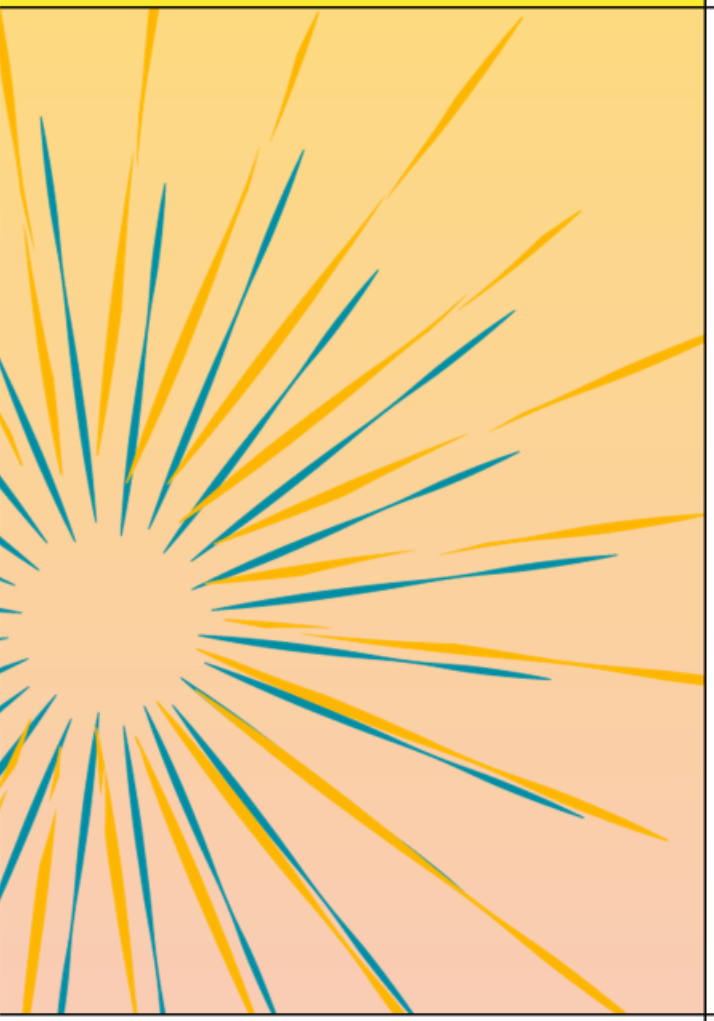
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The Festival of Trusteeship 2026



Show me the money:

A trustee's guide to fundraising

11.00am Friday 13th November

Money matters strand

evelyn PARTNERS

Trustees' Week

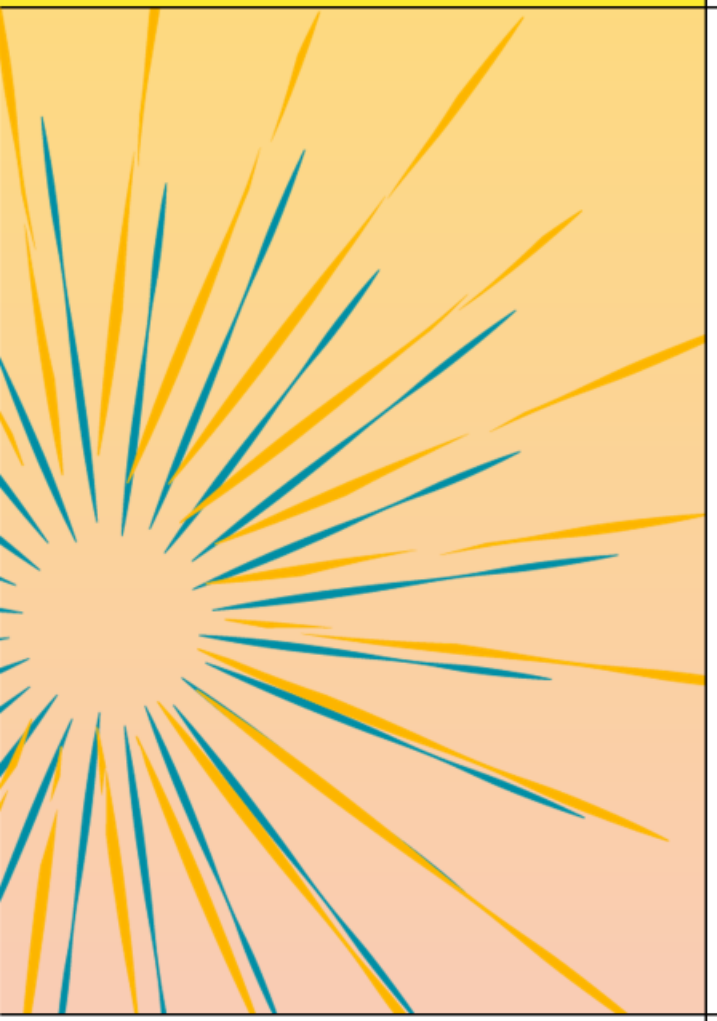
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The Festival of Trusteeship 2026



Welcome! We're so pleased you're joining us for this session.

This session will be recorded. Please stay muted unless we ask you to unmute. It helps to make sure everyone can clearly hear who is talking.

Closed captions are available; you need to enable these.

Please use the chat to ask questions and share experiences. We'd love to hear from you. Please keep your comments respectful, useful and accurate.

Please also feel free to ignore the chat and focus on the discussion if you'd prefer. We always read out questions fully.

Trustees' Week

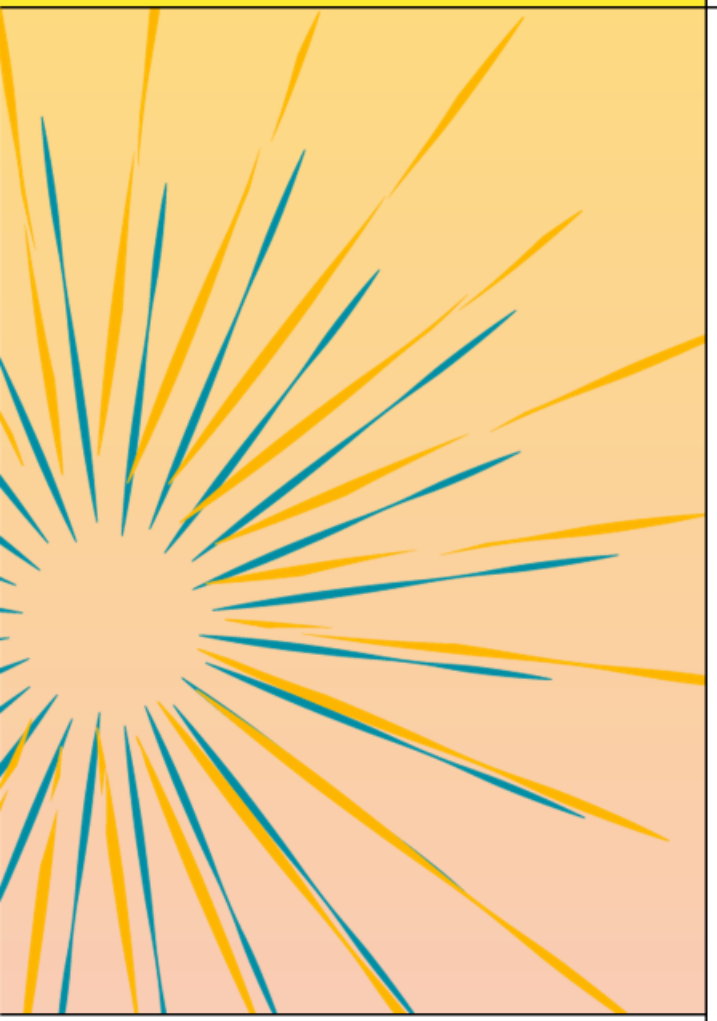
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Trustees' Week

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Thank you to our wonderful partners

CFG Leading the way for charity finance

Association of Chairs

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Bayes Business School, City St George's University of London

acevo imagine, inspire, improve

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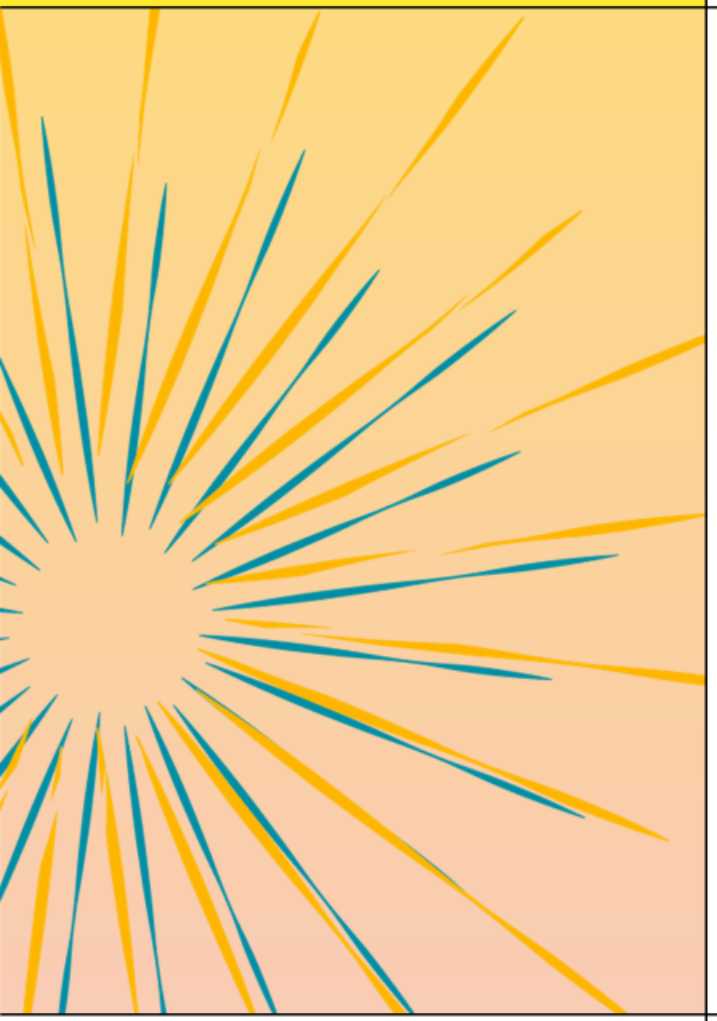
Charity Excellence Framework

Queer Trustees

Trustees' Week

Eastside People

The Festival of Trusteeship 2026



Chair	**Juliet Ellis**, Director, Fundraising Across the Board; Former trustee, The Sleep Charity **Sarah Goddard**, Director, Fundraising Across the Board; Former trustee, The Sleep Charity & Stay Brave
Panellists	**Jo Simpson**, Head of Programmes, Eastside People
	Jo Jeffery, Founder & Curator, The List
	Victoria Davie, Investment Manager, Evelyn Partners; Trustee, Edinburgh UNESCO City of Literature

Trustees' Week

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Fundraising Across the Board

SHOW ME THE MONEY: A TRUSTEE'S GUIDE TO FUNDRAISING

EASTSIDE PEOPLE FESTIVAL OF TRUSTEESHIP 2026

Brought to you by Sarah Goddard, Juliet Ellis,
Jo Jeffery, Jo Simpson and Victoria Davie

WHAT WE'LL COVER TODAY...

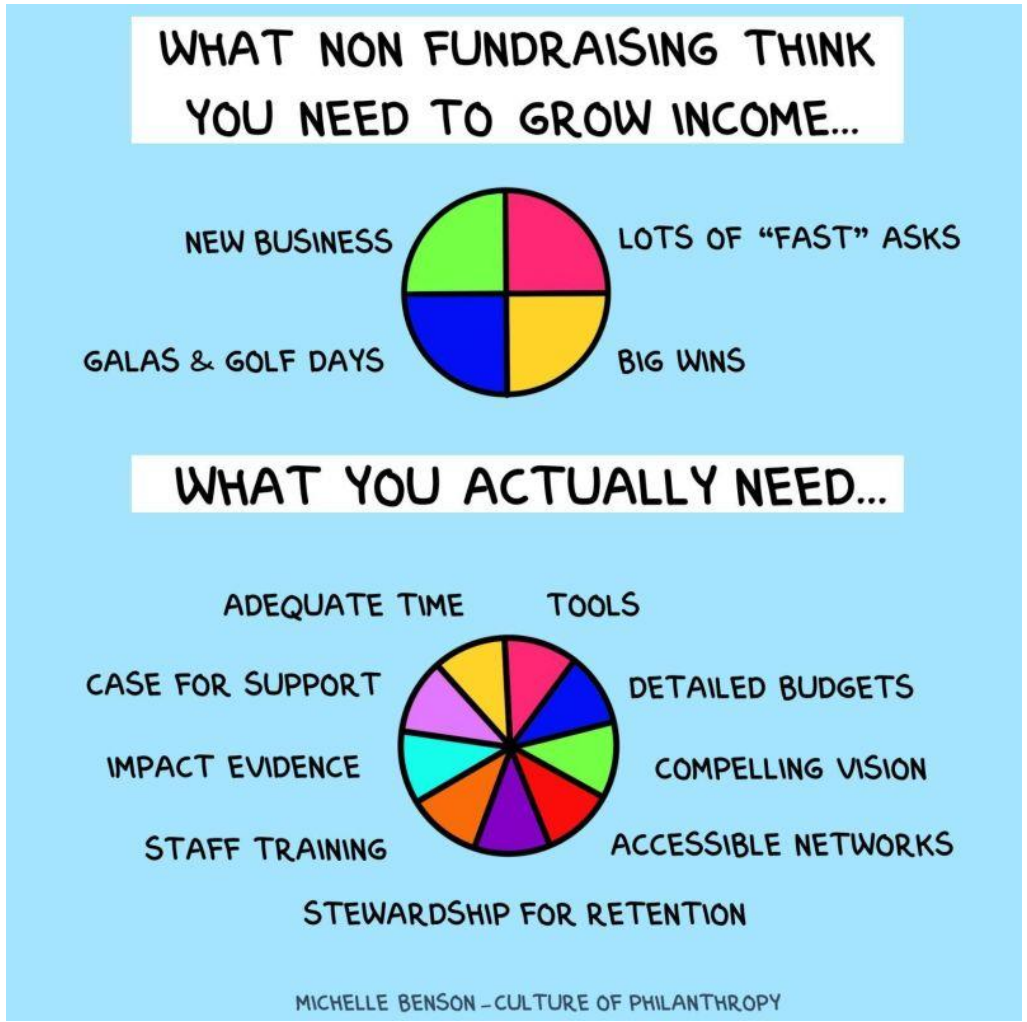
1. What Fundraising is - and the current climate for giving
2. Sources of Income including a deep dive into Trusts and Foundations
3. Investment Considerations through a Fundraising Lens
4. Social investment and when it should be part of the funding mix.
5. Playing your part as a Trustee
6. Summary and Q&A

Fundraising Across the Board

A BALANCED FUNDRAISING PORTFOLIO



Fundraising Across the Board



IN A NUTSHELL...

Making sure your teams and organisation have THESE things

Fundraising Across the Board

TOP TIPS FROM OUR SPEAKERS TODAY

1. **Sarah:** If you want to grow fundraising income you have to invest in it
2. **Juliet:** Look after your fundraisers proactively - the money will follow
3. **Jo J:** We've never seen such a relentless and unforgiving pace to changes in trust and foundation grant-making, which needs to be reflected in target setting
4. **Jo S:** Charities and social enterprises need to look beyond grants to be resilient. If you have a trading element, you need to consider social investment.
5. **Victoria:** Holding on to cash is an investment decision in itself

Fundraising Across the Board

SPECIAL OFFER



FUNDRAISING ACROSS THE BOARD CAN...

- Provide tailored training to your Trustee Board
- Support you with fundraising strategic planning
- Support you in assessing specific fundraising income areas or campaigns
- Give you or your team more in-depth training in different fundraising disciplines and skills

Confirm your tailored training for Trustee Boards before end November and save £250

Enquire here!

Fundraising Across the Board

QUIZ: WHAT ARE THE TOP FIVE FUNDRAISING MYTHS?

1. Anyone/everyone is a fundraiser
2. That you can ‘just ask [insert celebrity name/ company] to support us’
3. That you shouldn’t spend money on ‘admin’
4. That you, as a Trustee, need to perform some of the fundraising function
5. There are quick wins that will bring in the money quickly

Fundraising Across the Board

REFERENCES, LINKS & SECTOR BENCHMARKING

Fundraising Regulator – Trustee responsibilities
www.fundraisingregulator.org.uk/code/standards-which-apply-all-fundraising/responsibilities-those-who-govern-charitable

Charity Commission – number of charities
https://register-of-charities.charitycommission.gov.uk/en/sector-data/sector-overview

UK Giving Report 2026
www.cafonline.org/insights/research/uk-giving-report

Fundraiser Income Expectations – AAW Report 2024
www.aawpartnership.com/aawbenchmarkingreport

Lark Owl Nest Egg Trust Fundraising Success Rates 2025
https://larkowlnestegg.substack.com/p/trust-fundraising-success-rates-2025

The UK Trust Landscape Report 2026
https://grantedgiving.co.uk/insight-and-benchmarking-reports/the-2026-trusts-landscape-report/

Legacy Futures Report 2026
www.legacyfutures.com/resources/the-legacy-giving-report-2026/

LarkOwl Benchmarking Report - ROIs
https://larkowl.uk/benchmarking/

Enthuse - variety of reports
https://enthuse.com/insights/

JustGiving - 2026 Events Fundraising Snapshot
www.justgiving.com/for-charities/resources/2026-event-fundraising-snapshot

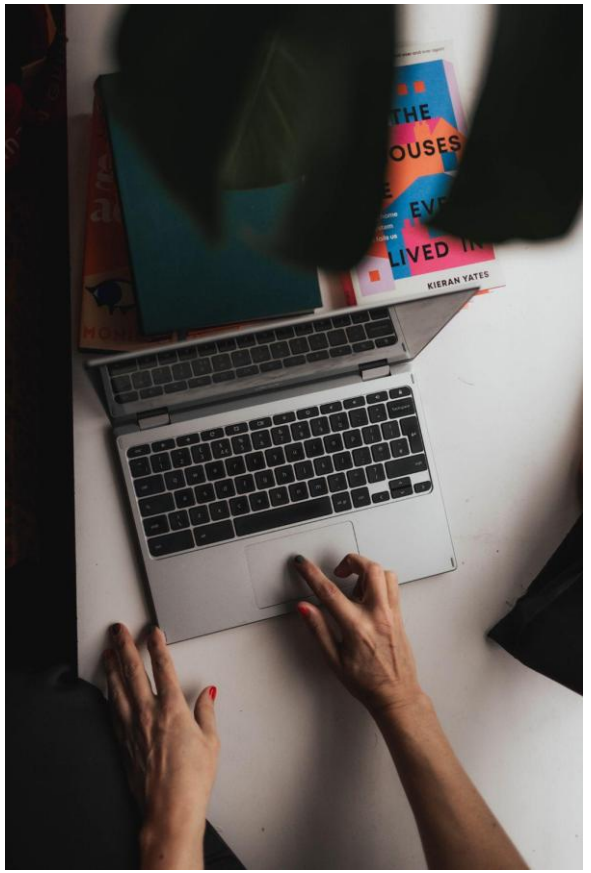
Joanna Jeffery, Full Circle Consultancy

Trends and Sector Insights

Understanding the Shifting Landscape of Trust and Foundations







The Headlines

Funding closing to new applications on... - City Bridge Foundation

23 Sept 2024 — Our new ten-year funding policy, Standing with Londoners, was publishe...



City Bridge Foundation

Two grants programmes close whilst char undergoes strategic review

31 May 2024

Important Update about our Grantmaking

As part of our ongoing commitment to improving our systems and processes, BBC Children in Need are transitioning to a new grantmaking system. This transition will take place throughout 2025 and we will launch our new system by the end of September. During this period there will be some disruption to our grant programmes.

As a result BBC Children in Need are no longer accepting new Expressions of Interest applications until we launch our new grantmaking system, by the end of September 2025.



Lankelly Chase to wholly redistribute its assets over the next five years

IF YOU ARE A CHARITY AND ARE INTENDING TO APPLY FOR FUNDING, PLEASE NOTE THAT APPLICATIONS ARE CURRENTLY CLOSED DUE TO OVERWHELMING REQUESTS FOR FUNDING.

RECENT NEWS

2024 Applications

I am so sorry but we completely failed to open on 1 August and I am sorry to anyone who benchmarked this date. We are now open and will be until the 30 September this year. There is no change to the criteria we will use.

The Albert Gubay Charitable Foundation's General Fund is currently closed to applications. Please check back regularly for updates.

Applications currently suspended (except Luton Matters)

Lottery fund urges charities not to apply for £362m programme as it plans new version

The National Lottery Community Fund has urged charities to postpone applications to its £362m Reaching Communities grant programme until April.

4 Feb 2025

Welcome

Welcome to The Albert Hunt Trust. We are a grant giving charitable trust that supports local registered charities throughout the United Kingdom.

PLEASE NOTE : In 2023 the Trustees decided to spend The Albert Hunt Trust's entire resources by January 2029. You can read more here.

Steve Morgan Foundation

Changes to our grant giving

26 FEBRUARY 2025

PLEASE NOTE APPLICATIONS FOR 2025 FUNDING

The Gisela Graham Foundation is currently NOT accepting any applications for funding. The application process will re-open in JANUARY 2025 and applications may be submitted at that time.

This form is not currently available. Due to the very high number of applications we have received, we are unable to process any further applications for the time being. Our next meeting is in December 2025. We hope to be able to accept new applications from 15 September 2025, at which time this form will be made available again.

Will Charitable Trust

Important notice - extended closure to applications

03/04/2025: Tudor announces first round of grants under new strategy

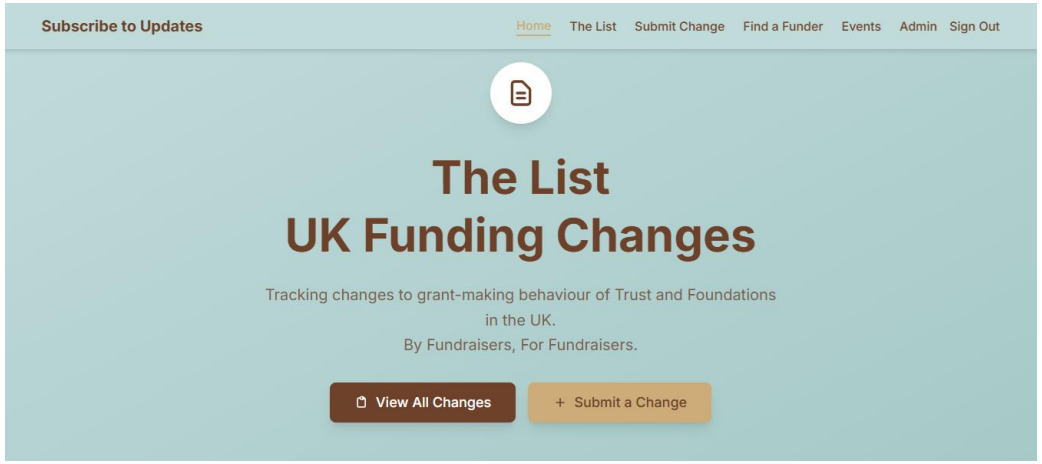
Peter Harrison Foundation

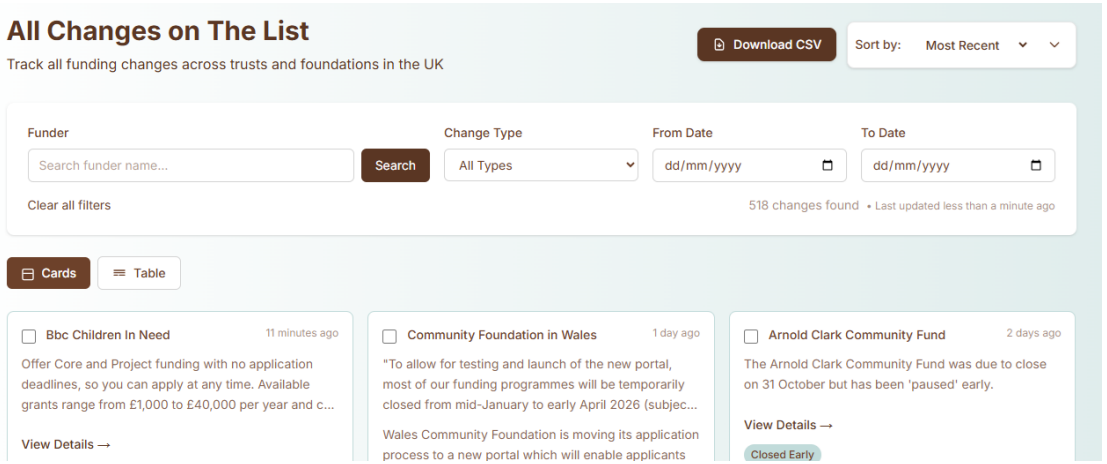
https://peterharrisonfoundation.org › announcement-clo...

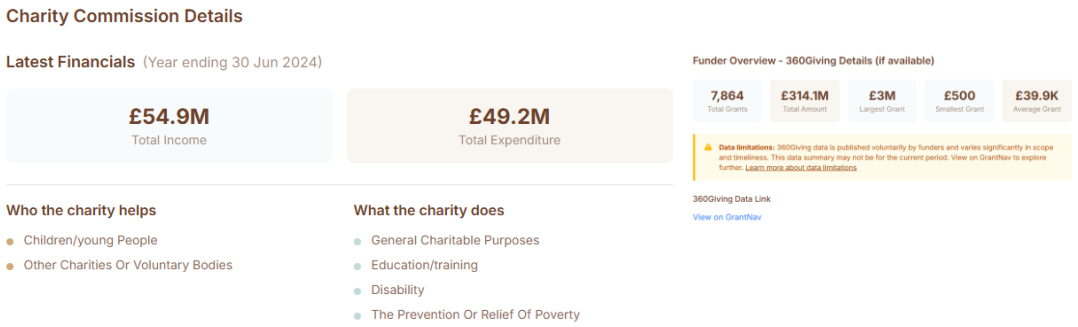
Announcement – closed to applications

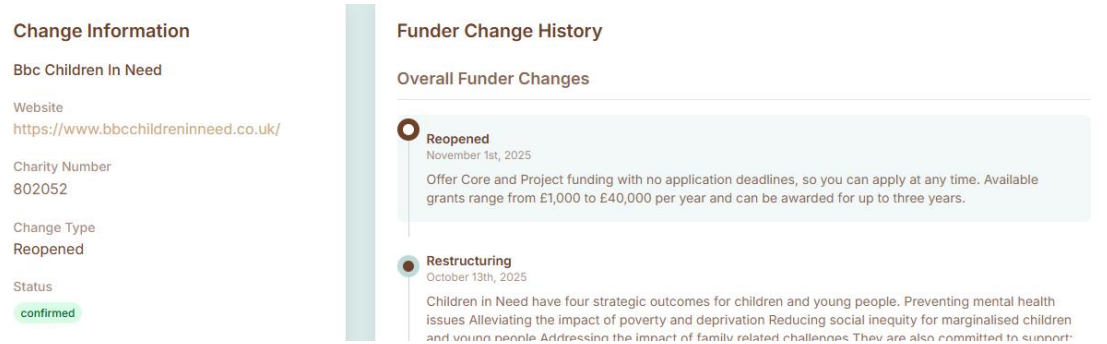
2 Apr 2025 — **The Peter Harrison Foundation is now closed to new funding applications** until further notice. This decision follows an unprecedented surge in demand for ...

The Website









www.the-list.uk

Built by Tom Watson of Data for Action, sponsored by Lamplight

Headlines

- More are Spending Out and moving to Not Open to Unsolicited Applications, previously had open grant programmes
- The rise of the ‘Extended Pause’, ‘Early Closures’ and ‘Short Deadline’
- We are starting to see Re-Pauses, those that have previously Paused having to Pause again
- Early closure is often repeated behaviour
- 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

- Social welfare – 63 changes across 54 funders
- Health – 61 changes across 52 funders
- Education – 44 changes across 41 funders

Changes are affecting all sizes of charitable organisations from

National Trust to Zoe's Place

What trustees need to know about changes in grant-making

- Opportunities are contracting, and funders may change their grant-making at short notice.
- Support your fundraising team by exploring what's changed—and what they need—before asking for more applications.
- Status quo income targets can now be stretch targets.

Further Reading

You can read 'On Golden Ponds'. How are Trusts and Foundations ageing out? What we can learn from The List. August 2024' with Emma Collier here;

https://joannajeffery.substack.com/p/on-golden-ponds

You can read ‘ A Very Quiet Crisis: Charity Sector Challenges and Closures in the UK 2025’ here;

https://joannajeffery.substack.com/p/a-very-quiet-crisis-charity-sector

You can read ‘Open All Hours? Charity Closures in the UK 2024’ here;

https://joannajeffery.substack.com/p/not-open-all-hours-charity-closures

You can read On the #63 Funding for the Jilted Generation - Wider Research Edition - Headlines here;

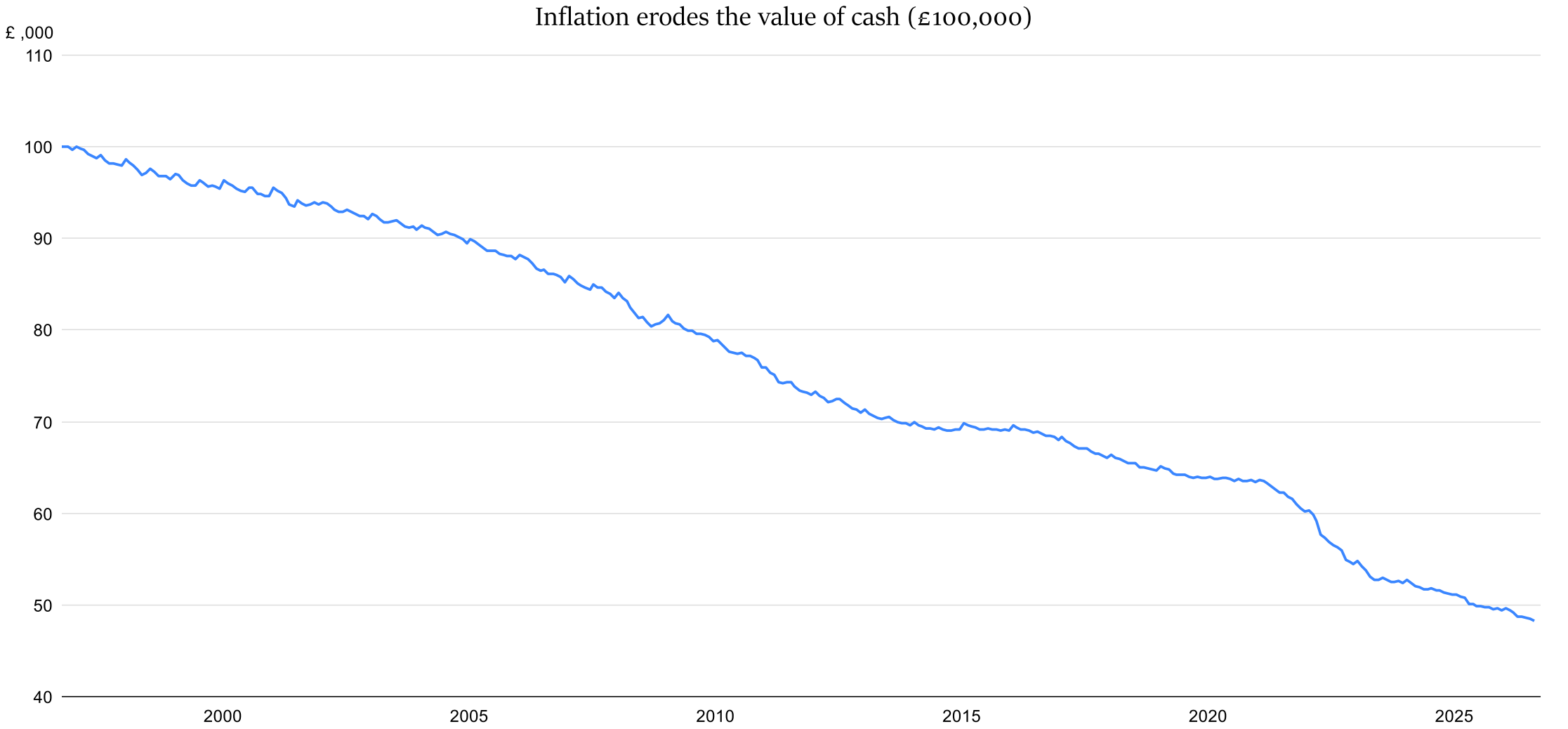
https://joannajeffery.substack.com/p/on-the-63-34b

INVESTMENT CONSIDERATIONS THROUGH A FUNDRAISING LENS

Victoria Davie

Fundraising Across the Board

Erosion effect of inflation on cash (UK CPI)



Source: LSEG Datastream/Evelyn Partners, Data as at 01 Oct 2026

Important Questions to Ask

What are we holding in cash, and why?

How predictable are our other sources of income?

What would we do if we received a large donation tomorrow?

And do we have a clear investment policy that answers those questions?

evelyn PARTNERS

Please reach out :



Victoria Davie

INVESTMENT MANAGER

+44 141 212 9333

victoria.davie@evelyn.com

www.evelyn.com/charities

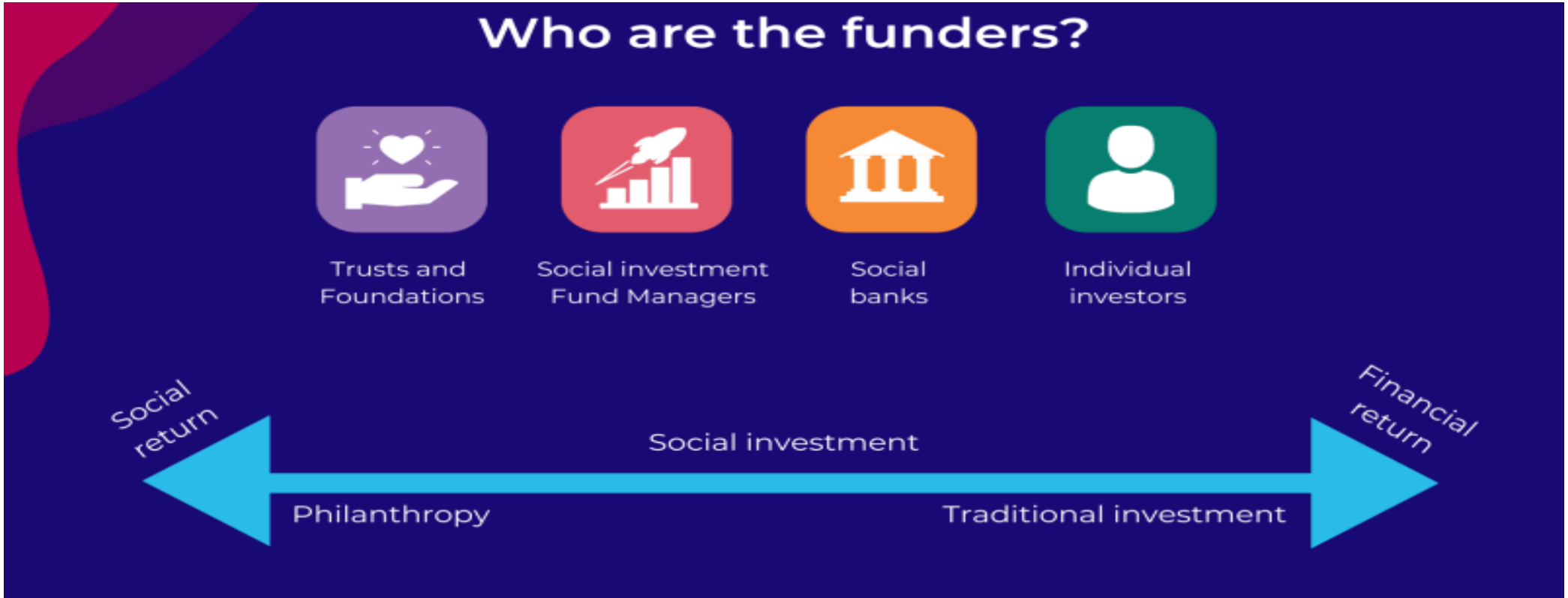
What is social investment?

Jo Simpson

Eastside People

What is social investment?

"Social investment is the use of **repayable finance** to help an organisation achieve a social purpose." (source: Good Finance)



What is social investment for?

Social investment can be an option for social sector organisations who are:

- Looking to build or carry out a major refurbishment on a property
- Looking to purchase a property or properties, maybe moving from leased to owning
- Looking to grow or innovate – a new service, new geography, new beneficiaries etc
- Kickstart your organisation
- Short-term working capital for cashflow etc

You may have already tried other traditional fundraising methods or been turned down by the banks.

Is social investment right for my organisation?

Key considerations when considering social investment:

- Do you have a clear ask and know how much money you will need?
- Do you have, or can you create an income stream, so you can repay any loan finance?
- Do you deliver clear social impact and know how to evidence it?
- Do you have the right people and resources to do this?
- Is your governance, legal structure fit for purpose?
- Can the board give the support and oversight needed?
- Do I have an asset to secure against? (not always required)

Useful resources

Good Finance: www.goodfinance.org.uk

Reach Fund: www.reachfund.org.uk

Social investment business: Funding for Charities & Social Enterprises - Social Investment Business

Big Issue Invest: Social Impact Loans for Social Enterprises and Charities - Big Issue Invest

CAF Venturesome: Venturesome Impact Fund | CAF

Charity Bank: Loans - Charity Bank

NCVO - Social investment | NCVO

Jo Simpson, Eastside People jo@eastsidepeople.org

Eastside People

The Festival of Trusteeship 2026

Thanks for joining us

Charity Trustee Hub: The one-stop shop for resources, events, and top tips for charity trustees.

https://bit.ly/4yY9Rtv

Top tips:
The SORP, Fundraising Code and Charity Governance Code.

https://bit.ly/4zvZ7Ur

Trustees' Week

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