

# Key Findings and Recommendations from Paul Hamlyn Foundation's Grantee and Applicant Perception Report

Prepared by the Center for Effective Philanthropy

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*The memo below outlines the key findings and recommendations from Paul Hamlyn Foundation's ("the Foundation") Grantee and Application Perception Report (GPR/APR). The results presented in this report reflect surveys conducted in May and June 2022, which achieved a 64 percent response rate for grantees and 34 percent response rate for applicants.*

*When interpreting results, it is important to bear in mind inherent differences between grantees and declined applicants. CEP recommends against comparing results from the two surveys head-to-head. For grantees, the experience of receiving funding is intrinsically positive, whereas for declined applicants, the experience is often more mixed. CEP recommends interpreting each set of findings in the context of benchmarking results against other funders and similar respondent populations. All ratings should be interpreted in the context of the Foundation's goals and strategies.*

*This memo accompanies the comprehensive survey results found in the Foundation's interactive online report at <https://cep.surveymaterials.org> and in the downloadable online materials.*

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## Overview

Broadly, Paul Hamlyn Foundation grantees' and applicants' perceptions are positive with respondents providing ratings in line with the typical funder in CEP's dataset and PHF's custom cohort. What's more, across survey themes – such as impact, relationships, and processes – both grantees and applicants rate significantly higher than in 2017.

- ▶ On a comparative basis, grantees and declined applicants largely provide ratings that are similar to each other. Notable differences are outlined specifically in this memo.
- ▶ Grantees strongly associate the Foundation as being committed to social justice, responsive and flexible to changing contexts and needs, honest in its communications, and demonstrating trust in its relationships.
- ▶ Interestingly, these improvements come while Foundation's staff caseload has doubled: now managing 56 active grants per programme full-time employee. This context is an important lens in interpreting the findings although CEP's research does not show a correlation between staff caseload and positivity of ratings overall.
- ▶ When analysing responses by Fund, CEP found no consistent statistically significant differences in ratings for either grantees or declined applicants.

## Positive Impact on Grantees' Organisations and Fields

- ▶ Grantees' ratings for the Foundation's impact on their organisations is positive – similar to the median funder in PHF's custom cohort and higher than the typical funder in CEP's dataset of over 300 funders.

- Relatedly, grantee and applicant perceptions of Foundation’s impact on and understanding of their fields are in line with the typical funder in CEP’s dataset, with grantee perceptions significantly higher than in 2017.
- ▶ Notably, provide ratings in the top quarter of all funders in CEP’s dataset for the extent to which PHF is aware of challenges facing grantee organisation with ratings that are significantly higher than in 2017.
- ▶ Comments frequently echo sentiments of one grantee, who was “struck by the expertise offered by Foundation staff... and by the willingness to act as a partner.”

### Grantmaking Characteristics

CEP’s broader research has shown that grant characteristics – specifically size, length, and whether the grant was restricted – are often meaningful predictors of perceptions of impact on grantee organisations, with multi-year unrestricted support being a particularly powerful contribution.

- ▶ Paul Hamlyn Foundation grants are notable investments in grantee organisations with comparatively smaller budgets. While the median grant size is similar to the typical funder, the Foundation funds a relatively large proportion of grantees’ annual operating budgets.
- ▶ Approximately three-fourths of grantees, a higher than typical proportion, report multi-year grants. This is notable as these grantees rate significantly higher across many survey themes, including impact on grantee organisations.
- ▶ Of note, a larger than typical proportion of grantees (54 percent at PHF compared to 36 percent at the custom cohort) report being first time grant recipients. These grantees have smaller annual budgets, and receive smaller, shorter grants, and report less frequent contact with staff. First time grant recipients rate significantly lower on nearly all measures in the survey, including for aspects of impact, understanding and relationships.
- ▶ Finally, one of the largest themes in grantee suggestions for the Foundation relates to grant-making characteristics. Specifically, grantees request larger, consistent, multi-year, and unrestricted funding. Grantees note that these changes would allow for greater flexibility, long-term stability and impact.

### Valuable Support Beyond the Grant

Of the 45 percent of grantees who report receiving non-monetary support, nearly 90 percent indicate that it was a major or moderate benefit to their organisation or work.

- ▶ Further, grantees who receive non-monetary support rate significantly more positively on many measures, including for perceptions of the Foundation’s impact on and understanding of their organisations, and aspects of relationships.
- ▶ In a custom question asking about the helpfulness of various types of supports offered by PHF, grantees find advice and support from their Grants Manager to be most helpful.



*“[PHF] offers vital support to organisations, freeing them from the restrictions of council funding and encouraging and nurturing risk taking.” - Grantee*



*“Offer scope for networking with other people in the field that the Foundation may already have a relationship with.” - Grantee*

## Improved Interactions with Staff

Across several measures related to funder-grantee relationships – such as the extent to which the Foundation has exhibited trust in grantees’ staff, respectful interactions, and compassion for those impacted by the funded work – grantees’ ratings are in line with the typical funder in CEP’s dataset. Staff are described as “incredibly supportive,” “flexible,” and “always helpful.”

- ▶ Grantee perception of responsiveness, approachability, and the Foundation’s openness to ideas are significantly more positive than 2017, with ratings now in line with that of the median funder in PHF’s custom cohort. Applicants also rate significantly higher – and in line with the typical funder – for the Foundation’s responsiveness and fairness.
- ▶ Still, nearly a quarter of sampled<sup>1</sup> suggestions from grantees were related to interactions with PHF staff. Specifically, grantees suggest more frequent interactions (N=24) and site visits (N=18).
- ▶ In terms of communications, both grantees and applicants find the Foundation to communicate its goals and strategy clearly, providing higher than typical ratings on these measures. In addition, grantees and applicants find the Foundation to be significantly more transparent than in 2017.
  - However, applicants frequently request more clarity around funding criteria, opportunities, and expectations for processes.

### Insights from analyses

- ▶ Grantees report being in touch with Foundation staff about as frequently as at the typical funder, with roughly 90 percent of grantees interacting at least once every few months.
  - Grantees who interact at least every few months rate significantly higher across nearly all measures in the survey, including for aspects of impact, understanding, and relationships.
- ▶ Ratings and written comments indicate opportunities to reflect on staff transitions. Twenty-eight percent of grantees indicate having a contact change in the past six months and rate significantly lower for aspects of understanding, relationships, communications, and processes.
  - One grantee, echoing others, writes “towards the end of our grant period our lead officer left and we were allocated to a new person who is new to PHF. A handover meeting with both parties would have been helpful, and helped ensure better continuity, for the benefit of all parties.”



*“My experience of PHF is as an exceptionally thoughtful, high quality and principled funder... [staff are] open, engaged, and responsive... we [have] a genuine partnership with the Foundation based on shared values and interests.” - Grantee*



*“More capacity to interact with the funded organisation and its work - it would be great to have what we are doing validated, and also to share some of the thinking that it has prompted for us.” -Grantee*

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<sup>1</sup> CEP coded 250 randomised comments, proportionally representing responses by Fund.

## Helpful Processes, with Opportunities to Better Communicate Declinations

Paul Hamlyn Foundation processes are seen by grantees as valuable and thorough: grantees rate the helpfulness of the selection and reporting processes in the top fifteen percent of funders in CEP's dataset. In fact, all measures related to reporting – such as straightforwardness, relevance, and adaptability – are higher than the typical funder and significantly higher than in 2017.

- ▶ Processes are notably more streamlined, as well. Grantees spend a median of 38 hours on Foundation requirements across the grant lifetime – down nearly twenty hours from 2017. Grantees now receive a higher monetary return than in the past - £2.1K in funding per hour spent on Paul Hamlyn Foundation requirements in 2022 compared to £1.2K in 2017.

### Declined Applications

Applicant ratings and comments indicate a hunger for greater feedback and support during the process. When asked how the Foundation could improve, declined applicants most often suggest more feedback on their applications (N=35), to further streamline process requirements (N=32), and to provide support throughout the process (N=30).

- ▶ Nearly one-fifth of applicants did not receive a reason for their declined application. Forty-five percent of applicants requested feedback, but did not receive it – a notably higher proportion than at the average funder. When applicants did receive feedback, they indicate finding it helpful to strengthen future applications.
- ▶ In a custom question, applicants disagree that it was easy to speak to someone at the Foundation to answer questions related to the application process. Applicants are neutral about how easy it was to assess the potential fit between their work and PHF funding priorities.
- ▶ Perhaps relatedly, applicants indicate relatively high levels of pressure – and more than in prior years – to change their organisations/programmes in order to receive funding.



*"The application was very large and took a great deal of time, which is challenging for a small charity." - Grantee*



*"Perhaps a pre-application consultation with a member of staff to confirm whether organisations fit with the aims of the Foundation. This would avoid what seems to be misunderstandings on both sides." - Applicant*

## Diversity, Equity, and Inclusion

- ▶ PHF receives higher than typical ratings for grantees' agreement that the Foundation has clearly communicated what diversity, equity, and inclusion means for its work, and that PHF demonstrates an explicit commitment to diversity, equity, and inclusion. Similarly, ratings are strong and in line with the typical funder for agreement that the Foundation is committed to combatting racism.
  - Declined applicant ratings for these measures is also similar to that of the typical funder.

## Differences by Leadership Profile

- ▶ CEP's analyses found that UK-based grantee organisation whose leadership comprises at least 50 percent...
  - **People with lived experience of the issues their organisation is working on** rate significantly *higher* than other grantees on several relationship, process, and DEI measures.
  - **People Experiencing racial inequity** rate significantly *lower* than other grantees for PHF's transparency and approachability and for how strongly they associate the Foundation with a series of characteristics.
  - **Deaf, Disabled, and/or neurodivergent people** rate significantly *lower* than other grantees for agreement on a series of statements about the accessibility, ease of use, and troubleshooting of the application and grant-making process, and PHF's approachability
  - **LGBTQI+** do not provide significantly different ratings than other respondents.
- ▶ India-based grantees whose leadership is composed of 50 percent or more women provide significantly more positive ratings across nearly every measure of the survey.
- ▶ Declined applicants provide significantly lower ratings compared to other applicants if their organisation or initiative's leadership comprises of at least 50% of people who identify as any of the following:
  - People experiencing racial inequity
  - LGBTQI+
  - People with lived experience of the issues their organisation is working on

*It is CEP's standard practice to analyse responses for differences based on demographic characteristics.*

**Grantees who identify as women** rate significantly *lower* than respondents who identify exclusively as man for aspects of understanding, relationships, and processes.

**Grantees who identify as transgender** rate significantly *higher* than respondents who do not for aspects of impact, understanding, processes, equity, and grant-making characteristics.

**Grantees who identify as LGBTQ+** rate significantly *higher* than respondents who do not for aspects of equity and processes.

**Grantees who have a disability** rate significantly *lower* than respondents who do not for aspects of processes and grant-making characteristics.

**Applicants who have a disability** rate significantly *lower* than respondents who do not have a disability for perceptions of impact, understanding, relationships, communications, and the support, clarity, and ease of the application process.

## CEP Recommendations

Based on its grantee and applicant feedback, CEP recommends that Paul Hamlyn Foundation consider the following to build on its strengths and address potential opportunities for improvement:

- ▶ Continue and build on the Foundation's strategies and practices that have contributed to positive – and significantly improved – perceptions of its impact and relationships. Spend time reflecting on the choices, approaches, and values that you believe is contributing to positive perceptions and ensure they are clearly understood and codified.
  - Given the large proportion of first-time grantees, reflect on aspects of grant-making, onboarding, and interactions that are contributing to their significantly lower perceptions.
- ▶ Explore opportunities to further strengthen relationships with grantees, such as touchpoints to build relationships, ensure responsiveness, and ensure smooth staff transitions. Discuss internally any barriers or challenges.
- ▶ Consider revisiting policies surrounding declination decisions, especially providing a larger proportion of applicants with more detailed feedback on how their proposal can be improved or guidance on whether to apply again.
  - To reduce the time declined applicants spend on unsuccessful applications and to lighten the load on Foundation staff, provide more clear descriptions of who should apply for funding and who will not be considered for funding.
  - Keep in mind lower ratings on processes from both grantees and applicants with disabilities as you implement any changes to ensure greater accessibility and uniformity of experience across partners.

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