

Welcome!

Maximising success: What's hot in fundraising right now

Please settle in and we'll be kicking off shortly...



Welcome from the Benefact Group

Our common purpose is to **give** all available profits **to good causes**



**Directory of Social Change’s UK Guides to Company Giving 2017-26.*

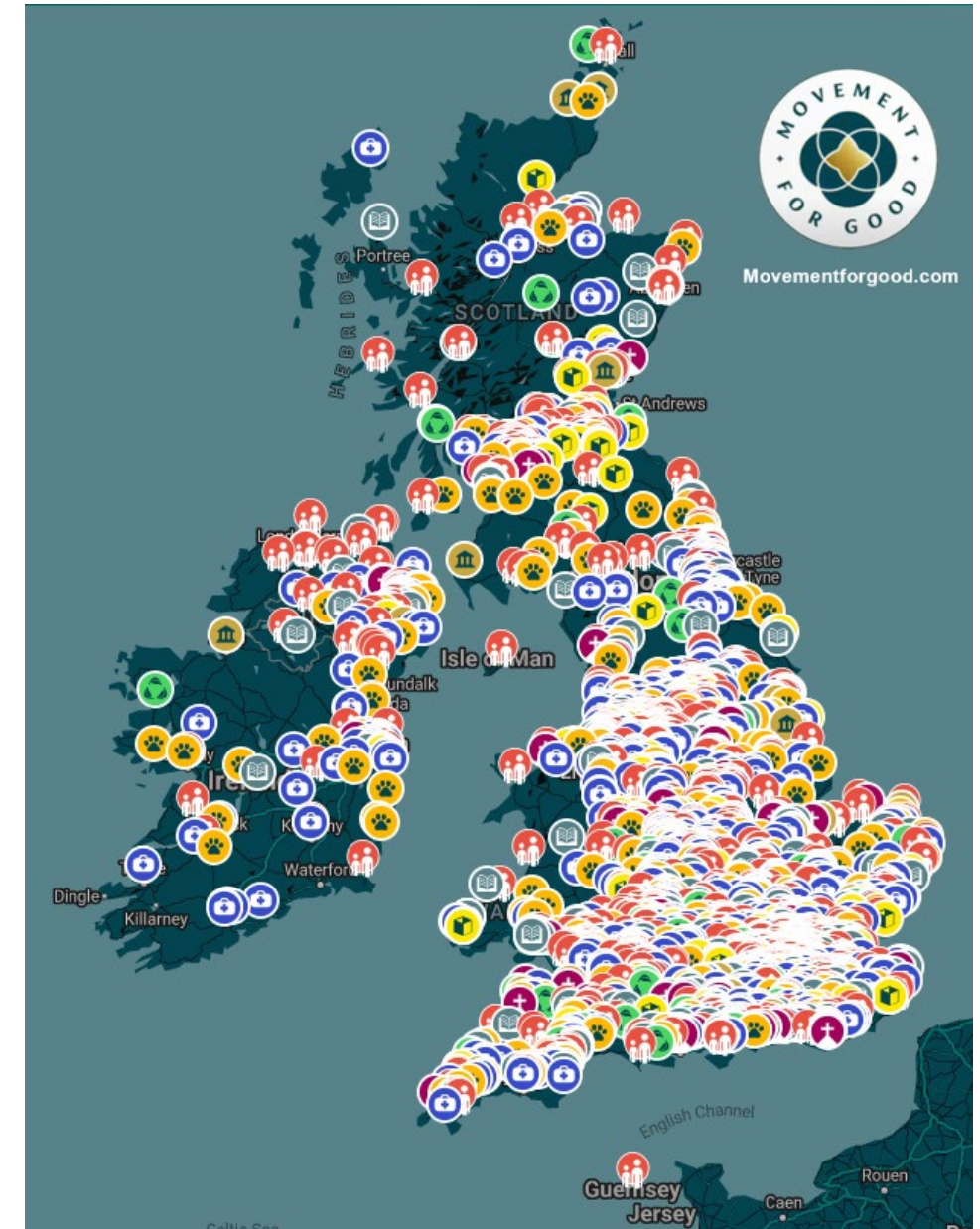


How we give – the Benefact Group



1. **Small donations** to charities doing every possible kind of good
2. **Partnership funding** to charities doing amazing work really important to our customers and communities
3. **Charity support** enabling charities to be more successful and sustainable

Visit www.movementforgood.com
today to nominate



Current funder thinking and trends

Jay Kennedy, Director of Policy and Research
Directory of Social Change



Some figures for context - foundations

Population mirrors the rest of the charity sector

- A few thousand are financially large, most small
- Most don't even give over £50k p.a.
- Majority don't even have websites!

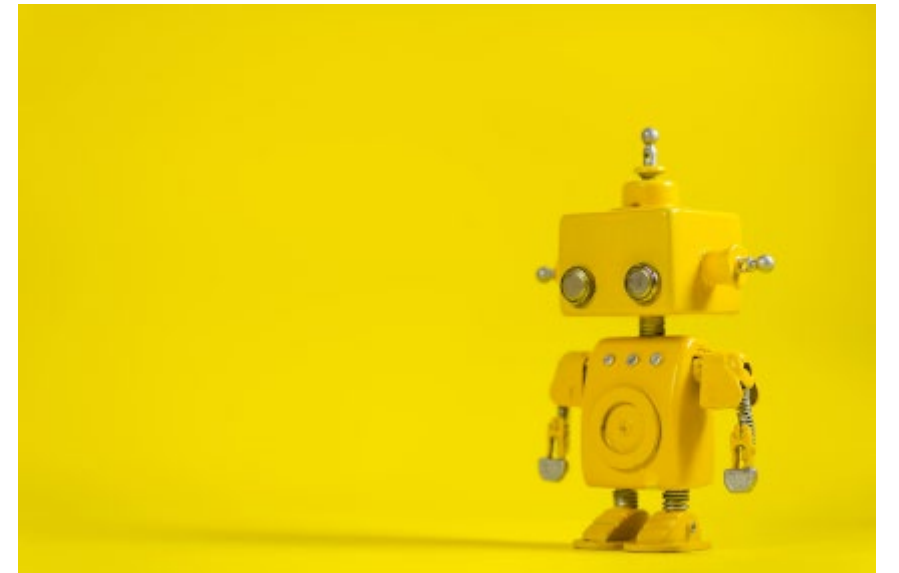
Funding in context:

- Total grants = ~£6-8bn per year
- Total grants have increased recently
- Companies, lottery, local government give less
- Public donations are the largest charity income source



Systemic issues affecting foundations

- Market volatility – investment returns
- Pressure from statutory services in crisis
- Hangover from Covid responses
- Rise in (ineligible) applications
- Artificial Intelligence – in applications
- Social and political critique / attacks:
 - wealth inequality, lack of diversity
 - alleged political biases
- Many are small charities with few staff
- Don't often like spending on themselves



Some ways they are responding

- High demand leading to:
 - Programme and strategy reviews
 - Narrowing or changing criteria
 - General purposes → more specific causes
 - Pausing new grants
 - Process changes (e.g. EOIs, two-stage)
- Spend out or use more endowment
- Pool funds or boost fundraising
- Sift out AI enabled applications
- Funder Plus – adding value



Top tips

- Do your research...
...and keep doing it more often
- Find funders that are aligned and focus
- Read the guidance!
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- Read the guidance!
- Plan ahead – programmes may change more quickly
- Cut the jargon – don't assume they will understand it
- Demonstrate the difference you make (impact)
- What else could you ask for?



Other things you can do

- Keep any eye out for changing priorities
 - Subscribe to newsletters
 - Follow them on social media
 - Subscribe to www.fundsonline.org.uk
- Think harder about your visibility
 - What's your USP? Why are you special?
 - What's your online presence?
 - What could a funder find out about you?
 - Work those networks! (trustees)



Other things you can do

- Raise up beneficiary stories
 - Use creativity
 - Case studies
 - Videos?
- Be careful using AI...
 - If it's 'free' *your data* is the price
 - *Don't* use for confidential / proprietary info
 - Carefully interrogate sources
 - Still easy to spot AI generated text

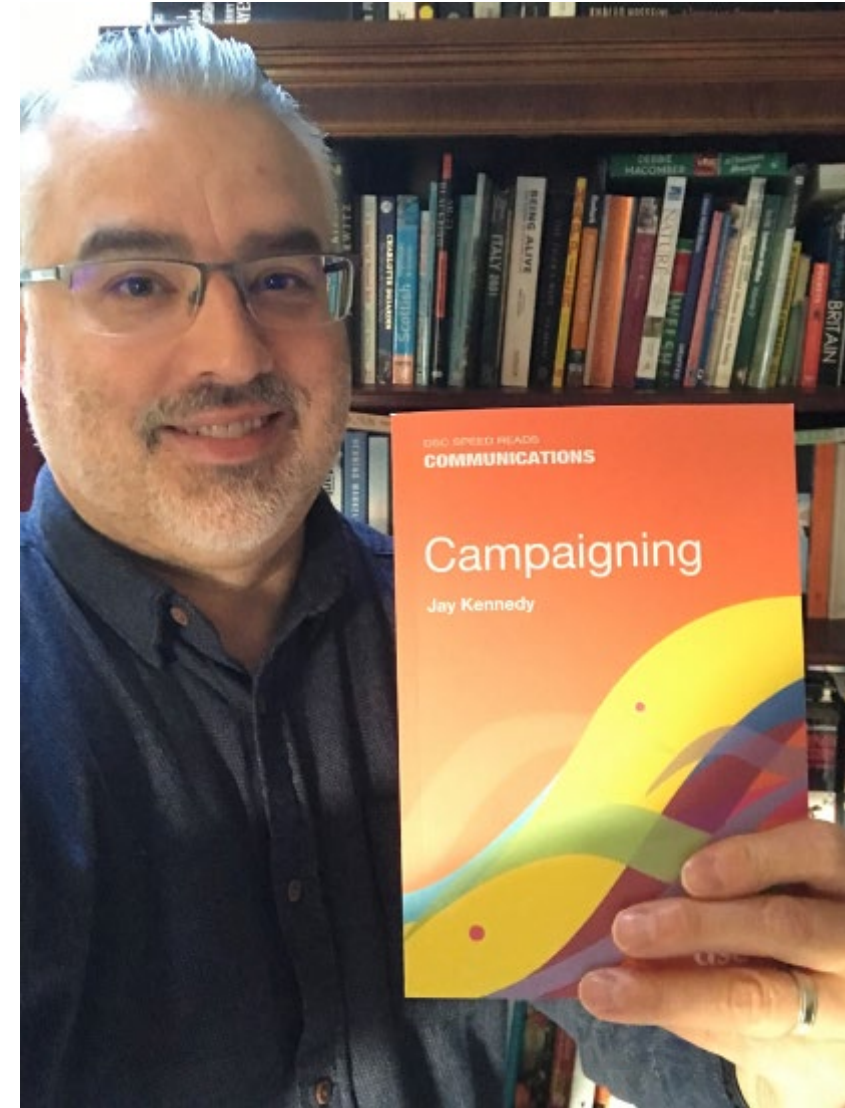


perplexity

Thank you

For more about me including free articles and publications see:

- www.dsc.org.uk
- [Campaigning Speed Read](#)
- www.fundsonline.org.uk
- [Linked In](#)

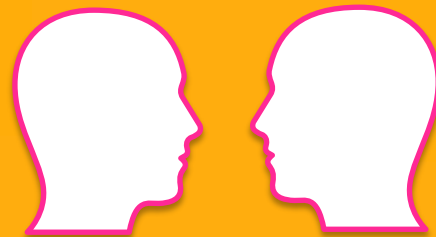
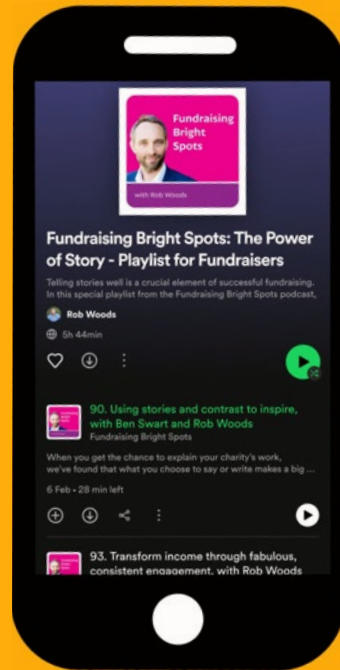


The super habit
to help you feel braver
and get better results

With Ben Swart
Bright Spot



brightspot.



What do the best car companies focus on?



What do the best car companies focus on?



**What is it about focussing on
test drives that helps:**

A) ...the **customer** to buy?

B) ...the **salesperson's** morale, persistence, creativity, confidence?

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Offering a nice thing; less pushy / their decision; control what you can control etc; more test drives = more sales; less stressful

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Offering a nice thing; less pushy / their decision; control what you can control etc; more test drives = more sales; less stressful

It's JUST EASIER!!!

**What is it about focussing on
event attendance / conversations
that helps:**

A) ...the **supporter** to give?

B) ...the **fundraiser's** morale, persistence, creativity, confidence?

Offering a nice thing; less pushy / their decision; control what you can control etc; more test drives = more sales; less stressful

It's JUST EASIER!!!

The ultimate distinction of ultra successful relationship builders

Your first job is to book test drives (conversations)



Bright spots have a different relationship with the phone to most of us

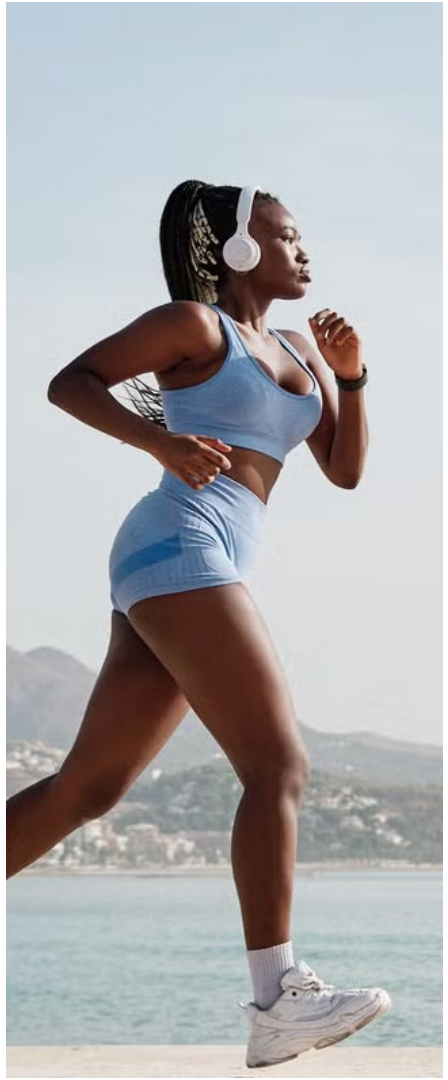


Bright spots have a different relationship with the phone to most of us









Don't use the phone? You're not alone:

“I'm a *nuisance*”

“It feels *too difficult*”

“I hate *cold callers*”

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I feel like I'm taking...

Martha



Bowel Cancer^{UK}



Martha – 6 weeks later

“I love the phone!”



3 steps that helped Martha and others

- 1) **Make calls; to thank, to your colleagues; to reply to an email**
- 2) **Be flexible** – use it to turbo charge seeking test drives
- 3) **Give don't take** - Remember the feeling you're giving them



3 steps that helped Martha and others

1) Normalise picking up the phone.

Three easy reasons to call:

- a) ...Say thank you
- b) ...Help your colleagues
- c) ...To reply to emails

1) Normalise it - say thank you

Thank you so so much for your phone call today, it made me cry hearing some one else mentioning my daughter [redacted] name again 💖 both [redacted] and [redacted] received intensive care on SCBU ([redacted] now 11 and loving secondary school!) it was lovely to know we'd raised 7k over the years to say thank you and hopefully help other babies as I didn't realise it was that much!! So the time you took to call was really appreciated especially after a tough week at work 🥰



Max Newton

1) Normalise it – say thank you



Naomi Campbell
Fields of Life

1) Normalise it – say thank you



“You have no idea how much your call made my day!!

Really!! No charity has ever called, just to thank me”

1) Normalise it – help your colleagues

- 1) Make Thank You Calls - Who can you thank this week?
- 2) Help your colleagues - Make more calls internally

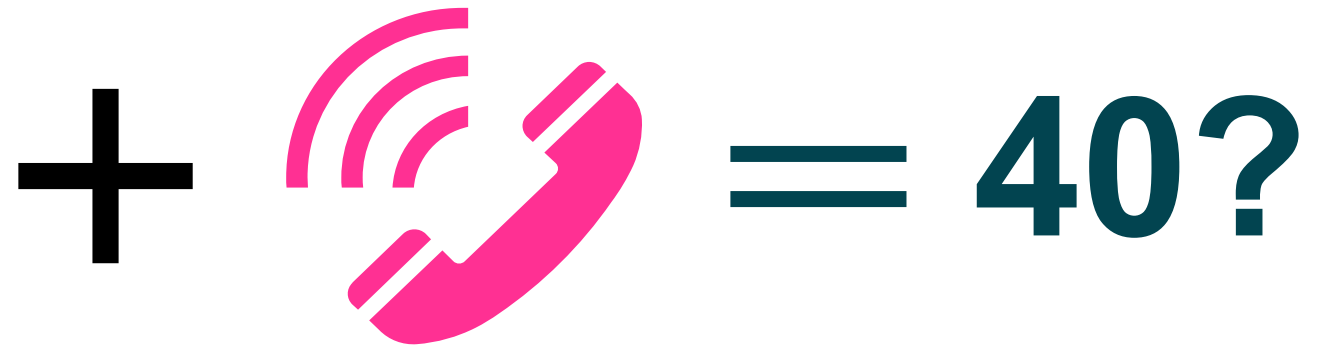


1) Normalise calling to reply to emails

*“we must have been one of the only charities to **call them**”*



2) Be flexible seeking test drives (use it to turbo charge)



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$$+ \text{📞} = 64 \text{ } \cancel{40?}$$

3) Give don't take - Remember the feeling you're giving them

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“You have no idea how much your call made my day!!”

What can I do today?

- 1) **Make calls; to thank, to your colleagues; to reply to an email**
- 2) **Be flexible** – use it to turbo charge seeking test drives
- 3) **Give don't take** - Remember the feeling you're giving them



FREE resources for ideas and inspiration

- *WOW your donors* Handbook
- Specially curated podcasts

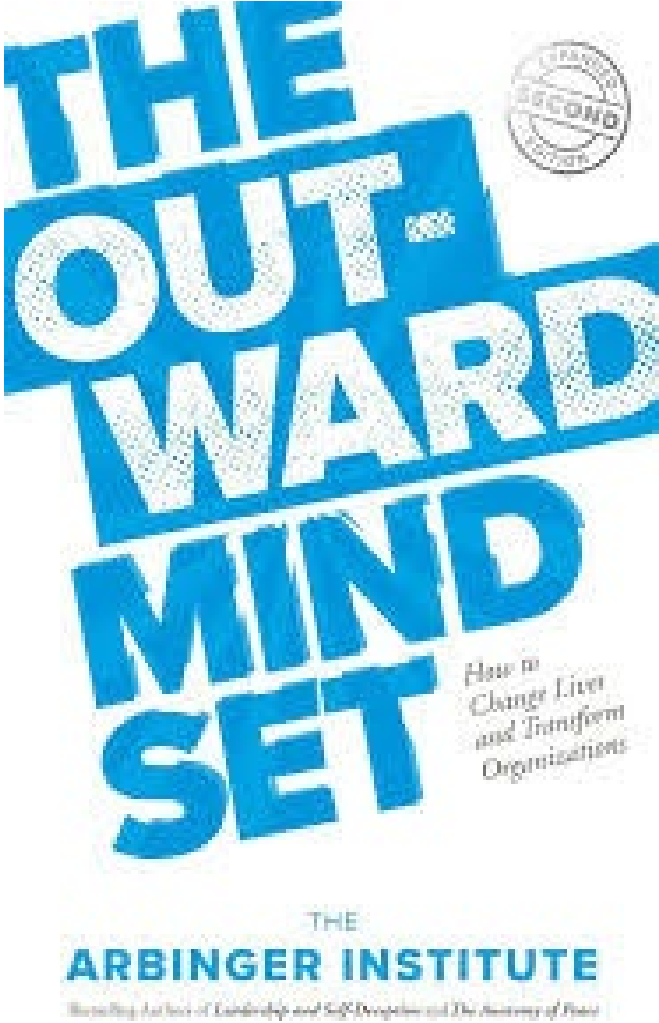


What's working and what isn't

Lindsay Tilston Jones – Head of Community
Fundraising, Shelter



A little bit about me



Trends

- Cost of Living
- Job cuts
- More with Less
- Perception of low or no growth in the sector
- A feeling that there is no money

.....It can all feel a bit GRIM

What is it like on the ground?

- Being asked to do more and more with fewer resources
- Different demands and needs from supporters
- Changes in ESG guidance from our Corporates
- Trusts closing their applications
- Changes in supporter loyalty
- A pull back on innovation
- Increase in need for our services

It is NOT all negative

Tougher and challenging times often lead to the best innovation

- WHAT IS WORKING
- RELATIONSHIPS,
- OLD SCHOOL TACTICS
- COLLABORATION
- MINDSET SHIFTS
- INNOVATION
- SHARED PURPOSE



What can we do?

- Share skills
- Share resource
- Mentor/ Buddy
- Build relationships
- PIVOT to the supporters wants and needs
- Challenge your leadership
- Make EVERYONE a Fundraising
- Use 'Old School' tactics- THEY WORK



Keep in touch

Lindsay Tilston Jones

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Instagram: LTJShelter



Q&A

And finally... Five exciting things to leave you with

1. Attend future webinars

<p>Webinar</p> <p>Trusts and Foundations: How to write a winning application</p> <p>3 July 2025</p> <p>Terms apply</p>	<p>Webinar</p> <p>How to secure corporate fundraising</p> <p>9 October 2025</p> <p>Terms apply</p>	<p>Webinar</p> <p>Storytelling: How to attract and nurture donors</p> <p>13 November 2025</p> <p>Terms apply</p>
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Register online at
<https://benefactgroup.com/charity-support/>

2. Register your interest in one of our face-to-face fundraising forums

Our in-person forums bring together fellow fundraisers for a half day of networking , learning, and support. Hear from a sector expert on a key subject impacting the charity/fundraising sector. Find out more about the valuable support The Benefact Group provides to charities and other charitable organisations, including our current offering and any exciting new initiatives. Connect with other passionate fundraisers, share best practices and leave feeling energised and better equipped to make a greater impact.

- 02 October - Birmingham
- 06 November – Gloucester
- 20 November – London

Register your interest at <https://benefactgroup.com/charity-support/>



3. Register your interest in our final Founders forums of 2025

We know that being a charity founder can be a challenging and multifaceted role. Balancing HR, finance, strategy, legal, innovation, culture, and managing trustees, staff, and beneficiaries can be overwhelming.

Which is why we are launching our Founders forums in which you can look forward to:

- **Connect:** Network with fellow founders, share challenges, and celebrate successes.
 - **Share:** Learn from peers and gain insights into fundraising, operations, and program development.
 - **Inspire:** Join a supportive community that drives positive change.
 - **Teach:** Help us understand how we can support you and other founders to create impactful change.
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- 26 March 2025 - London
 - 14 May 2025 – Manchester
 - 08 July 2025 - London
 - 12 November 2025 – London

To register your interest please email fundraising@benefactgroup.com with the subject 'Founders Forum'

4. For Impact: The Charity Podcast

Episode 5 – Why good charity endings matter (and how to have one)

There's no denying that charity endings – especially organisational ones – are extremely hard. The emotions that are tied up in charities, the expectations of service users and donors, the weight of responsibility that lies on the shoulders of leaders and the board – these are not easy issues to navigate.

In this episode we talk to four guests to help us understand why endings are so hard, and how to have a good one. Iona Lawrence, Chief Deceleration Officer at the Decelerator; Richard Litchfield, Chief Executive of Eastside People; and Alison Lucas and Lizzie Bentley Bowers, Executive Coaches and co-authors of Goodbye.

Available on your favourite podcast platform or on our charity support hub – just scan the QR code.



5. Join our Movement for Good network

***“The Movement for Good Network** brings together a group of special charities to learn, share feedback and gain access to extra opportunities and support. We want to get to know your fantastic organisations better and do more to support you!”*



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Thank you for listening

