



# Right-sizing the Grantmaking Process

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**PRINCIPLE 1**

Take a fresh look at information requirements

**PRINCIPLE 2**

**Right-size grant expectations**

**PRINCIPLE 3**

Relieve the burden on grantees

**PRINCIPLE 4**

Make communications clear and straightforward

A collaborative initiative of the



In partnership with

Association of Fundraising Professionals  
Association of Small Foundations  
Council on Foundations  
Forum of Regional Associations of Grantmakers  
Foundation Center  
Grantmakers for Effective Organizations  
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**Project Streamline** is an effort of funders and nonprofits to improve grant application, monitoring and reporting practices. It is a collaborative initiative of the Grants Managers Network, in partnership with the Association of Fundraising Professionals, the Association of Small Foundations, the Council on Foundations, the Forum of Regional Associations of Grantmakers, the Foundation Center, Grantmakers for Effective Organizations, and the National Council of Nonprofits. For more information, go to [www.projectstreamline.org](http://www.projectstreamline.org).

**The Grants Managers Network (GMN)** improves grant-making by advancing the knowledge, skills and abilities of grants management professionals and leading grantmakers to adopt and incorporate effective practices that benefit the philanthropic community. GMN has more than 1,400 members from 1,000+ grantmaking organizations who represent the breadth of the philanthropic community including small family foundations, prominent national foundations, grantmaking public charities, and socially responsible corporations. For more information, go to [www.gmnetwork.org](http://www.gmnetwork.org).

# Project Streamline At A Glance

What can funders do to improve their grant application and reporting processes, reduce the burden on nonprofits, and free up more time for mission-critical activities? How can grantseekers support these efforts?

Project Streamline has worked with leaders in grantmaking and nonprofit organizations to identify challenges, propose solutions and develop resources to help you streamline.

## Streamlining Challenges

***Drowning in Paperwork, Distracted from Purpose,*** a Project Streamline study, found ten flaws in the current system of grant application and reporting:

1. Enormous Variability
2. Requirements Aren't "Right-Sized"
3. Insufficient Net Grants
4. Outsourced Burdens
5. Trust Undermined
6. Reports on a Shelf
7. Fundraising Gymnastics
8. Due-Diligence Redundancy
9. Double-Edged Swords
10. Time Drain for Grantmakers, Too

## Streamlining Solutions

Our research suggests four core principles that grantmakers can adopt into practice to make things easier on nonprofits.

**Principle 1: Take a fresh look at information requirements.** Begin with a rigorous assessment of what kind of information you really need to make a responsible grant.

**Principle 2: Right-size grant expectations.** Ensure that the effort that grantseekers expend to get a grant is proportionate to the size of the grant, is appropriate to the type of grant, and takes into consideration any existing relationship with the grantee.

**Principle 3: Relieve the burden on grantees.** There are many ways that funders can reduce the burden that grant-seeking places on grantees. By minimizing the amount of time, effort, and money that nonprofits spend getting and administering grants, funders increase the amount of time, effort, and money devoted to mission-based activities.

**Principle 4: Make communications clear and straightforward.** Good communication is critical to a streamlined process and essential for fostering a mutually respectful relationship between grantmakers and grantseekers.

## Streamlining Resources

We provide resources to help you streamline.

### Guide to Streamlining Series

Guides on:

- Due Diligence
- Right-Sizing
- Grant Budgets and Financial Reports
- Online Applications and Reporting
- Communications

### Making Streamlining Stick

Explores four steps to develop your organization's strategy:

1. Take stock
2. Make the case
3. Plan changes
4. Implement and Refine

### Online Self Assessment

Tool to assess your current practice

### Workshops

Interactive sessions for grantmakers

### Website

Resources, events, ideas

### Newsletter

Stories, voices, research

# Guide Snapshot

## Right-sizing the Grantmaking Process

Right-sizing is the concept that one size might not fit all when it comes to application and reporting. When grantmaking is right-sized, the information requirements are proportionate to the size of the grant, are appropriate to the type of grant, and take into consideration prior relationships with grantees.

### The Bottom Line for Funders

To help your organization think through its own right-sizing process, we offer the following core recommendations.

#### 1. Know the net grant—and keep it as high as possible.

The “net grant” is the grant received, *minus* the cost of seeking, getting, managing, and reporting on that grant. For smaller grants—those \$5,000 or under, for example—it is easy for grantees to spend a sizable chunk of the money in the application and reporting process alone. We think that grantmakers have a responsibility to ensure that their net grants stay high.

**2. Figure out what information you really need for grant applications and reports.** Grantmakers should periodically assess their information needs and eliminate questions that are redundant or that generate information that isn't actually used in the decision-making process.

**3. Simplify the application and reporting process for small grants, renewal grants, operating support grants, and repeat grantees.** A one-size-fits-all approach to application and reporting may seem easiest for the funder, but we believe that this practice can cause a lot of unnecessary work for grantseekers and grantmakers alike. We recommend streamlined processes based on grant size, grant type, and prior relationship.

**4. Find ways to filter.** From eligibility quizzes to letters of inquiry to staggering the timing of information requirements, we recommend that funders look for creative ways to ensure that grantseekers who complete your full application are those most likely to be funded.

### Tips for Nonprofits

Grantseekers play an important role in right sizing in at least two ways: (1) deciding which opportunities to seek and (2) offering feedback about the grant process to the funder. We recommend that grantseekers do the following to help funders right size:

- Apply to funders whose missions and goals are aligned with yours.
- Assess the time and effort necessary to meet requirements in light of the potential grant's size.
- Follow grantmaker guidelines and don't send information that wasn't requested.
- Make information about your organization accessible to funders online.
- Keep good records.
- Incorporate application and reporting costs into your budget and represent the true costs to grantmakers.
- Be prepared to offer grantmakers constructive feedback on their grant application and reporting process.

## Are You Taking Money from Mission?

Nonprofits don't really receive grants. They receive "net grants"—the amount of the grant minus the cost in staff time that was required to seek the funding and report on its use.<sup>1</sup> Funders can increase the size of their net grants by right-sizing their application and reporting requirements. This means that the effort that grantseekers are asked to expend to get the grant must be *proportionate to the size of the grant, be appropriate to the type of the grant, and take into consideration any existing relationship* with the grantee.

### Unfortunately, funder application and reporting requirements are often not "right-sized."

In our research for *Drowning in Paperwork, Distracted from Purpose*, we learned that

- 66 percent of funders don't vary their requirements by grant size,
- 59 percent don't vary requirements by grant type, and
- 72 percent don't vary requirements for previously funded organizations.<sup>2</sup>

We also discovered that, even among the funders interviewed that had made efforts to right-size requirements, few could say how much time their efforts saved grantees.<sup>3</sup>

Of course, we realize that grantmakers—including those of us who developed this guide—don't *intend* to burden nonprofits with their application and reporting requirements. Funders put their application and reporting requirements in place with good intentions—both to help manage the volume of funding requests that come in and to assess and improve the impact of their grantmaking. And they can have good reasons for those requirements. Nonprofit capacity varies widely, meaning there can be enormous variety in the quality of information submitted by grantees. Different programs within a funder organization might have different information needs. And many funders, interviews have found, struggle with trying to consolidate information needs across program areas.



**DISCUSSION QUESTION** What criteria or specific data does your board need in order to make grant decisions?

Still, we believe that right-sizing is a critical streamlining principle, and that it can be done in ways that honor our need for good grantmaking information.

### We recommend funders do the following to right-size their grant requirements:

1. Know the net grant—and keep it as high as possible.
2. Figure out what information you really need for grant applications and reports
3. Simplify the application and reporting process for small grants, renewal grants, operating support grants, and repeat grantees
4. Find ways to filter, so that only those grantseekers with a good shot at a grant have to fill out lengthy applications.

1. Buechel, Keating, and Miller, *Capital Ideas: Moving from Short-Term Engagement to Long-Term Sustainability*, 24.

2. Bearman. *Drowning in Paperwork: Distracted From Purpose*, 11.

3. Interview notes from Right-Sizing Work Group

Will right-sizing make more work for your organization? It might. Grantmakers must navigate a tension between reducing grantee burdens and keeping the process manageable and informative for grantmakers' needs. Numerous examples of successful right-sizing efforts have shown that it is possible to strike the right balance.

## Trust is critical

Another obstacle revealed by the research: funders often don't get much feedback from their grantees about their application and reporting requirements, so they may not realize that change is needed. Grantees may not feel comfortable giving the feedback that grantmakers need, unless they have a strong and trusting relationship with their grantmaker. And even with a strong relationship, grantees are unlikely to offer unsolicited critical feedback. We recommend building in a process where your organization regularly seeks feedback from grantees via an anonymous survey or a third-party evaluator.

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**It's the conversation,  
 not the guidelines.**

—Sara Engelhardt, former  
 president of the Foundation  
 Center and Project Streamline  
 co-founder  
 .....

Grantmakers that build trust and strong communication find that the benefits extend far beyond good feelings to include:

1. Greater likelihood of achieving mutually sought outcomes for any given grant project;
2. A reduction in the amount of paperwork, since trust generally reduces the need for written proof; and
3. Increased opportunity to discuss and explore opportunities to further streamline the grantmaking process.

There is no single formula to determine whether requirements are “right-sized.” Needs vary from organization to organization. As Sara Engelhardt, former president of the Foundation Center, says, “it's the conversation, not the guidelines” that is most important. We believe that Project Streamline's right-sizing recommendations for grantmakers and nonprofits can help to get that important conversation started.



**DISCUSSION QUESTION** You might trust your grantees, but do they know it? Are you making it clear?

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**RECOMMENDATION 1:**

# Know the Net Grant—and Keep It As High As Possible

Funders are notorious for underestimating the amount of time it takes nonprofits to complete their applications and reports. A 2008 Grantmakers for Effective Organizations (GEO) survey of all staffed foundations in the United States found that only 12 percent collect any information about how long it takes grantees to meet their foundation’s administrative requirements<sup>4</sup>.

As a result, it’s not surprising that, when asked to estimate the time they think their grantees spend fulfilling these requirements, funders guessed that their grantees spend a median of 10 hours on the proposal and selection process. How much time do grantees *actually* spend? According to a Center for Effective Philanthropy (CEP) survey of comparable foundations,<sup>5</sup> almost twice as long, logging a median of 20 hours.

Here’s the problem: without knowing how long your process actually takes, you don’t really have any way to understand the *net grant* you are giving. Project Streamline recommends that grantmakers take these two steps to keep their net grants high:

**1. Know how much time it takes for applicants to complete your application.**

One way you can estimate this is to ask grantseekers through surveys or focus groups. Another way is to pretend your organization is seeking funds from itself. Complete all the application fields and track how much time it takes you and any colleagues to gather and submit all the information. Use this information to ensure your application and reporting process do not require significant time (and therefore significant money) from the organization, reducing the net grant you are awarding substantially. Test-driving your application process in this way may also shed light on whether your questions and requirements are clear. If you can’t figure out how to answer a question or easily provide an attachment, chances are your grantseekers can’t, either.

**2. Include all your expectations up-front,** including application requirements, financial and budget requirements, any desired attachments, and reporting requirements and timelines. Online systems should allow applicants to see the entire application up front (see Project Streamline’s *Guide to Online Applications and Reporting*). In addition to helping applicants structure their application, including expectations up-front will allow them to know and assess the time and labor demands of applying for and receiving a grant.

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**SMALL GRANT, SMALL PROCESS**

After the executive director of **The Cumberland Community Foundation** in North Carolina spent an inordinate amount of time writing a proposal for a potential grant from a statewide foundation that they didn’t get, she began to wonder whether their own processes could be simplified. This line of questioning led them to streamline a small but long-standing grantmaking program, which led to substantial savings of staff and grantseeker time.

Applicants to this program tended to be volunteers working in low-income neighborhoods. The foundation created a simple request form that didn’t need to be typed and could be completed by filling in the blanks. They revised their accompanying budget requirements to make them equally accessible and streamlined.



**DISCUSSION QUESTION** Do you currently vary your requirements at all based on size or type of grant? How about based on prior relationship with the grantee?

4. Grantmakers for Effective Organizations. *Is Grantmaking Getting Smarter? A national study of philanthropic practice. Full Data, v.*  
 5. Center for Effective Philanthropy, *Analysis of Key Predictors of Grantee Ratings of Process Helpfulness and Time Spent* (prepared for Project Streamline)

**RECOMMENDATION 2:**

## Figure Out What Information You Really Need For Grant Applications and Reports

Grantmaking processes can pick up extraneous requirements like boats pick up barnacles. Questions may be added over time to reflect interests of particular board members. Or new requirements might be added in the wake of a grant that went awry. Over time, these requirements can accumulate and hang on quite tenaciously, even when the information may not be critical to decision-making.



**DISCUSSION QUESTION** Is there information you ask grantees for but never or seldom use to make grant decisions?

Part of the right-sizing process is a thorough review of application and reporting materials to weed out questions and requirements that are redundant, unnecessary, confusing, or unduly burdensome. Here are some suggestions for how to get started:

- Assess what information is most essential to your organization to make a grant decision and measure success, and request only that information. Determine how that information will be used and how it is linked to a final decision. Ask yourself: What information do we actually use to make a funding decision? What information can we eliminate from the grant application?<sup>6</sup>
- Don't ask vague questions that encourage the grantee to spend time including additional information that is not necessary. For example, avoid questions like, "Is there anything else you would like to add?"
- Ask: Do we need the same information from all applicants? Or can we require less information for certain types of grants, certain grant sizes, or successful, previously funded grantees?
- Set page limits or ranges as part of your grant application to make clear the scope and depth of information you are seeking for different sizes and types of grants. (At the same time, we don't recommend character or word limits, which can cost grantseekers time cutting down content just to make the limit.)
- Be judicious in your reporting requirements. Make sure to align reporting requirements with the information requested in the application. Only require reports that will be read and used. When possible, consider requiring reports no more frequently than on an annual basis. (For more information, see Project Streamline's *Guide to Grant Budgets and Financial Reports*.)

In 2008, the Philanthropy program of **The William and Flora Hewlett Foundation** concluded that they were asking for more information in their grant application than was necessary to make a funding decision. Applicants submitted narratives of twenty-plus pages when the information needed often was contained in the first few pages. At the same time, the Foundation as a whole was discussing whether grantee reports conveyed the right amount of information to evaluate progress.

All this prompted the Philanthropy program to streamline and revise their grant application and reporting requirements. The team decided to focus on the most essential elements: goals, strategy, evaluation, and capacity. In addition, the team reduced the narrative section of the application from eight questions to three; added page limits and a glossary of key terms; and used more simple language with less jargon.

"It was challenging deciding what to cut from the application," says Lauren Libruk, Program Associate for Hewlett's Philanthropy Program "Even with only three program staff, we each had a preference for different questions. Getting input from grantees during the process was crucial."

6. Refer to recommendations from the Basic Due Diligence Requirements working group.

- Don't ask grantees for information that you can look up yourself. You can usually find a lot of organizational information (board members, organizational structure, staff, etc.) on the organization's website. (It's fair to ask if a website is up to date.) Looking at a website or other third-party sources can also give you insight into the transparency and overall quality of an organization.
- Don't insist on superfluous and time-consuming application and reporting requirements, such as multiple copies of applications or reports, copies of all invoices, bills, checks, sales slips, time cards, and several notarized signatures.
- Do not require the grantee to produce data in a different format from its standard reports unless there's a very good reason to do so. If you prefer to receive financial information in standardized formats, consider using a streamlined budget template that can be provided to the grantees.<sup>7</sup>

Many grantmakers think of application and reporting complexity for small grants as a way to “build capacity” in smaller nonprofits. Although the process may be burdensome for not very much money, they argue, the nonprofit is gaining valuable experience.

It is true that asking an applicant to clarify its logic model, theory of change, and/or evaluation plans can help an organization think through how it will achieve its goals. But not all organizations require capacity building. And capacity building may be more reasonable to undertake with organizations that are most likely to be funded (or that have already been funded) rather than with the full range of grantseekers.



**DISCUSSION QUESTION** How might you monitor grantees other than through written narrative and financial reports? What might be the benefits and costs?

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7. [Click here](#) for more information on streamlined budgeting and financial reporting guidelines.

**RECOMMENDATION 3:**

## Simplify the Application and Reporting Process for Small Grants, Renewal Grants, Operating Support Grants and Repeat Grantees

We believe that almost all grant application and reporting processes can be right-sized—but certain types of grants have particular potential for right-sizing: small, renewal, operating support, and repeat grants. Grantmakers must always determine the amount of information needed based on the level of risk that a potential grant might incur. We realize there will always be cases where even small grants or long-time repeat grantees warrant a more rigorous process. But, for the majority of cases, we maintain that the size of the grant, the type of the grant, and the prior relationship with the grantee should all matter when it comes to right-sizing.

For starters, we recommend grantmakers look at their data and determine what percentage of their overall grants are small grants, renewal grants, operating support grants, and grants to repeat grantees.

**Small grants:** Although it is difficult to establish a hard and fast threshold for “small” grants, Project Streamline generally recommends that grants under \$5,000 have a streamlined application and reporting process that takes fewer than five hours, on average, to complete. Grantmakers have found that this is not only beneficial for smaller grantees, but also a huge time saver for funder staff and trustees, since they are no longer spending the same amount of time on a \$5,000 as on a \$50,000 grant. What’s at stake here? Imagine the development director of a nonprofit spends twice as much as the five hour recommended maximum for a \$5,000 grant. The average rate for a Director of Development for a nonprofit organization is \$28 per hour. If she or he spends 10 hours on the application and reporting process for a \$5,000 grant, the net grant would actually be \$4,720.

**Renewal grants:** Renewal grants can be streamlined by combining the reporting on the previous grant cycle with the reapplication for subsequent funding. Funders can also request only items that have changed since the applicant’s last submission. It is useful to have a system—whether online or manual—to store information in an easily retrievable manner.<sup>8</sup>

**Operating support grants:** We recommend that funders create a streamlined process for all operating support grants, including using existing financial statements (see Grant Budgeting and Financial Reporting Guide). Grantmakers might also consider accepting existing materials—such as an organization’s Annual Report—instead of requiring a customized grant report.

**Repeat grantees:** Some grantmakers have long-term relationships with grantees, supporting them over periods of many years. And yet many of these grantmakers require the same level of information each and every time the organization applies for funding. We recommend a different approach, where repeat grantees are able to submit updates when their information has changed or answer specific questions if they are seeking funding for a new program, but can otherwise use a streamlined process to reapply.

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**RIGHT-SIZING A SMALL GRANTS PROGRAM**

**Zell Family Foundation in Massachusetts** created a streamlined application process for its small grants program. Operating every other year, the program offers grants up to \$5,000 for general operations, programs, or other organizational needs. The streamlined “by invitation only” application includes a two-page concept letter, budget information in an as-is format, and financial statements.

“The small organizations appreciate the shorter format and relatively quick turnaround time,” says Trustee Amy Zell Ellsworth, “and our board appreciates the more limited amount of information to review.”

—from *ASF Essentials newsletter*, Fall 2009  
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8. See Project Streamline’s Guide to Online Systems for guidelines related to choosing and using online application and reporting systems.

Last but not least, Project Streamline also believes that the *grantmaker*, not the grantee, should take responsibility for storing grantee information. Grantees applying for renewals should be able to submit updates without re-submitting document and information that they have already provided. Even if you don't have a sophisticated online system, you can still store basic information such as an organization's letter of determination (if you require it), mission statement, and board list.

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**Project Streamline also believes that the *grantmaker*, not the grantee, should take responsibility for storing grantee information.**  
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**DISCUSSION QUESTION** Based on your overall grantmaking activity, where do you have an opportunity to make a significant improvement through right-sizing? And how would you start?

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**RECOMMENDATION 4:**

## Find Ways to Filter

By the time funding is granted to a nonprofit organization, most grantmakers—no matter how streamlined their process—will want to have certain things in their files. These often include a full proposal, various due-diligence information, and specific budget and financial information. The question is: Do you need all of that from every grantseeker that comes through your doorway? We would argue that you don't.

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**DISCUSSION QUESTION** Consider timing. Could you stage or stagger the timing of various requirements to reduce the burden on your staff and on the applicants?

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Here are some suggestions for staging your information requirements so that only those with the best chance of receiving funding end up taking the time to submit a full proposal.

- **Provide guidance using an eligibility quiz.** These quick 2-3 question 'quizzes' are usually online. They help a grantseeker to ascertain whether they are a good candidate for funding before they even think about applying.
- **Filter using a Letter of Inquiry or pre-application meeting.** A letter of inquiry or mandatory pre-application meeting or phone call can ensure that applicants with a low chance of funding do not waste their time, nor that of the funder. (This filter isn't recommended for repeat grantees or renewal grants. And if your organization funds mostly solicited proposals, you're likely doing this filtering in another way.)
- **Hold off on the non-essentials.** Some grantmakers have found that they save their time and that of grantseekers by collecting some of their required due-diligence only after they are fairly confident that funding is forthcoming. That way, the grantee doesn't spend time assembling (and the grantmaker doesn't spend time collecting) letters of determination, audited financials, board lists, etc. until funding looks likely. Some grantmakers use 'conditional' grant commitments where the grant is approved based on key organizational and/or project information received, but still requires the organization to submit additional narrative or financial information prior to a payment being made. This allows the grantmaker to perform this additional due diligence only on provisional grantees and generally is done to perform a final check for potential problems before the grant begins.
- **Make the process clear to applicants.** If you use a staged process—letter of inquiry, eligibility quiz, etc.—be sure that process is clear to applicants and that you stick with it. This is especially relevant when different programs within a funder organization have different processes, as sometimes is the case.

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**WHAT DO WE NEED AT FIRST?**

The Pittsburgh based **Grable Foundation** used a specific question to guide their streamlining effort: "What do we need at first?"

Asking this question led them to determined that a lot of the information they had been asking for didn't need to be included in the first step of the application process. Program officers could get that information during site visits or other meetings with grantees.

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## Guidelines for Grantseekers

The grantseeker plays an important role in right sizing in at least two key ways: (1) deciding which opportunities to seek and (2) offering feedback about the grant process to the grantmaker. The first role happens with great frequency. Experienced grantseekers almost always weigh the requirements relative to the amount of funding proceeds before deciding to apply. The second role is less common. Nonprofits may fear that expressing anything but glowing comments about the grantseeking process will have a negative effect on their future funding prospects.

We recommend that grantseeking organizations do the following to contribute to right-sizing and the streamlining process generally:

**1. Apply to funders whose missions and goals are aligned with yours.** Make sure to read the funder's guidelines. If you are not sure about alignment, ask the funder to help you clarify. Don't change your organization's mission to fit the guidelines of a funder.

**“We want to make sure that we only apply to foundations where our programs match their funding priorities, so we ask questions about that, if it is not already apparent.”**  
—St. Mary Medical Center, Long Beach, CA

**2. Make sure you know the full range of the funder's application and reporting requirements,** and assess the time and effort necessary to meet them in light of the size of the potential grant. Try to be objective about the cost-benefit of applying and reporting. Consider whether the labor is worth it, or ask the funder to consider requirements that work best for you. If you're not certain about whether a certain piece of information is required, don't be afraid to just ask the funder. Grantmakers generally don't want grantseekers going through Herculean efforts to determine requirements when they could just pick up the phone.

**“...we discourage faculty and staff from pursuing high-effort, low-award-amount opportunities.” (We ask,) “Is the amount of effort required for the application, reporting, and program delivery something we can and want to provide based on staffing levels and other resources and priorities?” “We have had requests for information that would take hundreds of hours of staff time to generate, and we simply have to forego these opportunities.”** —A university foundation

**3. When applying for a grant, don't send** information that was not requested by the grantmaker. If you have something additional that you think would be important, just ask the grantmaker.

**“When the application is open-ended I always follow the adage that ‘less is more.’ Too much information makes an application tedious to read and that's the last thing we want when a potential funder is considering our request.”** —Forty Carrots Family Center, Sarasota, FL

**4. Make information about your organization accessible to funders** by posting often-requested materials on your website, such as organization mission, history, staff bios, budget, and financials. Keep these key documents also in PDF format so you can send them easily upon request.

**5. Keep good records.** Create a system and archive for tracking proposals that have been submitted, due dates for grant reports, and other funder requirements. This tracking system and archive should be accessible to multiple people in the grantseeker's organization to ensure that information won't be lost in the event of staff turnover.

**6. Incorporate application and reporting costs into your budget.** These labor costs are real operating or program costs and should be considered by funders as they are evaluating proposals and determining grant amounts.

**7. Be prepared to offer grantmakers constructive feedback** on their grant application and reporting process. Many grantseekers are uncomfortable with the idea of criticizing their funder for fear that it might jeopardize future funding. We understand this trepidation! But our research has shown that most grantmakers really want their processes to work for you—and will be grateful for your input. Grantmakers may be unaware of parts of the process that impose considerable time and labor demands on grantseekers—even making it not worthwhile to seek a grant. Your suggestions may offer the impetus for positive change.

#### QUESTIONS TO ASK YOURSELF BEFORE APPLYING FOR A GRANT

1. Is our work aligned with the funder's mission, goals, and guidelines?
2. What is the likelihood of receiving funding?
3. Do the funder's application and reporting requirements allow us to fairly and adequately portray our work, its challenges, and our successes?
4. Does the funder make their application and reporting requirements and timelines clear up-front—including budgets and any attachments?
5. Is the amount of effort required to complete the application, reporting, and program delivery something we want to invest in, given our staffing levels and other resources and priorities?
  - Do the funder's electronic applications, forms, and reports allow us to cut and paste selected text from other documents?
  - Does the funder require special budgets and financial reports that we do not currently have? If so, how much labor will be involved in creating them?
  - What kinds of progress reports are required, and how hard will it be to create them?
  - Will new evaluation data be required? If so, will it be useful to us, internally?
  - Will we be able to meet the funder's reporting timeline?
6. Who at the funder organization is available to answer our questions? If no one is available, is it worth applying?

#### WHO'S THE BEST? WHO'S THE WORST?

If you're a grantseeker or grantee, we hope you'll nominate grantmaker organizations with great and not-so-great application and reporting practices. Just fill out a quick survey at <http://www.surveymonkey.com/s/6B95J9W>. Your thoughts will be anonymous, and none of the nominated organizations will be highlighted by name without their consent.

## Evaluating Your Efforts to Right-Size

Assess your progress as you go. It will help you make mid-course corrections, decide where to best invest your time and effort, and even identify broader improvements to make in your grantmaking process. Consider asking these questions to help monitor, evaluate and enhance your right-sizing:

1. As you explore ways to right-size, have you tested potential changes with grantees and asked for their feedback?
2. After you make changes, have you talked with grantees to see if your efforts have worked?  
We realize, as we mentioned earlier in this guide, that many grantees may not feel comfortable providing such feedback. The onus is on grantmakers to establish the trust, open communication and, if needed, confidential channels to increase that comfort. We also encourage you to make it an iterative process, in which feedback is invited, changes are made, feedback is invited on those changes, and so on.
3. How have the changes affected staff at your organization? If changes create new burdens, how can those burdens be addressed—without placing them back on grantees?
4. After right-sizing, are you getting all the information you need? One grantmaker recounted how, as she and her colleagues were reviewing a streamlined application, some program officers said they “missed” certain questions that had been eliminated. We recommend looking before leaping in response to these kinds of requests to reinstate questions. Does one program officer miss an eliminated question but not everyone? Can you find the desired information elsewhere?
5. Finally, has the net grant increased as a result of your efforts? Try to measure what it costs a group of the same or similar grantees to seek, get, manage, and report on a grant before and after your efforts. This is the ultimate indicator of your progress!



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