



SA-UK Trust Network

Completing Application Forms

Love them or hate them, if potential donors (or even existing donors for re-applying) have forms and require them to be completed, this must be adhered to. Application forms can be tedious. However, some donors take the trouble to draw them up, as they are clear on the specific information that they want. A reason that forms can be off-putting and difficult to complete is that they are generic. Donors often have only one template for forms, irrespective of the diversity of their grant making. How many times have you seen irrelevant questions on such forms? The most difficult forms to complete are often from donor countries where English is not the mother tongue.

Answer the Questions

It is vital that forms are populated properly. There is one simple rule to the correct completion of application forms – answer the questions! Answer the questions **exactly as asked**. An alarming number of people do not carry out this straightforward task and, instead of providing the information requested, fill in inappropriate waffle. This can often be due to ready answers being cut and pasted from generic proposals or from other completed application forms.

Not Applicable

It is acceptable to write in 'n/a' ('not applicable') if a question does **genuinely** not apply to an organisation or the project for which funding is being requested. But, avoid the lazy and quick out of overuse 'n/a'. This is also wrong.

Use Allocated Spaces

Avoid not using the spaces provided by recording information or a budget on a new page as an attachment and inserting, 'see annexure A' or 'see attached.' If this information was wanted or needed by the donor as an attachment, it would have been requested as such. If a space has been provided for information, use it! Study forms carefully as some indicate (and sometimes only pertaining to specific questions or sections) that extra pages may be added.

Repeated Questions

Forms can be irritating as they often repeat questions. Answer them! **Never** direct them to another part of the form by entering something such as, 'See question 6.3'. **But** ensure that it is in fact a repeat request for the same information. It may not be. It could be asking for something similar. Understanding the questions can be the biggest challenge.

Hook Them In

Ensure that the most important information appears in the first few lines when answering a question to 'hook' the reader. Even if there is quite a bit of space allowed for an answer, and even if it is used, it is imperative to grab the attention of whoever reads the form as quickly as possible. Avoid long waffly wording with key points buried near the end of the allocated space.

Practice

If you are not experienced at completing application forms and even if potential donors to an organisation have not announced a call for applications, practice by completing key donors' previous forms. This will help to overcome resistance to this task and prepare for when calls are made, and you may well have developed some powerful yet succinct wording that can be used or minimally adapted when application calls are announced.

The completion of forms presents an excellent opportunity for practising time management within a fund development office. Aside from having sound generic proposals to work from, it is also a good idea to save (in an easily accessible shared folder) similar questions that occur on forms, for easy reference and, of course, to save previously completed forms for quick copying and pasting if relevant. **But do not** do so should an answer not fit exactly. Edit and adapt wording where needed.

Online Forms

More and more forms are online and most have strict limits as to the number of words, and in some cases, even the number of characters is restricted. One tip is to draft answers to questions in a Word document as this enables monitoring of the word count. While it's a good idea to write as succinctly as possible in early drafts, it's more important to capture the relevant information required in each section. Therefore, by starting with a Word document it's better to do a first draft, even if too long. When starting by directly populating a form and the word count is reached, not a single character can be added. Also, in some cases, works in progress cannot be saved very frustrating!

Admin Help

A secretary or fundraising intern could be trained to complete all quick and easy information on forms in the interests of conserving the time of more experienced staff members or volunteers.

Suggested Steps in Completing Application Forms

1. Study the donor's website.
2. Study the guidelines pertaining to the application and very carefully list all attachments required and particularly those that need anyone else's signatures or the certification of documents. This should immediately spark the warning that delays are possible and will require close management.
3. Go over the entire application form.

4. Do **not** begin completing the form. The single biggest mistake that most people make is to dive in and begin randomly populating the form as they believe, mistakenly, that this saves time. 'I'll just fill in what I can for now to get it started.' No!
5. The completion of an application form and compilation of the whole submission (including attachments) should be viewed as a project and should be managed accordingly. **It should be planned.**
6. Consultations must be held with anyone whom such an application would affect. This could be operational staff members who will be responsible for the delivery of the service should the application be successful. The CEO or MD of an organisation may need to sanction a major application. (Always remember that an application form is the foundation of a legally binding contract between the organisation and the donor. Contracts are drawn up based on information contained in application forms. In some cases, no contracts are required as the application form is considered binding.)
7. Address the financial information required early in the process. This may entail:
 - Confirmation that an existing project budget is still current.
 - The financial person (not the fundraiser) updating the pertinent project budget to reflect latest income.
 - The financial person being fully briefed, early, to prepare a project budget within the requirements of the potential donor.
8. Request quotations. This is rarely the task of the fundraiser but the person managing the donor application process must alert the appropriate line manager to instruct whoever is responsible for seeking quotations from suppliers.
9. Request of each person what is needed for the application pack. This might include:
 - Certified copies of identification documents from trustees, staff or volunteers.
 - Certified copies of documents from various sources.
 - Certificates via the finance person (who, in turn, may need to source these from auditors or HMRC.)
10. Instead of completing questions that are easy to do, start by asking the specific questions that you will need help on, and of the appropriate person.

Project Management

Really good project management skills are required. It is vital to carefully manage all requests for information and enclosures, keeping the deadline in mind. Merely requesting budgets, documents or information, rarely results in these being provided. Project management, in this case, will entail on-going following up on all requests with the management of the 'project' of completing a form (**not** to be confused with the project for which funding is sought) well underway and being monitored by the person responsible for the application process. Only then should you begin to complete the

form. Ideally, an assistant will have begun to populate it with the 'easy' and repetitive information such as name, address and registration numbers and other similar information. Interestingly, this is an ideal place to begin training a new staff member or volunteer in corporate and trust fundraising.

Deadline

The deadlines for the various applications in a fundraising office at any one time should determine the order in which each application is tackled. In addition, very close oversight of the entire process must be monitored and managed daily. If, for instance, someone does not provide what you had requested, you may have to approach someone more senior. If you are being delayed by a board member, you may have to turn to the chairman. Plan well in advance and don't simply default to an advertised deadline. Submit applications as soon as possible. They are generally processed in the order in which they are received – just another reason to submit as early.