Checklist for grant applications:
Key factors for building a successful grant application

After researching possible donors and funders for your charity, use this checklist to identify key points to consider before making a grant application.

Even though some COVID-19 emergency funding opportunities have shorter and less involved application requirements, you will still need to give this some thought. This checklist will help your organisation to respond to potential questions from funders, be on the front foot and be confident about your application.

You may not have each point completed, or started. For example, you may not be in a position to give a full financial plan, but if you have agreed the basic costings and decided what action you will take to develop this plan, then you will be in a much stronger position to apply for a grant.

The checklist: key factors for successful funding applications

✓ A **strong vision and mission statement**, which clearly expresses the difference your charity wants to make and how it will achieve this. With increasing competition for philanthropic funds, it's important to be able to briefly and succinctly explain the impact your fundraising will have. If you already have a vision, update it to reflect how you plan to respond to the effects of COVID-19 and how you aim to help your beneficiaries going forward.

✓ A compelling and clear **case for support** which conveys the need for your charity's project activities or services; what your solution to the need is; and what outcomes your solution will provide. We have also produced some guidance on writing a case of support and on outputs and outcomes.

✓ A **'shopping list'** of your project/activity/service costs and/or running costs broken down into easily identifiable chunks to be funded.

✓ **Commitment of time and resources to fundraising** from your trustees and leadership. It is important that your trustees understand that successful fundraising takes time and resources and that they are committed to fundraising across the organisation.

✓ Well organised **administration and financial management.** It's essential to have people who are opening the post, banking money and liaising with funders. You will need to show that your finances are well managed, including regular financial statements, annual reports and accounts.

✓ A **fundraising plan** should practically define how you intend to implement fundraising. Set out how much you aim to raise and for what purpose, by when, from whom, laid out in a clear table with dates and tasks listed. In your plan, consider several streams of fundraising income, and how they will work together to maximise benefit for your charity.

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✓ An **implementation plan** will help you deliver your fundraising plan; clearly identify who will take forward the actions and manage the milestones set out in your fundraising plan.

✓ Make sure you are aware and adhering to **fundraising regulation**. For example, make sure data protection statement is up to date to show that you are protecting donors' personal information. The fundraising regulator has further guidance (**https://www.fundraisingregulator.org.uk/code**) on the Code of Fundraising Practice.

✓ Clarity on **who is responsible for fundraising** in your charity. This may be one dedicated fundraiser or a wider team who share the load. It is important to be clear on who is responsible for delivering on fundraising targets, and they have enough time and support to do so.

✓ Thorough **research and recording** of possible donors and funders. Make sure you have a way of recording the causes supported by these potential funders and donors, how to apply, deadlines and any requirements. We have developed some useful tips to help you to organise your research into possible donors and funders. You may want to separate the COVID-19 funders (as they are likely to have imminent deadlines) from ongoing, regular funders where your application is less time critical.

✓ A way to say **thank you** to donors and supporters. Make sure you have considered the various ways you can thank and recognise funders, such as a donor board, a mention in newsletters or social media posts.

✓ **Monitoring and evaluating the impact** of your project is important to funders. Reporting your impact is a key part of successful fundraising, so consider how to do this and the key metrics you will focus on.

✓ Consider how you will **report back to the funder**. Grant funders will expect to see evidence of the impact of their grant. Not all funders will ask for a follow-up report for their funding but it is best to be prepared.

Next steps

Once you have gone through the checklist, it's helpful to create a timeline grid to address key areas that your charity wants to focus on. An example is shown here:

Action	Person	Complete by
Re-evaluate fundraising plan and commit resources to fundraising	Leadership team	15th September
Research into Covid-19 recovery funds	Volunteer fundraiser	1st October
Produce monthly newsletter to keep donors informed on Covid-19 recovery	PR and marketing manager	First newsletter to go out on 1st November

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