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













graceeyre

































I am also a Trustee!



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







Developed from an idea by Brabban and Turkington (2002)

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

FUNDRAISING

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



24.4

24.3

Dec-17

Mar-18

Mar-18

24.2

755.1

19 Paul Hamlyn Foundation

18 Ahmadiyya Muslim Jamaat International

20 The Pears Family Charitable Foundation

TOP 300 FOUNDATIONS RANKED BY GIVING

1 (1) 2 (2) 3 (3)	1 (1)	Wellcome Trust		(£ M)	(£ M)
	0.101		Sep-18	349.00	24,200.10
3 (3)	2 (2)	Children's Investment Fund Foundation	Dec-17	162.43	3,838.75
	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
	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
	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 HB Allen Charitable Trust	Dec-17	22.40	15.83
***********	24 (165)	AKO Foundation	Dec-18	22.12	74.10
	25 (35)	Lloyds Bank Foundation For England & Wales	Dec-17	20.17	50.03
	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
	5 (23) 6 (6) 7 (5) 8 (9) 9 (8) 10 (12) 11 (19) 12 (40)	4 (4) 6 (5) 7 (62) 8 (34) 5 (23) 9 (61) 10 (12) 6 (6) 11 (8) 12 (28) 7 (5) 13 (7) 8 (9) 14 (11) 15 (13) 9 (8) 16 (10) 17 (29) 18 (15) 10 (12) 19 (22) 21 (17) 22 (16) 12 (40) 23 (95) 24 (165) 25 (35) 26 (27) 13 (15) 27 (31)	4 (4) 6 (5) Garfield Weston Foundation 7 (62) BHP Billiton Sustainable Communities 8 (34) Football Foundation¹ 5 (23) 9 (61) Lempriere Pringle 2015 10 (12) Grace Trust 6 (6) 11 (8) Esmée Fairbainn Foundation 12 (28) The Health Foundation 7 (5) 13 (7) Arcadia 8 (9) 14 (11) Wolfson Foundation 15 (13) Henry Smith Charity 9 (8) 16 (10) Monument Trust 17 (29) Bridge House Estates² 18 (15) Ahmadiyya Muslim Jamaat International 10 (12) 19 (22) Paul Hamlyn Foundation 11 (19) 20 (42) The Pears Family Charitable Foundation 21 (17) Lloyd's Register Foundation 21 (17) Lloyd's Register Foundation 22 (16) United Talmudical Associates Ltd 12 (40) 23 (95) The H B Allen Charitable Trust 24 (165) AKO Foundation 25 (35) Lloyds Bank Foundation For England & Wales 26 (27) Goldman Sachs Gives (UK) 13 (15) 27 (31) The Robertson Trust 14 (7) 28 (9) Gatsby Charitable Foundation	4 (4) 6 (5) Garfield Weston Foundation Apr-18 7 (62) BHP Billiton Sustainable Communities Jun-18 8 (34) Football Foundation¹ May-18 5 (23) 9 (61) Lempriere Pringle 2015 Mar-18 10 (12) Grace Trust Jun-17 6 (6) 11 (8) Esmée Fairbairn Foundation Dec-18 12 (28) The Health Foundation Dec-18 8 (9) 14 (11) Wolfson Foundation Apr-18 8 (9) 14 (11) Wolfson Foundation Apr-18 15 (13) Henry Smith Charity Dec-17 9 (8) 16 (10) Monument Trust Apr-18 17 (29) Bridge House Estates² Mar-18 18 (15) Ahmadiyya Muslim Jamaat International Dec-17 10 (12) 19 (22) Paul Hamlyn Foundation Mar-18 11 (19) 20 (42) The Pears Family Charitable Foundation Mar-18 11 (19) 20 (42) The Pears Family Charitable Foundation Jun-18 12 (40) 23 (95) Th	4 (4) 8 (5) Garfield Weston Foundation Apr-18 67.72 7 (62) BHP Billiton Sustainable Communities Jun-18 53.17 8 (34) Football Foundation* May-18 49.66 5 (23) 9 (61) Lempriere Pringle 2015 Mar-18 46.16 10 (12) Grace Trust Jun-17 41.43 6 (6) 11 (8) Esmée Fairbairn Foundation Dec-18 40.53 12 (28) The Health Foundation Dec-18 31.70 7 (5) 13 (7) Arcadia Dec-18 31.70 8 (9) 14 (11) Wolfson Foundation Apr-18 31.11 15 (13) Henry Smith Charity Dec-17 30.93 9 (8) 16 (10) Monument Trust Apr-18 27.26 17 (29) Bridge House Estates² Mar-18 25.60 18 (15) Ahmadityaya Muslim Jamaat International Dec-17 24.42 10 (12) 19 (22) Paul Hamlyn Foundation Mar-18 24.33 11 (19) 20 (42) The Pears Family Charitable Foundation Mar-18 22.61

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 <u>https://www.aliciagrainger.co.uk/</u>



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

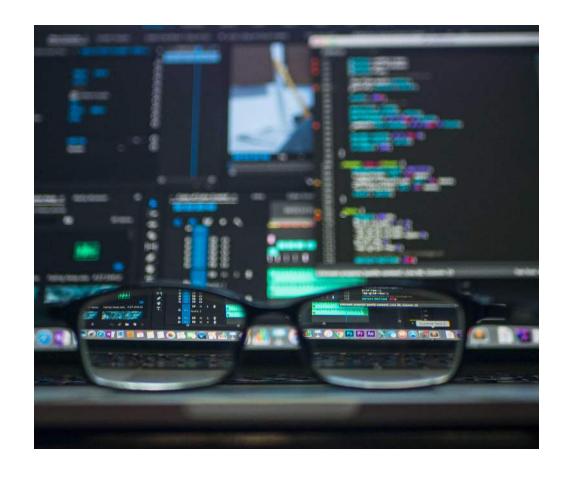
Grants Online <u>www.grantsonline.org.uk</u>

Various Subscription options - FREE Newsletter

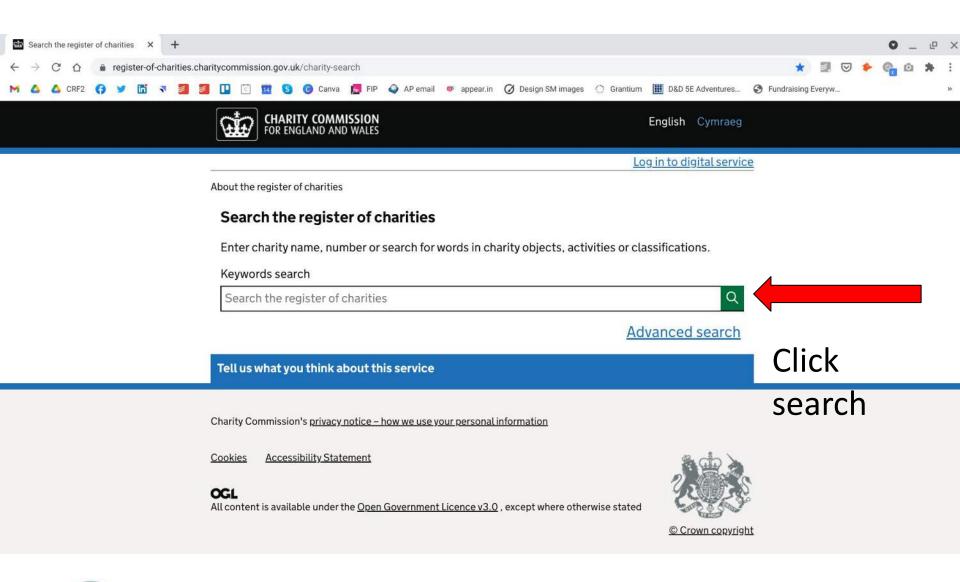
Charity Commission Website

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

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

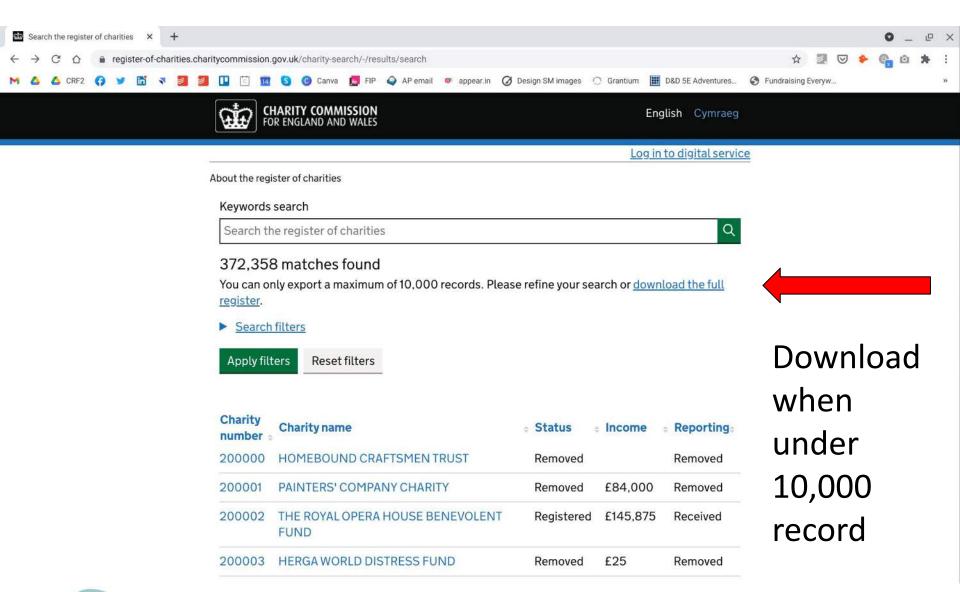




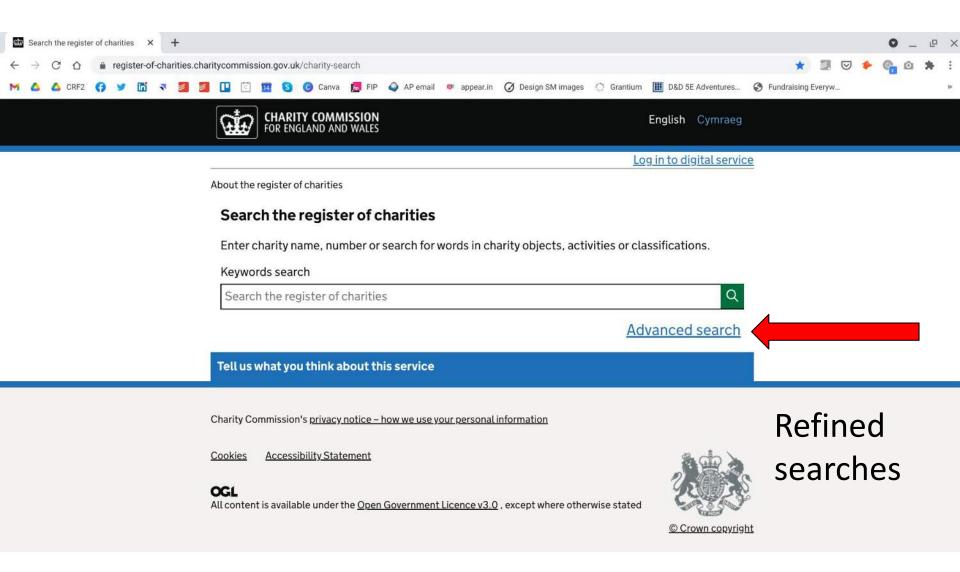




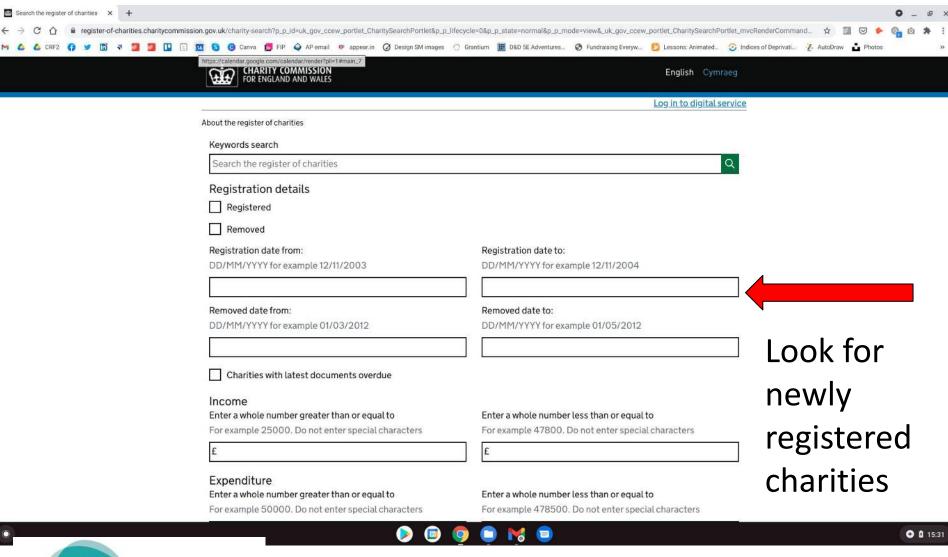
https://register-of-charities.charitycommission.gov.uk/charity-search













Search options

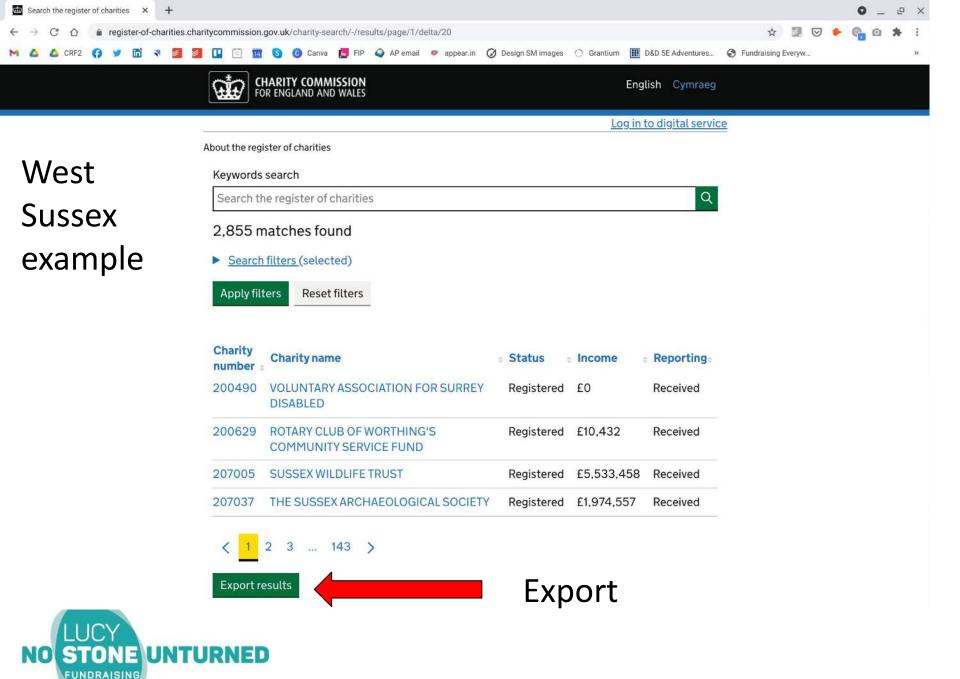
- Classifications Art, General Charity, Disability etc
- Who the charity helps Children, Older people, People with disabilities etc
- How the charity helps 'Makes Grants to

Organisations'

Geographical boxes



DW elec	the charity helps
]	Acts As An Umbrella Or Resource Body (21869)
]	Makes Grants To Individuals (49469)
2	Makes Grants To Organisations (68487)
]	Other Charitable Activities (31952)
-	37



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





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

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

28

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 <u>not encouraged</u> 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

2019

GRANTS PAYABLE

	2020
	£
Grants Payable	55,00
	202
Brain Tumour Research	-
Combat Stress	-
Diabetes UK	
International Spinal Research Trust	-
The Countess Mountbatten Hospice	15,0
Cavernoma Alliance UK	5,0
Camphill Village Trust	5,0
British Liver Trust	10,0
Prostate Cancer UK	10,0
Life Changes Counselling Ltd	7.5
Thinking Well- East Sussex	5,0
Versus Arthritis	
Dyscover Limited	5,0

2020	2013
£	£
55,000	64,000
2020	2019
-	10,000
-	10,000
	2,000
-	5,000
15,000	
5,000	
5,000	
10,000	
10,000	
	10,000
5,000	10,000
-	12,000
5,000	5,000
55,000	64,000

NTS PAYABLE

Grants Payable

NO STONE UNTURNED

Alzheimers Resear	rch UK
Arthritis research I	JK
Brain Research Tri	ust
British Liver Trust	
HUBB Support Gr	oup
Lee Smith Foundar	tion
Donation action for	r M.E
Macular society	
Pro Cancer Research	ch Fund (PCRF)
	Supranuclear Palsy Association
The Amecca Trust	-To Build House in Malawi

1,000	82,000
2018	2017
	5,000
	10,000
	10,000
1,000	1,000
	2,000
	2,000
	10,000
	5,000
	37,000
**********	********
1,000	82,000
	54





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

What to include

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



What to include

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

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@nostoneunturned.uk



@Lucy Stone



www.nostoneunturned.uk



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

