BENEFACT GROUP

# Welcome!

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

**With Vic Hancock Fell, Helen Gray and Jo Jeffery**

# Introductions

**Ian Tate**

Fundraising Manager, Benefact Group

**Vic Hancock Fell**

Founder of Small Charity Leaders

**Helen Gray**

Trust Director, Benefact Trust

**Jo Jeffery**

Freelance Trust Specialist, Founder of The List

# 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.*

# 10 things I've learnt as a fundraiser turned grant assessor

Vic Hancock Fell — 2026

*This is what I look like when I read the opening line of 90% of applications... see if you can guess what it is...*

# Disclaimer...

- The system is broken...
- Thank you #FixTheForm, IVAR and funders who are advocating for a better way
- Success rates are LOW right now

# 1 Fit

- Check, double-check and triple-check whether you meet the funder’s criteria and strategic priority areas.
- Not sure? Contact them to check.
- Show them you know you're a great fit, for them.
- A surprising number of applications aren’t eligible / suitable.

# 2 Follow their rules

- Have you followed their guidelines to the letter?
- If oversubscribed, not following the guidance could be enough to disqualify you.
- I have to say no to great apps because they haven't followed guidelines.

# 3 Easy to understand

- The average reading age in the UK is…?
- No lingo, no acronyms ever.
- Don’t assume anything.
- The person reading your application is more than likely a non-expert.

Over 90% of applications I review start with the same sentence format – what is it?

*“ORG NAME was founded in YEAR, in LOCATION, to do THING”*

# 4 Stand out

- Remember that a human is reading your application (hopefully).
- Don’t shy away from showing the personality of your organisation.
- Try something different.
- Make it personal — address to the Trustee / CEO by name.

The Apollo (Sutton) Foundation

**Hello! To kick things off, please could you tell us a little about your organisation?**

Chapter

Certainly! Chapter provides support to people with severe and enduring mental illness in Cheshire West and Chester. Our tailored programme of one-to-ones, group activities, training and voluntary work placements help our service users grow in confidence, improve their mental health, make new friends, and feel hope for the future.

The Apollo (Sutton) Foundation

**When you say "severe and enduring", what does that mean?**

Chapter

It's an NHS-based term which refers to any diagnosis with very life-limiting symptoms and which lasts a long time, if not a person's whole life. Diagnoses include bipolar disorder, schizophrenia, personality disorder, psychosis, eating disorder and self-harm. To explain the effects of such an illness, here's Lucy!

*Hi, I'm Lucy and I have bipolar disorder. My thoughts race, I have trouble sleeping and I sometimes behave erratically, including making bad financial decisions and spending myself into debt, which causes anxiety. My medication helps a bit, but it also makes me forgetful and jittery, which can make me worried about going out in public. I was very low when I got involved with Chapter.*

Chapter

Thanks Lucy. Joining Chapter has really worked for Lucy. She's grown in confidence to the point where she is not only able to leave her house every day… She is now delivering some arts and crafts classes herself!

The Apollo (Sutton) Foundation

**I see… How many people like Lucy are there?**

Chapter

Estimates vary, but something like 1 in 100 have a severe mental illness. That would mean that in Cheshire West and Chester – where we work – there are more than 2,000 working age people with such a diagnosis. We know there's a real need for our work because for the first time in our 25 year history, we have a waiting list.

The Apollo (Sutton) Foundation

**Thanks. Can you tell us about your group activities?**

Chapter

We run 5-6 different activities every week which offer our service users the opportunity to meet new people, learn new skills and get out into the community. Activities include countryside walks, board games, cooking, photography and many more. In 2019, we have held 116 sessions, engaging 64 different people. Your £500 grant will go towards materials and room hire for these activities.

For more about how our activities help, here's Joe.

# 1 in 6 to 1 in 2 or 3

success rate — and it varies massively by funder

# WAGOLL

*What a Good One Looks Like*

- Something different or surprising — e.g. newspaper column style.
- Evokes emotion: the emotional brain is far faster than the logical brain.
- Photos, headings, coloured text.
- Graphically designed in something like Canva.

# WABOLL

*What a Bad One Looks Like*

- Font size lower than 11 or 12.
- Huge walls of words — no spacing.
- Generic application, not specific to the funder.
- Nothing but words.
- Full of acronyms.
- Reads like an academic research paper.

# 5 Who's it about?

- It's not all about you, soz.
- Your application has to centre the voices and stories of the people you exist for.
- Do fundraisers get a chance to connect to the people the org exists for?
- How can you include their voices?

# 6 Evidence

- WHY are you doing what you're doing?
- What is your evidence of need?
- Are your activities needed and wanted by the people you exist for?
- When was the last time you asked them?
- How can you tell this story in your applications?

# 7 Impact

- Impact, not ‘busyness’.
- Describe the change.
- Don’t leave the reader asking, ‘so what?’

# 8 Numbers

- Make sure your budget is accurate and realistic.
- Explain anything that might be a red flag.
- Get someone else to double-check your numbers.
- Don’t assume any understanding.

# 9 Get organised

- Get organised behind the scenes.
- Check your website, social media etc. don’t contradict anything in your application.
- Charity Commission filings and annual reports.
- Name your files in a helpful way.
- Get all your supporting docs ready in advance.

# 10 It's hard

- The system needs change.
- Success rates range massively.
- If it's not a yes, it's not always because it wasn't a good application.
- Consider following up.
- Don't put all your eggs in the grant basket.

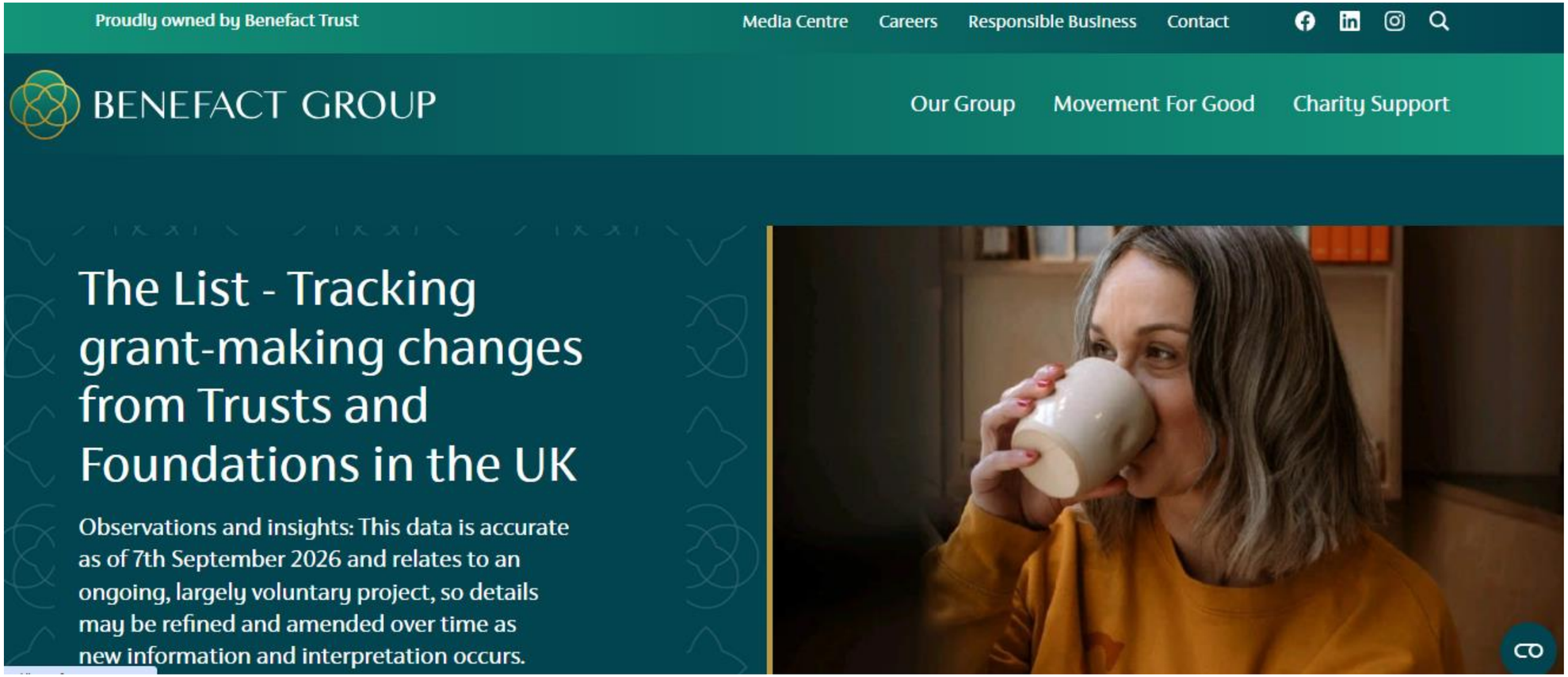
SMALL CHARITY LEADERS

# Thank you.

www.smallcharityleaders.co.uk

# Joanna Jeffery, Full Circle Consultancy

The List - Tracking changes to grant-making behaviour of Trust and Foundations in the UK.




https://benefactgroup.com/charity-support/charity-fundraising-articles-and-guides/the-list-jo-jeffery/

We have seen a landscape dominated by Restructuring and Pausing over the last couple of years however this year there has been a slowing in these categories this year and we instead see an increase in the categories of Closed Early, Short Deadline and Updated Criteria, Extended Pause.

| Change Type | 2026 YTD | 2025 | 2024 |
|---|---|---|---|
| Closed Early | 16 | 10 | 8 |
| Criteria Updated | 28 | 3 | |
| Deadline change | 5 | 3 | |
| Extended Pause | 14 | 9 | |
| Not Open to Unsolicited Applications | 21 | 31 | 2 |
| Other | 41 | 17 | 3 |
| Paused | 34 | 95 | 35 |
| Removed From Register | 41 | 10 | 3 |
| Reopened | 37 | 30 | 6 |
| Restructuring | 30 | 111 | 36 |
| Short Deadline | 15 | 8 | |

- Early closure is often repeated behaviour e.g  Sir Halley Stewart has a tendency to Close Early; their last four rounds (reported September 2026) have reached capacity at least 6 weeks before the deadline.

- More prevalence in Not Open to Unsolicited Applications, previously had open grant programmes e.g GC Gibson Charitable Trust

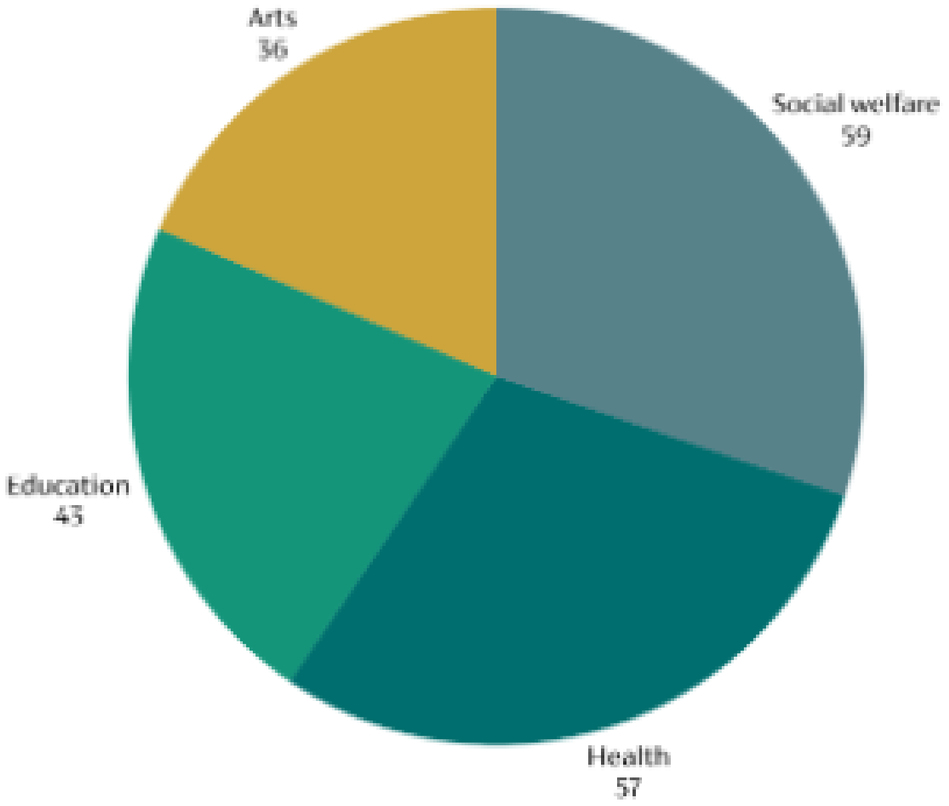
- We are starting to see Re-Pauses, those that have previously Paused having to Pause again and Extended Pauses e.g Robertson Trust, Hodge Foundation , Will Charitable Trust

- Those who have paused/and or restructured  and that have new funded programmes have very specific themes for example  Henry Smith Foundation, City Bridge Foundation, Lloyds Bank Foundation, Morrisons Foundation

Causes most affected

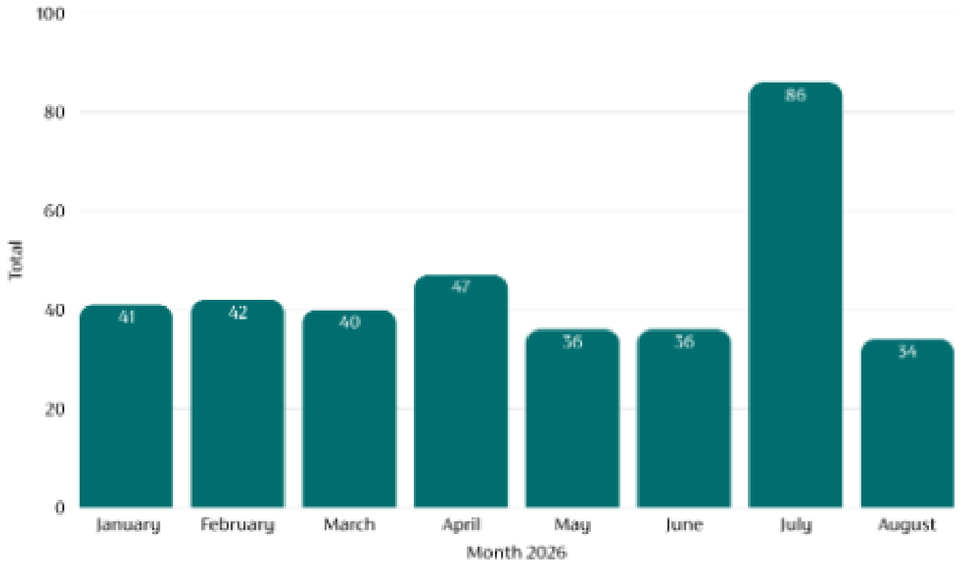
The main funders identified as driving these changes were:

- Social welfare: Hodge Foundation having undergone an extended pause due to their new platform experiencing problems
- Health: The National Lottery has undergone relentless change in a very short amount of time with the most significant change being that they decided to stop accepting applications for national or multi-region projects in June, preferring one geographical area.
- Education: Grace Trust have moved to Not Open to Unsolicited Applications after a Restructuring, which meant applications assessments were delayed
- Arts: Arts Council and Paul Hamlyn Foundation. Arts Council –NPO and Grantium!



# Month-by-month – Trends of Funding Changes 2026

The most changes were catalogued in July 2026, including Removed From Register (36) Reopened (8) Criteria Updated ( 4 ) Not Open to Unsolicited Applications (4 ). Funders included; National Lottery , Henry Smith , Friends Provident , Dulverton Trust and Masonic Charitable Trust. April was pretty busy too with 6 Pauses, 5 Closures and 5 Restructuring, including National Lottery, Hodge Foundation, Sylvia Waddilove Foundation UK.



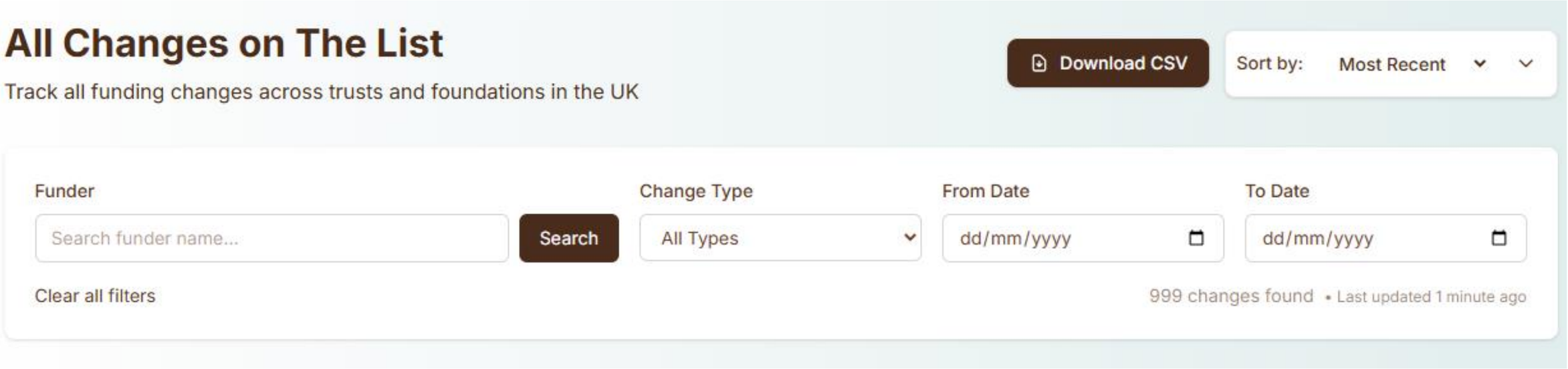
# Bid Ready or Bid D-ready?

Short-notice grants. Tighter deadlines. More specific priorities and geographies. A growing emphasis on collaboration, partnerships and lived experience. And a different application platform for almost every funder.

Are we actually becoming less ready to apply?

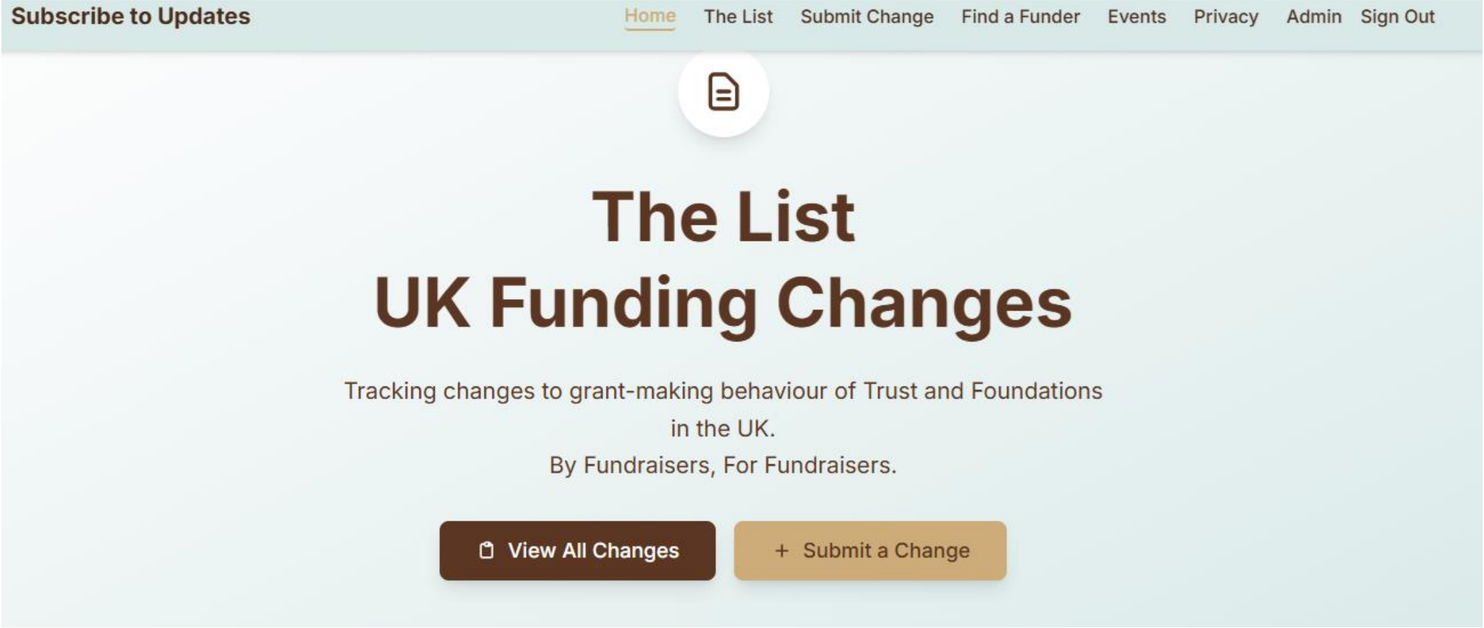
There's a risk we mistake our well-practised adaptability for readiness.

This is a liminal phase- an uncomfortable in-between- not a personal failing. The processes that used to work are spluttering. The new infrastructure, long promised – better data, more transparent funders, more proportionate processes, better application forms – is still emerging




With 999 changes now categorised, we are reaching a critical mass of information. The profiles show more than what each funder is doing in isolation: they help us spot behaviours and emerging practices that may be relevant across the wider funding landscape.

- Use trusted information. Look for behaviour, not just stated priorities. And trust yourselves. This matters particularly as a plethora of platforms promise funder prospects.




https://the-list.uk/submit

https://the-list.uk/subscribe

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# From a funder’s perspective

September 2026

# What Benefact Trust funds

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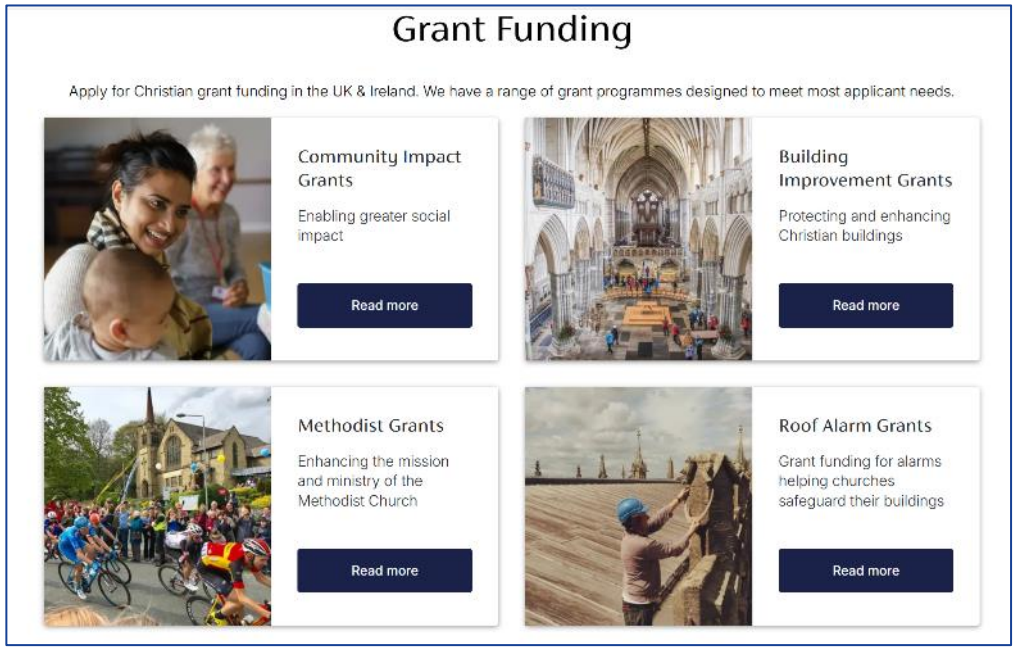
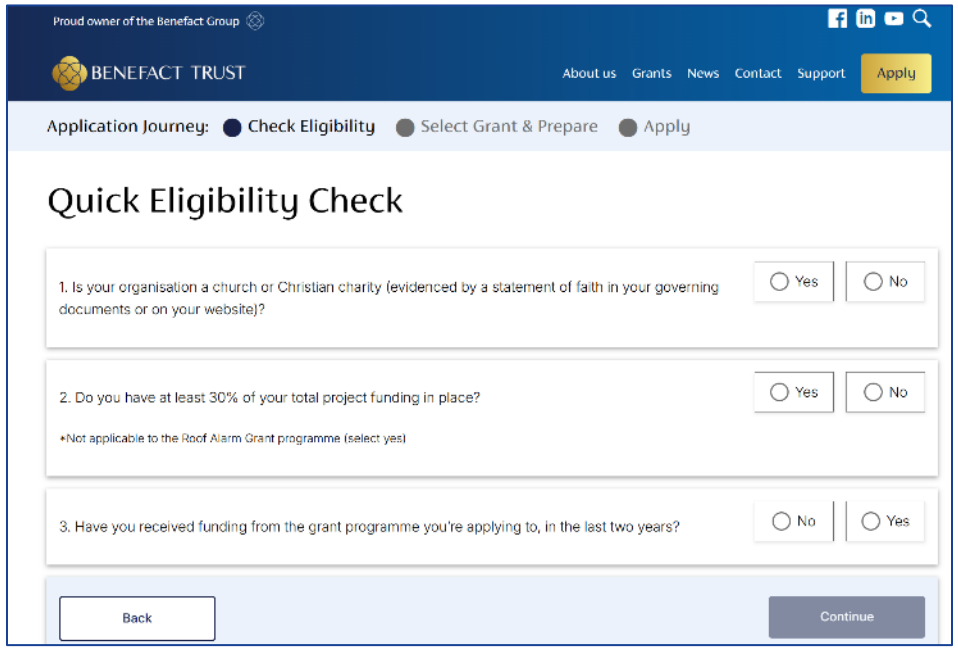
# How to apply

www.benefacttrust.co.uk

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# 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 project will make

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# Q&A

# 5 things to look forward to:

1 Fundraising Webinars …

2 Get together at a fundraising forum …

3 Register interest in Founder Forums …

4 Listen to our podcast series …

5 Join our Facebook Group …

# Thank you for listening

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For Impact: The Charity Podcast

The Benefact Group Charity Network – Facebook

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