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# Working Together: Grant Fundraising

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## About this guide

As a small organisation, employing a freelance grant fundraiser is likely to represent a big investment of time and resources, so you'll want to make sure whoever you're employing can support you to the best of their abilities.

I have made this guide to provide you with all the useful information you need before you start working together, so you can best understand what a fundraiser can help you with, the likely return on investment you can expect, and what you will need to do at your end to maximise your fundraising efforts.

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## Grant Fundraising in 2025

You've probably heard that grant fundraising has recently become harder.

It's certainly true that many funders have been making changes to their criteria and/or application process - with many no longer accepting unsolicited applications. But it's important to remember that those funders only represent a small-ish part of the sector.

Another key trend has been funders closing application windows early, often with very little, if any, notice at all. Both these trends have largely been driven by a massive surge in the number of applications they've been receiving.

At the same time, we've also seen the continuation of a longer-standing trend, with the number and size of grant-makers "spending out" exceeding the number and size of new funders being created.

David Burges of Apollo Fundraising wrote a really good summary of what you can expect this year:

- The biggest challenge for charities and fundraisers will continue to be the higher number of applications you're competing against, not the number of funders closing or pausing.
- The total amount of funding distributed by grant makers this year will be broadly in line with previous years. However, the number of funders changing the way they make decisions will almost certainly increase.
- It doesn't matter what's going on across the sector - what matters is what changes are being made by the specific funders on your prospect list. Focusing on this will help you adapt in the best way.
- The priority for most organisations this year will need to be consolidating your relationship with existing and recent funders, as well as those you

have started to build a relationship with. This includes funders you have applied to over the last 3-5 years.

- When it comes to proposals, the priority should be quality over quantity (but isn't that always the case?).
- I think we'll see a shift away from grant-makers looking for new/risky/"innovative" projects and, instead, a greater focus on supporting projects with a proven success record that they can help sustain and scale. As a result, charities and fundraisers need to get better at measuring and sharing their impact.
- With more funders taking a proactive route, fundraisers need to consider how "findable" their organisations and projects are and take steps to improve this.

You can read the full report [here](#). If you would like to understand better what's happening in the sector at the moment, these are all good articles:

- [Alex Hayes - Why have so many funders closed to applications, Civil Society](#)
- [Alex Evans - Application Apocalypse!, Barely Civil Society](#)
- [Jo Jeffery - On Golden Ponds, Circles](#)

This isn't to say that Trusts & Foundation fundraising isn't and will not continue to be an important part of many (most) charities and CICs' income mix. But it's important to understand that (as has always been the case really!) it can only represent one part of your strategy - and that in an increasingly competitive landscape it's important to think beyond grant writing, to consider fundraising strategically, and ensure your organisation is, to paraphrase [Kevin Brown](#), findable and fundable.

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## Before you get started - essential documents

Grantmakers want to fund organisations which are well managed, solvent, have appropriate policies in place, and can adequately demonstrate impact – and a big part of fundraising is ensuring your organisation can clearly demonstrate this.

This is not something which can be “made better” through good writing - funders will check your charity commission entry and your online presence. And they will often ask you to upload policies, management accounts and other supporting documents.

It's important that all of your documents tell a consistent story - about your mission and vision, and how you get there. It might not seem like it, but accounts and budgets, policies and governing documents, social media accounts and websites tell much more about this than you might realise. And funders will be looking!

Below is a checklist – but don't worry if you haven't got everything in place yet. Development is a process, and, depending on your organisation's size and project, you can often start fundraising with just a few things in place! In red are absolute essentials you will need before you can do any kind of grant fundraising.

### Checklist: [Funder Ready Checklist](#)

It's also very important to understand that effective fundraising is about much more than bid writing (more on this below). Typically, working with a fundraiser will involve:

- Building clarity around what you do and why. This could involve reviewing your Theory of Change and impact framework, or drafting a new case for support - and it will require your input as all this information needs to be true to your work and embedded across the organisation

- Strengthening internal systems to support fundraising and grant management. This might involve reviewing and setting up data collection systems, or creating templates for reporting and budget management. This will require support and input from your admin/delivery function, so that it best fits your organisation's needs and is commensurate with your capacity and aligned with your work patterns.
- Reviewing your communications - to ensure your organisation's mission and work is reflected consistently across all your channels. Your fundraiser will need to work closely with your Marketing or Comms team for this.

Like with the checklist above - you don't necessarily need to wait to have done all of this work before you can start fundraising. But you will need to work with your fundraiser on this throughout your time together.

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## Forecasting Income

At the beginning of your time working with a fundraiser, they will work with you to agree on a fundraising target. This will be worked out from a combination of:

- Funding gap. How much you need to raise to continue activities at their current level
- Future plans. Where do you see your organisation 3 - 5 years from now, and what would take you there
- Past fundraising. How much have you raised to date, and what's your success rate like for warm and cold prospects

They will then look through your existing prospect list and/or do some additional research for you, and put together a fundraising plan.

This is basically a spreadsheet which will map out your applications for the year and forecast your income. It will have columns for:

- Funders name
- Amount of funding sought
- Success rating (more on this below)
- Amount adjusted to the success rating percentage

Everyone will have their own way of doing this, but I would recommend keeping it simple and splitting your prospects into 3 categories:

- Funders who have never given to you before (cold prospects)
- Funders who have given to you before, but have not made an ongoing commitment (warm prospects)
- Funders who give to you regularly (regular donors)

To each of these categories, you will need to assign a success rate, working it out as an average over the past 3 years. For example, if you applied to 50 funders over the past 3 years who had never given to you before, and 10 gave you a grant, your success rate for cold prospects will be 20%.

Once you've done this, all you need to do is multiply the amounts sought by the relevant success rating and add them up.

## What fundable looks like

There is no amount of good writing that can make up for your organisation not having the right expertise, evidence, and policies and procedures in place to reassure prospective funders that you are a safe investment with the ability to affect real positive impact.

Your fundraiser can support you to become more fundable, but you will need to do the work here.

Essential	Good	Very Good
<b>Financials</b>		
<p>Last year's audited accounts showing:</p> <ul style="list-style-type: none"> <li>Ability to meet your financial obligations and continue operating for at least the next 12 months.</li> <li>Sufficient reserves, in line with your reserves policy</li> </ul> <p>Yearly budget and cash flow forecast</p>	<p>A well-balanced funding mix - as evidenced in your accounts and/or cash flow forecast &amp; budgets</p> <p>Strong financial processes in place, including:</p> <ul style="list-style-type: none"> <li>People responsible for setting, managing and overseeing budgets</li> <li>Processes for recording and checking expenditure and income</li> <li>Procurement policy and processes for signing off expenses</li> <li>Processes for managing access to financial information</li> </ul> <p>Staff &amp; Board expertise managing organisation finances</p>	<p>A 2-3 year business plan, showing your organisation's plans, its strategy for achieving those plans and its long-term viability.</p>
<b>Leadership</b>		
<p>Unrelated board members and /or min 2 directors (CIC) and 3 for charities</p> <p>Leadership team with the relevant experience and skills to lead the organisation, including experience of:</p> <ul style="list-style-type: none"> <li>Managing budgets/ finances</li> <li>Managing teams</li> <li>Safeguarding &amp; data protection</li> <li>Experience working on the issue / with the communities the organisation serves</li> </ul>	<p>Lived experience at leadership level</p>	<p>Board reflecting a diversity of lived and professional expertise - as relevant to your organisation</p> <p>Evidence of community leadership throughout the organisation.</p> <p>Thought leadership: evidence of the organisation being a respected voice in its field - sharing knowledge, insights and perspectives to drive positive change</p>

Essential	Good	Very Good
<b>Track record</b>		
<p>Staff / Leadership team have a track record of successfully delivering similar programmes.</p>	<p>Beneficiaries data - highlighting the organisation's existing / past reach:</p> <ul style="list-style-type: none"> <li>• Numbers</li> <li>• Demographic data</li> <li>• Location data</li> </ul> <p>Outcomes framework / TOC and past outcomes data - evidencing impact</p> <p>Case studies and beneficiary quotes</p>	<p>Past programme evaluations/project reports</p> <p>Social proof - existing donors and supporters, and/or partner organisations</p> <p>Online presence evidencing the organisation's impact / telling the organisation's story of change</p> <p>Received independent recognitions/ awards and accreditations for programmes and organisation.</p>
<b>Risk Management</b>		
<p>Public Liability Insurance</p> <p>Health and Safety Policy</p> <p>Safeguarding Policy and DBS checks, where relevant</p> <p>Privacy Policy and Data Retention Schedule</p> <p>Membership of all relevant regulators:</p> <ul style="list-style-type: none"> <li>• Charity Commission / CIC Regulator</li> <li>• Fundraising Regulator</li> <li>• ICO</li> </ul>	<p>Financial controls to prevent fraud and mismanagement of funds</p> <p>Processes for managing restricted funds</p> <p>Clear roles for Trustees / Director to oversee different areas of compliance (and relevant skills/expertise) including:</p> <ul style="list-style-type: none"> <li>• Safeguarding</li> <li>• Health &amp; Safety</li> <li>• Finance</li> <li>• Employment and Company Law</li> </ul> <p>Staff have the necessary skills and expertise</p>	<p>Risk register/risk management plan - regularly reviewed at Board Level</p> <p>Ethical fundraising / Donations Refusal Policy</p> <p>Comms / PR Policy and Plans, and strong Comms expertise on your Leadership Team</p>

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## Working together

Fundraising is a collaborative process. In order to do their job, your fundraiser will need to work closely with a number of people in your team. Everyone will have their own way to do this, but this is the process I use when working with clients.

### Before we get started

#### *Setting targets*

When we first start working together, we'll agree on a fundraising target for the year. Each year we will then review last year's target and set the next year's accordingly.

#### *Fundraising plan*

In line with your target, I will prepare a fundraising plan for the year, which will map out the funding applications we will work on together and forecast income.

You might already have a very busy pipeline, or I might need to do some additional prospect research. I will also regularly update this research. I usually do this as I go along - but I might occasionally need to do an additional day or two of research throughout the year.

#### [Pipeline, Grants Research & Action Plan](#)

#### *Big projects*

As we work together we might identify some key projects for us to work on together, alongside bid writing - to support your fundraising. This could include:

- Reviewing your impact framework
- Setting up data collection / reporting
- Reviewing and updating your website / social media content
- Developing a calendar of networking / comms opportunities
- Developing funder cultivation plans

These bigger pieces of work will most likely involve different people in your team, and would take place alongside the other stuff.

### Regular Reviews

#### *Reviewing Projects / Departments*

I try to meet with clients yearly to review specific projects/departments - and map out the year ahead in that area of work.

These are usually 2 x 1 / 1.5 hrs long meetings - which we use to fill in a Project Review and a Project Plan document. In the first meeting we will look at how that specific area of your work has gone this year - what went well, what didn't, what we've learned and will take forward into the next year. In the second meeting we map out the yearly budget, key partners, evidence of need, outputs, outcomes & evaluation.

#### [Project Review](#)

#### [New Project Development](#)

#### *Reviewing Key Documents*

We're also periodically going to review your case for support and impact framework - to make sure all the information is up to date, and still aligned with your work

## Developing Applications

This is the process we will usually go through when we're working together on applications. For smaller amounts we might not need to meet to develop the project, and all the information I need might be already included in the Project Plan / Case for Support. Meeting a specific deadline does rely on us moving through all these steps at a good pace.

- 1 Brainstorming Sessions: for bigger and/or more complex applications I will meet with members of the team responsible for that area of work - so we can talk about your priorities, see where they align with the funders and map out a basic project outline.
- 2 Budget & Outputs: I will then draft a budget and suggest some outputs based on our conversation, which you will need to sign off on.
- 3 Collating Information: I might need additional information in order to progress the application. Depending on what the information is we might work together on pulling it together.
- 4 First Draft: I'll send you a first draft - highlighting in the comments extra bits of information I might be missing, or places where I need your input. I will also ask you to check if there is anything in there which doesn't feel true to your work or organisation. A fundraiser will try to find synergies between yours and funders' priorities - sometimes it might mean framing things differently, but it shouldn't feel completely alien.
- 5 Final Draft & Sign Off: We will discuss any points you've raised / questions you have and I will make relevant changes. A member of your team will need to do a final sign off.
- 6 Submission

## Communications

Everybody is always super busy - so it's easy for your fundraiser to end up wasting huge amounts of time chasing meetings and information. If you leave a big gap between pieces of work it also makes it really hard to pick things back up again, and wastes a lot of time too. I usually:

- Chase emails / texts / calls no more than twice
- Wait a month for an answer / follow up on a piece of work

If I haven't heard by then I assume that you are no longer interested in pursuing that specific piece of work.

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## Contact

Do you have any questions about this guide? Or would you like to suggest an addition or amendment?

Please contact Elena Italia at [elenaitalia2020@gmail.com](mailto:elenaitalia2020@gmail.com)