

Trusts and Foundations: How to write a winning application – Your questions answered

Please find below Layla's answers to a selection of the questions we did not have time to answer on the day. Unfortunately, too many questions remained to provide answers to all.

1. When so much fundraising is reactive, what's the best way to be more strategic? Can you share examples of how to write your strategies?

The main thing about effective fundraising and bid writing is being proactive instead of just rushing at the last minute. It's key to plan and find the right balance between what your organisation needs and what funders want to support. If you're always chasing money reactively, you end up adjusting your goals just to fit whatever funding is available, which isn't great for staying focused on your real priorities.

Being strategic takes time, and effort but planning gives you a better chance to build a steady, sustainable income stream. Your aim is to set clear long-term targets, know exactly what you need to raise, why you need it, and over what timeframe.

I can't share other strategies due to confidentiality, but your fundraising plan should always match up with your organisational strategy— vision, mission, and key objectives. It's also important to understand your audiences and figure out which funding avenues make the most sense for you.

What are your financial targets, what are the risks and how will you manage them, and make sure you show ways to monitor and evaluate so you know what's working and what needs to improve. This saves you from reinventing the wheel and makes your proposals more targeted. Also, you can then plan and prioritise your actions.

2. How do you prove to new funders that you have a good relationship with other key funders?

You can share testimonials or letters of support from existing funders, highlight ongoing communication like regular reports or updates, and display successful projects funded by others. Mentioning multi-year or repeat funding agreements also shows long-term trust and commitment and gives other funders confidence in you. When appropriate, naming your existing key funders in your materials can further show that you are a reliable and valued partner and have long term relationships.

3. How do you know that you have a track record or not? How is that measured?

It is showing you have done good work over time and completed successful projects, reached your objectives, and made a difference for the people you support. You have then evidenced effective report writing and established a good template for monitoring and evaluation. Also important are feedback from your beneficiaries, photos, stories, and proof of how well you've managed the funds.

Funders usually look for signs that you've used past funding well, met your aims, and kept things going after the funding ended. Having a monitoring and evaluation template helps you show what

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you've achieved, so it's important to be clear about what you will measure in your original proposal.

4. A lot of Philanthropic Trusts do not accept applications or give opportunities to make an expression of interest. How can you get on their radar?

Fundraising and raising awareness go hand in hand. It's important to build relationships to raise your profile. Researching funders' interests and priorities is key, then see if you can find any connections through fundraising networking events and conferences, sector contacts or through your trustees, or by engaging with them. Sharing your organisation's successes and impact through newsletters, social media (where appropriate), or summaries of reports can also help. Showing genuine respect and take the time to understand their priorities and objectives and whether they have synergy with yours.

5. Top tips for approaching funders that don't accept unsolicited applications?

If they are clear about that then you may need to respect that, however, if you feel there is chance, then try and really understand their priorities and funding focus and where possible build relationships and see whether one of your trustees can solicit it for you. You can give the person who is happy to solicit this for you a brief, narrative that clearly shows how your work aligns with their goals. Don't send attachments. Be patient and respectful—sometimes it takes time to get on their radar. Finally, keep them updated with your organisation's impact through newsletters or reports to stay visible and build trust, but ensure you respect data protection and GDPR as they may not want that.

6. Any suggestions about getting through to proactive funders (e.g. The Julia Rausing Trust)?

That's quite specific but it's important to research properly and to understand their mission, values, funding priorities, as well as any exclusions. Tailor your approach by clearly demonstrating how your project marries with what they care about and the impact you expect to achieve. Try to use some of their language for example, if they want their funding to be transformational, explain how your project delivers that. Building a relationship is important in whichever scenario you feel you can. Be clear, don't waffle, and showing evidence of your organisation's credibility and past success will help you stand out. But if you're new, you need to provide evidence of why you're the right organisation to fill the gap.

7. Why has there been a decline in Legacy Giving?

I am not an expert, but it could be a number of things—rising living costs, people having less savings, or more financial obligations like university fees—making them less able to leave large gifts in their wills. Traditional approaches to giving might not be as appealing as they once were. People today like to know exactly where their money is going, and with social media, there are

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now many more ways to give digitally and see quick, visible impact. Also, with people living longer, there's less opportunity to see legacies in action within a typical fundraising timeframe.

8. Is there anything different charities from the heritage and cultural sector need to think of when seeking funding?

Heritage projects are ongoing due to the nature of what they are. It's important to show why you want to preserve the history, culture, and identity of your project. Funders want to see clear evidence that your work connects with the public, how it's sustainable long term, has a real educational impact, and helps bring communities together or can even have an impact on improving local tourism. And funders like to see more happen with less money so they like partnerships to see you working alongside local councils, other cultural organisations, or community groups. This can show that your project has strong support, and you can all make a bigger difference together with each of you bringing your key strengths.

9. How do you overcome the issue of having a high income (e.g. the care sector) when seeking funding, as many funders will not then consider?

Again, I am not an expert on this specifically but try focusing on the specific needs and the challenges and how your specific skills can help. If you have statistics and case studies that always helps. Show the difference your project will make, what gap you are trying to fill, your outputs and outcomes and the long-term impact. Be clear about who you're helping and highlight the people who fit what the funder cares about.

10. What is (the) exact title of core cost contribution in the budget?

The exact title for core cost contributions can be different depending on the funder or organisation. Terms can vary from "Core Costs," "Overheads," "Management & Administration," or "Organisational Running Costs." If the funder gives you a budget template, it's best to use their wording. If not, "Core Costs" or "Organisational Overheads" are usually safe and clear choices.

11. Can you suggest what an appropriate core cost percentage might be to add to the budget? 10%, 20%? How should you label these in the budget? How do you dress up core costs such as insurance, utilities, depreciation to make them acceptable, especially when Trusts and Foundations explicitly state they exclude them?

This really depends on the organisation and is subjective. Core costs can range anywhere from 5% to 15%, sometimes more or less. I'd say 5-10% is usually a safe estimate. But core costs aren't just boring overheads like rent or salaries; they're the heart of what you do. For example, if you're a cancer research charity, you need core income to keep the lights on—without it, you can't run any projects. Core costs cover important things like insurance, admin staff who keep everything running smoothly, utilities that make it possible to deliver your services, and yes, things like rent and salaries too. These might not be directly linked to a single project, but they're

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essential to making real impact happen. When funders ask for details, you need to be ready to explain this clearly, showing how core costs support your overall work and outcomes.

12. Do we need a case for support that is a visual document or is word still ok?

A word document is fine - if it's clear, makes your case well, and tells your story in a strong way. But these days, some funders and donors like things that are more visual, photos, simple charts, or testimonials especially if you're sharing it in a meeting or online. Having both can be useful: one full written version for when you need the detail, and a shorter, more visual version to grab people's attention quickly.

13. For a growing charity applying for bigger amounts e.g. lottery, Esmée etc. what documents are essential to have at the ready?

Transparency and preparation are key. It's important to have your main documents ready to show that your organisation is well-run and ready to deliver. This usually includes things like your governing documents, recent audited accounts, a clear budget for both the project and the organisation, and a compelling case for support. You'll also need a fundraising strategy, safeguarding and EDI policies, and sometimes monitoring and evaluation policies, a theory of change or impact framework, plus evidence of need and demand. Funders might also ask for a business plan, partnership letters, or evaluation plans.

14. What are three mistakes to avoid when writing an application for repeat funding?

First, make sure you clearly show the impact of the funding you received before as they want to see that their support made a real difference. Share how you monitored and evaluated the last grant, what outcomes you measured, and what changes or improvements you've seen. They want to feel part of the journey and understand how their money helped.

Secondly, don't just assume the funder remembers all the details from your last proposal. So do give a brief, clear recap of what was funded and what you achieved.

And thirdly, don't just copy and paste your old proposal. Show how your project has grown, evolved, or learned from previous experience. Highlight any new goals, improvements, or a wider reach to demonstrate that you're building momentum and making continued progress. Funders want to see that you're moving forward and making the most of their support.

15. Can you comment on the National Lottery Fund's requirement to convey VALUES?

I'm not an expert on this, but from what I understand, the National Lottery Fund really wants applicants to show that their projects reflect important values like inclusivity, integrity, and community benefit. It's not just about what you deliver, but how you do it. Is the project fair, transparent, and helps a wide range of beneficiaries? Is the reach large, is it reaching those with a disadvantage? They want to see a project with a long-term positive impact and soundly

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operated; that all risks are thought through and it's ethical. If your application doesn't clearly show these values, it could weaken your chances, even if the project itself is strong.

16. What would you say is the protocol for “chasing” applications?

It's okay to check in on your application, but it's best to wait until the time they said they'd get back to you has passed. When you do follow up, keep it polite and friendly. A short email is usually best. Just include your project name and any reference number and ask nicely if there's any update. Funders are often busy, so being respectful and patient goes a long way.

17. Are there any major differences for applications by CICs?

Some trusts don't fund CICs, often because CICs aren't registered charities. Many funders have policies that prioritise or exclusively support charitable organisations, as they're regulated by the Charity Commission and must follow strict rules on public benefit.

However, some CICs can get funding, but funders sometimes want a bit more proof that the funding will really help the community. You'll need to show clearly what your social goal is, how any profits will go back into the work, and that you've got a good system in place. The process is mostly the same, but you might need to give a bit more detail to show you're all about public benefit.

18. Do you have any advice on managing and stewarding internal relationships with service delivery teams to get them to think more like funders? I have a big issue where projects are only approved and informed to me as the fundraiser when they are weeks away from starting, and the only hard data collect is for formal audits which don't actually show the benefit to beneficiaries in a way that's appealing to funders, and when senior leadership weighs in on applications they expect the application language to more clinical rather than emotional for a funder. What sort of ways can you go about managing this in a larger organisation where the service delivery team is removed from fundraising in this way.

Start building relationships early and keep talking before projects begin. Help the team understand funders want real stories that show impact not just dry stats and not just negative stuff. Work together to collect info that tells a clear story without extra hassle.

Include fundraising in project planning early on to avoid last-minute surprises. And remind leaders that funders respond better to warm, simple language.

These small steps make fundraising feel like a team effort, not a surprise. Also ensure you plan your monitoring and evaluation process together.

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19. What is the biggest change we will face in next ten years in the sector?

I think one substantial change will be how charities use technology. It's becoming more important not just for raising money or spreading the word, but also for showing the real difference you're making. Funders and donors want to see clear results, and they're asking more questions. We need to find new ways to work together and tackle big issues and tell our story. Think about how often we are on our phones and how impactful info on the go can be.

20. Resilience and poor success rates - any survival tips?

Fundraising is tough. You'll hear "no" a lot more than "yes," and that can be deflating. But every "no" helps you understand what you need to work on.

Celebrate small wins, like finishing an application or getting positive feedback. Don't wait for big successes to feel proud.

Talk to others who understand like friends, work colleagues, other fundraisers. It helps to know you're not the only one going through it.

Most of all, look after yourself. Take breaks, set boundaries, and try not to let the stress take over. You're doing important work. Keep going and preparation is key.

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