The Foundation Practice Rating 2025/26

Year Five

Appendices

Assessing diversity, accountability and transparency in grant-making foundations

Friends Provident Foundation
March 2026

Friends
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Foundation
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Rating

Further information

This document comprises the appendices to the Foundation Practice Rating 2025/26 full report.

The full report and a summary are available on the FPR website at www.foundationpracticerating.org.uk

About Friends Provident Foundation

Friends Provident Foundation is an independent charity that makes grants and uses its endowment towards a fair and sustainable economic system that serves people and planet. We connect, fund, support and invest in new thinking to shape a future economy that works for all. Since 2004, we've pioneered the creation of a fair economy for a better world. Already, we've helped improve access to financial services for people who were once excluded, and supported the development of resilient economic communities across the UK.

We're a catalyst for wider change, making an impact through continuous experimentation and shared learning. And we do all we can to embody the change we want to see. We invest in great social enterprises, and use our money in line with our values. Tomorrow, we'll continue to fund more new thinking, connect new ideas, invest our capital in line with our aims and values, and create better systems so that in the future the economy will serve both people and planet.

Connect with Friends Provident Foundation online:

Website: friendsprovidentfoundation.org

LinkedIn: www.linkedin.com/in/friends-provident-foundation

BlueSky: fprovfoundation.bsky.social

Foundation Practice Rating:

BlueSky: fpracticerating.bsky.social

LinkedIn: linkedin.com/showcase/foundation-practice-rating

Contents

A. Method: How the Foundation Practice Rating works

This section describes who is involved in the FPR and their roles, the principles underpinning the design of the FPR, how the rating process was developed, how research was undertaken, and how the data collected about the foundations were converted into ratings.

Principles which inform the FPR method

A rating, not a ranking or index

The FPR is a *rating* of foundations, not a *ranking*.

A rating is an absolute measure of performance. In a rating system, everybody can get top marks, or everybody can get bottom marks.

The FPR is not a ranking, because rankings show relative performance (who is top, who is second, and so on). The FPR intends to assess what prospective applicants experience, which is a foundation's absolute performance, not relative performance. If all the foundations with which a charity deals are brilliant, it doesn't much matter which one is slightly more brilliant than the others; and if all the foundations are awful, it doesn't matter who is marginally the worst. Furthermore, a ranking is a zero-sum system: if somebody rises, somebody else must fall: in other words, one organisation's gain is at somebody else's expense. This is not how the Foundation Practice Rating works.

By contrast, a rating shows foundations' performance on an absolute scale so gives a stronger signal for improvement than a ranking would, and is also capable of indicating the improvement of the sector overall.

Equally, the FPR is not an index. An index – such as the Retail Price Index – solely tracks changes over time, rather than showing the absolute level.

Objectivity

A key principle in the FPR is objectivity. Hence the decisions are based on external sources whenever possible. For example:

- An existing list of foundations is used, rather than creating a new one.
- The FPR criteria draw on other self-assessment tools and ratings in the private, public and non-profit sectors – such as GlassPockets' Transparency Standard, Give.org's BBB Standards for Charity Accountability, the Social Mobility Employer Index and the Racial Equality Index. These sources are detailed in previous years' reports. There was also a public consultation about the criteria and process.
- Each criterion has equal weighting within its domain. Hence the FPR is neutral as to the relative importance of the various criteria within a domain.
- Each domain – diversity, accountability and transparency – is equally weighted in the overall score: the FPR is neutral as to the relative importance of the various domains.
- On assessing foundations' investment policies and whether they should have them, the FPR used the fact that GlassPockets features a criterion that foundations should include an investment policy, and the Charity Commission for England and Wales publishes guidance on what investment policies should contain.

Nonetheless, some scores unavoidably involved subjective judgements. For instance, one criterion asks whether a foundation had published any analysis of its own effectiveness (distinct from listing grantees or the budgets of its various funding streams). The researchers have to judge whether any particular document constitutes analysis of that foundation's effectiveness.

Taking the stance of a prospective applicant

Grant-making foundations create social change through the organisations that they fund. The FPR puts those organisations centre-stage. The research process was designed to mimic the experience of prospective applicant by acting as they do:

- **Only publicly available data were used.** The FPR uses only the sources most likely to be used by a prospective applicant, i.e. the foundations' websites and their annual reports and accounts filed with the regulator. Other materials, such as those presented at events or on social media, are not taken into account.
- **A time limit was set for the research.** Each researcher spends up to 90 minutes researching each foundation, a plausible time that a charity might spend initially researching a possible funder. Sometimes the information was hard to find: sometimes it took 90 minutes to find it all, at other times it was faster. A prospective applicant may not take (or have) as much as 90 minutes, so, even if the information was found and the foundation scored well on that aspect, there is scope to make it easier to find.

The FPR uses only public information

For a few criteria, the information must come from the website. These include: 'Does the foundation say who its staff are on its website?'

Of course, this may not completely capture what foundations are doing. For example, if they did an excellent job involving a diverse group of stakeholders but did not mention that on their website or in their annual report, the rating gave no credit for that. The research team did not look at material posted on social media, simply because of the difficulty of searching through it.

Clearly, foundations may have materials or processes which are not public, e.g. one has diversity goals which are not public, and one told the research team privately that it is willing to talk with prospective grantees before they apply. Those are not counted because they are not visible to outsiders.

Some foundations wrote to the research team saying that they have considered publishing particular material and there is some good reason why they do not. Again, that information – and usually the rationale for not publishing it – are not visible to outsiders, so it is not counted. (Some of these decisions seemed curious. For instance, one foundation said that it does not put trustee names on its website for reasons of 'privacy' or 'avoiding bias', though in England and Wales they are – by law – published by its regulator.)

Roles

Funding

The FPR is funded by eight foundations (listed in the full report). The Funders Group meets regularly to advise. The Association of Charitable Foundations (ACF) is also invited to these meetings.

Research

The design and refinement of the rating system (including defining the criteria and research process) is led by Giving Evidence, an independent consultancy and research house. Giving Evidence works to encourage and enable *giving* based on sound *evidence*. It developed the rating system, including the criteria and scoring system, and produces the research and analysis for the ratings each year.

Giving Evidence's role covers:

- determining the criteria (including running a public consultation each year);
- determining the cohort of foundations to be assessed;
- gathering the data about each included foundation and ensuring its accuracy;
- turning the data into scores in each of the three domains, and from that ratings on each domain, and from that an overall rating; and
- analysis of the results.

Decisions

The Funders Group has no control over the detail of the assessment, nor the data about or ratings assigned to individual foundations, including themselves. All operational decisions are made by Giving Evidence; discrepancies on the research findings are resolved by the research team; and the scores are determined by the scoring system set up by Giving Evidence.

Scope: How the assessed foundations are chosen

The FPR looks at UK charitable grant-making foundations.* Public grant-making agencies (such as local authorities or the research councils) are not included because they have other accountability mechanisms.

Each year's cohort comprises 100 foundations, which are:

1. **the foundations which fund this project.** This project does not aim to criticise other foundations, but instead to improve the whole sector. The Funders Group are each assessed using the same criteria and process as the other foundations;
2. **the five foundations with the largest giving budgets** in the UK, because they so dominate UK grant-making overall; and
3. **a stratified random selection of community foundations and other foundations.**

Giving Evidence published the sampling process showing in detail how they selected the cohort of 100 foundations for Year Five before research started.

The process in brief is as given below.

The FPR uses independently produced lists of foundations. For its first three years, the FPR used the Foundations Giving Trends report, which was published annually by the ACF, which concerned the (roughly) 300 UK foundations with the largest giving budgets. It also used a list of community foundations provided by UK Community Foundations (UKCF).

ACF ceased producing the Foundation Giving Trends. The FPR switched to using UK Grantmaking, produced by 360Giving, which includes a wider range of funders, including non-charitable ones, and is produced in collaboration with the Association of Charitable Organisations (ACO), UKCF and London Funders.

UK Grantmaking was launched in June 2024. It collates data from regulators, funder accounts and data published using the 360Giving Data Standard. For the FPR's Year

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* The FPR includes the organisations that fund it. One of these, the Joseph Rowntree Reform Trust, is a non-charitable grant-making foundation. It is the sole non-charity included.

Five, researchers used the UK Grantmaking list published in June 2025, which is based on data from 2023–24.

There are hundreds of charitable foundations in the UK, so a sample is taken. There are two steps involved in sample selection. First, the researchers identify the subset of UK Grantmaking's list which is relevant to FPR. This is the sampling frame, i.e. the list from which they draw the cohort. Second, they select the cohort from that sampling frame. These steps are described below.

1. Creating the sampling frame

The FPR is specifically concerned with UK charitable grantmaking foundations, which primarily support organisations, as distinct to supporting individuals. This is not every entity on UK Grantmaking, so those which are of interest are selected.

First, remove segments not relevant to the FPR

UK Grantmaking categorises the funders into five segments.[1] Figure 39 shows the relative size of the grantmaking segments in 2023–24, by spending on grants. Only the 'trusts and foundations' segment (the mustard-coloured circle) is relevant to the FPR, so all other segments are removed.

***Figure 39:** Number and size of UK grantmakers, by segment, 2023–24*

The following segments were excluded, with the remainder comprising the 'trusts and foundations' segment:
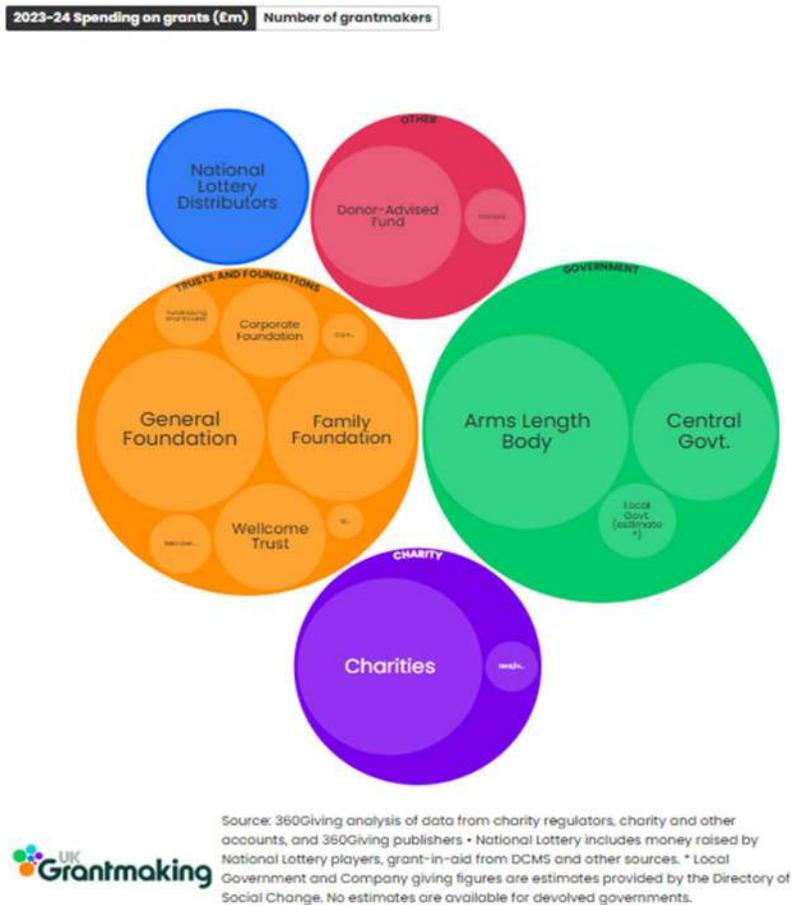
Figure 40: Criteria for excluding certain foundations from the longlist of UK Grantmaking

Category	Description	Rationale for exclusion
Charity (shown in purple)	Charity	Defined as charities that conduct grantmaking alongside other charitable services or supporting a single cause/institution/or members only, e.g. Save the Children, Oxfam, Multiple Sclerosis Society, Hospice UK, Whizz Kidz. They may make grants in the course of their work, but this is not their main activity. They aren't fundamentally a grant-maker in the sense that the FPR wants.
Charity (shown in purple)	NHS/Hospital Foundation	These foundations mainly are attached to a single hospital (or other health facility) – which is a public body – rather than being a general grant-maker or funding outside the NHS.

Category	Description	Rationale for exclusion
Government (shown in green)	Arm's length body, central, local, devolved	These are not charities, they are government bodies.
Lottery (shown in blue)	Lottery distributor	Defined as distributors of National Lottery funding. Also sometimes distribute government and other funds. These are not charities, but rather public bodies.
Other (shown in red)	Donor advised funds	Defined as a charitable vehicle whose main purpose is tax-effective giving for a range of donors who direct the grant-making. It includes donation platforms where the donor specifies the charity. One can argue that these should be included, and they may be considered in future. But they have been excluded so far to minimise changes from the previous years: they were not included in Giving Trends.
Other (shown in red)	Companies	These are not charities.

Second, remove ineligible foundations

Foundations which are not eligible are then removed:

Figure 41: *Criteria for excluding certain grant-makers*

Category	Description	Rationale for exclusion
Any foundation that is not active or unknown status	All foundations for which the column titled 'Active' is FALSE or blank	Inactive foundations cannot be held to account.
Spending below threshold or no information regarding spending	Spending budget on grantmaking to institutions is less than £1.17 million	This is about matching the foundation size to the set of foundations analysed in previous years. The smallest listed foundation on ACF Giving Trends reports had giving budgets of £1.17 million in the 2023 report, and £0.79 million in the 2022 report. For consistency, the researchers set the threshold for the giving budget at £1million. For Year Five, this was adjusted for inflation. They used 2021 as the base year for that as their start year (because that is when most foundations included in the most recent ACF report published the accounts on which that report is based) and look at inflation from then until 2023 (because the UKG data are for the FY 2023–24). The Bank of England inflation calculator only has whole years for that period. That resulted in £1.170 million as the inflation adjusted value for £1 million.
Does need a full audit[2]	Income below £1 million or have gross assets below £3.26 million and income below £250,000	The FPR uses full annual reports, which are required by the Charity Commission for England and Wales only from charities that have income above £1 million or have gross assets above £3.26 million and income above £250,000. Any foundation which does not have an audit requirement is removed
Any foundation with the word 'Benevolent', 'Chorister', etc. in the name		Not a general-purpose grant-maker: these make grants just for specific communities, and mainly to individuals.

Final sampling frame for Year Five

The final sampling frame when all above criteria were applied had:

Figure 42: *Final sampling frame*

Grant-making charities: community foundations (CFs)	37
Grant-making charities: non-community foundations (non-CFs)	508
TOTAL	**545**

2. Drawing the cohort

Every year, the researchers select 100 foundations for assessment, in the three parts described above.

The cohort is organised such that a fifth is in the top quartile of foundations by giving budget; a fifth in the second quartile by giving budget; and so on.

Community foundations (CFs)

In the FPR's early years, CFs were placed in the same list as non-CFs and the cohort was drawn randomly from that combined list. Previous FPR reports have found that community foundations score better on average than other foundations, so the number of CFs influenced the overall performance of the cohort. To reduce this noise, the proportion of CFs in the cohort is now the same as the proportion of CFs on the sampling frame. This is a probability proportional to size (PPS) sampling strategy and reduces those fluctuations.

To illustrate: this year, there are a total of 545 foundations in the sampling frame, of which 37 are CFs. The proportion of CFs in the sampling frame is therefore 6.8%. Therefore, the cohort of 100 should have seven CFs (after rounding 6.8%).

The researchers arrange the full set of CFs by giving budget; split that into quintiles (i.e. quintiles just of the CFs); randomly draw one CF from each quintile; and then, because they need seven in total, randomly draw two others.

Selecting the other foundations

There are 100 'slots'. In each quintile the slots must be filled by foundations in the relevant-size quintile (i.e. 20 foundations which are in the top quintile of the sampling frame; 20 foundations in the second quintile; and so on).

First, the researchers fill five slots in the top quintile with the five largest foundations (by budget given to organisations).

Second, they populate some slots (seven) with the selected community foundations; and fill some slots with the foundations funding the FPR. [Funders Group members are all included automatically. One (Joseph Rowntree Reform Trust) is not a charity, so would be removed in Step 1, but is added back in because it funds the FPR. Some others would be removed in Step 1, e.g. Friends Provident Foundation's assets are below the cut-off, but again those are added back in.]

The remainder are selected as follows. All the foundations on the sampling frame are arranged from largest to smallest by giving budget to organisations, and they are stratified into five quintiles. The researchers select randomly from within each quintile until they have filled the 'slots' in the relevant quintile of the cohort.

Anomalies

Sometimes there are foundations that could not be assessed for extraordinary reasons, for example, a foundation included in the sampling frame that had since ceased operations. In two cases, selected foundations were replaced because they were not in fact grant-makers. (The FPR works closely with UK Grantmaking / 360Giving who know that their new dataset inevitably has some errors and the researchers alert them to ones that are found so that they can make necessary amendments.)

Some foundations did not have open grants during the assessment, but they did provide an indication of when their grant cycles would reopen. The assessment period was August–September 2025, and each selected foundation was evaluated within this timeframe. If a foundation indicated that its grants would reopen within the period, the assessment was delayed until then. However, if there was no clarity on timing, or if reopening was scheduled for after the assessment window, the assessment was based on the information available on their websites – such as previous grants, guidelines and any updates on new plans.

It is important to note that for foundations not accepting grants at the time of assessment, it was often challenging to determine whether they would invite unsolicited proposals in the future. Such cases were assessed based on their usual practices and it was assumed that they would continue to operate in the same manner once their grants reopened.

Several such scenarios arose this year. Figure 43 summarises these foundations, the extraordinary circumstances observed, and how each challenge was addressed.

Figure 43: Treatment of some paused foundations

Foundation	Issue	Solution / decision
BBC Children in Need	It was expected to be functional by the end of September 2025.	Assessed based on whatever was available on 25 September 2025 (i.e. it was given two weeks' grace).
City Bridge Foundation	It was expected to be functional in autumn (no clear date).	Assess based on whatever was available.
John Lyon's Charity	It was transitioning to a new application portal for its funding programme, so information on how to apply for funding did not load, especially when the researchers tried to access the application form.[3]	Assess based on whatever was available.
Access to Justice Foundation	It was not open for grants.	Assess based on whatever was available.
Lloyds Bank Foundation for England and Wales	Most of its programmes were closed to applications when it was assessed, except for one (and this open one was by invitation only).	Assess based on whatever was available.
Kahal Chassidim Bobov Foundation	Requires people to register before they can see anything.	Assessed using its annual report.
Wellspring Settlement	It is not a funder.	Replaced with another foundation from the same quintile.
Global Compact Network UK	It is not a funder.	Replaced with another foundation from the same quintile.
Golden Bottle Trust	Removed from the Charity Commission (CCEW) website.	Replaced with another foundation from the same quintile.

Opt ins

In response to requests in Year Two, foundations can now opt in to the FPR to be assessed. Such foundations pay a small fee to cover the research work. They are assessed in the same way as the main cohort, and their results reported here but separately from the main analysis to avoid the selection effect skewing the results. In Year Five, five foundations opted in.

The process for gathering the data

Gathering and checking the data

Giving Evidence's research team comprised seven researchers plus a research manager: all the researchers had worked on the FPR in previous years. The researchers are chosen to have enough experience of charities, foundations or similar organisations and/or fundraising to understand the dynamics and perspectives of a prospective applicant, but not to know the UK foundation scene so closely that they have relationships and hence conflicts of interest. Several of the researchers are based outside the UK, deliberately, because some prospective applicants are outside the UK and have little or no contact with UK foundations. Each year, each researcher declares whether they have any relationship with any of the foundations included in the FPR: none did. Equally, no assessed foundation, including the Funders Group, is a Giving Evidence client.

Each foundation is researched by two researchers operating independently. Each researcher is given 90 minutes to research the non-financial questions on each foundation (the financial points are scored by a separate, specialised researcher). This is to mimic a charity researching a prospective funder: such a charity is unlikely to spend more than an hour and a half looking at any given foundation. On some occasions, researchers run out of time: they cannot answer all the questions within that time. In those cases, the questions which they have been unable to answer in that period are unanswered and the foundation will not score any points for those unanswered criteria. This is not a treasure hunt!

The pairs of researchers are mixed up to avoid errors if two researchers happen to have the same blindspot.

In order for data or reports to count, they must be published within the last three years.[*] This rule was introduced in Year Three and is to avoid foundations getting credit for material that may be very old and hence no longer relevant or even accurate. The Year Two report stated that this change was being considered. For foundations' annual reports, only the most recent one is used.

Data were gathered relating to the *criteria*, which contribute to the scores and ratings, and also *questions*, which do not. A 'question' is a piece of information that is collected but which does not contribute to the score, such as 'website address'.

The two researchers' answers are compared by Giving Evidence's Research Manager, who moderates them, possibly involving a third researcher to resolve discrepancies. If

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[*] As mentioned, reports that were undated were assumed to be current and hence were counted. Research related to consulting with communities to determine the foundation's priorities was given a five-year window.

the two researchers' answers agree, that answer is not checked again. This process is modelled on the approach that many universities take to marking exams.

For foundations which have been assessed previously, their previous data are also checked. This is to check the accuracy of changes that are identified (e.g. they used to publish X but now do not).

The data were gathered from August 2025. Each included foundation was sent its data during October / November 2025 to check, and given three weeks to do so. The foundation's published preferred contact method was used: that was mostly email, but some foundations had no email address so the material was sent by post. When a foundation raises a valid point, e.g. cites a relevant public document which the researcher had missed, the data are amended.

Included foundations were also invited to webinars – which are public and advertised and open to anybody – in October and November 2025, to discuss the FPR and have their questions answered.

Making exemptions

Foundations are only scored on criteria which are relevant to them, and are exempt from criteria which are not. For example, a foundation which has few (or no) staff cannot be expected to publish gender pay gap data, and so is exempt from that criterion.[*] A full list of the FPR's exemption rules is in Appendix C.

Equally, some foundations have programmes which are not grant-making programmes but rather campaigns with which the foundation is involved. Those programmes and that spending were excluded from the analysis because the FPR is about grant-making. So, for example, when assessing the percentage of a foundation's giving for which success rates are published, only the foundation's grant-making budget is included (as denominator): that may be less than its total spend.

As a result of these exemptions, the maximum score available within a domain varies between foundations: a foundation's maximum possible score in a particular domain was determined from only the questions relevant to that foundation.

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[*] For instance, one criterion was whether foundations published a plan for improving their staff diversity. Any foundation with five or fewer staff was exempt from this criterion.

　　　The legal requirement, when the Year Two process started, was only for employers with over 250 staff. Very few foundations have that many staff. The researchers use 50 staff as the exemption ceiling, because that was the original recommendation to government by a report it commissioned in 2017 from Baroness McGregor-Smith: The McGregor-Smith Review (2017) *The Time for Talking is Over: Now is the time to act.* https://assets.publishing.service.gov.uk/media/5a7f81c6ed915d74e33f6dc4/race-in-workplace-mcgregor-smith-review.pdf

Converting the data into domain scores, domain ratings and an overall rating for each foundation

Calculating the domain scores

Because of the FPR's principle of objectivity, the criteria within a domain were all weighted equally in generating the domain score.

To obtain a foundation's numerical score for each domain, its actual score for that domain (i.e. the number of points it is awarded in that domain) was divided by the maximum possible score for it on that domain, which gave a percentage figure. The maximum possible score differed between foundations because of exemptions.

Each foundation's numerical score in each domain was then converted into a domain rating. FPR ratings have four grades, from A (the highest) to D. Four grades were chosen partly because various UK public sector rating / quality assessment systems have four (e.g. Ofsted, HM Inspectorate of Prisons, the Care Quality Commission). A to D were chosen because they are easy to understand.

Each foundation's rating on each domain is published, but not the numerical scores. This is to prevent a ranking being constructed from the data, which would be unhelpful for the reasons given earlier.

Calculating a foundation's overall score

Because of the FPR's principle of objectivity, the three domains are weighted equally to give the overall rating. A natural way to generate a foundation's overall rating would simply be to take an average of its scores of the three domains. However, really excellent performance requires a minimum level of achievement in all three areas, rather than just an outstanding score on one or two domains. So the FPR does not use a straight average.

This issue was addressed by the public sector comparators that were used. For example, in Ofsted's ratings, if a school is rated as 'inadequate' on any of the four domains of its criteria, it will be 'inadequate' overall: in other words, a school's overall rating will not be higher than its lowest domain score.[4] The Care Quality Commission regulates health and social care provision in England. It assesses providers on various aspects, and if a provider scores below 'good' on any aspect, it cannot get an 'outstanding' rating overall.

The FPR uses a similar principle. If a foundation scores badly on any domain, it cannot be said to be excellent. For instance, if a foundation is graded A in both accountability and transparency but D in diversity, it does not warrant an overall grade of A.

The FPR rule is that a foundation's overall rating can be at most one grade higher than its lowest domain score. That is, if a foundation scores D in any domain, the best overall score it can get is C. Similarly, if a foundation scores C in any domain, the best

overall score it can have is B. The overall rating of a foundation is determined by taking the *lower* of:

- what the overall grade would be if the foundation's average score from the three domains were converted into one number, and then into a grade; and
- the lowest grade that a foundation achieved for an individual issue, increased by one.

This is illustrated in Figure 44.

Figure 44: Illustration of rating system used by the FPR

Foundation	Diversity rating	Accountability rating	Transparency rating	Rating based on the numerical average of its domain scores	Actual overall rating	Reason
1	A	B	A	A	A	Lowest grade (B) raised by one is the same as the simple average.
2	A	C	A	A	B	Lowest grade (C) raised by one is B, which is lower than the average score.
3	B	B	B	B	B	The simple average is B, and there is no reason to lower it.
4	D	A	A	B	C	The lowest grade (D) raised by one is C. This is lower than the simple average (B). This foundation's grade is affected by its poor performance on diversity.

Analysis and statistical tests

The research team did various analysis on the ratings and also on the numerical scores. They used statistical analysis to check whether apparent changes from year to year in

the numerical scores are statistically significant or just likely to result from random chance.

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How the criteria were originally defined, and how they have been amended since

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The way that criteria were originally defined, and the external systems from which they were drawn (e.g. the Racial Equity Index) are detailed in previous FPR reports and not repeated here. The same is the case for the definition of the three domains, and their inter-relatedness.

The criteria are deliberately changed as little as possible between years to avoid moving the goalposts. However, sometimes changes are made as a result of the following issues.

Regulatory changes

Whereas for Year Four, the FPR's criteria on investment policies changed because the regulator's guidance changed, no such changes were required this year.

The consultations and sector feedback

In order to ensure that the FPR reflects what operational nonprofits want from foundations, each year Giving Evidence runs a fresh public consultation, promoted to UK charities and foundations. Respondents can suggest new criteria, criteria to be removed or adapted, and any other changes to the process. In some previous years, the consultations produced suggestions of additional issues to cover, such as lived experience. As a 'toe in the water', non-scoring questions on these topics were added, to see what foundations publish and test the feasibility of scoring criteria on them later. The results of these non-scoring questions are discussed in the report, even though the data doesn't contribute to the ratings.

This year, no criteria or non-scoring questions were added as a consequence of this feedback. The findings of the consultation are detailed below.

Operational issues

Some minor changes were made in various years to improve clarity and the research process. They include:

- Combining a couple of questions which turned out to be rather duplicative.
- From Year Four onwards, for the criterion about foundations assessing their own effectiveness, feedback from grantees or applicants was required to cover all of the foundation's work, rather than just select programmes or funding streams. This aims to prevent selection bias (i.e. foundations only reporting on the programmes

that get most positive feedback.) This change may slightly reduce accountability scores.

- In Year Five, the cohort included Derbyshire Environmental Trust, which distributes landfill funds, so it has a relationship with Derbyshire County Council, on whose website it has a page. The researchers had to decide whether that constituted 'a website' or not. They decided that it did: any web material produced by the foundation (as opposed to a directory produced by a third party) would count, even if scant.
- This year, what was mean by a trustee recruitment policy was tightened up. The researchers felt they were perhaps overly generous in previous years, allowing the very brief statements in some foundations' annual reports which talk mainly about how new trustees are inducted.
- This year, publishing in Welsh was exempted for foundations which operate globally / internationally, since they cannot be expected to publish in every official language of all their countries.
- As mentioned, in Year Five, several foundations were encountered that were temporarily not accepting applications in a departure from their normal practice. No allowance was made for this. Because that is part of the applicant's experience, they were assessed as normal: on the materials which were publicly available at the time of assessment.

As mentioned, the minimum foundation size was increased to reflect inflation.

References

1 UK Grantmaking (2025) 'Methodology and data'.
   https://www.ukgrantmaking.org/2025/methodology-and-data/
2 UK Government (2023) 'Prepare a charity annual return'.
   https://www.gov.uk/guidance/prepare-a-charity-annual-return
3 John Lyon's Charity (no date) 'Charities'. https://www.jlc.london/grants/charities
4 Ofsted (2021) 'School inspection handbook'.

B. Detail of the criteria in the FPR

Figure 45 sets out the data that researchers gather about each foundation. Most of these translate into criteria on which the foundation is assessed, though there are some 'questions' which are for information only and do not score. The figure also shows the domain (diversity, accountability or transparency) to which each criterion contributes.

As discussed, not all questions apply to all foundations. Some examples are foundations that only fund by invitation, have no staff, or have a low number of trustees. In such cases, that foundation is exempt from that criterion: it receives no marks, but the calculation of the overall percentage also removes those questions from the potential total score. This means that if foundations achieve a perfect score on all the questions that apply to them, they will receive 100%. The exemption criteria are set out in Appendix C.

Figure 45 lists the full set of questions / criteria precisely as the FPR's researchers see them.

Figure 45: *The FPR's questions and whether / how they score*

Question	Domain	When does it score?	How much does it score?
2. Does the foundation have a website?	T	Always	1
3. If yes, please insert the URL. If there is no website write 'none'.	T	Never	
4. Can you navigate the foundation's website using only the keyboard (without a mouse)? Answer N/A if there is no website.	D	Always	1
5. Can you zoom to 400% on any page within the foundation's website and still read ALL of the text in a single column (the text and images don't overlap or spill off the page)? Answer N/A if there is no website.	D	Always	1
Please enter any comments on web navigation here.	D	Never	

Question	Domain	When does it score?	How much does it score?
6. Is the foundation currently on the Charity Commission for England and Wales, the Office of the Scottish Charity Regulator or The Charity Commission for Northern Ireland? (i.e. has it filed accounts within the last 24 months with at least one of those regulators?)	A	Never	
7. Which charity regulator did you use to find the foundation's information? Charity Commission for England and Wales (CCEW), Office of the Scottish Charity Regulator (OSCR) or Charity Commission for Northern Ireland (CCNI)?	A	Never	
Please enter any comments on regulator website information here.	A	Never	
8. Does the foundation publish on its website any information about its funding priorities? Answer N/A if there is no website.	T	Always	1
9. How many ways does the foundation present its funding priorities – PDF, web text, video, via public forums or other? Please tick all that apply.	D	Always	1
10. Does the foundation only fund proposals that it has invited? (e.g. it does not accept unsolicited applications.)	T	No marks – just for record keeping	
11. Does the foundation state how to apply for funding? Answer N/A if the foundation only accepts solicited proposals	T	Not if funding by invite only (Q10 is 'yes')	1
12. Is it possible to submit funding proposals in a range of different formats? Enter 'no' if there is no information given about how to apply or if there is only one way to submit an application. Answer N/A if the foundation only accepts solicited proposals.	D	Not if funding by invite only (Q10 is 'yes')	1
13. What different types of formats are accepted for proposals by the foundation? Hand-written, paper, video, audio, in-person, online meetings? Please tick any that apply. If it is not clear how to submit a proposal, show that in the following question. Answer N/A if the foundation only accepts solicited proposals.	D	Not if funding by invite only (Q10 is 'yes')	1
14. If it is not clear how to submit a proposal, please tick here.	T	Never	

Question	Domain	When does it score?	How much does it score?
Please add any comments on applications here.	T	Never	
15. Does the foundation publish any eligibility criteria for what it funds? (That is, who as a potential recipient would be eligible for a particular grant.) Answer N/A if the foundation only accepts solicited proposals.	T	Not if funding by invite only (Q10 is 'yes')	1
16. How are the eligibility criteria presented? PDF, eligibility quiz, web text, video? Please tick any that apply. Answer N/A if the foundation only accepts solicited proposals.	D	Not if funding by invite only (Q10 is 'yes')	1
17. For approximately what percentage of all funding are eligibility criteria presented? Please select one of the following scores: 0=none, 1=1–25%, 2=26–50%, 3= 51–75%, 4=76–99% or 5=eligibility information provided for all funding. Answer N/A if the foundation only accepts solicited proposals.	T	Not if funding by invite only (Q10 is 'yes')	1
18. Is the foundation explicit about what it will not fund? The foundation must state 'we do not fund' or 'are not likely to fund' (or similar) to score 'yes'. Answer N/A if the foundation only accepts solicited proposals.	T	Not if funding by invite only (Q10 is 'yes')	1
19. Is there an explicit mechanism to ask questions about funding? (e.g. contact details for the relevant people or general contact for funding questions.) Answer N/A if the foundation only accepts solicited proposals.	T	Not if funding by invite only (Q10 is 'yes')	1
Please add any comment about eligibility criteria here.	T	Never	
20. Does the foundation give a time frame for when applicants will be informed about whether or not their application will be funded? (This is distinct from application deadlines.) This must include either explicit dates or information such as 'within four weeks after proposal submission' or similar.	T	Next question	

Question	Domain	When does it score?	How much does it score?
21. For approximately what percentage of the foundation's funding is a timeline given? Please select one of the following scores: 0=none, 1=1–25%, 2=26–50%, 3= 51–75%, 4=76–99% or 5=timelines are provided for all funding. Answer N/A if the foundation only accepts solicited proposals.	T	Not if funding by invite only (Q10 is 'yes')	1
22. Does the foundation say how soon a successful applicant will receive the funds? Answer N/A if the foundation only accepts solicited proposals.	T	Not if funding by invite only (Q10 is 'yes')	1
Please add any comment here on time frames.	T	Never	
23. Does the foundation cite any criteria on which its funding decisions are made?	A	Always	1
24. Does the foundation say who makes the funding decisions in its organisation? (The staff, the trustees, an external panel, or other.)	A	Next question	
25. For approximately what percentage of the foundation's funding is information given on who makes the funding decisions? (Does the foundation specify the individual, or, if it is a panel, who is on that panel?) 0=none, 1=1–25%, 2=26–50%, 3= 51–75%, 4=76–99% or 5=if this information is provided for all funding.	A	Always	1
Please add any comment about funding decisions (time frames for decisions, and who makes them) here.	A	Never	
26. Does the foundation give any information on who or what it funded?	T	Always	1
27. If the answer to the question above is no, do they state why? Please enter 'N/A' if the answer to Question 26 is 'yes'.	T	Score captured in line above	
28. Is the following information provided about the awarded grants? Please tick any that apply. a) name of grantee; b) award date; c) description / title; d) amount awarded; e) duration	T	Not if answer to 27 is 'yes'	1

Question	Domain	When does it score?	How much does it score?
29. Does the foundation provide its data on awarded grants in a downloadable (open) format that doesn't require payment to access? (.xlsx, .csv, .jstor, or .txt) The answer to this question is 'yes' if they have made their data available on 360Giving (see below). PDFs do not count.	A	Not if answer to 27 is 'yes'	1
30. Does the foundation say it has made data available for download at 360Giving?	T	No score – captured in line above	
Please add any comments on the information on previous funding decisions here.	T	Never	
31. If the foundation funds recipients in Wales, is a Welsh language format provided? 'N/A' if the foundation does not have a presence in Wales.	D	Not if foundation does not have a presence in Wales – answer N/A here	1
Please add a comment if appropriate about why you concluded that the foundation does not have a presence in Wales.	D	Never	
32. Are funding success rates provided?	T	Always	1
33. If not, is there a reason why? (The foundation funds invite-only proposals or similar.) 'N/A' if the funding success rates are provided.	T	Never – captured in line above	
Please add any comment on success rates here.	T	Never	
34. Does the foundation publish information about any grant reporting requirements for its grantees?	T	Always	0.5
35. Does the foundation publish information about branding requirements for its grantees?	T	Always	0.5
Please add any comment on reporting and branding requirements.	T	Never	

Question	Domain	When does it score?	How much does it score?
36. Does the foundation publish who its staff are on its website? N/A if they have no staff, this can usually be verified on the relevant charity regulator's website.	A	Not if staff (qn 39) = 0	1
37. Does the foundation provide a bio for its senior staff? 'N/A' if there are no staff.	A	Not if staff (qn 39) = 0	1
38. Is the following information presented for the staff? Please tick any that apply. a) name; b) picture; c) previous job history; d) job title; e) contact information; f) social class; g) lived experience	A	Not if staff (qn 39) = 0	1
39. Please write down the number of staff. Please get this from the relevant charity regulator's website (in the Charity Overview, under People).	A	Never	
Please add any comment on staff here.	A	Never	
40. Does the foundation publish who its trustees / board members are on its website? This is 'no' if this information comes from a charity regulator's website. Answer N/A if the foundation has no website	A	Always	1
41. Does the foundation provide a bio for its trustees / board members?	A	Always	1
42. Is the following information presented for the trustees? Please tick any that apply. If none are provided, please indicate that in the next question. a) name; b) picture; c) previous job history; d) job title; e) contact information; f) social class; g) lived experience	A	Always	1
43. Please write down the number of trustees / board members. Please get this from the relevant charity regulator's website (in the Charity Overview, under People).	A	Never	
Please add any comment on trustees / board members here.	A	Never	

Question	Domain	When does it score?	How much does it score?
44. Does the foundation publish a breakdown of the diversity of its staff against the following categories? Please tick as many as apply. Please tick 'N/A' if they have no staff or one member of staff.	D	Not if staff (qn 39) < 6	1
45. At what URL(s) did you find the breakdown of staff diversity for the previous question?	D	Never	
46. Does the foundation have a plan to improve the diversity of its staff? This can include tackling systematic racism or sexism within the institution. Please give details in the comments. 'N/A' if there are five or fewer members of staff.	D	Not if staff (qn 39) < 6	1
47. Does this plan include specific, numerical targets to improve the diversity of its staff? 'N/A' if there are five or fewer members of staff.	D	Not if staff (qn 39) < 6	1
48. Please tick all of the following targets that are in the diversity plan for staff. 'N/A' if there are five or fewer members of staff. Gender; BAME; LBGTQI+; Disability; Social class; Lived experience	D	Not if staff (qn 39) < 6	1
Please provide any comments on any staff diversity plans here and provide the URL for this plan if there is one. Write 'none' if there is no plan.	D	Never	
49. Does the foundation publish information on any pay gaps (gender, ethnicity, disability)? 'N/A' if there are fewer than 50 members of staff.	D	Not if staff (qn 39) < 50	1
50. Has the foundation made a public commitment to be a Living Wage Employer? 'N/A' if there are no staff.	D	Not if staff (qn 39) = 0	1
50a. Has the foundation made a public commitment to be a Living Wage Funder?	D	Data collection only	
Please enter any comments on pay gap or Living Wage commitments here, if there are any.	D	Never	
51. Does the foundation publish a breakdown of the diversity of its trustees / board members against the following categories? Please tick as many as apply. N/A if there are 5 or fewer trustees / board members.	D	Not if trustees (qn 43) < 6	1

Question	Domain	When does it score?	How much does it score?
52. At what URL(s) did you find the breakdown of trustee diversity for the previous question?	D	Never	
53. Does the foundation have a plan to improve the diversity of its trustees / board members? Answer N/A if there are 5 or fewer trustee/board members.	D	Not if trustees (qn 43) < 6	1
54. Does this plan include specific, numerical targets to improve the diversity of its trustees or board members? Answer N/A if there are 5 or fewer trustee/board members.	D	Not if trustees (qn 43) < 6	1
55. Please tick all of the following targets that are included in the diversity plan for trustees.	D	Not if trustees (qn 43) < 6	1
Please add any comment on board / trustee diversity plans here and provide the URL for this plan if there is one. Write 'none' if there is no plan.	D	Never	
56. Does the foundation publish its recruitment policy for staff? 'N/A' if there are no staff.	D	Not if staff (qn 39) = 0	1
57. Does the foundation publish its recruitment policy for board members?	D	Always	1
Please add any comment on recruitment for staff or trustees here – including whether they have specific aims to recruit for diversity including social class and lived experience.	D	Never	
58. Is there contact information provided on the foundation's website? If the foundation has no website the answer is 'N/A'.	T	Always	1
59. Please tick the different ways mentioned on its website for contacting the foundation. Email, phone number, online form, mailing address, web-chat, Facebook, Twitter, Instagram etc. Use the next question if no contact information is provided.	D	Always	1
60. Does the foundation give ways to contact them for people who have disabilities? (text relay, BSL or other) Please tick the different types of accessible contact (do not repeat any information from above).	D	Always	1

Question	Domain	When does it score?	How much does it score?
61. Does the foundation provide a mechanism for comments, complaints (feedback)? (This is over and above simple contact information.)	A	Always	1
62. Please tick the different ways given for contacting the foundation concerning complaints. Email, phone number, online form, mailing address, web-chat, or any others. Be sure to include BSL, text relay, etc., if available. Please add a comment in the next question if no contact for complaints is provided.	D	Always	1
Please add any comment on ways to contact the foundation concerning complaints.	D	Never	
63. Is there a mechanism to report malpractice concerns (whistleblowing)?	A	Always	1
64. Please tick the different ways given for contacting the foundation concerning malpractice. Email, phone number, online form, mailing address, web-chat, or any others. Be sure to include BSL, text relay, etc. if available. Please add a comment in the following question if no contact for malpractice is provided.	D	Always	1
Please add any comments on contacting the foundation concerning malpractice here.	D	Never	
65. Does the foundation publish any feedback it receives from grant seekers and/or grantees? (This must be feedback, e.g. suggestions for the foundation.)	A	Always	1
66. Does the foundation publish any actions (however minimal) it will take to address this feedback? (What they are doing differently as a consequence.)	A	Always	1
If you answered 'Yes' to the previous question, at what URL did you find evidence?	A	Never	
67. Does the foundation publish any analysis of its own effectiveness? (This is effectiveness of the foundation, not analysis from the grantees of what they are doing with the funding.)	A	Always	1

Question	Domain	When does it score?	How much does it score?
68. Please write down what this analysis is and where you found it (and the URL, if possible) or 'none' if there is no analysis.	A	Never	
69. Does the foundation publish some information of what it is doing differently as a consequence of this analysis?	A	Always	1
70. Please write down what this information is and where you found it (and the URL, if possible), or write 'none'.	A	Never	
71. Does the foundation cite any evidence that it has consulted the communities it seeks to support in determining its funding priorities?	A	Always	1
72. Please write down what this information is and where you found it (and the URL, if possible), or write 'none'.	A	Never	
73. Does the foundation publish data about diversity of its grantees or applicants, for example on gender, ethnicity or disability?	D	Never – info gathering only	
74. If so, what do they publish? (e.g. on grantees or applicants, and on what categories do they publish, and using what definitions do they seem to use?) and at what URL?	D	Never – info gathering only	
Please add any comments on foundation effectiveness, self-examination and feedback.	D	Never	
75. Does the foundation have an investment policy?	A	Not if answer to 75 is N/A	1
76. Does this policy include the following? (Please write down all that apply.) a) the scope of its investment powers b) the charity's investment objectives c) the charity's attitude to risk d) how much is available for investment; timing of returns and the charity's liquidity needs e) the types of investment it wants to make; this might include ethical considerations f) who can take investment decisions (for example trustees; an executive; an investment adviser or manager) g) how investments will be managed and benchmarks and targets set by which performance will be judged	A	Always	1

Question	Domain	When does it score?	How much does it score?
h) reporting requirements for investment managers (if applicable. Please make a note in following question if it is not applicable)			
77. Are points (g) and (h) from the previous question applicable?	A	In line with the above	
78. Please write down the income for the foundation from the most recent published accounts, in £.	T	Never	
79. Please write down the net assets for the foundation from the most recent published accounts, in £.	T	Never	
80. Does the foundation provide any comment / explanation about their payout rates?	T	Never	
Please add any comment on financials here, including URL for investment policy.	T	Never	

C. Exemption rules

Diversity exemptions

These questions are grouped such that those sharing an exemption criterion appear together.

Figure 46: Exemptions for diversity criteria

Question number	Criterion	Exemption rules
44	Does the foundation publish a breakdown of the diversity of its staff against the following categories?	5 or fewer staff
46	Does the foundation have a plan to improve the diversity of its staff? This can include tackling systematic racism or sexism within the institution.	5 or fewer staff
47	Does this plan include specific, numerical targets to improve the diversity of its staff?	5 or fewer staff
48	Please tick all of the following targets that are in the diversity plan for staff.	5 or fewer staff
49	Does the foundation publish information on any pay gaps (gender, ethnicity, disability)?	49 or fewer staff
51	Does the foundation publish a breakdown of the diversity of its trustees / board members against the following categories?	5 or fewer trustees / board members
53	Does the foundation have a plan to improve the diversity of its trustees / board members?	5 or fewer trustees / board members
54	Does this plan include specific, numerical targets to improve the diversity of its trustees / board members?	5 or fewer trustees / board members
55	Please tick all of the following targets that are in the diversity plan for trustees.	5 or fewer trustees / board members
31	If the foundation funds recipients in Wales, is a Welsh language format provided? 'N/A' if the foundation does not have a presence in Wales.	Does not fund in Wales
12	Is it possible to submit funding proposals in a range of different formats?	Solicits proposals

Question number	Criterion	Exemption rules
13	What different types of formats are accepted for proposals by the foundation?	Solicits proposals
16	How are the eligibility criteria presented? PDF, eligibility quiz, web text, video?	Solicits proposals
50	Has the foundation made a public commitment to be a Living Wage Employer?	No staff
56	Does the foundation publish its recruitment policy for staff?	No staff

Accountability exemptions

Figure 47: Exemptions for accountability criteria

Question number	Criterion	Exemption rules
36	Does the foundation publish who its staff are on its website?	No staff
37	Does the foundation provide a bio for its senior staff?	No staff
38	Is the following information presented for the staff?	No staff
75	Does the foundation have an investment policy?	If not applicable

Transparency exemptions

Figure 48: Exemptions for transparency criteria

Question number	Criterion	Exemption rules
11	Does the foundation state how to apply for funding?	Solicits proposals
15	Does the foundation publish any eligibility criteria for what it funds?	Solicits proposals
17	For approximately what percentage of all funding are eligibi criteria presented?	Solicits proposals
18	Is the foundation explicit about what it will not fund?	Solicits proposals
19	Is there an explicit mechanism to ask questions about fundi	Solicits proposals

Question number	Criterion	Exemption rules
21	For approximately what percentage of the foundation's fund is a timeline given?	Solicits proposals
22	Does the foundation say how soon a successful applicant w receive the funds?	Solicits proposals

D. Examples of foundations that exhibit each item assessed

Figure 49 lists an example foundation that met the conditions for each FPR question. Every question was met by at least one foundation assessed in Year Five: this shows that everything being sought is attainable.

As mentioned, the researchers gather data on all the *criteria* – which are used in the scoring – but also other *questions*. Foundations are not scored on the *questions* but those data are used in the process. For example, *questions* include its website URL, the date on which the data were gathered, and the number of staff. At the end of Figure 49 are some examples of these questions. There are also two questions about whether the foundation publishes data about the diversity of its grantees or applicants. These have not contributed to scores this year, but are clearly linked to the diversity domain, so they have been included in that part of the table.

Figure 49: *Examples of foundations that exhibit each item assessed (categorised by domain)*

Criterion	Example foundation meeting the criterion
Diversity domain	
4. Can you navigate the foundation's website using only the keyboard (without a mouse)?	The Robertson Trust
5. Can you zoom to 400% on any page within the foundation's website and still read ALL of the text in a single column (the text and images don't overlap or spill off the page)?	Foundation Scotland
9. How many ways does the foundation present its funding priorities – PDF, web text, video, via public forums or other?	John Lyon's Charity (PDF / downloadable doc, web text, video / slides / audio)
12. Is it possible to submit funding proposals in a range of different formats?	Cumbria Community Foundation
13. What different types of formats are accepted for proposals by the foundation?	Wiltshire and Swindon Community Foundation
16. How are the eligibility criteria presented?	The Road Safety Trust

Criterion	Example foundation meeting the criterion
31. If the foundation funds recipients in Wales, is a Welsh language format provided?	BBC Children in Need
44. Does the foundation publish a breakdown of the diversity of its staff against the following categories?	Paul Hamlyn Foundation
45. At what URL(s) did you find the breakdown of staff diversity for the previous question?	https://www.phf.org.uk/assets/documents/Gender-and-ethnicity-pay-gap-report-2024.pdf?v=1733831731
46. Does the foundation have a plan to improve the diversity of its staff? This can include tackling systematic racism or sexism within the institution.	Children's Investment Fund Foundation (UK)
47. Does this plan include specific, numerical targets to improve the diversity of its staff?	Cheshire Community Foundation Limited
48. Please tick all of the following targets that are in the diversity plan for staff: gender; BAME; LBGTQI+; disability; social class; lived experience	Cheshire Community Foundation Ltd
49. Does the foundation publish information on any pay gaps (gender, ethnicity, disability)?	Foundation Scotland
50. Has the foundation made a public commitment to be a Living Wage Employer?	John Ellerman Foundation
50a. Has the foundation made a public commitment to be a Living Wage Funder?	John Lyon's Charity
51. Does the foundation publish a breakdown of the diversity of its trustees / board members against the following categories?	Esmée Fairbairn Foundation
52. At what URL(s) did you find the breakdown of trustee diversity for the previous question?	https://esmeefairbairn.org.uk/latest-news/esmee-staff-and-trustee-diversity-data-2024/
53. Does the foundation have a plan to improve the diversity of its trustees / board members?	Access to Justice Foundation
54. Does this plan include specific, numerical targets to improve the diversity of its trustees or board members?	Cheshire Community Foundation Ltd (only this one foundation met this criterion this year)
55. Please tick all of the following targets that are included in the diversity plan for trustees.	Cheshire Community Foundation Ltd (only this one foundation met this criterion this year)
56. Does the foundation publish its recruitment policy for staff?	Walcot Educational Foundation

Criterion	Example foundation meeting the criterion
57. Does the foundation publish its recruitment policy for board members?	John Ellerman Foundation
59. Please tick the different ways mentioned on its website for contacting the foundation.	Rayne Foundation
60. Does the foundation give ways to contact them for people who have disabilities?	Postcode Places Trust
62. Please tick the different ways given for contacting the foundation concerning complaints.	City Bridge Foundation
64. Please tick the different ways given for contacting the foundation concerning malpractice.	Corporation of Trinity House of Deptford Strond
Accountability domain	
23. Does the foundation cite any criteria on which its funding decisions are made?	The John Lewis Partnership Foundation
24. Does the foundation say who makes the funding decisions in its organisation?	Manoukian Charitable Foundation
25. For approximately what percentage of the foundation's funding is information given on who makes the funding decisions	Pimco Foundation Europe
29. Does the foundation provide its data on awarded grants in a downloadable (open) format that doesn't require payment to access?	Hampton Fuel Allotment
30. Does the foundation say it has made data available for download at 360Giving?	Caretech Charitable Foundation
36. Does the foundation publish who its staff are on its website?	St John's Foundation Est. 1174
37. Does the foundation provide a bio for its senior staff?	Galilee Foundation
38. Is the following information presented for the staff? Please tick any that apply. a) name; b) picture; c) previous job history; d) job title; e) contact information; f) social class; g) lived experience	Barnwood Trust
40. Does the foundation publish who its trustees / board members are on its website?	Band Aid Charitable Trust
41. Does the foundation provide a bio for its trustees / board members?	Barnwood Trust
42. Is the following information presented for the trustees? a) name; b) picture; c) previous job history; d) job title; e) contact information; f) social class; g) lived experience	Variety the Children's Charity
61. Does the foundation provide a mechanism for comments, complaints (feedback)?	Community Foundation for Calderdale

Criterion	Example foundation meeting the criterion
63. Is there a mechanism to report malpractice concerns (whistleblowing)?	John Ellerman Foundation
65. Does the foundation publish any feedback it receives from grant seekers and/or grantees?	John Ellerman Foundation
66. Does the foundation publish any actions (however minimal) it will take to address this feedback?	Paul Hamlyn Foundation
67. Does the foundation publish any analysis of its own effectiveness?	Enthuse Charitable Trust
68. Please write down what this analysis is and where you found it (and the URL, if possible) or 'none' if there is no analysis.	https://assets.ctfassets.net/pc40tpn1u6ef/2ysD0mvZ7gm3MjUDyjHvyH/2f49f90b59ba1b97c57c821a91209d64/FINAL_Evaluation_of_STEM_Learning-s_ENTHUSE_Partnerships_151024.pdf
69. Does the foundation publish some information of what it is doing differently as a consequence of this analysis?	Hampton Fuel Allotment (only this one foundation met this criterion this year)
70. Please write down what this information is and where you found it (and the URL, if possible), or write 'none'.	They used the findings from the impact report to inform their strategy and the development of systems and measurement tools: https://www.hamptonfund.co.uk/file/3747/impact_report_2025.pdf (page 16)
71. Does the foundation cite any evidence that it has consulted the communities it seeks to support in determining its funding priorities?	Wiltshire and Swindon Community Foundation
72. Please write down what this information is and where you found it (and the URL, if possible), or write 'none'.	https://www.wscf.org.uk/assets/uploads/files/WCF%20OCSI%20Needs%20Analysis%20for%20Wiltshire%20and%20Swindon%202023%20v2%20-%20Full%20Report%20with%20Appendices.pdf
75. Does the foundation have an investment policy?	Buckinghamshire Community Foundation

Criterion	Example foundation meeting the criterion
76. Does this policy include the following? (Please write down all that apply.) a) the scope of its investment powers b) the charity's investment objectives c) the charity's attitude to risk d) how much is available for investment; timing of returns and the charity's liquidity needs e) the types of investment it wants to make; this might include ethical considerations f) who can take investment decisions (for example trustees; an executive; an investment adviser or manager) g) how investments will be managed and benchmarks and targets set by which performance will be judged h) reporting requirements for investment managers (if applicable. Please make a note in following question if it is not applicable)	Baily Thomas Charitable Fund
Transparency domain	
2. Does the foundation have a website?	This Day Foundation
3. If yes, please insert the URL.	https://www.this.day/
8. Does the foundation publish on its website any information about its funding priorities?	Cumbria Community Foundation
11. Does the foundation state how to apply for funding?	BBC Children in Need
15. Does the foundation publish any eligibility criteria for what it funds?	The Robertson Trust
17. For approximately what percentage of all funding are eligibility criteria presented?.	The Joseph Rowntree Charitable Trust
18. Is the foundation explicit about what it will not fund?	Paul Hamlyn Foundation
19. Is there an explicit mechanism to ask questions about funding?	Point North Community Foundation
20. Does the foundation give a time frame for when applicants will be informed about whether or not their application will be funded?	Point North Community Foundation
21. For approximately what percentage of the foundation's funding is a timeline given?	John Ellerman Foundation
22. Does the foundation say how soon a successful applicant will receive the funds?	Lloyds Bank Foundation for England & Wales
26. Does the foundation give any information on who or what it funded?	Cumbria Community Foundation

Criterion	Example foundation meeting the criterion
28. Is the following information provided about the awarded grants? Please tick any that apply. a) name of grantee; b) award date; c) description / title; d) amount awarded; e) duration	Cumbria Community Foundation
32. Are funding success rates provided?	Postcode Neighbourhood Trust
33. If not, is there a reason why?	Maurice Wohl Charitable Foundation
34. Does the foundation publish information about any grant reporting requirements for its grantees?	Clore Duffield Foundation
35. Does the foundation publish information about branding requirements for its grantees?	King Charles III Charitable Fund
58. Is there contact information provided on the foundation's website?	John Armitage Charitable Trust
Below are example 'questions' (as opposed to criteria): the answers to questions are used in the research process, e.g. to determine exemptions, but do not contribute to scores directly:	
10. Does the foundation only fund proposals that it has invited?	Standard Chartered Foundation (which is invite-only)
73. Does the foundation publish data about diversity of its grantees or applicants, for example on gender, ethnicity or disability?	John Ellerman Foundation
74. If so, what do they publish (e.g. on grantees or applicants, and on what categories do they publish, and using what definitions do they seem to use?) and at what URL?	Annual report, pg 26: https://files.ellerman.org.uk/John-Ellerman-Foundation-Annual-Report-2023_24-HR.pdf

E. Correlations between scores and other foundation features

The research team examined the relationships between the scores achieved on each domain and various other factors:

- the net assets of the foundation;
- the giving budget of the foundation;
- the number of staff; and
- the number of trustees or board members.

In each case, foundations' numerical scores on the domain were used, rather than the A–D rating.

The relationship is strongest for the number of trustees: all four correlations with that are highly statistically significant (the only ones which are), and also the coefficients are much larger than those for the other factors. Giving budget has no statistically significant correlation with the scores. Net assets correlates weakly (0.2) with diversity scores but nothing else. The number of staff correlates weakly (~0.2) with scores on accountability and diversity. This repeats last year's finding that the strongest correlations are with the number of trustees.

Figure 50: Correlation coefficients between selected variables and overall and domain scores, Year Five

	Overall score	D scores	A scores	T scores
Net assets	0.176	0.207*	0.187	0.109
Giving budget (£)	0.158	0.167	0.172	0.109
Number of staff	0.192	0.218*	0.205*	0.124
Number of trustees	0.404***	0.37***	0.426***	0.329***

Correlations with stars in this table are statistically significant – at the conventional level of 5%. The stars indicate the p value and hence level of statistical significance:

* $p<0.05$, ** $p<0.01$, *** $p<0.001$.

F. Foundations included in each year

Figures 51–54 show which foundations were included in each year of the FPR, by category.

Five largest UK foundations

Two of the 'Big 5' foundations were included in all five years.

Figure 51: *Foundations included, ordered 1 to 5 by size of giving budget (the five largest UK foundations)*

	Year One	Year Two	Year Three	Year Four	Year Five
1	Wellcome	Wellcome	Wellcome	Wellcome	Wellcome
2	Children's Investment Fund Foundation	Children's Investment Fund Foundation	Children's Investment Fund Foundation	Children's Investment Fund Foundation	Children's Investment Fund Foundation
3	Leverhulme Trust	The David and Claudia Harding Foundation	Leverhulme Trust	Gatsby Charitable Foundation	Quadrature Climate Foundation
4	Comic Relief	Leverhulme Trust	Garfield Weston Foundation	Quadrature Climate Foundation	UBS Optimus Foundation UK
5	BBC Children in Need Appeal	Garfield Weston Foundation	Reuben Foundation	Leverhulme Trust	CH Foundation (UK)

Community foundations

Community foundations are randomly selected each year. No community foundation has been selected for inclusion more than three times, but two were selected in Year Five which had been selected twice before (shaded light green in Figure 52), and two were selected in Year Five which had been selected once before (shaded blue).

Figure 52: *Community foundations included in the FPR*

Year One	Year Two	Year Three	Year Four	Year Five
Berkshire Community Foundation	Berkshire Community Foundation	Bedfordshire and Luton Community Foundation	Cambridgeshire Community Foundation	Buckinghamshire Community Foundation
County Durham Community Foundation	Community Foundation for Calderdale	Community Foundation North East	Cheshire Community Foundation Limited	Cheshire Community Foundation Limited
Cumbria Community Foundation	Gloucestershire Community Foundation	Community Foundations for Lancashire and Merseyside	Community Foundation for Calderdale	Community Foundation for Calderdale
Foundation Derbyshire	Herefordshire Community Foundation	Cornwall Community Foundation	Community Foundation for Northern Ireland	Wiltshire and Swindon Community Foundation
Northamptonshire Community Foundation	Lincolnshire Community Foundation	County Durham Community Foundation	Cornwall Community Foundation	Cumbria Community Foundation
	Norfolk Community Foundation	Devon Community Foundation	Hertfordshire Community Foundation	Foundation Scotland
	Oxfordshire Community Foundation	Gloucestershire Community Foundation		Point North Community Foundation (formerly County Durham Community Foundation)
	Suffolk Community Foundation	Herefordshire Community Foundation		

Year One	Year Two	Year Three	Year Four	Year Five
		Hertfordshire Community Foundation		
		Kent Community Foundation		
		Leeds Community Foundation (includes Bradford)		
		Leicestershire and Rutland Community Foundation		
		Lincolnshire Community Foundation		
		London Community Foundation		
		One Community Foundation (The Community Foundation for the People of Kirklees)		
		South Yorkshire Community Foundation		

Funders Group

Six of the Funders Group have been included in all five years by virtue of their membership in each year.

One (The Indigo Trust) joined as a Funders Group member in Year Two, having been randomly selected for Year One. Two others (City Bridge Trust (which, during this period, changed its name to City Bridge Foundation) and John Lyon's Charity) joined

the Funders Group in Year Two, but were not part of the random sample in Year One. One (The Robertson Trust) joined in Year Four.[*]

Figure 53: *Funders Group foundations in each year*

Year One	Year Two	Year Three	Year Four	Year Five
Barrow Cadbury Trust†				
Friends Provident Foundation				
Paul Hamlyn Foundation				
John Ellerman Foundation				
Joseph Rowntree Reform Trust				
The Joseph Rowntree Charitable Trust				
	City Bridge Foundation			
	The Indigo Trust			
Blagrave Trust				
Esmée Fairbairn Foundation				
Power to Change				
Lankelly Chase Foundation				
			The Robertson Trust	
	John Lyon's Charity			

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[*] The Indigo Trust was also included in the Year One cohort by random selection. Esmée Fairbairn Foundation was also included in the Year Five cohort by random selection, as was John Lyon's Charity. The Joseph Rowntree Charitable Trust was in the Funders Group in Years One to Three; its confirmation of continued support for Year Four onwards came after the cut-off for inclusion in this year's main cohort. So though it funded the FPR in Year Four, it was that year not included in the research or analysis of the Funders Group, but rather is treated as an opt in.

† Barrow Cadbury Trust is funding FPR this year, though because of when confirmation of this was received, it is not assessed this year.

G. Responses to the Year Five consultation

Each year, Giving Evidence runs a consultation process to inform the next iteration of the FPR. The Year Five consultation asked demographic questions, which filtered out all respondents from outside the UK (who are ineligible), and to determine the type of organisation responding. It then sought information on:

- How accurately does the FPR reflect the needs of charities for information on foundations' diversity, accountability and transparency?
- What can the FPR team do to improve this?
- How clear are the FPR's criteria and method?
- How clear are the FPR's results?
- What can the FPR team do to improve the clarity of the FPR?
- For foundations, has the FPR prompted any changes in foundations' practices?
- Have foundations responding been assessed in the FPR during the past four years?
- Do respondents consider that the FPR provides an accurate and fair assessment of their foundation?
- If no, why not, and what can be done to improve this?
- How can the FPR better support practice improvements across UK foundations?
- What additional resources would be helpful in understanding and acting on the FPR?

The following are the major points from the Year Five consultation. The full report is published on the FPR website at www.foundationpracticerating.org.uk

- A 100% increase in response rates this year. In total, there were 80 'forms' (respondents), an increase on previous years (40 forms in Year Four, 10 in Year Three and 14 in Year Two).
- Most respondents were positive about the FPR, saying that it is clear and/or useful.
- Encouragingly, 85% of foundations responding said that the FPR has promoted change in their practice, including several foundations who have not yet been assessed in the FPR.
- Some respondents want less detail about the FPR method; others want more (!). The latter generally asked questions which have been answered in public (e.g. how numerical scores are turned into the letter grades, or how exemptions work). Some respondents ask for things that have been deliberately ruled out, e.g. being a ranking.

- Suggestions were deliberately solicited about how the FPR can be more useful, and there are some, notably for more and clearer communications, including: more support/ examples / information, and making more findable the examples of a foundation for each criterion (e.g. if you want to know how to achieve criterion X, look at foundation Y). Several respondents asked for explanations about things which have been explain publicly, or asserted things about the FPR which are not true, implying that the FPR communications haven't reached them.
- One (only one) respondent was unhappy, e.g. 'Less not clear, just rather pointless', 'Don't know and don't care – [I] take no notice of the ratings.' They are a not-for-profit company which has not been assessed in the FPR.