

How do you find the best Funders for you Prospecting and Research

Lucy Stone, No Stone Unturned Fundraising



Lucy Stone - Helping not for profits

- Increase Grant, Trust and Foundation income
- Develop new income streams
- Improve relationships with funders
- Arts & Cultural organisations
- Sussex Grassroots Organisations

Who I've worked with



I am also a Trustee!



Pelican Parcels

Session overview

- Charity Registers
- FREE resources
- Paid resources
- Charity Commission Website
- Charity Accounts
- Database

You

- How are you?
- How is your mental health?
- Are you getting support?
- Are you taking breaks?
- How is your time management?
- Are the 'nos' hitting you harder?

You

- You can not do your best work for your organisation if you are not ok.
- You can't keep on track if you are feeling overwhelmed.
- This has always been an important question, however, with COVID-19 the world is very different.

Stress Bucket

Mental
Health
UK



What are Trusts & Foundations?

- Trust = specific legal entity. Most are charities but not always. Not all give grants!
- Foundation = Trust, Charity, Ltd Company etc
- Grants = can be given by Trust, Foundations, Government, companies etc.
- Can be family, corporate, community etc

Trusts & Foundations (2019/20)

- Trusts & Foundations = £6.5 billion donated
 - Wellcome Trust gave out £679 million
 - The top 10 give out over £1.4 billion
 - £3.48 billion from the top 300 trusts
 - Tens of thousands of Trusts & Foundations
- National Lottery = £1.85 billion

Where can we find the information?



Charity Registers

- Charity Commission England and Wales
<https://beta.charitycommission.gov.uk/charity-search/>
- Scottish Charity Regulator OSCR
<https://www.oscr.org.uk/>
- The Charity Commission for Northern Ireland
<https://www.charitycommissionni.org.uk/>

Free resources

- ACF Foundation Giving Trends <https://www.acf.org.uk>
 - annual publication reviewing top 300 grant makers

OTHER INDEPENDENT CHARITABLE GRANT-MAKERS WITH SUSTAINABLE FUNDING			
COMMUNITY FOUNDATIONS		GRANTS	
London		£16.4m	
Tyne & Wear and Northumberland		£7.6m	
County Durham		£4.8m	
Cumbria		£4.6m	
Norfolk		£3.3m	
Quartet		£3.1m	
FUNDED BY MEMBERS, CONGREGATION OR TRADE		GRANTS	
Archbishops' Council		£121.4m	
Royal Academy of Engineering		£16.0m	
Academy of Medical Sciences		£7.4m	
GambleAware		£5.9m	
South London Church Fund & Southwark Diocesan Board of Finance		£3.4m	
SUPPORTING A SINGLE INSTITUTION, AREA OR CAUSE		GRANTS	
The Dulwich Estate		£7.8m	
Greenham Trust		£3.0m	
Paddington Development Trust		£2.0m	
Stratford-Upon-Avon Town Trust			
York Minster Fund			
FUNDED BY GOVERNMENT MANDATE, TAX RELIEFS, LEVIES OR ENDOWMENTS		GRANTS	
National Lottery Community Fund (formerly known as Big Lottery Fund)		£508.5m	
Thalidomide Trust		£55.5m	
Royal Society of Wildlife Trusts		£14.9m	
Nesta		£3.6m	
Racing Foundation		£3.2m	
TRUSTS ASSOCIATED WITH NHS HOSPITAL(S)		GRANTS	
Great Ormond Street		£35.1m	
Barts and the London Charity		£27.6m	
Guy's and St Thomas' Charity		£20.4m	
Above and Beyond		£6.1m	
Royal Brompton & Harefield Hospital Charity		£4.9m	
MIXED FUNDING AND/OR ACTIVITIES			
Cancer Research UK			
British Council			
British Heart Foundation			
Royal Society of Edinburgh			
Shetland Charitable Trust			

FAMILY FOUNDATIONS (YEAR END)		GRANTS (£ MILLION)	VOLUNTARY INCOME (£ MILLION)	TOTAL INCOME (£ MILLION)	NET ASSETS (£ MILLION)
1 (1)	Wellcome Trust (Sep-18)	349.0	0	484.8	24,200.1
2 (2)	Children's Investment Fund Foundation (CIFF) (Dec-17)	162.4	0.7	209.8	3,838.7
3 (3)	Leverhulme Trust (Dec-18)	106.2	0	110.0	3,178.0
4 (4)	Garfield Weston Foundation Apr-18)	67.7	0	73.8	9,933.8
5 (23)	Lempriere Pringle 2015 (Mar-18)	46.2	17.4	32.8	31.5
CORPORATE FOUNDATIONS					
1 (7)	BHP Billiton Sustainable Communities (Jun-18)	53.2	0.01	0.3	1.5
2 (1)	Lloyd's Register Foundation (Jun-18)	23.1	0	10.3	291.8
		20.2	51.5	52.1	50.0
		19.9	18.3	19.5	90.9
		16.8	21.6	21.8	4.5

TOP 20 FOUNDATIONS BY GRANT-MAKING 2016/17				A/C YEAR	GRANTS (£ MILLION)	NET ASSETS (£ MILLION)
1	Wellcome Trust			Sep-18	349.0	24,200.1
2	Children's Investment Fund Foundation			Dec-17	162.4	3,838.7
3	Leverhulme Trust			Dec-18	106.2	3,178.0
4	Comic Relief			Jul-17	72.8	116.9
5	BBC Children in Need Appeal			Jun-18	70.0	31.7
6	Garfield Weston Foundation			Apr-18	67.7	9,933.8
7	BHP Billiton Sustainable Communities			Jun-18	53.2	1.5
8	Football Foundation			May-18	49.7	54.3
9	Lempriere Pringle 2015			Mar-18	46.2	31.4
10	Grace Trust			Jun-17	41.4	23.2
11	Esmée Fairbairn Foundation			Dec-18	40.5	997.3
12	The Health Foundation			Dec-17	36.7	1,008.8
13	Arcadia			Dec-18	31.7	11.9
14	Wolfson Foundation			Apr-18	31.1	739.2
15	Henry Smith Charity			Dec-17	30.9	1,010.9
16	Monument Trust			Apr-18	27.3	6.9
17	Bridge House Estates*			Mar-18	25.6	1,395.8
18	Ahmadiyya Muslim Jamaat International			Dec-17	24.4	24.2
19	Paul Hamlyn Foundation			Mar-18	24.3	755.1
20	The Pears Family Charitable Foundation			Mar-18	24.0	22.6

*The grant-making arm of Bridge House Estates is City Bridge Trust



TOP 300 FOUNDATIONS RANKED BY GIVING

CORPORATE LAST YEAR ()	FAMILY LAST YEAR ()	TOP 300 LAST YEAR ()	NAME	A/C YEAR	GIVING (£ M)	NET ASSETS (£ M)
	1 (1)	1 (1)	Wellcome Trust	Sep-18	349.00	24,200.10
	2 (2)	2 (2)	Children's Investment Fund Foundation	Dec-17	162.43	3,838.75
	3 (3)	3 (4)	Leverhulme Trust	Dec-18	106.19	3,177.99
		4 (3)	Comic Relief	Jul-17	72.75	116.89
		5 (6)	BBC Children In Need Appeal	Jun-18	69.96	31.67
	4 (4)	6 (5)	Garfield Weston Foundation	Apr-18	67.72	9,933.75
1 (7)		7 (62)	BHP Billiton Sustainable Communities	Jun-18	53.17	1.53
		8 (34)	Football Foundation ¹	May-18	49.66	54.33
	5 (23)	9 (61)	Lempriere Pringle 2015	Mar-18	46.16	31.45
		10 (12)	Grace Trust	Jun-17	41.43	23.21
	6 (6)	11 (8)	Esmée Fairbairn Foundation	Dec-18	40.53	997.32
		12 (28)	The Health Foundation	Dec-17	36.69	1,008.79
	7 (5)	13 (7)	Arcadia	Dec-18	31.70	11.90
	8 (9)	14 (11)	Wolfson Foundation	Apr-18	31.11	739.22
		15 (13)	Henry Smith Charity	Dec-17	30.93	1,010.94
	9 (8)	16 (10)	Monument Trust	Apr-18	27.26	6.92
		17 (29)	Bridge House Estates ²	Mar-18	25.60	1,395.80
		18 (15)	Ahmadiyya Muslim Jamaat International	Dec-17	24.42	24.22
	10 (12)	19 (22)	Paul Hamlyn Foundation	Mar-18	24.33	755.09
	11 (19)	20 (42)	The Pears Family Charitable Foundation	Mar-18	24.03	22.63
2 (1)		21 (17)	Lloyd's Register Foundation	Jun-18	23.06	291.85
		22 (16)	United Talmudical Associates Ltd	Mar-18	22.61	1.57
	12 (40)	23 (95)	The H B Allen Charitable Trust	Dec-17	22.40	15.83
		24 (165)	AKO Foundation	Dec-18	22.12	74.10
3 (5)		25 (35)	Lloyds Bank Foundation For England & Wales	Dec-17	20.17	50.03
4 (4)		26 (27)	Goldman Sachs Gives (UK)	Jun-18	19.88	90.90
	13 (15)	27 (31)	The Robertson Trust	Mar-18	19.27	367.69
	14 (7)	28 (9)	Gatsby Charitable Foundation	Apr-18	18.96	423.45
		29 (144)	Grand Charity	Mar-18	18.05	21.05

Free resources

- Charity Excellence Framework FREE COVID Funder Database
<https://www.charityexcellence.co.uk/>
- 360 Degree Giving <http://grantnav.threesixtygiving.org/>
 - grant giving data from 142 funders
- Competitors websites and accounts

Free resources

- Livery Companies Database
<http://liverydatabase.liverycompanies.info/>
 - 110 livery companies, comprising London's ancient and modern trade associations and guilds
- 101 Ways to Grow Your Prospect List - Alicia Granger
<https://www.aliciagrainger.co.uk/>

Free resources - Facebook

Fundraising Chat

<https://www.facebook.com/groups/FundraisingChat>

Trust Fundraising Hub

<https://www.facebook.com/groups/trustfundraisinghub>

Free & Paid for resources

Directory of Social Change (DSC) <https://www.dsc.org.uk>

- Printed Directories - available to buy or **FREE** in the library
- Funds Online - <https://fundsonline.org.uk/> (£410+VAT)

NCVO MY Funding Central

- **FREE** for charities under £30k, Up to £50k is £50+VAT up to under £1mill is £300+VAT <https://www.myfundingcentral.co.uk/>
- £1mill + is GrantFinder www.grantfinder.co.uk/funding-services

Grants Online www.grantsonline.org.uk

- Various Subscription options - FREE Newsletter

Charity Commission Website

Searchable: You can search the register of charities in England and Wales


Research: find out more about those you want to apply to



Search the register of charities x +

register-of-charities.charitycommission.gov.uk/charity-search

English Cymraeg

 **CHARITY COMMISSION**
FOR ENGLAND AND WALES


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Search the register of charities



372,358 matches found

You can only export a maximum of 10,000 records. Please refine your search or [download the full register](#).

► [Search filters](#)

Apply filters

Reset filters

Charity number	Charity name	Status	Income	Reporting
200000	HOMEBOUND CRAFTSMEN TRUST	Removed		Removed
200001	PAINTERS' COMPANY CHARITY	Removed	£84,000	Removed
200002	THE ROYAL OPERA HOUSE BENEVOLENT FUND	Registered	£145,875	Received
200003	HERGA WORLD DISTRESS FUND	Removed	£25	Removed



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when
under
10,000
record

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register-of-charities.charitycommission.gov.uk/charity-search

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Refined searches



Search the register of charities

register-of-charities.charitycommission.gov.uk/charity-search?p_p_id=uk_gov_ccew_portlet_CharitySearchPortlet&p_p_lifecycle=0&p_p_state=normal&p_p_mode=view&_uk_gov_ccew_portlet_CharitySearchPortlet_mvcRenderCommand...

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About the register of charities

Keywords search

Search the register of charities

Registration details

☐ Registered

☐ Removed

Registration date from:
DD/MM/YYYY for example 12/11/2003

Registration date to:
DD/MM/YYYY for example 12/11/2004

Removed date from:
DD/MM/YYYY for example 01/03/2012

Removed date to:
DD/MM/YYYY for example 01/05/2012

☐ Charities with latest documents overdue

Income

Enter a whole number greater than or equal to
For example 25000. Do not enter special characters

Enter a whole number less than or equal to
For example 47800. Do not enter special characters

Expenditure

Enter a whole number greater than or equal to
For example 50000. Do not enter special characters

Enter a whole number less than or equal to
For example 478500. Do not enter special characters



Look for
newly
registered
charities

Search options

- Classifications - Art, General Charity, Disability etc
- Who the charity helps - Children, Older people, People with disabilities etc
- How the charity helps - 'Makes Grants to Organisations'
- Geographical boxes



How the charity helps

1 selected

- ☐ Acts As An Umbrella Or Resource Body (21869)
 - ☐ Makes Grants To Individuals (49469)
 - ☒ Makes Grants To Organisations (68487)
 - ☐ Other Charitable Activities (31952)
-

West Sussex example



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About the register of charities

Keywords search



2,855 matches found

[Search filters \(selected\)](#)

Apply filters

Reset filters

Charity number	Charity name	Status	Income	Reporting
200490	VOLUNTARY ASSOCIATION FOR SURREY DISABLED	Registered	£0	Received
200629	ROTARY CLUB OF WORTHING'S COMMUNITY SERVICE FUND	Registered	£10,432	Received
207005	SUSSEX WILDLIFE TRUST	Registered	£5,533,458	Received
207037	THE SUSSEX ARCHAEOLOGICAL SOCIETY	Registered	£1,974,557	Received

< 1 2 3 ... 143 >

Export results



Export

Charity Details Export Headings

- Charity Number
- Charity Subsidiary
- Charity Number
- Charity Name
- Charity Address
- Charity Postcode
- Charity Constituency
- Phone
- Email
- Website
- Last Recorded Financial Year
- Last Recorded Income
- Last Recorded Expenditure
- Charity Status
- Charity Type
- How the charity helps
- What the charity does
- Who the charity helps
- Activities
- Charity Objects

Looking at individual charities

- Not all charities giving grants have a website.
- Many will be happy to get a letter, email or phone call.
- They are all required to provide certain information to the Charity Commission.
- Research even if you think you know them!

Let's look at one...

5 Trustee(s)

Name	Role	Date of appointment	Other trusteeships	Reporting status of other trusteeships
Dr JOHN ARTHUR CLEMENTS	Trustee	23 November 2001	None on record	
GUNNAR RICHARD ANDERSEN	Trustee	20 January 1977	None on record	
Dr PHILIP JOHN MARRIOTT	Trustee	17 November 2016	CROWBOROUGH DISTRICT GUIDE ASSOCIATION	Charity reporting is up to date
CHARLES ANTONY HICKS	Chair	08 April 1982	MISS P.M.MAJOR CHARITABLE SETTLEMENT	Charity reporting is up to date
MARIANNE ELEANOR BURT	Trustee	23 November 2001	None on record	



THE VIOLET M RICHARDS CHARITY

Charity number: 273928

Charity reporting is up to date

Charity overview

What, who, how, where

Governance

Trustees

Financial history

Accounts and annual returns

Governing document

Contact information

Activities - how the charity spends its money

Grant making trust to other charitable bodies principally in the health and medical research fields.No assistance available to individuals.

Income and expenditure

Data for financial year ending 05 April 2020

Total income: £81,410

Total expenditure: £82,006

People



5 Trustee(s)

Title	Reporting year	Date received	Received	Download
Annual return	05 April 2020	23 November 2020	On time	
Accounts and TAR	05 April 2020	23 November 2020	On time	Download
Annual return	05 April 2019	19 December 2019	On time	
Accounts and TAR	05 April 2019	19 December 2019	On time	Download
Annual return	05 April 2018	17 December 2018	On time	
Accounts and TAR	05 April 2018	09 January 2019	On time	Download
Annual return	05 April 2017	07 December 2017	On time	
Accounts and TAR	05 April 2017	07 December 2017	On time	Download
Annual return	05 April 2016	30 January 2017	On time	
Accounts and TAR	05 April 2016	30 January 2017	On time	Download

Click to download



What can the accounts tell you?

- Objectives and Aims
- Public benefit
- Grant making policy
- Future plans
- Grants given - who, amount given, length

The Violet M Richards Accounts

Who the charity helps

- relief of the aged, the relief of sickness and the advancement of medical education to support particularly medical research and research into geriatric problems, homes for the sick, facilities for the relief of the elderly and medical education
- East Sussex/ Crowborough area, where the Founder lived.

The Violet M Richards Accounts

Grant giving decision making

- The Trustees prefer to be proactive with charities of their own choice, rather than react to external applications.

Accordingly external applications are not encouraged and to save costs are not acknowledged and only successful applicants are notified

- individual trustees to nominate beneficiaries which they think are in the spirit of the Founder.

The Violet M Richards Accounts

4. GRANTS PAYABLE

	2020	2019
	£	£
Grants Payable	<u>55,000</u>	<u>64,000</u>
	<u>2020</u>	<u>2019</u>
Brain Tumour Research	-	10,000
Combat Stress	-	10,000
Diabetes UK	-	2,000
International Spinal Research Trust	-	5,000
The Countess Mountbatten Hospice	15,000	
Cavernoma Alliance UK	5,000	
Camphill Village Trust	5,000	
British Liver Trust	10,000	
Prostate Cancer UK	10,000	
Life Changes Counselling Ltd	-	10,000
Thinking Well- East Sussex	5,000	10,000
Versus Arthritis	-	12,000
Dyscover Limited	5,000	5,000
	<u>55,000</u>	<u>64,000</u>

GRANTS PAYABLE

Grants Payable

Alzheimers Research UK
 Arthritis research UK
 Brain Research Trust
 British Liver Trust
 HUBB Support Group
 Lee Smith Foundation
 Donation action for M.E
 Macular society
 Pro Cancer Research Fund (PCRF)
 PSPA (Progressive Supranuclear Palsy Association)
 The Amecca Trust -To Build House in Malawi

2018	2017
£	£
<u>1,000</u>	<u>82,000</u>

2018	2017
	5,000
	10,000
	10,000
1,000	1,000
	2,000
	2,000
	10,000
	5,000
	37,000
<u>1,000</u>	<u>82,000</u>



Storing your research: Database



Storing your research: Database

Purpose

- Overview of who is on your radar
- Tracking and storing information
- Date of action
- To support applications, stewardship and evaluation
- Funds you have reviewed that aren't for you

Storing your research: Database

What to include

- Web and Charity Commission link
- Scoring system (grant size and fit)
- Match to your work (RAG)
- Action needed
- Date of action

Storing your research: Database

What to include

- Type of application - letter, email, application, network
- Status of application - draft, submitted, result
- Relationship - past funder, current funder, prospect

Storing your research: Database

Things to think about

- Can be a simple excel document
- Regularly update and check the data
- Keep it simple - it is to make decisions and take action not to store all information
- Don't over complicate it!
- 'Chunk' the time spent on it.

Be curious. Be nosy. Ask Questions!



Keep in touch

I will be producing free templates over the coming months so please email me



lucy@nostoneuntuned.uk



[@Lucy_Stone](https://twitter.com/Lucy_Stone)



www.nostoneuntuned.uk



www.linkedin.com/in/lucy-stone-charity/

