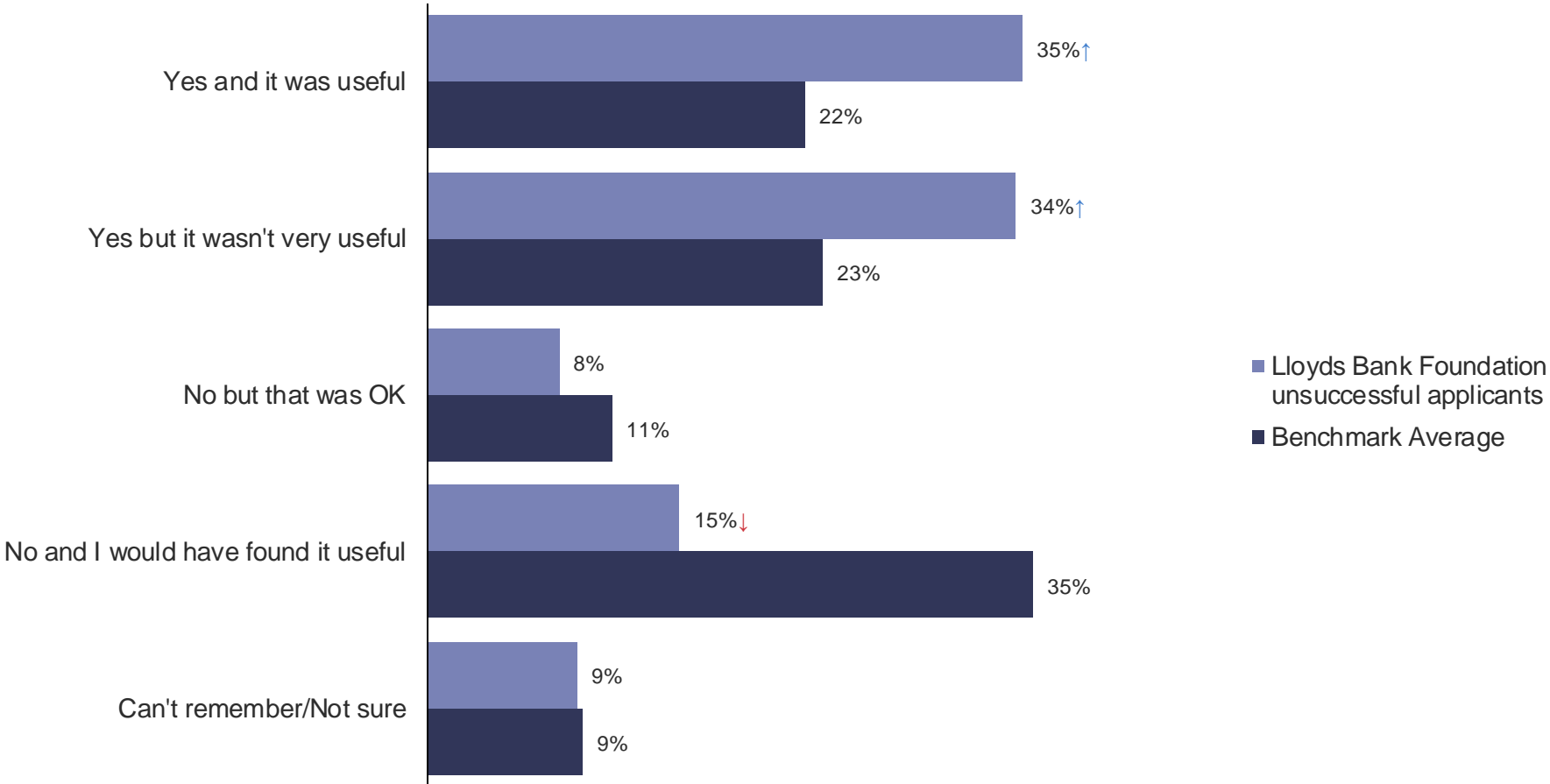
Reason for rejection has become clearer for unsuccessful applicants over time

"How clear was it why Lloyds Bank Foundation declined your application?"



More applicants are receiving feedback compared to the benchmark average, but half of them didn't find it useful

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



Source: Grant maker benchmark, nfpResearch | Base: ~13,000 applicants across 15 funders
Source: Lloyds Bank Foundation applicant survey 2023 | Base: 288 respondents



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

Those who found feedback useful said it was specific and helped them to improve their work

“Comments received have given us a chance to reflect on our next submission and think thoroughly on what made us unsuccessful.”

“We had written feedback and we have also recently discussed our application with a grants officer as we are looking to reapply. The feedback provided was very useful for us.”

“It was felt we were not ready so we have worked on the areas highlighted e.g. Business Plan.”

“Feedback is always useful, hard to hear sometimes.”

“We were told our application was excellent but that there were other people that needed the support more than us. I think that was fair and transparent comment.”

Those who didn't find the feedback useful said it was too generic and not actionable

“We used it to put in another application to Lloyds that was also rejected... for the same reasons... even though we addressed them specifically in the new app. It felt that the feedback was just generic.”

“I understood the overall feedback, but thought it was too general for me to make a better application next time.”

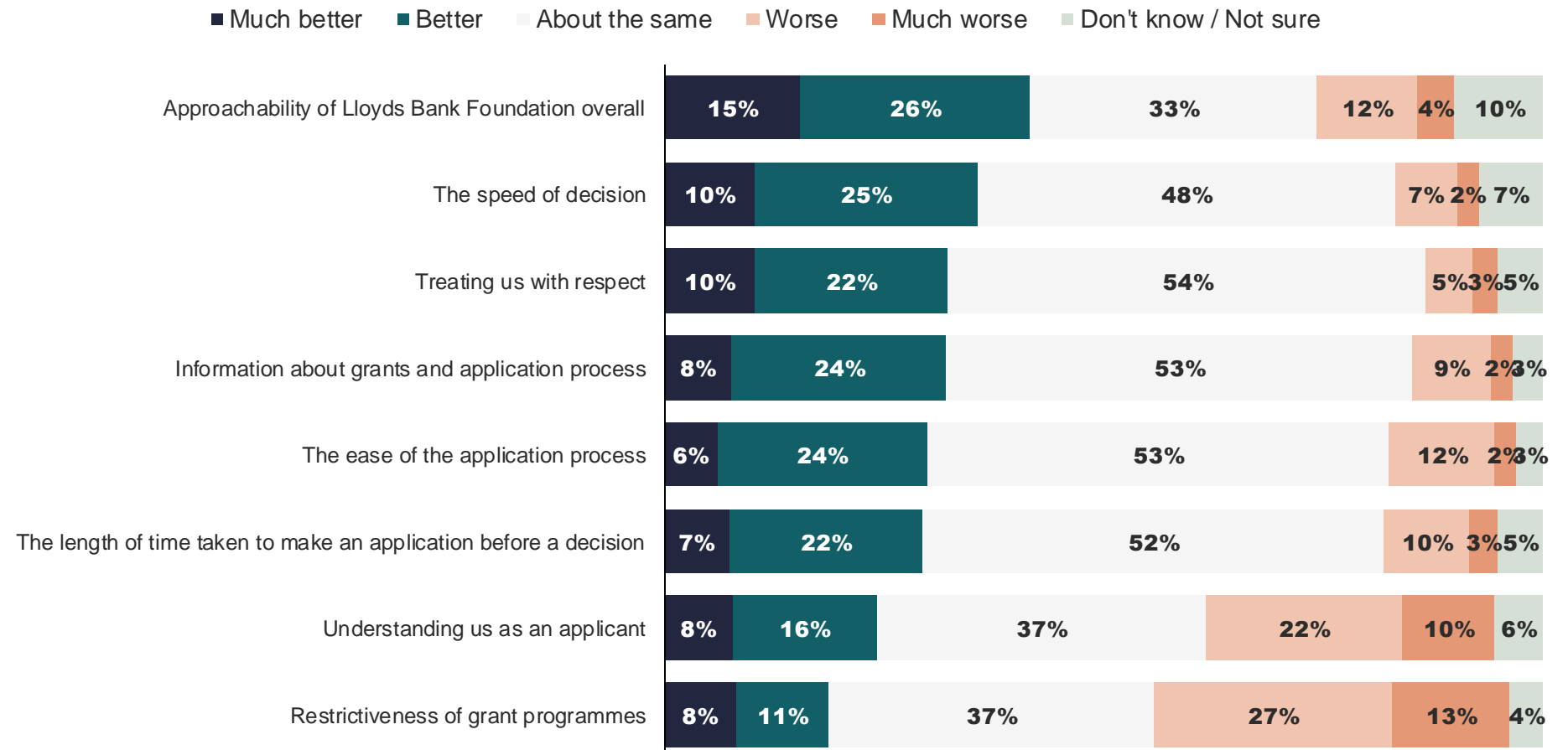
“We were rejected on what I would call a technicality and Lloyds did not engage with us about it at any stage during the application.”

“If the feedback is that the Foundation was oversubscribed with applicants, the feedback is meaningless.”

“It seems there was nothing in particular that was wrong with the application.”

Restrictiveness of programmes is the area where the Foundation compares least favourably to other grant-makers

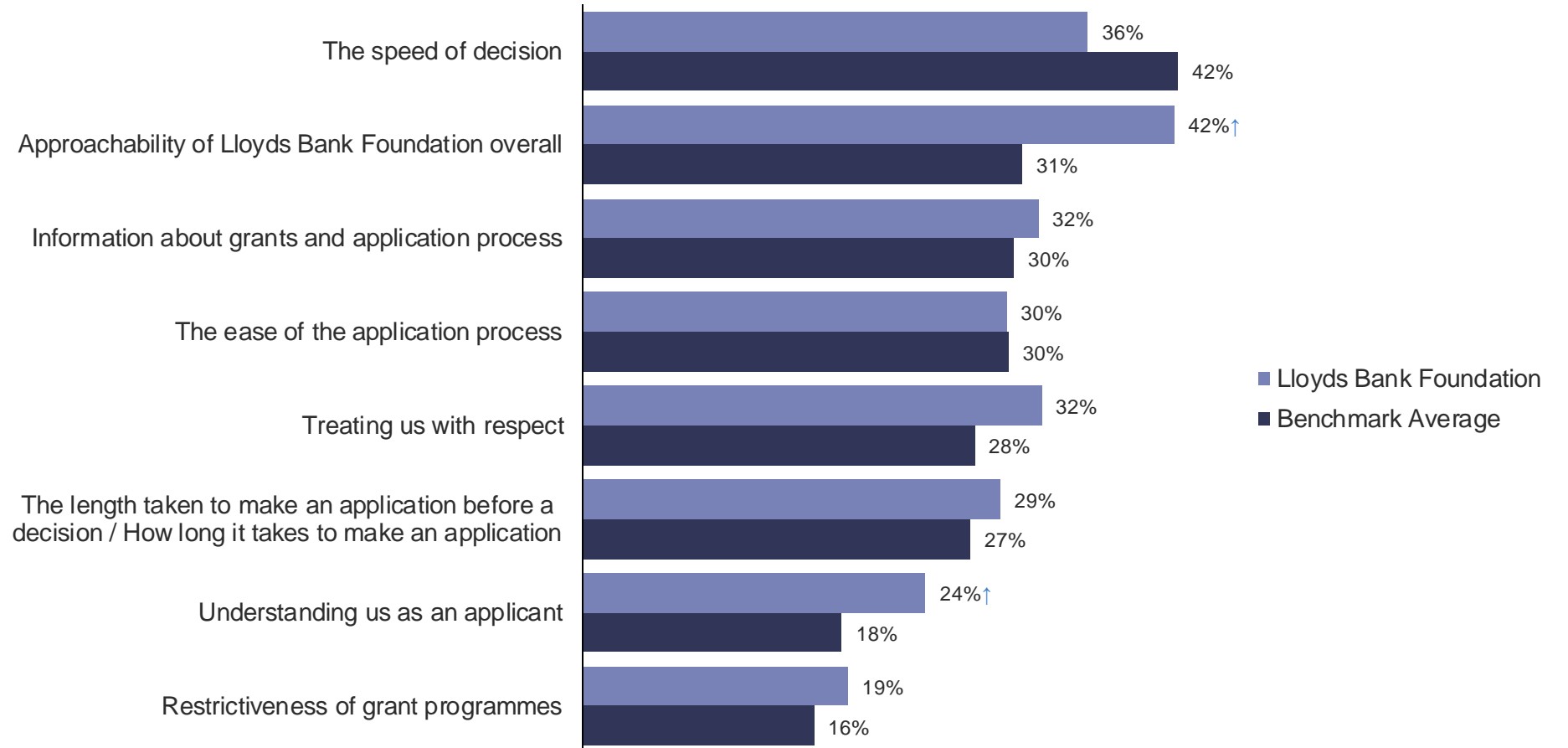
"When you think about your experience of applying for and NOT getting a grant with Lloyds Bank Foundation how would you say they compare with other grant-makers?"



The Foundation outperforms the benchmark on approachability and understanding for unsuccessful applicants

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

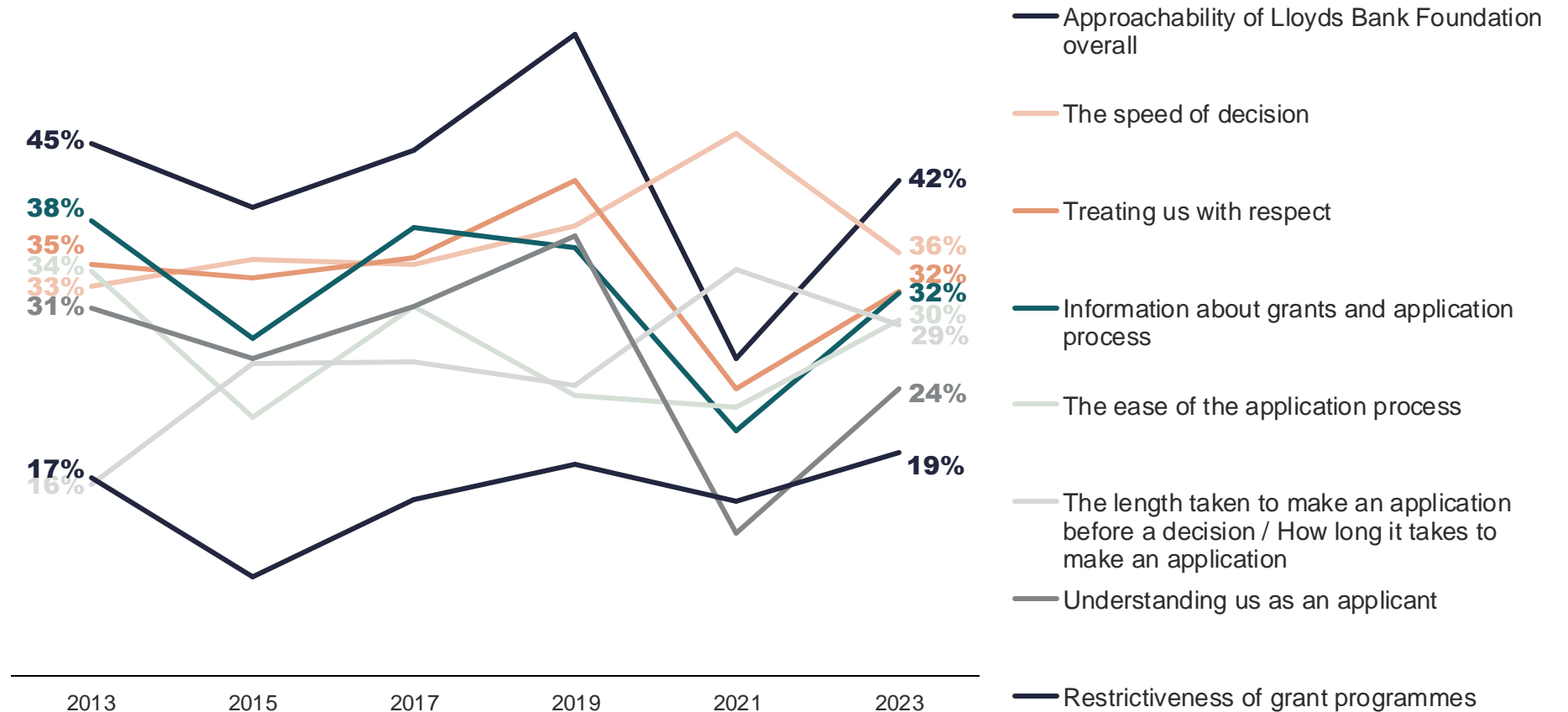
Much better + Better



Many areas have improved for unsuccessful applicants compared to 2021

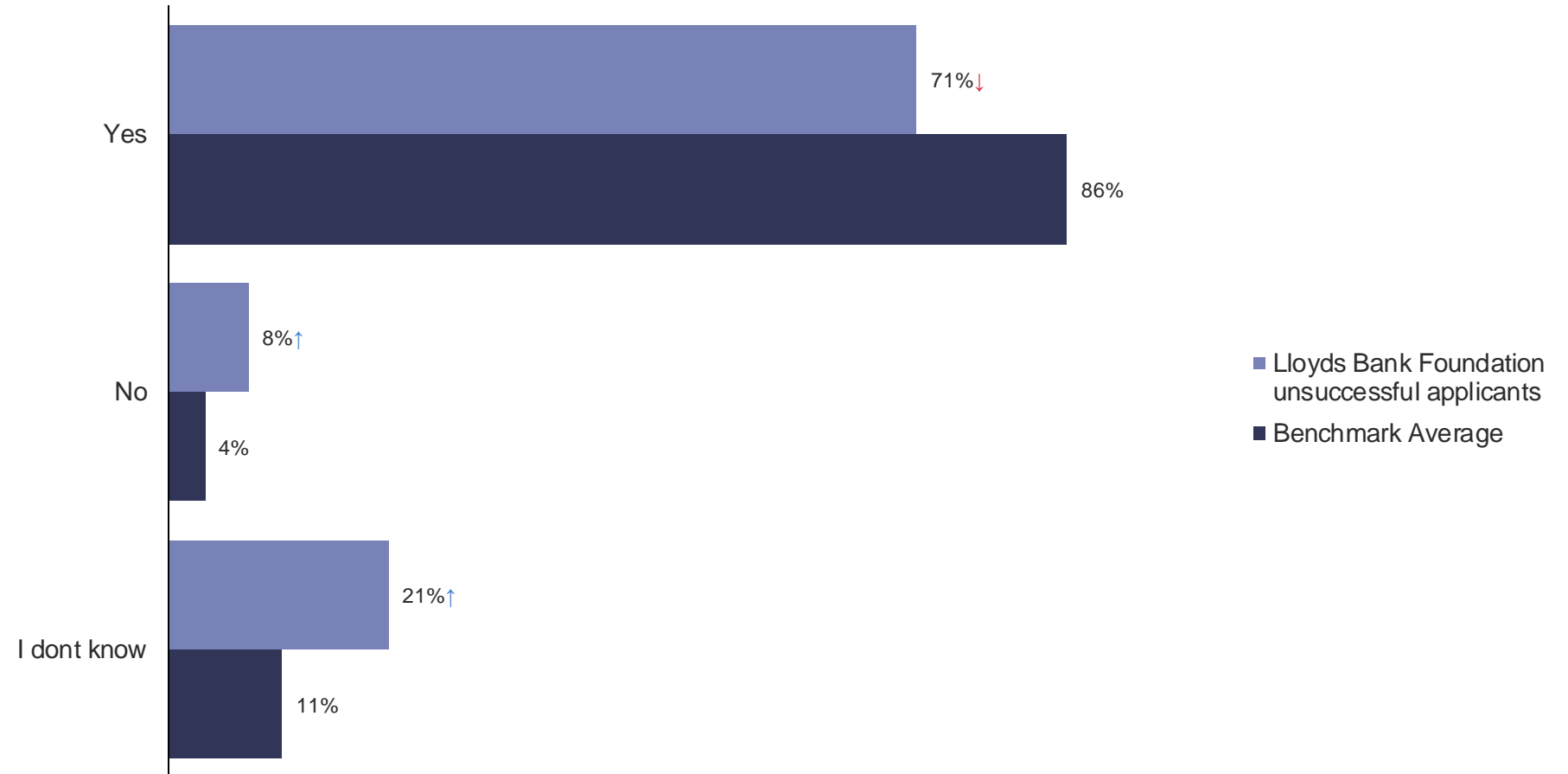
"When you think about your experience of applying for and NOT getting a grant with Lloyds Bank Foundation how would you say they compare with other grant-makers?"

Much better + Better



Unsuccessful applicants are less likely to consider reapplying compared to the benchmark average

"Would you consider applying for funding from Lloyds Bank Foundation again in future?"





Would you consider applying for funding from Lloyds Bank Foundation again in future?

Yes – answers focused on the need for funding and positive past interactions

“Because the funding landscape is bleak and we have plans to apply for every funder we find where we feel we are a good fit for their priorities.”

“As a charity we cannot discount any potential funder.”

“They are one of the few socially progressive funders who will consider our type of work, so the options are few and far between.”

“We have had great experiences with Lloyds Bank Foundation and would love the opportunity to partner with them again.”

“We were successful a few years ago and that was a good experience.”

No / Not sure – answers focused on a need for improved process or criteria changes

“We are not sure how to make our case better. We feel our work strongly aligns with the criteria but not sure how we can communicate it any better to you in the application.”

“I would not apply again unless I thought I met the criteria more closely.”

“It took a lot of time to make the application and we were rejected so don't feel overly inclined to make a fresh application.”

“Demanding application process and criteria for success are too rigid.”

“Because we are a faith based charity we aren't eligible even though our faith would be irrelevant to projects.”

5

Overall perceptions of Lloyds Bank Foundation

What words or phrases come to mind when you think of Lloyds Bank Foundation? Top 20 themes

Supportive / support	192	Friendly	41
Helpful	109	Caring / kind / compassionate	39
Knowledgeable / experienced/ experts/ leaders	66	Trusted / trusting / trustworthy	39
Understanding	58	Partnership	38
Approachable	57	Large funder / grants / unrestricted funders	34
Innovative / driving change / forward thinking / progressive / strategic	51	Champion for small charities / grass roots	33
Amazing / great / brilliant	45	Transparent / clear / clarity	26
Professional	43	Fair	24
Understands our needs / learns about our organisation / supports us	43	Accessible	23
Funder / funding	42	Flexible	23

Are there any other grant-makers who you think Lloyds Bank Foundation could learn from?



National Lottery:

"Amazing application, really easy to follow."

"Very easy process and very quick."

"Supporting more long-term programmes and lasting change."



Garfield Weston Foundation:

"Very free reporting which focusses on client stories and allows the charity to decide what is reported."

"Ease of application and access to funding for core costs."



Esmée Fairbairn Foundation

"Core funding and clear funding programmes."

"Less restrictive but equally supportive."

Top 10 mentions

National Lottery Community Fund	60
Garfield Weston Foundation	17
Esmee Fairbairn Foundation	13
National Lottery Awards for All	13
Tudor Trust	12
Big Lottery	9
Paul Hamlyn Foundation	9
Henry Smith Charity	7
Postcode Lottery	6
Trust for London	6

"Are there any other grant-makers who you think Lloyds Bank Foundation could learn from? In what way?"

Source: Lloyds Bank Foundation applicant survey 2023 | Base: 580 respondents

How else could Lloyds Bank Foundation support you or the wider sector? Summary of themes from open ended responses

Themes present in the comments for this question reflect a desire for comprehensive support that goes beyond financial assistance (much of which is already offered by Lloyds Bank Foundation to its grantees). Applicants emphasise the importance of capacity building, advocacy, community engagement, and tailored support to meet the varied needs of the sector.

Funding: The most frequently mentioned theme is the need for more or different types of funding. This includes calls for more general funding, flexible funding options, and financial support tailored to specific needs or projects.

Support: Closely following funding is a general need for support, which encompasses a broad range of areas. These include more hands-on assistance, advisory services, capacity building, and resources to help organisations grow or navigate challenges.

Community Engagement: Many respondents highlighted the importance of community engagement, suggesting that the Foundation could play a role in fostering stronger connections within communities, supporting community-led initiatives, or enhancing the visibility of community issues.

Policy and Advocacy: There's a call for the Foundation to engage even more in policy work or advocacy, suggesting that it could help influence policy changes, advocate for the sector, or support organisations in their own advocacy efforts.

Training: Training and development opportunities for organisations are also a common request. Respondents are looking for workshops, educational resources, and professional development programmes to build skills within their teams.

What does Lloyds Bank Foundation do well?

Key themes mentioned by applicants

- Great knowledge and support from staff / regional managers
- Additional holistic support that goes beyond financial assistance
- Unrestricted funding, specifically over multiple years
- Trusting and collaborative approach toward grantees
- Communication, engagement and relationship building with grantees
- Supporting and understanding community / specialist organisations
- Evaluating need and targeting marginalised areas
- Listening to and understanding organisations and the problems facing the sector
- Excellent policy work

Where might Lloyds Bank Foundation need to improve?

Key themes mentioned by applicants

- The application process, particularly in terms of how long it takes to complete and the demand it places on applicants
- Consider the restrictiveness of some eligibility criteria
- Be more flexible and understanding toward individual organisations' nuances / complexities
- Better understanding of the limitations faced by charities, especially small charities
- Offer longer funding periods
- More site visits or face-to-face interactions
- More support for non-specialist charities



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