



Checklists to help  
implement the  
simplification of funding  
call structures

These checklists are intended to help as you plan how to improve diversity, inclusion, and equality in pre-award funding processes through the simplification of your funding call structures. The first checklist is a high-level list of general actions and questions to consider within your organisation before you start planning any specific interventions. The second checklist provides a more focused set of questions that can be used to inform your plan to simplify funding call structures. Neither list is intended to be either exhaustive or prescriptive; rather, they are meant to provide a useful starting point for discussions within your organisation, in order to give your planned intervention the best chance of success.

# 1. General actions and questions

Remember that changing your application processes to reduce the likelihood of bias in outcomes is a long-term objective. Culture change can only occur if it happens at a pace at which you can bring your community with you, so planning for and managing this change carefully is absolutely essential. Engaging with your stakeholders – applicants, reviewers and evaluators, staff, and others – throughout the change process is critical to success. This will enable you to understand and take into account any real or imagined barriers to making progress, while an iterative approach, with check-in points, and opportunities to adapt to changing circumstances or new evidence, will help you build trust and achieve the desired outcomes. It is equally important to evaluate the changes being made: understanding where your organisation is starting from, where you want to get to, and how and when to measure your progress – including making adjustments, as needed.

We recommend that you consider the following questions and actions before starting to plan any specific interventions within your organisation.

Clarify the challenge; what exactly are you trying to solve?

How will solving this challenge improve the workings, mission, or culture of your organisation? Identify an internal stakeholder or team to be responsible and accountable, and to drive the project. A champion at the leadership level will be especially helpful

Is the challenge specific to your organisation, or is it part of a wider problem within your sector? If the latter, consider communicating with another organisation or a group to gain a sense of where the general thinking is and increase the likelihood of success/acceptance within your sector.

Benchmark the current situation (collect data, conduct surveys or focus groups)

What internal resources are available? (e.g. people, technology, financial)

Are any other internal resources available? For example, are there existing initiatives or groups within your organisation that you could engage with to expedite the initiative?

What external resources are available? For example, toolkits on the [DORA](#) or [Research on Research Institute \(RoRI\)](#), or other websites; examples of other organisations working in this area, who could be approached for advice?

What intervention options are available and feasible? Examples could include introducing an inclusion component in proposals, extending deadlines to increase participation from carers, auditing your data collection workflows for redundancy that can be removed, updating training, etc.

Decide how to measure the impact of intervention(s) – would quantitative, qualitative, or both methods work best?

Are there any potential downsides to implementing changes?

Decide how to follow through the process, including checking workflows

Is additional training required – for applicants and/or other stakeholders (e.g. reviewers)? What form should this take – online, in-person, via interactive sessions or asynchronously?

Do you have examples of best practices and case studies?

Will other changes be needed, e.g. to deadlines, to grant applications or other systems, to templates?

What follow-up actions will be needed, and what is the time frame for review?

How will you address any issues that arise?

What opportunities will there be for users to provide feedback outside of the consultation processes? (e.g. feedback forms on websites, regular surveys, etc.)

Develop a strong communications plan, which includes listening as well as disseminating

## 2. Checklist: Simplification of funding call structures

Once you've worked through the general actions and questions above, you're ready to consider the questions in the checklist below, which are specifically related to your planned intervention.

What evidence do you have that there are challenges, e.g. feedback from surveys, emails, reports? Do you need to gather more information?

What kinds of issues are you dealing with, e.g. administrative burdens, challenging deadlines (too short, clashing with school holidays, etc.), demographic groups who are under-applying and/or under-succeeding, etc.?

Are these challenges occurring across the whole workflow, i.e., from initial call, through evaluation, to research and reporting phases?

Will you address all underrepresented/underserved demographics initially, or will you prioritise specific groups, in which case, how will you decide who to focus on first?

Are there any relevant policies (internal or external) which you want or need to align with?

Are there opportunities to consult with other organisations, e.g. other funders, or organisations in adjacent sectors such as universities?

Can you run pilots? If so, when and how will you evaluate them?

Will you need to make updates to your systems in order to implement changes?

How, and how often, will you evaluate the impact and effectiveness of the changes you make to your training?

Do you have a process in place to continually reflect on and improve the changes if needed?

How and when will you communicate to your wider community the changes that you make, to those both within and external to your organisation?

✉ [info@sfdora.org](mailto:info@sfdora.org)