

## MERCERS' PHILANTHROPY

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IVAR Open & Trusting  
Grantmaking

# EIGHT FUNDER COMMITMENTS

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THE  
MERCERS'  
COMPANY





## 01 DONT WASTE TIME

- Our guidelines are clearly stated on our website. We track patterns emerging in the applications that we are declining and update our guidelines accordingly.
- Potential applicants can send us questions via our website, including questions about eligibility.
- For our Young People & Education programme we have an eligibility checker for our three special initiatives. We will consider introducing this for all programmes.
- For our Young People & Education programme we hold webinars at the launch of new special initiatives, to be clear about eligibility and guidelines upfront.
- All our open programmes have an expression of interest process to cut down on wasted time.
- We have a proactive approach to our Heritage & Arts programme, to avoid large numbers of applications when only a small number of grants can be made.



## 02 ASK RELEVANT QUESTIONS

- For our Church & Communities, Older People & Housing and Young People & Education programmes, we use a two-stage application process – a shorter, lighter-touch Expression of Interest, which we can turn around quickly. Those requests that are taken forward complete a longer application form.
- We speak to all applicants who are invited to submit a full application; to gain a better understanding of their organisation and their proposal as part of our assessment process. We explain to all applicants at this stage how our decision-making works and how long a decision is expected to take.
- We will not ask for information that is publicly available, where possible.



## 03 ACCEPT RISK

- By looking at our grant portfolios as a whole, we take an approach that balances risks and benefits, this way we support a diverse range of grantees.
- We are willing to be a first funder, support new concepts and pilot projects.
- We can provide capacity building support through our Funder Plus offer, which helps mitigate risk.



## 04 ACT WITH URGENCY

- For our Church & Communities and Older People & Housing programmes we run an open rolling programme, which is always open to Expressions of Interest. We review all Expressions of Interest within a maximum of 4 weeks of submission, often less. If an Expression of Interest is successful and an organisation is invited to submit a full application, we will discuss time pressures and urgency with the applicant, tailoring our approach accordingly.
- For our Young People & Education programme, we operate funding rounds and have an Expression of Interest process. With those invited to submit a full application we discuss our timeframe upfront and how long a decision is expected to take.
- For our Heritage & Arts programme we discuss timescales with all invited applicants upfront.
- We have regular Committee meetings throughout the year and all applicants are told at which Committee meeting their application will be considered. We communicate the decisions taken at these meetings within five working days.

- When our grant holders face issues, we swiftly react – e.g. during the pandemic our first Covid Rapid Response grant was awarded on the first day of the first lockdown and in Spring 2023 we issued automatic grant uplifts to organisations funded through Church & Communities and Older People & Housing programmes to mitigate the cost-of-living crisis.

- We publish data about our current major grantmaking programmes on 360 Giving and update this each quarter.
- We do monitor applicant success rates. We will include data on success rates in our internal reporting and start publishing this online by the end of 2024.
- We let those who submit an Expression of Interest know what our decisions are based on. If we meet with an organisation, as part of assessing an expression of interest, we offer verbal feedback if we later decline it.
- We offer verbal feedback to all applicants who submit a full application.
- We ask all grantees for feedback on us as part of our reporting process and later in 2024 or early 2025 we will be running our first perceptions survey, asking all applicants and grant holders for feedback on our funding approach.
- We keep the website pages up to date with information about our Philanthropy and publish all external evaluation reports into our funding on our website.



## 05 BE OPEN

- We are transparent that our Church & Communities, Older People & Housing and Young People & Education Special Initiatives are open funding opportunities, for which any eligible organisation can apply. We are also transparent that we only approach organisations to apply for our Heritage & Arts programme and certain strands of the Young People & Education programme.



## 06 ENABLE FLEXIBILITY

- To ensure we reach all potential applicants we take a proactive approach to identifying organisations from areas or led by specific communities, as well as funding organisations through the Propel Fund, where we have gaps.
- We will continue to offer project, core, or unrestricted funding over multiple years, recognising that our grantees are the experts and know what their organisation needs most.
- We are keen to have strong relationships with grantees and we are happy to discuss and make changes in how funding is used during the course of a grant, depending on need/learning.



## 07 COMMUNICATE WITH PURPOSE

- We make our programme guidelines as clear and short as possible.
- We are updating our website to try and make it clearer.
- We pride ourselves on being a relational funder. For all our programmes we set up kick-off meetings with all grantees, so that expectations on both sides are clear from the outset. We also encourage grantees to update us between annual progress reports and visit and attend grantee events, where possible.



## 08 BE PROPORTIONATE

- Across all our programmes, we believe that our application forms and reporting are proportionate to the size of grant awarded. We only ask questions that are necessary.
- We share our report template and the timeframe for reporting at the time of award.
- We are considering whether we can be more open to receiving reports that grantees have produced for other funders, and in other formats, such as films/videos.
- We will continue to ground our reporting in learning and are committed to sharing this learning better.
- For our Young People & Education programme, there is an expectation that grantees will work with an external learning partner and as part of a cohort of funded organisations, and this is made clear from the outset.
- We try not to ask applicants and grant holders for the same or similar information more than once.