



# Myriad Research

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**COMMERCIAL IN CONFIDENCE**

## ***Research Report***

*Final*

Client: *Tasmanian Community Fund*

Project: *Client Survey*

*July 2014*

## **Executive Summary.**

### **Research Aim**

Myriad Research conducted baseline research for the Tasmanian Community Fund in February 2009 which comprised a survey of applicants for the 2008 general grant rounds 16 and 17.

The 2014 client consultation was commissioned to provide an objective assessment of client satisfaction with the application process for general grant rounds 26, 27 and 28; to assess other key aspects of client engagement with the TCF over the relevant period; and to compare key indicators in relation to client experience with the 2009 baseline research outcomes.

### **Research Methodology**

- A letter of introduction was distributed to all applicants for grant rounds 26, 27 and 28 explaining the purpose of the survey, introducing the research consultants and encouraging client participation. The letter explained the survey methodology, covered the privacy aspects and provided the opportunity for applicants to opt out of the consultation if they so desired.
- The consultation was conducted via telephone survey of a random and representative sample of applicants (both approved and declined) from each of the three general grant rounds. Interviews were conducted over the period 24 June – 11 July 2014, with all fieldwork completed in accordance with the relevant Market and Social Research quality assurance and privacy protocols.

### **Sample distribution and profile**

- The final survey sample comprised 200 respondents – 92 approved, 87 declined and 21 with both accepted and declined outcomes from grant applications. The table below summarises sample distribution across the three grant rounds and includes multiple grant applicants.

	Approved	Declined	Total
Round 26	48	39	87
Round 27	39	48	87
Round 28	31	31	62
<b>Total interviews</b>	<b>113</b>	<b>108</b>	<b>200</b>

- The following tables summarise respondent profile in terms of application outcome, region of the state and funding category applied for.

Application outcome	Frequency	% total sample
Accepted applicants	92	46.0
Declined applicants	87	43.5
Both accepted and declined applicants	21	10.5

Region of state	Frequency	% total sample
South	100	50.0
North	37	18.5
Northwest	37	18.5
Statewide	26	13.0

Funding category	Frequency	% total sample
Children and young people	51	25.5
Community wellbeing and life skills	39	19.5
Culture, arts and heritage	60	30.0
Community participation and recreation	16	8.0
Connecting communities	37	18.5

- Of the successful applicants, 74 were in the small grant funding level (up to \$10k), 113 in the medium category (\$10k - \$100k) and 23 in the large grant funding level (above \$100k), noting there were 10 grant recipients across more than one funding level and 3 grant recipients across more than one funding category.
- The total survey sample provides **statistically valid results** for the total applicant group, with a *maximum sampling error of plus or minus 6% at the 95% confidence level*, ie. survey results for the total sample are likely to be within 6% plus or minus of the actual parameter for the total client group – grant applicants for rounds 26, 27 and 28. Sampling errors for the two main client segments (approved and declined applicants) are higher given the smaller sample sizes, but are still considered to be statistically robust – 7% and 8% respectively.

## Key Research Findings

### Awareness and understanding of the Tasmanian Community Fund

- Applicants first heard about the Tasmanian Community Fund via a range of channels, and more likely to be by way of referral from other person or organisation – 40% of the total sample group – and similar to the 2009 level of 37%.
- Awareness via media advertising is marginally down from the 2009 level (11%, down from 14%) whilst awareness via the internet is well up on the 2009 level – 28% compared to 17%.
- Most applicants have at least a reasonable understanding of the main purpose of the Tasmanian Community Fund, its role and function – similar to 2009 survey findings.

### The application process

Respondents were asked to rate their experience with various aspects of the grant application process. The table summarises rating scores for the client segments across the nominated aspects, with 2009 outcomes included for comparison.

Aspect	% positive rating*							
	Total group		Approved		Declined		Both	
	2014	2009	2014	2009	2014	2009	2014	2009
Guidelines for application completion	86.0	87.0	95.7	92.6	78.2	83.0	76.2	-
Grant conditions	83.2	84.0	91.2	95.0	72.1	76.6	95.0	-
Grant application system (SmartyGrants)	79.5	-	83.9	-	74.4	-	81.0	-
Information required within application	73.7	78.8	84.4	92.5	59.8	69.4	85.7	-
<b>Total</b>	<b>80.6</b>	<b>83.3</b>	<b>88.9</b>	<b>93.4</b>	<b>71.1</b>	<b>76.3</b>	<b>84.3</b>	<b>-</b>

\* percentage of respondents rating 4 or 5 on the 5 point scale (5 = excellent, 3 = OK, 1 = poor)

- As the table indicates, clients are generally satisfied with the application process, with the new 'SmartyGrants' system being endorsed by 80% of the total group.
- Ratings are however marginally down on the 2009 levels across most aspects for the total survey group and the two main client segments. The exception is a significantly improved rating for application completion guidelines from the 'approved' client group.

### Assistance from the Tasmanian Community Fund

Respondents were asked if they had received direct assistance from the Fund in completing their grant application, how that assistance was provided and their rating of the level of assistance.

- 55% of all surveyed applicants had received direct assistance from the Fund to complete their application – significantly up on the 2009 level of 38%. Approved applicants were more likely to have received assistance from the Fund (58% compared with 51% of the declined group), noting the higher differential from the 2009 research (46% and 32% respectively).
- Assistance was most likely to be provided by telephone, with assistance provided in person and in writing also important avenues for intending applicants. Assistance provided by telephone as a proportion of total is well down on the 2009 level (72% compared with 87%) whereas assistance provided in writing (including by email), is well up on the 2009 level (22% compared with 8%).
- Respondent rating of the assistance provided was once again very high at 92% positive, but marginally down on the 2009 level of 97%.

The survey next asked respondents if they had applied for a grant using the ‘expression of interest’ process (applicable to medium and large Grant applications) ...

- Overall, 22% of applicants reported using the ‘expression of interest’ process.
- The new EOI process was endorsed by most (74% of the applicable group), and more likely to be ‘approved’ applicants (88% compared with 67% of the ‘declined’ group).

### Views regarding key aspects of the general grant rounds

- The table summarises responses to the relevant questions.

Aspect	Support for current provisions (% agree)
Funding categories	89.0
Funding levels	91.0
Time between grant rounds	91.0
Time grant rounds are open	87.0

- As the table shows, most respondents agree with current arrangements in terms of the five funding categories, the three funding levels, the time between grant rounds and the amount of time that general grant rounds are open, with all ratings close to 90% or above.

### Advice after lodging application

Applicants were asked to rate the post lodgement response by the Fund, summarised in the table below.

Aspect	% positive rating							
	Total group		Approved		Declined		Both	
	2014	2009	2014	2009	2014	2009	2014	2009
Timeliness of advice	84.5	81.0	90.2	87.8	78.2	76.3	85.7	-
Specific advice provided	69.1	57.5	86.0	94.7	45.7	32.1	90.5	-

- Applicants are generally happy with the timeliness of advice in relation to application assessment – 85% positive and marginally up on the 2009 level.
- Whilst the rating for specific advice provided by the TCF in relation to the assessment outcome is lower at 69%, it is significantly up on the 2009 rating of 58% – driven by a much higher rating from the ‘declined’ group, compared with 2009 (46% positive up from 32%).

Declined applicants were asked to rate the feedback received from the Fund in relation to their application.

- 43% of unsuccessful applicants received feedback from the Fund relating to their application.
- 57% of this group rated the feedback positively, marginally down on the 60% positive rating from 2009.
- Client comments were likely to be in relation to the level of detail provided, in particular reasons for their grant application being declined.

### Post approval arrangements

- The table summarises respondent ratings for the various aspects.

Aspect	% positive rating	
	2014	2009
The Grant deed	92.6	84.6
Payment of grant funds	92.3	94.7
Reporting obligations	85.1	89.8
Audit requirements	87.0	88.9
Other grant conditions	92.0	96.7

- As the table shows, most applicants are satisfied with the post approval arrangements, reflecting a similar result from 2009.

*Larger grant recipients were independently audited. The table summarises ratings for key aspects of the audit process.*

Aspect	% positive rating
Information sought	66.7
Communication	68.8
Timeframe	77.8

- As the table shows, ratings are positive but with some room for improvement, particularly in relation to information sought by the auditors and communication with the auditors.

### Overall experience in dealing with the Tasmanian Community Fund

*Respondents were asked to rate their overall experience in dealing with the Tasmanian Community Fund, what was the positive aspect and where things could be improved.*

- The table summarises rating for overall experience for the three client segments, with 2009 comparison.

Segment	% positive rating	
	2014	2009
Approved applicants	92.4	97.5
Declined applicants	69.8	60.0
Both	100.0	-
<b>Total</b>	<b>82.9</b>	<b>75.2</b>

- There has been an increase in rating of overall experience for the total respondent group, marginally down for ‘approved’ applicants and up for ‘declined’ applicants.
- Responses in relation to the **most positive aspect** of dealing with the TCF are in combination a strong endorsement of the professionalism of Fund staff and their engagement with grant applicants. The Report contains the range of verbatim comments which include the high level of communication and feedback and the *SmartyGrants* online application portal. Some indicative verbatim comments -

- *Uncomplicated requirements. Obligation clear. Personal touch. Excellent communication and feedback*
  - *Willingness to offer assistance at any point in the process*
  - *We were able to fund the project for the whole town and community. Advice from TCF was excellent*
  - *Clear information flow, realistic timeframes, ease of getting access to people*
  - *Very professional – the personal support and SmartyGrants – well done!*
- The range of **suggested improvements** contained three key themes –
    - a simplified application process
    - applicant feedback when not successful
    - clearer definitions regarding eligibility for funding

### **Experience with other funding bodies**

*Clients were asked if they had dealt with other similar funds and to compare their experience.*

- 78% of applicants had dealt with other similar funds (similar to 2009).
- Respondents were most likely to rate their experience with TCF better than other similar funds (61%) or at least the same (30%), with only 9% rating their TCF experience worse in comparison with other similar funds. These results reflect a similar outcome from the 2009 survey.

### **Tasmanian Community Fund profile**

*Finally respondents were asked for their thoughts on how the Fund could further develop its profile within the Tasmanian community.*

- Suggestions for developing the TCF profile provide a useful resource for the Fund going forward and were likely to relate to increased exposure in local media and via social media, including the highlighting of 'good news' stories from successful applicants.



## **Discussion.**

This comprehensive consultation with Tasmanian Community Fund grant applicants was a follow-up to the 2009 baseline research and provides a direct comparison of key indicators in relation to client engagement and satisfaction.

The 2014 survey provides a timely snapshot of the client relationship – both those who were successful with their grant application and those who were not. The survey sample was robust and representative (with a doubling of the research sample from the baseline 2009 consultation) enabling extrapolation to the total client group for the three funding rounds – 26, 27, and 28.

The research outcomes from this follow-up survey together provide a very **positive report card for the organisation**, notwithstanding the challenges of a significant increase in the number and scope of applications, resource constraints and the requirement to provide a professional level of service on a statewide basis.

Of particular relevance ...

- A significant increase in direct assistance provided to applicants (from 38% to 55% of the surveyed group);
- The maintaining of the rating of assistance provided at above 90% positive;
- Applicant satisfaction with the status quo in relation to key aspects of the general grant rounds;
- An increase in the rating of overall experience with the Fund;
- Over 90% of respondents rating their experience with the TCF as better or at least the same as with other similar funds;
- Generally positive ratings and feedback from *both* client segments which indicates a strong level of engagement with both successful and unsuccessful organisations and their representatives.

The 2014 client survey has been an opportunity for approved and declined applicants to 'have their say' in relation to their dealings with the Fund. As such it has been a positive and cooperative exercise and will be **an important input to future strategic planning and client engagement**.

Brian and Ros Correy  
Directors  
Myriad Research.

2 September 2014