



Trust Fundraising Triage:

Diagnose, Prioritise, Transform

Rosa Fund Summer Conference 2026

Host:

Stacey Teece Trust Fundraising Consultant



Stacey Teece

Trust Fundraising Consultant



- 20 years' experience in income generation and relationship building
- Proven success across diverse causes: health, social welfare, animal welfare, disability & fuel poverty
- Experience with both large national charities and small community organisations

The Current UK Trust Funding Landscape

- High competition: oversubscribed trusts
- Success rates: often <25%
- Repeat funding getting harder?
- Relationship-building + strong proposals is essential
- Shift from quantity to quality in applications



When did you last really look
at your Trust fundraising pipeline?

In A&E, you don't treat everyone at once. You identify what's critical. You prioritise. Then you act

Diagnose / Prioritise /
Transform



Four diagnostic areas

1. Case and narrative

Do you have a case for support and is it doing its job as a living internal resource?

2. Pipeline & prioritisation

Is your pipeline a working, thinking document or just a “to do list”?

3. Decision-making

Are you making decisions based on alignment or volume?

4. Capacity and pace

Are you doing things that aren't earning their place?



Is your case for support doing its job as a living internal resource?

- Last updated with new stats only — no new stories, case studies or testimony
- Language hasn't been refreshed — familiar phrases that no longer land
- Missing newer angles: social value, beneficiary involvement, co-production
- Writing tailored applications still feels like starting from scratch

Is your pipeline a working, thinking document or just an income forecast or to do list?

- Prospects added but never reviewed or removed
- No distinction between warm relationships and cold leads — everything treated the same
- Values added up to hit the target, not assessed for genuine fit
- No record of last contact, last outcome, or next action, especially Stewardship

Cold success rate: 1 in 10

$$\begin{aligned} &\text{Target (£60,000)} \div \text{Average ask (£3,000)} \\ &= 20 \text{ grants needed to hit target} \\ &\times 10 = 200 \text{ applications} \end{aligned}$$

Is your average ask high enough to hit your target?
Is your target grounded in what your pipeline can deliver?

Are you making decisions based on alignment or volume?

- Applications driven by deadlines, not strategic fit
- Pressure from above to "just apply" — the ask feels hard to refuse
- No clear criteria for what makes something worth pursuing
- Fear of saying no — every prospect feels like potential income you can't afford to lose

What are you doing that isn't earning its place?

- Reporting that costs more time than the grant was worth
- Maintaining relationships with funders who haven't given in years — out of habit or hope
- Applying annually to the same funders without questioning whether the relationship has moved on
- Researching prospects in detail who were never a realistic fit

Three tools you can use this week

30-min pipeline refresh

Confidence Tiers

Stop-Start-Continue



Confidence Tiers

I usually use four tiers.

High - strong relationship, previously funded, clear fit
60 to 80% confidence

Medium - good fit, no prior relationship, competitive fund
30 to 50% confidence.

Low - cold, weaker alignment, high competition
10 to 20% confidence.

Very Low - barely fits, cold, highly competitive
0 to 5%.



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30-min pipeline refresh

Confidence Tiers

Stop-Start-Continue



Your Triage Notes

Before we finish today make a note of:

- One bottleneck you've diagnosed
- One thing you'll treat first



Three things to take away from today's session



1. Doing less, but better, IS a strategy
2. Your Pipeline and your Case for Support are levers
3. You have permission to question your targets.





Q & A

Let's carry on this conversation so we can keep helping you with your trust fundraising.

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