

## Here are some Useful Links

The Trust Team:	<a href="#"><u>The Trust Team</u></a>
Directory for Social Change:	<a href="#"><u>DSC</u></a>
Institute of Fundraising:	<a href="http://www.institute-of-fundraising.org.uk"><u>www.institute-of-fundraising.org.uk</u></a>
Charity Commission:	<a href="http://www.charitycommission.org.uk"><u>www.charitycommission.org.uk</u></a>
For information on Scottish charities:	<a href="http://www.oscr.org.uk"><u>www.oscr.org.uk</u></a>



## Did you notice that there are lots more than 10 Top Tips?

### We like to over deliver.

**The Trust Team** is focused on Trusts and Foundations. We also help smaller charities with Big Lottery, BBC Children in Need and statutory fundraising but 90% of the time is focused on Trusts. This is because it is usually a way for a small charity to punch above it's weight when using IT and some simple sales techniques.

We always start with a strategy meeting followed by a document that is presented to you and your Trustees. At that meeting we will give you a cost and a forecast of income, which includes a time-scale. We will also give you the number of Trusts that we will apply to, together with the value that they usually support.

As long as you can offer a relevant project to them this is a project that we will handle for you. We do not work on a commission basis as it has been found to deter Trusts from supporting. We are obliged to tell the Trust how much commission we will be paid out of their funds. The I.o F. Code of Practice is not in favour of commission agents in fundraising.

We charge the same fixed price for each project to every client and we have 3 really popular ones that most charities choose. These are: **START**, **DRIVE** and **AUTOPILOT**

**The Trust Team** are all members of the Inst. Fundraising and members of the Trust SIG (Trust special interest group) who are Trust Fundraisers. We are currently working is a charity as a Trust fundraiser, on maternity leave, between jobs or working part-time. This means that we just focus on our strengths – and it will bring results to your charity.

# Fundraising from Trusts

by

**The Trust Team**

*10 really easy tips to  
bring in funds*

## **Fundraising From Trusts by The Trust Team**

### *10 really easy tips to bring in funds from Trusts*

When we talk about “Trust Fundraising” we mean asking for support from charitable bodies called “trusts and foundations”. These groups of people usually have a large capital sum of money that they invest. Each year they give away the interest on this capital investment. Sometimes more and often they give out less than the interest that they make that year.

They are listed at the Charity Commission in England and Wales and they make grants only for a charitable cause.

You can find a trust's purpose in its trust deed on the Charity Commission website:

[www.charity-commission.gov.uk](http://www.charity-commission.gov.uk).

In England and Wales, the Charity Commission oversees Trusts.

In Scotland, the [Office of the Scottish Charity Regulator](#) oversees them.

Don't get confused between trusts and foundations. They are really the same if you need funding.



## **The Nature of the Need**

Good trust fundraising always starts with a clear articulation of the need that the applicant requires to be met. This may be for its general purposes, for buildings or equipment, or for special projects. Only by first defining the need clearly is it possible to identify accurately the prospective funders.

Therefore, the first step in making an application to a grant making trust should be clear articulation of the need for which the grant is being sought in the context of the organisation's whole mission.

## **Research**

Have a look and see if there have been any approaches to trusts in the past.

Maybe past donations and existing contacts can be revived.

Have a look to see if the published aims of the Trust match those that your charity has at Charity Commission and you should be able to identify those trusts whose objects and policies match your project.

You can find out how much they gave away to charities last year and you would be best to match your amount asked for with their average giving last year.

Sometime a trust will decide on a Theme for next year. Always angle your project towards their new theme so that you match their preferred cause.

Just call them up and ask if they are going to choose a theme for their next round of giving.

## Approach

Why not pick up the telephone? Just call or sometimes email with a 20-word email.

Simply say, "If we put in an application that *benefits children in low income households*, would this be considered if the project is solid?"

You also need to know:

- Has all the money been given out or is these some available this year?
- When do the applications close? What is the deadline for applications?
- How often can you apply to the Trust? Often every 6 months but sometimes every 12 months.



Please do not duplicate your efforts so that you make an application and so does someone else in a local branch or in another office. Trusts hate it.

## Your application process

Match your Aims with their Aims. If they say, "we support projects in Kenya" then the first line of your application will say, "We have a project in Kenya that gives young Kenyans a better life."

Match the aims of the trusts being approached.

Then go on to explain how what you do is EXACTLY what they want delivered. They WANT to give out money to achieve their aims and they will give it to you if you can make some thing happen to further their aims.



Keep this covering letter down to one side of A4 or print on the reverse of the paper. Do not include a covering letter of two pages.

Next include a one-page description of your project. Print on both sides of the paper. This can be a standard description. Only the covering letter need be specific to the Trust.

Now include your accounts. Not all 15 pages however.



Put the “bottom line of the accounts on the front. Most accountants leave this at the back (page 13)  
You put it on the first page. What your turnover was and if you have a surplus.

Now print it on A5.

If you cannot do this easily then use a software package (free) called FinePrint If you use Open Office you can set the options to print a “brochure” Make sure that you take out the accountants “filler” and only send the numbers for last year and the year before. They want maybe 5 pages of numbers. None of the words and notes used by your auditor. Leave them out.

- Your application will fit into an A5 envelope with no other information included. No VDV, no brochures, nothing else at all. Lets re-cap:
- 1 covering letter on A4 folded.
- 1 Project description that can be “standard to all applications on 1 piece of A4 paper folded.
- The costs of the project in summary form only.
- How much the total cost will be and how much you want the Trust to give you as a proportion.
- Tell them where you will get the rest of the money from.
- 1 set of accounts printed A5 booklet maybe 5-6 pages only. 2 A4 pages folded as can get 4 A5 pages to each piece of A4.
- This should weigh less than 100 gms so that you can post this inside the weight limit.

If a trust wants more information they will ask for it. This is a good sign. Do not send them too much, just the basics and then only what they ask for.

Unless a trust’s application procedure specifies other requirements on financial information, full budgets with breakdowns and explanations of costs appropriate to applications should be included. Any reasonable and justified management and administration costs should be included in the proposed budget (even if these costs are not being asked for). It should be explained how figures were reached.

Tell several Trusts if you are applying to some others. They do talk to each other and two of three may be able to help you by teaming up together. They are not trying to trip you up. They want to help. If a similar Trust is being approached they may bother help you get to your target.

- Keep it brief.
- Don’t use jargon.
- Tell the Trust of two other people in the charity that they can talk to.  
Maybe you and the CEO or the Chair.

Have in mind two or three Referees. Write to them now. Get their consent to write to say that they support the charity and the project. You need a local MP, Celebrity, retired judge, retired academic or someone working and will use their official notepaper. Your trustees should be able to come up with an eminent friend or colleague.

### **When you have been accepted**

#### **Don't panic!**

When an application is approved the trust only need you to reply saying that your letter should be regarded as official receipt of their money.

You can download a standard letter from our website.

Do it straight away. Do not leave it to the treasurer. You must do it.

Tell your team and celebrate. Goodness knows how hard it is to bring the money in so really celebrate it's arrival. Tell everyone. Especially the person who might do your newsletter and your website. Make sure you add the news to both documents.



There may be conditions such as the trust having a say in the work. Just agree to these conditions in writing. They will not get in your way – they just want to give you more money later.

Now try to maintain an excellent relationship with the trust. Put them on your Christmas Card list, invite them to events and here is a great tip:

Write a letter to their Chair or CEO from your CEO and get your CEO to sign it.



### **When you have been rejected**

It is not your fault. You will have 90% rejections if you do it properly. If you only have 50% rejection or less then you are not asking enough people.

When applications are rejected then accept it. Do not appeal.

Simply ask when you can re-apply. If they say that you are not eligible then ask them why not. Sometimes they only give to a certain local area. In that case re-apply but ONLY for that area. Look out for “England and Wales” Do not mention Scotland or Northern Ireland. Watch out for “young People”

Exactly what age are they talking about? You might re-word your application from, “young People” to, “Children under 12 years old” if that is what they ask for.

## Reporting back

Do you want to be funded next year? If you do then we recommend that you use the reporting function as a great sales tool to get more funding next year. Some charities think of it as a chore. Let them. You will win when you relish and look forward to reporting back.

Always invite the Trust to come and see the work or the beneficiaries. They may not turn up but your invitation is worth a million pounds.

Keep your reports brief and to the point. Only go into more detail at the end of grant period.

Your relationship during the application process will help them to understand the level of involvement you might like after your application is approved.

If you think you might have problems with the funded work like a delay then the trust should be informed as soon as you can.

If you change your plans then tell the trust and ask them if it is OK to make the changes. You will be rewarded with a great understanding of your project.



## Some legal requirements you need to know.

As a charity you have a legal requirement to state your charity number whenever you write to a Trust.

If your project does not go ahead, then any relevant parts of the money received must be returned. You can always ask the Trust if you can spend it elsewhere, but it is not yours if the project does not go ahead.

## Doing a mass mailing

There is no evidence that this works. It just gets people annoyed. It is the really big charities that do this. They are perceived as wasting money, arrogant and failing to do their research properly.

Maybe you might think about it if it was a national disaster or emergency that needed a quick response. Please do not do any mass or standardised mailing. Just research your targets, talk to them and put in a TRA. **A TRA** is what the Trust Team delivers. These are Targeted, Researched Applications. They are key to your success. The more that you make of these then the more money you will raise.

## **Approaching a Trustee**

The details of a trustee are usually available on the Charity Commission website. This is public domain.

You can call them directly but always ask permission to talk about an application first. Start the call off like this, "Is it a convenient time to talk about the TRUST and our project to (*help homeless teenagers, save endangered trees etc*)?"

If they say no then stop talking and apologise. If they say "Yes" then talk about your application to the Trust. Sometimes a trust will say that they only make grants to projects known to the trustees.

So find out if anyone in your team or volunteers know the Trustee. Check on the Charity Commission website in case the trustees are on other trusts. Lastly ring them up and talk to them.

## **Making an unsolicited application.**

Sometimes a trust will state that they will not support unsolicited applications. This might be because they have given out all of their money or they may be winding down. So you can make a quick phone call to just make sure that this is the current situation. It might be last year's situation and now they are open for applications. Ring them and ask, "When will you be ready to accept applications again?"

## **Building your Relationship:**

If your project encounters a problem then maybe you should tell the Trust.

Having a chat with them about what can be done and whether they might want

their money returned is often regarded by trusts as a positive thing. They learn to trust you and instead of withdrawing their support, they might put more money in. So talk to them often.

Some trustees do not understand the role of good fund-raisers. We know that you make sure that applications are relevant, well written, and properly submitted, which makes both parties happy.

Do not be put off by this attitude.

Just work hard to prove that you save them time and you help causes by your good work.