



Improving Grant Application and Reporting

From website comments to national and local meetings to philanthropic blogs, the response to Project Streamline has spurred conversation, comment, and questions from both grantmakers and grantseekers. Project Streamline would like to share the feedback we've received on the four core principles outlined in the report as we work towards finalizing those principles.

Making Communications and Grantmaking Processes Clear and Straightforward

Summarized by Taylor Kate Brown

Communication on both sides of the grant equation should be a top priority for Project Streamline. "Better communication could solve a lot of the problems in the current system," one grant maker said.

Of course, different kinds of communication have different kinds of problems. Responses to the Project Streamline report at regional meetings as well as on the web identified three key areas:

1. the online presence of the grantmaker,
2. the relationship between applicant and grantmaker and
3. the quality of feedback the grant maker receives.

When potential grantees first visit a website, oftentimes they are met with obtuse or contradictory information. Grantmakers themselves said the application guidelines on their websites led to "ambiguity and frustration". Potential applicants wanted clarification on the phrase "does not accept unsolicited proposals". Depending on the foundation, the meaning ranged from "board selected projects only" to "submit a LOI first". Avoiding jargon should also be a priority, grant seekers said.

Clarifying website information has been helpful for grant managers. After implementing an eligibility screen and cleaning up language about funding priorities, one grant manager received better quality proposals and fewer proposals overall. The foundation now makes fewer decline decisions.

The balancing act between helping a grant seeker to create the best proposal and treating all applicants fairly is one area where streamlining had an ambiguous response. "I want to be clearer and more transparent in my relations with grantseekers," one grantmaker said, "But certain dynamics on both the grantseeker and grantmaker ends complicate the relationship." Others wondered how to balance getting extra information from the grant seeker without raising their hopes.

Some ideas on how to manage a transparent relationship with applicants included:

- Accept video or digital media formats, especially in pre-screening or qualifying a concept.
- Publish contact information so grantseekers can call, allowing them to make sure their proposals would be relevant to the foundation. A five minute conversation can save an enormous amount of time for both grantmakers and grantseekers.

One area than could be easily improved on is timely notifications. "It's a simple thing" one grant seeker said "All foundations should acknowledge, at least by email, that an application was received." Similarly, the award/rejection process should happen at the same time. "Send a rejection letter, postcard, or email", instead of making applicants assume they'd been rejected after months of no response.

Getting appropriate feedback during and after the application process is a major challenge. CEP's Grantee Perception Report or and a common evaluation by a larger organization, such as the United Way, were discussed as options. If a third-party evaluator is not an option, adding an online survey using free or low-cost tools like Survey Monkey or Zoomerang to the grantmaker website and highlighting it in application materials and correspondence might be a viable alternative to gaining an honest look at your grantmaking practices.