

Researching possible donors and funders

Successful fundraising and grant applications begin with research into possible donors and funders. We understand the process of finding the right funder for your charity can often be overwhelming and time consuming. To make your search quicker and easier, we have collated key sources and developed a template to help you organise your research.

Starting your research – where to go

The following sources are a good place to start your research. They include lists of COVID-19 emergency funding, as well as more general funding directories:

Site	Comment	Directory for:			Costs
		General Funding	COVID-19 Funding	Other resources	
Charities Aid Foundation (CAF)	A wide range of support and guidance on all aspects of charity finance and fundraising. Includes helpful insight reports and research.	✗	✓	✓	Free
Charities Excellence framework	Contains several online health-check questionnaires for your charity to review fundraising, governance and impact. You must register on the site for access.	✓	✓	✓	Free
Charity bank	List of funds for struggling charities and social enterprises.	✗	✓	✗	Free
Funds Online	Contains four lists of funding sources including grant making charities, statutory sources and contributions from companies. Run by the Directory of Social Change, who provide further resources and training on their website.	✓	✓	✗	Subscription

Site	Comment	Directory for:			Costs
		General Funding	COVID-19 Funding	Other resources	
GrantNav	This directory includes both general funds and COVID-19 emergency funding.	✓	✓	✗	Free
Grants Online	Contains regional funding information, as well as funds organised by cause. Grants Online also have a separate regularly updated list of COVID-19 funders.	✓	✓	✗	Free and subscription
Local community foundations	46 local community foundations across the UK provide support to local grassroots charities and groups. Check the UK Community Foundation website to see local support in your area.	✓	✓	✗	Free
Lottery good causes	Provides information on the various lottery fund programmes available.	✓	✓	✗	Free
The Heritage Funding Directory	Funding for the heritage sector. Further COVID-19 support resources for the heritage sector can be found on the Heritage Alliance's Covid-19 hub.	✓	✓	✗	Free
Third Sector	Third Sector's new COVID-19 grants tracker, for Third Sector members only. Third Sector also provide news and insights from across the charity sector.	✓	✓	✓	Subscription

Some of these websites charge subscription fees, so consider if you are part of any umbrella organisations or a network that already has access, that will mean you do not need to pay. It is also worth researching the annual accounts and reports of other charities and organisations doing similar work to you, to see which funders have supported them. Annual reports are in the public domain and are available via the **Charity Commission** website.

Once you have researched and found potential funders, the sources below offer support and guidance to help write a successful application:

- Building a Strong Case for Support guide highlights key grant application questions and how your charity can respond to them.
- **The Charity Commission** has information on all UK-registered trusts and foundations, including annual reports, names and contact details of trustees. Use this to see the size of grants a funder usually gives, the causes they support and if you can map a connection to any of the trustees.
- Funders themselves are often useful sources of information about how to write a stronger application. For example, **The Garfield Weston Foundation** has a list of useful resources on grant applications.
- **The UK government** has basic advice available for new charities starting to fundraise for the first time.
- **The Institute of Fundraising** is a valuable source for fundraising updates and information on grants and trusts, including guidance on the perfect grant application.
- **NCVO's** range of resources to help charities with fundraising and income are currently free to view during Covid-19. Usually this content can be accessed by members only.

Researching donors and funders – what to look for

When researching possible donors and funders, you will need to consider the types of information in the table below. We have provided a downloadable template for you to capture this information during your research. Examples of how you can use this template are provided on the next page.

Name	Name of potential funder or donor
Type	The type of potential funder that you want to approach. These include trusts, foundations, corporate funders, statutory bodies and philanthropic individuals who may be able to support your activities.
Area of interest	The potential funder’s areas of interest, the fit with your organisation and the projects/activities which need funding. For example, the funder may be interested in the protection of the environment and natural heritage; promoting the arts or helping marginalised sectors of society.
Past giving	Other charities, projects or organisations that a funder has supported in the past, and what kind of grants they have awarded. The funder may have a particular track record in supporting grass root community groups or the restoration of museums and heritage buildings. Understanding what a funder likes, or has a tendency to support, will help you to work out if they are a good match for your organisation. Knowing about relevant past grants or gifts, including the amount, will also help you gain a sense of what level of gift to request.
Key people	Try to find a list of trustees, key executives or administrative staff (such as a grants manager) of a given trust, foundation or funder. These should be listed in their annual reports or provided on the given funder’s Charities Commission website listing. Try to map a route to any of these through your networks to effect an introduction or letter of endorsement.
Procedure	Any key elements in the funder’s application process including deadlines and any financial information or supporting materials that they require. Some may wish you to complete a paper application form (rather than online) while others have an online quiz to assess your suitability for their grants. Some funders have several deadlines per year so think about which deadline ties in best with your charity’s governance process.
Important to note	Any special considerations relating to your approach to this funder or donor for a grant or gift. For example, some funders exclude capital projects or ongoing costs.
Target amount	The target amount that you will be seeking from this donor, taking their areas of interest and track record into consideration.
Next steps	What your organisation needs to do next to approach this donor or funder. For example setting up a phone or video meeting with the grants manager or drafting an application for funding.

Top tip: It can be helpful to colour code each of the possible funders/donors to show their potential to give a gift or grant to your charity. This can be according to their likelihood to give or the possible size of their financial contribution. Colour coding can help you to prioritise your approaches and applications. For example: **green** – most likely to give to your charity; **amber** – may give to your charity; **red** – unlikely to give to your charity.

Example research template

Name of funder Name of potential funder or donor	The XYZ company	AN other Trust
Types Individual, trust/ foundation, corporate, or statutory funder	Corporate funder	Grant-making trust
Area(s) of interest What is the funder's area of philanthropic interest, as relevant to your charity	Tackling homelessness	Animal welfare and protection
Past giving The kind of projects and organisations that a funder has supported in the past	Donate £50,000 annually to a range of homelessness charities	£25k to local dog shelter. £10k to XYZ care farm
Key people A list of trustees, key executives or administrative staff (such as a grants manager) of a given trust, foundation or funder	CEO: Miss Y, Corporate responsibly manager: Mr Z	Trustees: Mr A, Mrs B, Mr C, Mrs D
Procedure The application procedure of the potential funder	Online application form with 10 questions.	Email application. Confirm eligibility first
Important to note Any special considerations relating to your approach	Annual reports, quotes and testimonials needed for application.	The trust excludes ongoing staff costs
Target amount Proposed target grant or gift	£5,000	£25,000
Next steps Proposed target grant or gift E.g. set up meeting or draft application	Gather testimonials and prepare application	Email their grants manager to confirm eligibility

Find an empty template on our website.