

Welcome!

Trusts & Foundations: How to write a winning application

Layla Moosavi Rivers

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.*



Trusts and Foundations: How to write a winning application

Layla Moosavi Rivers



Layla Moosavi-Rivers, July 2025

Getting in the right mindset

Key questions to think about, information to prepare, planning your outline



Things to think about

- Attracting attention
- Making your project/cause transparent yet relatable
- Thinking creatively and outside the box
- Visualisation of project/cause
- Telling a Story
- SWOT/PESTLE
- Internal audit and preparation
- **Standing out in a crowd**
- Managing and Understanding the Competition
- Strong Case for Support = the need, the gap, the outputs
- Why are you the right organisation to deliver the project

Big questions before you take the leap

- Is your organisation proposal ready?
- Do you know what you need to prepare?
- Do you know what you want and why you want it?
- Have you carried out all the necessary advance preparation?
- If you were a funder, what would you be looking for?
- Are you totally funder led, or needs led or both?

Be prepared and strategic and you will be more effective

What is a funder looking for?

Good relationship with other key funders

Proven track record

If you are new - show you have done your research

Evidence of success- Impact

Established and credible

Brand awareness

Press reputation

Why you are the right organisation for the job

Have you thought of risks and overcoming them

Clear budget

Trust and Foundation landscape in the UK - Challenges

- Economic pressures: cost of living, increased demand
- **Political climate and uncertainty**
- Post pandemic recovery: **long-term impact of COVID-19, shifting priorities**
- **Changing regulatory and tax environment: stricter regulations, tax changes**
- **Growing focus on impact and efficiency, sustainability and long-term vision**
- **Decline in legacy giving**
- **Increased competition for funds, diversification of funding sources**

Internal and external preparation



Preparation is key - Pre and post planning the approach

- Internal preparation: key project information and budget
- Targeting the proposal content and style to the right audience
- Deciding how much to ask for based on research and judgement
- Getting in touch for feedback as and when necessary
- Monitoring and evaluation
- Re-pitch

**Please note that applications are much more directed by the questions and word count
Proposals are more of a free narrative.**

Pre – Proposal Internal and External Preparation

- Understanding your organisation's vision, missions, ethics, audience and positioning
- Fundraising elements within organisational strategy and Your core narrative
- Management team and Trustees
SWOT and PESTLE
- Funder analysis and Income generation pattern
Monitoring and evaluation policy
- Breakdown different elements of your service outcomes to see how they can be defined in various funder categories
e.g. improved mental health and wellbeing, educational activities to help with employment opportunities etc.



Key proposal planning words to think about (simple questions to help get you started)

WH and How questions



- Who (are you?)
- What (do you do?)
- Who (do you do it for?)
- Why (do you do it?)
- How (do you do it ?)
- How often (do you do it?)
- When (do you do it?)
- Where (do you do it ?)
- Who do you do it with?
- How (do you know it works?)

Key words to understand - Funders' Language

- Outputs and outcomes
- **Impact**
- Change and improvement for the better
- **Sustainability**
- Transformational - use funder's own language
- Clear and simple message
- To be taken on a journey
- Clear targets
- **Monitoring and evaluation plan**
- **How you will spend the funder's money - ROI**
- Need to motivate your funder/audience to give

Areas of assessment examples explained

Impact and effectiveness

- Demonstrate real impact through robust assessment of information and a range of facts.
- To understand the reach and influence of the project in detail.

Sustainability

- Achieve a lasting difference, changing the way the charity can do good for the long-term

Innovation

- Are you doing it differently – finding new and innovative ways to tackle social issues by taking a new perspective, establishing new partnerships or taking new approaches



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Don't just dive in - Can you answer key questions first?



What are the expected **outcomes and achievements** of the project?

Do you have a clear budget?

Core cost recovery – can you justify it all and be transparent?

How will you be sustainable?

Writing Winning Funding Applications

Do you already have funding **prospects**?

What have you committed to the project already?

Do you have a project start and finish date?

When do you need the money? Think of when the funder will get back to you.

How well do you understand the needs of your organisation?

Proposal budget - you are still telling a story with figures

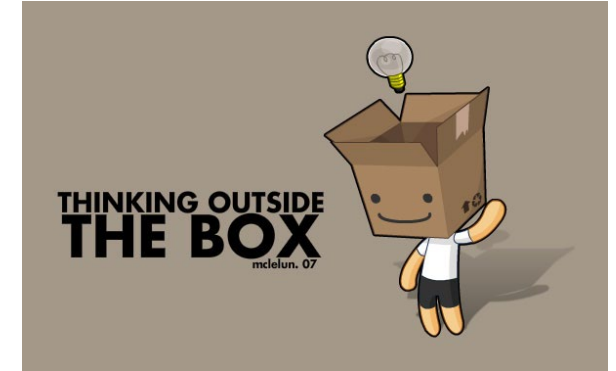


- **Core services are the heart and foundation of what you do and should not be underestimated**

- **Core/revenue - turn what could be perceived as boring into interesting**
- **Capital or project**
- **Core cost recovery**
- **Depreciation and inflation**
- **Pricing and packaging effectively**

Telling a story

- Attracting attention
- Making your project / cause transparent yet relatable
- Thinking creatively and outside the box
- Visualisation of project / cause
- **Assume the reader has no previous knowledge** – they are on a journey reading your proposal and need to visualise it



Proposals - Taking funders on a journey



What is the problem or need that needs to be met?

How do you intend to fill the gap?

Are you asking for core or project?

What are the aims and objectives of your organisation and specifically your project?

What methodology will be used to meet these aims?
e.g. services, research

What are the short and long-term strategic plans and does your proposal complement that?

What have been your achievements so far?

Proposal outline

Executive summary or introduction - based on proposal length

The need/problem/issue

How your organisation meets the need (fills the identified gap)

Impact you have made so far- major achievements if necessary

Details about the specific project or the most relevant bit of the organisation if it's for core funding

Statistics and facts that are relevant and make it a stronger proposal (up to date REFERENCES)

What you plan to do with the funding – your goal

How you plan to monitor and evaluate

The ASK - this can go where you feel it has more impact (start, middle or end)

Impact you plan to make - targets and intended outcomes

Summary

Appendices: case studies, testimonials that are relevant

YOU DON'T NEED TO INCLUDE EVERYTHING IT NEEDS TO BE TAILORED

CHECK THEIR CRITERIA AND EXCLUSIONS

Be relevant and up to date

- Understanding Funders and doing your research - **Have a prospect cultivation plan**
- **Find ways your leadership can communicate with funders**
- Be on top of your website, social media and annual accounts
- **Highlight your USP and expertise**
- Be hands on and up to date with your content delivery & move with the times
- **Always consider impact of external factors such as Covid, Cost of living**
- Look at what type of funders work for you at this point in time

Top Tips - Dos and Don'ts

Don't

- Ignore criteria and funders interest
- Forget to look at exclusions
- Sloppy budget
- Bad editing
- Lots of typos and bad cut and paste jobs
- Lots of different styles in the same application
- Not being clear about what you need
- Using too much jargon and abbreviation without explaining
- Unrealistic resources and time frames
- Out of date information

Do

- Tell your beneficiaries' stories
- Make your narrative up to date to reflect the current internal and external funding and economic scene
- Provide good testimonials or case studies (sometime videos may be required too)
- Have up to date facts and figures
- Find out what motivates your funder
- Find the right balance of emotive and factual
- Ask for what you need
- Find your style and what works for you - its content and messaging that is key
- Have an up-to-date website funders can refer to
- Explain how you plan to monitor and evaluate
- Explain how the project will be sustainable going forward

Why should a funder pick you?



find your why

Important questions to ask yourself AGAIN

- Is your organisation proposal ready?
- Do you know what you need to prepare?
- Do you know what you want and why you want it?
- Have you carried out all the necessary advance preparation?
- **What would you want to read in a proposal if you were a funder?**
- What is your story?



Corporate giving case study: The Benefact Group

Chris Pitt, Group Impact Director, Benefact Group



Corporate giving case study: The Benefact Group

1. Small donations



2. Partnership funding



3. Charity support

Fundraising Forum

Newcastle

18 September 2025

Register your interest

Webinar

Trusts and Foundations: How to write a winning application

3 July 2025

Sign up

Terms apply

BENEFACT GROUP

For Impact: The Charity Podcast

benefactgroup.com/forimpact/ep02

www.movementforgood.com

Benefact Trust: A funder's perspective

Helen Gray, Trust Director, Benefact Trust



From a funder's perspective

- What Benefact Trust funds?



From a funder's perspective

Top tips...

- Applications don't have to be perfect
- Check the guidance
- Is your project a good fit?
- Can you evidence the need?
- Sustainability and evidence of other support
- Can you articulate the difference your application will make?
- Help us to help you – Beneficiary survey



Q&A



Lives Touched / Impacted

As a funder, we are thinking about how we measure the impact of our donations.

We'd like to get your thoughts and experience of measuring the impact of your own work.

So ...

- Do you measure your impact in terms of 'lives touched' ?
- In what other ways do you measure your impact?



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

1. Attend future webinars



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 one of our Founders forums

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 this year we launched 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.

- **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

