



Chartered
Institute of
Fundraising



Essential Fundraising for Small Charities

Trusts and Foundations

supported by





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TRUSTS AND FOUNDATIONS FUNDRAISING FOR SMALL CHARITIES



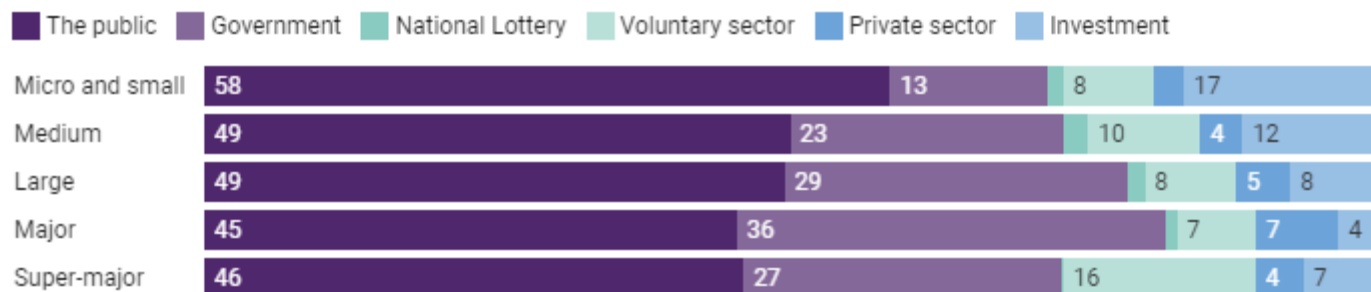
UK Charitable Trusts and Foundations

Over 10,000 Charitable Trusts and Foundations in the UK.

Grant-making by all foundations of £6.5 billion in 2017/18 (of which, £2.9 billion by the top 300 Charitable Trusts and Foundations, which have net assets of £67 billion in value). Giving by family, personal and corporate foundations grew on the previous year.

Foundation Giving Trends 2019, ACF

Breakdown of income by source and size of organisation, 2017/18 (%)



Source: NCVO, Charity Commission • [Get the data](#) • Created with [Datawrapper](#)

NCVO UK Civil Society Almanac 2020

Types of Charitable Trusts and Foundations

- Private Trusts and Foundations
- Family Trusts and Foundations
- Corporate Trusts and Foundations
- Community Foundations
- Public Appeal Trusts and Foundations
- Livery Company Funds
- The National Lottery Community Fund



Garfield Weston
FOUNDATION



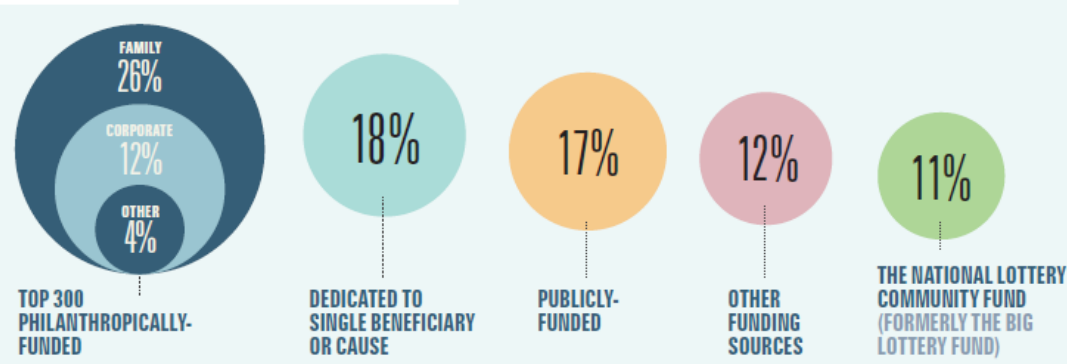
LLOYDS BANK
FOUNDATION
England & Wales



UK COMMUNITY
FOUNDATIONS
GIVING FOR LOCAL GOOD



FOUNDATION GRANT-MAKING UNIVERSE



*Foundation Giving Trends
2019, ACF*

Organisational structures supported

- Registered and Exempt Charities
- Constituted voluntary and community groups with charitable aims
- Community Interest Companies (CICs)
- Social Enterprises
- Sporting groups/associations
- Statutory organisations, e.g. schools, local councils

Example - BBC Children in Need requirement for CICs:

- three or more unrelated directors
- asset lock clause (funds/assets only transferable to another named asset lock body)
- CLGs (Companies Limited by Guarantee) as opposed to Companies Limited by Shares
- set up and registered as a CIC with Companies House

Grant Application Platforms

Brevio

“The future of grant making”

- One organisational profile, capturing standard data (68 questions reduced to 58 for registered charities)
- Detail your specific and ongoing funding needs
- Automated system continuously matches with potential funders
- Currently free to register, plan to introduce income-based subscription fee in mid-2021

The Good Exchange

Established by Greenham Trust

- Online funding platform designed for funders
- Oxfordshire/Berkshire focus
- Also a fundraising platform
- Around 20 funders manage some or all of their grant making through the platform
- ‘No win, no fee’ model
5% + VAT on funds raised through the platform

Impact of Covid-19 and latest grant-making trends

- Focus on emergency response and at-risk communities from April 2020, now developing into rebuild and recovery
- “Covid-19 has held up a great big mirror to the massive social inequalities that beset our nation - be that of class, ethnicity, disability, income, geography or age.” Dan Corry, NPC
- Greater flexibility and responsiveness
- Shift to more light-touch monitoring and less restricted funding
- Some funders improved application processes - streamlining application forms and swifter decision making
- Short-term grants, deadlines on when funding should be spent
- Investment values have fallen, reducing the grant-making capacity of trusts and foundations that are reliant on investment income
- Clear need for greater transparency, diversity, equity and inclusion

Smaller Charity Strengths for Trust Fundraising

- Funders don't feel their donations are just a 'drop in the ocean'
- Leadership more prepared and available to engage with funders
- Opportunities to develop more personal relationships
- Funders can feel more needed/involved with smaller charities
- More flexible and responsive to requests from funders
- Opportunities to show impact and engage funders personally

Some funders specifically focus on smaller charities, e.g.

- Walter Lees Foundation - income of up to £100,000
- Foyle Foundation Small Grants - income of up to £150,000
- Woodward Charitable Trust - income of up to £200,000
- Armourers & Brasiers Company - income of up to £500,000

Clear case for core funding - Esmée Fairbairn Foundation

'Insights on Core Funding' report sets out how it makes a difference to outcomes and organisations.

How core funding makes a difference to...




RESEARCHING CHARITABLE TRUSTS AND FOUNDATIONS

Research resources for no or low budget

- **Funding Central** - free for small organisations, £120+VAT for organisations with an annual income over £100,000
- **Charity Excellence** - free Covid-19 Grant Funding Database and Funder Lists (e.g. core funding, newly registered, focus areas)
- **GrantsOnline** - grant programmes and regional funding news, free to search and check headlines, annual subscription - £99+VAT
- Some local infrastructure organisations offer free access to online directories, find yours via 'Find a Member' on navca.org.uk
- **Local libraries** - old directories, some offer free online access
- **360 Giving GrantNav** (over 150 funders publishing grant data)
- Lists on funder websites (e.g. Edge Fund, WCMT)
- **GRIN** (Grants Resources Information News) - Daily Grants Bulletin for £15 per year, Grants Database for £100 for two years

Charity Commission research



 **CHARITY COMMISSION**
FOR ENGLAND AND WALES

Search the register of charities

Find information about registered charities in England and Wales, including

- what the charity does
- trustees
- finance information, like income and expenditure
- any actions the Charity Commission has taken against the charity

You can export up to 10,000 records.

[Find a charity >](#)

How the charity helps

1 selected

Acts As An Umbrella Or Resource Body (21769)

Makes Grants To Individuals (49199)

Makes Grants To Organisations (68154)

Main way of carrying out purposes is grant making

- Always select 'Registered'
- Keywords search - charitable, trust and foundation searchable
- Classifications - what the charity does, who the charity helps
- Geographic areas - London borough, local areas in England and Wales, other countries (includes Scotland, Northern Ireland)

[Export results](#)

OSCR Charity Commission for NI

OSCR
Scottish Charity Regulator

ABOUT US ▾ ABOUT CHARITIES ▾ BECOMING A CHARITY ▾ MANAGING A CHARITY ▾ GL

HOME ▸ ABOUT CHARITIES ▸ SEARCH T

OVERVIEW OF SCOTTISH CHARITIES

SEARCH THE REGISTER

REGISTER SEARCH

CHARITY REGISTER DOWNLOAD

THE 300 HIGHEST INCOME CHARITIES

FORMER CHARITIES DOWNLOAD

Register search

Keywords

Keywords or Charity Number

Include vowel accents

Additional Filters

Constitutional Form:

Please select ▾

Beneficiaries:

Please select ▾

Activities:

It makes grants, donations or gifts to organisatio ▾

The Charity Commission for Northern Ireland

Log in or get a password to Online service

About us Manage your charity Start up a charity Concerns an

Search results for

Search bar with magnifying glass icon

Filter by:

[Remove all filters](#)

Status ▾

Income ▾

Regions Worked ▾

Countries Worked ▾

What the charity does ▾

Who the charity helps ▾

How the charity operates

Grant making (442)

Rural development (437)

442 charities found

[Export to CSV](#)

Supporting Communities Ni

100005-0 | Up-to-date

Rural Community Network Ni

100009-0 | Up-to-date

Groundwork Northern Ireland

100017-0 | Up-to-date

The Emo Trust

100025-0 | Up-to-date

Serve In Solidarity Ireland

Online Research

Code of Fundraising Practice

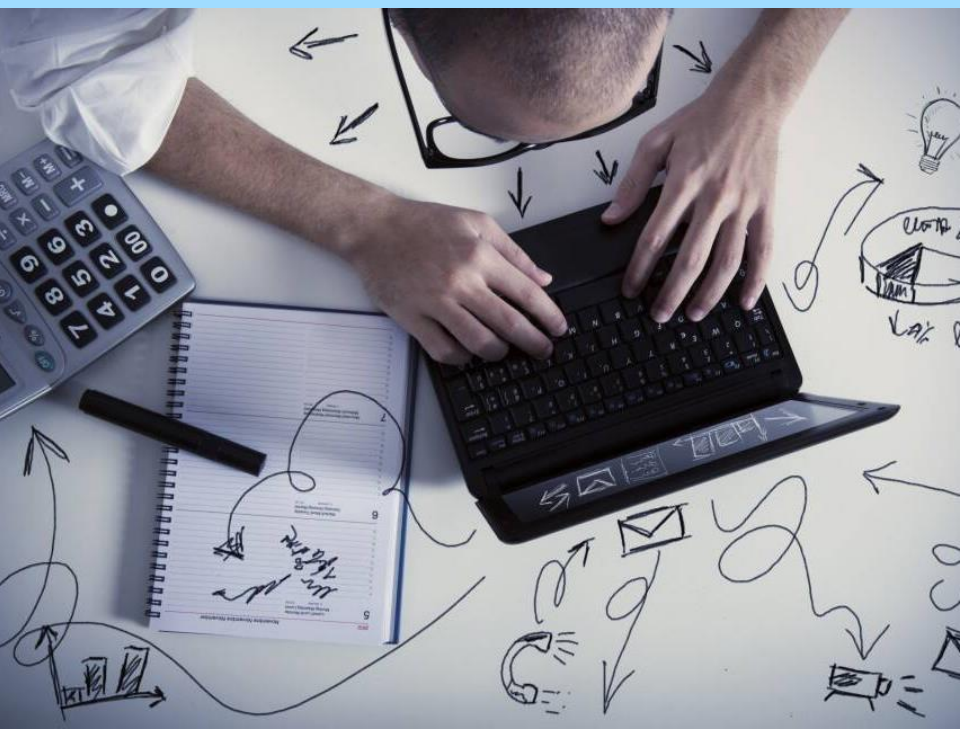
- Check supporter lists of similar charities - websites, annual reports
- Bookmark trust/foundation websites, sign up to newsletters
- Social media - follow charitable trusts and foundation prospects and supporters, funding advice and news
 - Some to choose from on UK Trusts and Foundations list on Twitter
- Set up Google Alerts for charitable trusts and foundation prospects
- Always check Charity Commission Register for up-to-date details
- Small Charities Coalition Funding Talk events, local network
- Make it easy for proactive trusts and foundations to find you!



13. Grant-making bodies (including trusts and foundations)

- 13.2.1. In general, you must avoid mass mailings and cold-calling to grant-making bodies, except in exceptional circumstances, for example a national disaster or emergency.

DEVELOPING AND UNDERSTANDING THE FUNDER APPLICATION



Take a step back

- Let's start with a plan

'If you fail to plan, you're planning to fail'

- Gather all necessary information for the plan and save them in one accessible place.
- Decide who you need to get involved, if you have delivery staff or just volunteers and beneficiaries
- Create a evidenced based budget for the plan based on three scenarios (depending on the type of project)
 - Test
 - Implement
 - roll out
- Pick the right funder
- Read the guidelines

Now you are ready to start the process of writing

Decide your approach

- Is it online, Single stage, two-stage, Expression of Interest or free form (2-4 sides of a4)?
- Are you going for Head (Facts and figures) or Heart (Emotion and connection)?
- The old FaBs – Features and Benefits
- Where do you start and is there a deadline for submission?
- Does the funder seem clear about what they are looking for?
- Are you clear on what they are looking for?
 - Word counts
 - Things you should include
 - Things you shouldn't include
- Remember that assessors are generally time poor
- Give yourself enough time complete and get it reviewed

The 14 typical questions

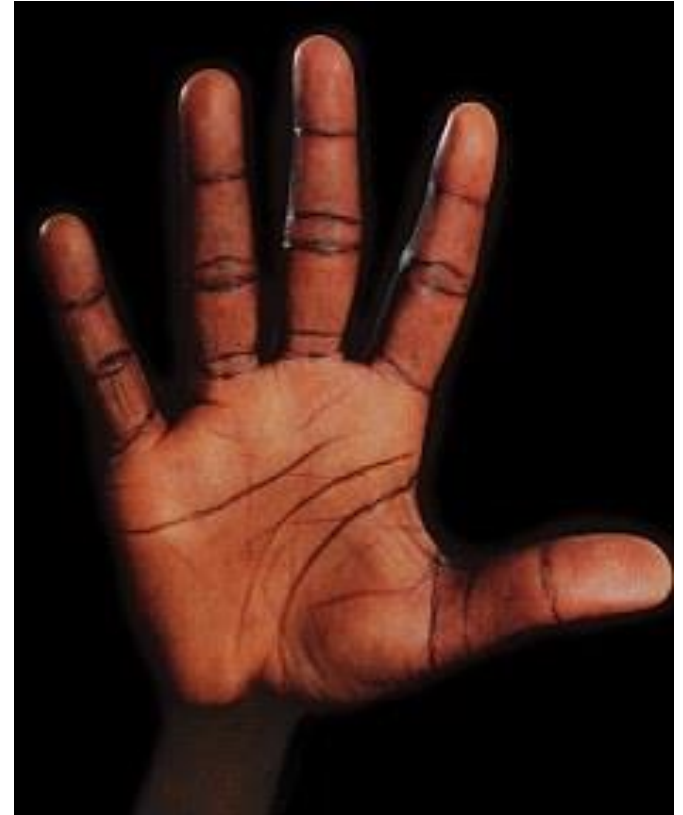
1. How many beneficiaries?
2. What are their specific needs?
3. What are the aims of your organisation?
4. How does your organisation engage its beneficiaries?
5. How does your work connect with other organisations?
6. What is the relevance of the project to your policies?
7. What are the project aims/outcomes?

The 14 typical questions

8. What are the key Activities?
9. What is the timescale for the project and when does it start?
10. How much do you need?
11. How will you monitor your progress?
12. How will you evaluate the project?
13. How will you fund the project in the long run? Or ...
14. How will you disseminate the results if it is a one-off activity?

Five Key Areas of Focus

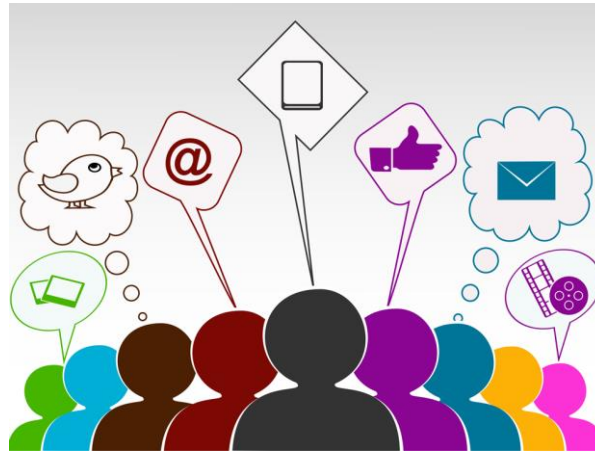
1. Establishing the Need
2. Similar Projects
3. Beneficiary Involvement
4. Outcomes and Aims
5. Clear Linkage throughout



BUILDING AWESOME RELATIONSHIPS

Building Great Relationships

**DON'T
WASTE
TIME**



**BEING IN A
RELATIONSHIP IS
ABOUT LEARNING,
UNDERSTANDING,
AND TRUSTING THE
OTHER PERSON**
PictureQuotes.com



Next Steps

- Be clear on the project(s) that your organisation wants to get funded and for how long you need the funding.
- Start your research with any previous Charitable Trust and Foundation supporters for your organisation
- Check with your local infrastructure organisation or library for any Trust/Foundation research services or directories
- Check out other similar charities or organisations, as you may be able to see who they have been funded by (through their the annual accounts or websites)
- Try the DIY research for new potential funders and prioritise those that are the best fit for your needs and organisation
- Develop a calendar of application (and reporting) deadlines
- Create a Plan for each project, programme or campaign you want to deliver, as it will save time in the long run
- Follow the Acronym (K.I.S.S – Keep It Simple and Stupid), if an 11 year old can understand your project, so can your assessor.
- Remember Guidelines are there for a reason and not following them is the quickest way to get your application eliminated from the assessment process.
- Ensure you have a critical friend that can take some time to review the application, before submission and ensure that time has been incorporated in your calendar
- Failure is just another step towards success! There will be rejections on your journey towards funding.

Resources and websites mentioned

- ACF Giving Trends report – [data and information on the state of grantmaking last year](#)
- NCVO Almanac – [data and information about the charity sector](#)
- UK Community Foundations – [find your local community foundation](#)
- Google Alerts for funder news – [how to set them up](#)
- Esmée Fairbairn Foundation – [Insights on Core Funding report](#)
- Code of Fundraising Practice – [section on grant-making bodies](#)
- NPC - [Interactive Covid-19 data for charities and funders](#)
- Twitter - [UK Trusts and Foundations list](#)

Follow up resources and further reading

Chartered Institute of Fundraising Guidance

- Recordings of our workshops on trusts and foundations fundraising, recruiting fundraisers, and fundraising for trustees are available on our [Youtube channel](#)
- You can also find local support or specialist subject advice – including on Trusts and Foundations - through the [Chartered Institute's groups](#). These are spread right across the UK, and are here to support fundraisers in organisations big and small. Find out more on [our website](#).

Follow up resources and further reading

Funding newsletters and databases

- Funding Central - [free for small organisations, £120+VAT for organisations with an annual income over £100,000](#)
- Charity Excellence Framework – [free Covid-19 Grant Funding Database and Funder Lists \(e.g. core funding, newly registered, focus areas\)](#)
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- 360 Giving - [GrantNav \(over 150 funders publishing grant data\)](#)
- GRIN (Grants Resources Information News) - [Daily Grants Bulletin for £15 per year, Grants Database for £100 for two years](#)

Follow up resources and further reading

Other guidance:

- Funds for NGOs – [list of funders for international projects](#)
- Department for International Development – [sources of funding for international projects](#)
- Fundraising Chat - [Facebook group](#)
- Charity Connect - [forum for advice and networking](#)
- National Lottery Community Fund – [signposting to lots of resources, broken down by cause](#)
- Money4You / BAMERHub - [#BrunchBriefings on Fundraising](#) (free for BAMER-led orgs)



Resources and further guidance on this topic,
plus details of other events, can be found at
bit.ly/ciofsmall

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