Voscur

Supporting Voluntary Action

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Funding bids planning checklist

Most major funders report that bids fail for simple, basic reasons. The project was ineligible, a question wasn't answered, the budget didn't add up, a document wasn't provided, the bid arrived after the deadline. Most of these problems can be overcome if you plan ahead, and the checklist will help you to do this.

Before you make up your mind to make an application;

- Have you double-checked the criteria to make absolutely sure you are eligible and that you are applying for the right amount?
- If the funder asks you to contact them to discuss your ideas before applying, have you done that?

Got the right funder? Now plan your application.

- Read the list of accompanying documents that you'll have to submit with the bid, for example your latest set of accounts or Equal Opportunities policy. Make sure you have the most up-to-date version now or start hunting for well before you need them.
- If you have to submit a copy of your governing document, make sure it's properly signed and has the date it was adopted.
- Look at the type of budget you'll be asked to provide and the detail of how you'll be asked to lay the figures out. For example, you may be asked to show VAT as a separate cost. Make sure whoever will be providing the financial information is clear about what's needed and has agreed the timetable (see below).
- Read through the form you'll be asked to complete, and the guidance notes. Make a note of anything you'll need to bear in mind - for example, word limits for answers.
- Put together a timetable for each task, starting at the final submission date then working backwards. Although you may be the person with overall responsibility for fundraising you'll always need to involve other people if you are to produce a good bid. A timetable will make it clear when things have to be completed by, and will allow everyone to plan ahead.

Your timetable will look something like this.

Task	Date for completion	responsibility
Final agreement on project plan	30th Jan	All/Trustees
1st draft project budget	20th Feb	Jan
1st draft application out for comments	21st March	Jo, Jez
1st draft comments submitted	28th March	All
2nd draft full application	10th April	Jo, Jez, Jan
2nd draft submitted to 2 external readers	10th April	Baz
External readers comments received and incorporated.	18th April	Jo, Jez

Final draft produced and out for comments	28th April	Jo, Jez
Final comments received	3rd May	All
Online application completed and submitted	12th May	Jo

- Always add an extra fortnight to your plan to allow for unforeseen happenings - a key staff members sickness for example. The deadline for the (fake) application above is noon on 31st May, so the plan leaves time to absorb the effect of unexpected delays.
- Find two people who know little or nothing about your work to read the final bid and comment. This will check that you've got your message across clearly and straightforwardly.
- During the final draft make sure that the budget headings exactly match the description of what you're going to do with the grant.
- Before the final submission, get someone who hasn't been involved up to now to check and re-check the budget and make sure you've added it up correctly.
- If you are submitting a paper application that has to be signed by a Trustee or Chief Officer, put this into your timetable and check that they will be available when you need them.
- If your application is to be submitted online ALWAYS start the final submission at least two days before the deadline. Some online systems are hard to manage, and accidents can always happen if you press the wrong button. If something goes wrong and there's no time to fix it before the deadline all your hard work will be wasted.

Other useful reading

IDOX Funding Survey 2014 - key findings

http://www.evolvederby.co.uk/sites/evolve/files/u181/IDOX%20Funding%20Survey%202014.pdf

The top ten reasons why bids fail

http://www.thirdsector.co.uk/top-10-funding-application-errors/fundraising/article/1143212

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