

Chat Summary

Trusts & Foundations Funding: Expert Advice from a Grant Assessor, Funder, and The List Author

Questions asked and answered in the chat

Are grants assessed on emotional feel rather than a scoring matrix?

No. Vic explained that an application must always meet the funder's criteria. But when 100 applications meet the criteria and only 10 can be funded, the ones that convince the assessor of the real-world impact of the work tend to stand out.

How can you stand out when most funders use standardised forms with word counts?

Vic's view was that there are still opportunities to stand out in fixed formats such as National Lottery or Comic Relief forms. It's less about how an application looks and more about the language you use and the way you talk about your organisation's work. She acknowledged the system is broken, but said that for now we have to work within it and do what we can.

How do you avoid acronyms when you're tight on word count?

Where you can, find other ways to describe your organisation or work. It isn't a hard and fast rule, though. If the funder is likely to know the acronym (for example, a VAWG funder will know what VAWG means), it's fine to use it.

Does flow matter, or is it better to tick off every prompt in the question?

It depends on the funder. Vic advised making the need-to-know information easy to read, especially if the funder doesn't know you. A more storytelling approach can work where the funder asks for it or you already have a relationship.

If a funder says it doesn't accept unsolicited applications, is it worth calling or emailing?

Vic's advice was to always go for a phone call where you can. One attendee noted that calls often go straight to voicemail. Vic also shared a blog on building relationships with invitation-only funders (see Resources below).

How do you get to know trustees when a trust doesn't list them (for example, when Ludlow Trust is the trustee)?

An attendee noted that the published accounts of individual trusts managed by Ludlow sometimes list the actual trustees, not just Ludlow staff.

Why favour 'unique' work? Doesn't that exclude many charities?

Vic clarified that it isn't only about being unique. Some funders, including the one she assesses for, specifically want to fund organisations doing things others aren't.

What does 'co-production' actually mean?

Vic defined it as collaborative decision-making and design: meaningfully involving the people your organisation exists for in everything it does. Attendees added examples:

- workshops with the people you support
- a seat on the board
- surveys and a sounding board of service users
- language such as "our beneficiaries told us" or "feedback from our pilot changed X"

One attendee noted this is harder for smaller charities, and for those working with animals or wildlife.

When several strong applications compete for limited funds, does the assessor favour lower-income charities?

It depends entirely on the funder's criteria.

How do you relay all this to your board?

Vic suggested sending them the recording.

Does Benefact Trust fund charities that aren't Christian, or new church and community buildings?

The [Benefact Trust eligibility check](#) was shared in the chat. One attendee confirmed their church had received Benefact funding for a new building.

Has anyone had success with the Ludlow Trust portal?

Experiences were mixed. Several attendees said they had never had a successful result. A few had one or two successes, although one noted these came from trusts that had funded them before joining Ludlow. Another said general applications can simply expire at the end of the year. One attendee planned to apply directly where a trust is well aligned, rather than through a general application.

How do you learn to demonstrate impact when every funder defines it differently?

This sparked a lot of agreement. An attendee recommended finding good training on outcomes and impact, noting that impact is always about real-world improvements. Vic offered to signpost people to free impact-assessment advice via LinkedIn.

Where can a small charity get help with impact assessment, or with gathering feedback from vulnerable beneficiaries?

Attendees suggested your local CVS (council for voluntary service), your county council's voluntary sector advisory service, or your local infrastructure organisation. You can find yours through [NAVCA](#).

Raised in the chat but not answered there

These came up in the chat without a reply there. Some may have been picked up in the live Q&A, so it's worth checking the recording:

- Are links to evidence welcomed by funders?
- If a funder offers £1,000 to £10,000, should you ask at the lower, middle or higher end?
- How do you make a case to funders when you deliberately prioritise depth of impact over beneficiary numbers?
- Are there warning signs before a trust changes its guidelines?
- How does a grant-giving charity measure its own impact?

Other useful information shared in the chat

Write for a reading age of eight. During Vic's talk, attendees guessed the average UK reading age, with most guesses between 7 and 14. The answer is eight, and it drops further when someone reads at speed, as assessors often do. This is a good reason to cut jargon, acronyms and assumed knowledge.

Opening lines tend to look alike. When asked how their applications usually begin, most attendees said a version of "We are [charity], founded in [year]" or "We are seeking funding for...". It's a useful reminder of how similar applications can look to an assessor reading dozens in a row.

Formatting preferences vary by funder. Some funders ask for plain text and say not to bother with design, images or formatting. Others welcome a richer approach: one attendee's recent application to a larger trust included case studies and pictures on three of its ten pages. Vic's summary: know your funder.

Relationships vary too. One attendee has a funder who "isn't one for a chat" and others who like weekly emails.

Some programmes close within minutes. Attendees reported that one foundation's round was closing about 20 minutes after it opened on the day. One person only got their application in by being online at 9am.

AI in applications divided opinion. Points raised included:

- AI-driven funder databases can be inaccurate, leading to ineligible applications and funders being flooded.
- Some funders use AI checkers because they don't want AI-generated content.
- Several attendees said writing that reads as AI-generated casts doubt on whether it's genuine and fact-checked. One said they've been accused of using AI when they wrote the application themselves.
- Environmental, health-information and literacy charities raised ethical concerns about AI's energy and water use and its accuracy.
- One attendee suggested every charity should discuss AI internally and agree an AI policy.

Shared frustrations with the funding landscape. These came up repeatedly:

- Long waits for decisions (one attendee was told 12 months), while many funders won't fund work retrospectively.
- Rules against back-to-back applications, which leave charities without earned income moving from funder to funder and closing and restarting services.
- Newer grassroots charities being funded for work established charities already deliver, with a call for funders to check what already exists locally.
- Deadlines clustering in school holidays.
- Word or character limits that change year to year or don't match on submission.
- Funder websites still saying "check back in 2026".
- Reduced council funding, particularly for mental health.
- Very little trust funding for animal welfare and rehoming charities.

One attendee suggested funders could publish how much funding is left in a round, so charities know whether it's worth applying.

Resources, tools and frameworks shared

- **Today's slides.** Download the full deck [here](#).

- **The List (Jo Jeffrey).** Jo's regularly updated list of trust and foundation funding changes: pauses, closures and new programmes. [Read about The List.](#)
- **SOFII.** Mentioned by Vic, SOFII is a free showcase of great fundraising examples to learn from: sofii.org.
- **Benefact Group charity support.** Free guides, articles and resources for charities: benefactgroup.com/charity-support.
- **Benefact Trust eligibility check.** Check whether your organisation can apply: [eligibility check](#).
- **Five ways to build relationships with invitation-only funders.** A blog by Mike at Lime Green Consulting, recommended by Vic: [read the blog](#). One attendee also recommended Mike's training course on invitation-only funders, run with Get Grants.
- **Get Grants free virtual conference.** Includes a session with Mike, taking place the week after the webinar: getgrants.org.uk.
- **Michelle Stein.** Recommended by an attendee for her writing on invitation-only funders: [LinkedIn](#).
- **NAVCA.** Use it to find your local infrastructure organisation for free support, including help with impact measurement: navca.org.uk.
- **AI and the environment.** An article shared during the AI discussion: [Greenpeace on AI, energy and the environment](#).
- **Free one-month Fundraising Everywhere membership.** Available to everyone who attended, via the green button below the video.

Notable tips shared by fellow attendees

- **Keep a "proposal go-to bag".** One attendee keeps a shared-drive folder with financials, safeguarding policies, certificates and annual reports, so they're ready when a deadline is tight. Another's first job in a new role was a "helpful docs" folder of accounts, bank statements, insurances and policies.
- **Put a real voice in every application.** Several attendees now include a story, quote or case study in every application, even in standard forms.
- **Show how the people you support shape your work.** Say what beneficiaries told you, how pilot feedback changed your approach, or who sits on your sounding board. Ask yourself: how do you know your service works?
- **Talk about difference, not busyness.** One attendee took away the need to focus on the difference their charity makes rather than how much activity it delivers.

- **Check the funder's own trust accounts.** Published accounts can reveal trustees who aren't listed elsewhere.
- **If you're new to fundraising, find your local community.** Look for a city- or county-wide fundraising group on social media, and contact your local CVS or infrastructure organisation. Both are good sources of peer support and free advice.
- **Agree an AI policy.** Discuss internally how, and whether, your charity will use AI in applications, especially if your funders or your own values put weight on environmental impact.