

# Fit for grants checklist

There are many reasons why a grant may be turned down, organisation eligibility or failing to meet the grant criteria being amongst the most common.

This simple checklist is designed to help you double check your application and ensure you have included the information requested and provided a clear description of your work. Below are some of the common things that are missed out in applications which can lead your hard work ending up in the bin.

Always remember that grants are only one type of funding source; whilst good to fund pilots and specific projects they are harder to secure for core organisational costs. Other sources such as donations, community fundraising, self-generated income and corporate sponsorship are also worth pursuing.

0	Pre application – is your house in order?	Done	Notes
	Have annual returns been submitted to the relevant authorities – eg Charity Commission/ Companies house?		
	Are trustee/director details correct?		
	Have accounts been submitted?		
	Does your organisation have relevant policies/procedures in place? E.g, Safeguarding, Welsh Language, Equality Diversity and Inclusion.		
	Has there been any adverse publicity about the Charity?		
	If the answer is 'Yes to the above, don't ignore the fact – tell the funder why this is – don't let them just find out something has not been done		
1	<b>Eligibility</b>		
	Have you checked that your organisation is eligible to apply? Some only fund non-charities, have income/regional restrictions etc		
	Does your Governing document give you the powers to deliver what you are applying for?		
	Are there restrictions on how often you can apply the funder? Many funders have a time limit in which you cannot reapply		
	Does your Governing Document allow you to apply for funding? Some organisation can have restrictions on who they can apply to e.g.: Churches not applying for Lottery funding		
	Is the funder offers contact information available? Have you made contact to run your idea by them to make sure it is of interest to them.		
2	<b>Criteria</b>		
	Does your project/organisation fit the purpose of the grant you are applying for? And also fit your own aims?		
	Have you checked the latest criteria for the funder? They can change their criteria without notice.		

	Have you checked for any exclusions? or example they may only fund capital ( <i>e.g. buildings and physical objects</i> ) projects or only fund revenue ( <i>e.g. staffing or activity costs</i> ).		
<b>3</b>	<b>Project description</b>		
	Are the aims and objectives of the project clear and realistic?		
	Have you given a clear and transparent description about what you want to do and how you will spend the money?		
	Have you avoided jargon and technical language?		
	Have you made it clear who will benefit and how; including how many people?		
	Does the application create a sense of urgency?		
<b>4</b>	<b>Demonstrate Need</b>		
	Does the project show how it benefits people – not just the organisation?		
	Have you demonstrated the need from the community and their involvement with the planning – evidence of survey, user groups, consultation for example?		
	Does the project clearly address the need you have highlighted?		
	Do you have statistics and hard facts to back up any claims? For example, Welsh Index of Multiple Deprivation, Census data, Heath Needs Assessment		
	Can you show how the project fits in with other local initiative and strategies and avoids duplication?		
<b>5</b>	<b>Planning</b>		
	Does project fit with other work of the organisation/ add value to what you already deliver?		
	Who will manage and deliver the project?		
	Grants typically take 3 months or more to be awarded; ensure that there is enough time to be awarded the grant before the money needs to be spent. Funders do not like retrospective grants		
	Have you identified how the project will continue once the grant ends?		
<b>6</b>	<b>Evaluations</b>		
	Have you clearly described how you will measure the change that the project is making? What methods will be used and how will findings be reported?		
	How will you use what you have learnt from the evaluation to improve future services?		
<b>7</b>	<b>Presentation</b>		
	Have you had someone proofread the application for accuracy and ensure it makes sense to someone from outside the organisation?		
	Does the application look appealing? Have you included images (where allowed) and colour; remember you do not always have to present your appeal as a letter.		
	Does the application follow the funders guidance for length and content?		

8	<b>Application Forms</b>		
	Does the funder have a specific application form; have you used the correct one?		
	Have you answer all the questions (Unless they are optional)? Read the guidelines for pointers on what information they want your answer to contain. Many questions have sub questions which should be addressed.		
	Have you kept to their word limits? Use the word limit guide on how much information you give. <i>Eg a 500 word answer is unlikely to score well if you just write 50 words; it will lack the detail they are looking for.</i>		
	Have you attached any additional forms or documents they request?		
9	<b>Timing</b>		
	Are you submitting in time to meet the deadline?		
	Does the project need to start before a grant would be paid (most have at least a 3 month timescale)		
10	<b>Costs/Finance</b>		
	Have you set a clear budget, and does it add up correctly?		
	Are the costs realistic and can you justify them/ have quotes for large items of expenditure?		
	Does the project represent good value for money? For example can you give a cost / beneficiary?		
	Can you deliver for the amount of money requested? and have all on-costs/overheads ( <i>e.g. management or organisational costs needed to run the project</i> ) been included ( <i>where allowed</i> )?		
	Have you been able to provide any match funding or have volunteer contribution of time		
	If your organisation has a large sum in reserves (for example over 12 months running costs), explain why. Don't shy away from explaining as it can often be the reason for rejection		

## A couple of final pointers:

Check the Charity Commission website to find out about the Trust you are applying to, have a look at their accounts to see who they fund, and the size of past grants awarded.

Consider what makes your application more worthy than one from a similar organisation.

### Remember!

If you don't have all the information above, you can access support for policies, volunteering (including recruitment and role descriptions) and funding advice from Third Sector Support Wales (TSSW).