

Finance, Governance & Grants Forum – Wednesday 16 October 2019

Unanswered SLIDO Questions

James's session

- 1. Are there questions within the survey on ethical investments - exclusions for example? Would this be useful as trustees become more aware of ESG responsibility.**

I'd support including this in the survey.

- 2. It would be good to know how many charities have moved away from traditional investment portfolios and what returns they are getting?**

What is 'conventional'. We do list investment asset breakdown, and this should help members identify those who haven't got a 'conventional' asset split.

David's session

- 1. Funding outside the trust - are these organisations the grantees? Do you ask for these projects to have some connection to/interaction with the trust?**

We fund other organisations, mainly charities, outside the Trust, that serve the same communities as the Trust does. These organisations mainly provide services and opportunities that complement the Trust's clinical work. Many of the organisations work in partnership with the Trust, including via referral routes. We don't insist on a formal relationship with the Trust, it is usually there in some form if the proposed activity is relevant to the population.

- 2. Do you allow other charities to operate on your premises (e.g. leagues of friends) and if so how does the grant making work with those charities?**

The Trust has input from a small number of local charities - e.g. link workers. We fund some of these for some of their activity.

- 3. We have moved to a similar 'commission' based grants scheme where we emphasise a requirement for match funding. Is there a similar requirement at Maudsley?**

We have a small number of regular grants to projects where the Trust contributes a share of the funding.

4. Can you comment on assessment criteria or do you use a priority scoring matrix?

We have a scoring system for reviewers with a specific set of questions and a parallel scoring system for assessment panels where the criteria are set for each programme and call.

5. Have you prepared a lesson learned analysis at each stage of your implementation you could share?

We're in the process of reviewing these and will be having a project review within the next few weeks, after which we should be able to share the lessons learned.

Oliver's Session

1. We have 100s of requests for relatively small sums. They all add up but it's quite challenging to figure out what data to collect and when. How do we do this?

One of the most important things in evaluation is to be proportionate. This means that the effort put into evaluation (from the charity and its grantees) should be in relation to the size of the grant or how useful the data will be at the end. In other words, you might decide not to do any evaluation at all on very small grants, those that have obvious value (a new sofa for a family room) or methods that already have a strong evidence base.

Sometimes very small grants can make up a significant part of our budgets or workloads, so it is worthwhile to do some simple analysis on the data that you are already likely to hold from the application or the information you record about the grant awarded. This can help answer questions like *'what kind of person is most likely to apply for a grant'*, *'what is the average grant size'*, *'what is the most common type of grant'* and *'has there been an increase over time or due to policy change?'*.

2. Can we get a link to your big charity survey please?

Very welcome to, here's a test version: www.surveymonkey.co.uk/r/nhscharities

The key aim of this survey was to better understand Trust staff awareness of our charity and what we do. We also asked how for feedback on how much staff agreed how we improve patient experience or whether our artwork and volunteers make their hospital a better place to work. It is important to get a large enough sample to be able to trust in the findings from this data.

3. Are you able to share the art postcard via the NHS Charities Together website - it looks interesting, and I'd love a closer look?

I've attached photos of the postcard; we were inspired by Great Ormond Street when we created this. There is a perforated fold so people can tear off the comment slip to put in a box and take the postcard home as a thank you from us. It is used to gather feedback on intermediate outcomes from the art's team theory of change, plus to help inform whether we should purchase less traditional art like one used in the postcard.

4. Can we ask how many charities or hospitals using 'Better Impact' system for basic volunteering data?

This was not a question directed at my presentation, but at the wider audience. For information, our volunteer and fundraising team use iMIS database and our grants team uses Flexi-Grant.

5. How were beneficiaries involved in deciding what the theory of change was, as they are the ones who experience it in action?

The shared measurement theory of change was created in 2016 (before I got involved) between a group of representatives from several NHS charities. No patients or hospital staff were involved in the process, but it is good practice to do this where it is possible. If there is a new phase of the shared measurement project, we could consider revisiting the shared theory of change—it is a 'living' document.

6. Is it possible to include evaluation in the application process: ask applicant what will success look like, what will you measure?

Yes—your application forms create lots of data that can be used in evaluation to highlight what is expected to happen and how the applicant will know this. This can be compared to grant-reports to help grant managers find out if the grant was successful.

Again, be proportionate when you ask these questions, don't encourage or expect grantees to give in-depth measurement plans for simple or low-value projects. I often use the answers to these questions to determine if I can offer any advice or resources to help them undertake evaluation.

7. I wonder whether all hospitals or wards would be happy for 3rd party to survey?

This question was in response to how I sometimes go to wards with surveys for staff and patients to complete—I find it gets a much better response than online surveys or leaving printed copies with your grantee. It also helps you learn more about the funded activity and the people that you are hoping to benefit.

In my experience, wards are happy for this to happen as it gives them content to put into their grant report forms. Naturally allow them to choose a time, keep the surveys short, do not interfere and share the data that you collect with the ward. We make sure our grant award letters manage expectations on what we require from grantees and our involvement.