



Practices Matter

Based on the results of our 2013 study, **Practices That Matter**, Project Streamline knows more about the specific practices that make the biggest difference to grantseekers and grantees.

- 1** Online application and reporting systems that work well, gather the right information, and store information from application to reporting, and from year-to-year.

Online application and reporting is both inevitable and positive, but systems still do unforgivable things... including timing out without saving, imposing mysterious character limits, and requiring information to be entered field by field, rather than cut and pasted.

- 2** Budget and financial reporting requirements that allow grantseekers to maintain their own financial categories.

Many funders require templates and specific formats for financials. Unfortunately, templates tend to promote error, mask important capacity issues, and ignore the fact that budgets' main purpose is a management tool for the nonprofit itself.

- 3** Clear and regular communications, including responsiveness to phone and email inquiries.

Clear communications covers a multitude of sins. Grantseekers particularly value clear, specific, and revealing guidelines that help them determine whether it is or is not worth their time to apply for a grant. Not surprisingly, applicants also want to communicate via phone or email with a real person who is willing to discuss a proposal before it is submitted.

- 4** Staged processes with techniques like a brief and simple letter of inquiry (or online inquiry form) prior to inviting a full proposal from groups most likely to receive funding.

Streamlined grantmakers minimize the number of organizations that do a lot of work when they have a small chance of success. They are aware of the proportion of proposals they are declining and work to keep it low. Here's how:

1. Clear funding guidelines and eligibility screens that reduce the number of unfitting requests.
2. Talk with applicants prior to submission.
3. Filter with a letter of inquiry that is truly shorter and requires less work than a full proposal.

- 5** Simplified application for small grants and repeat or renewal grants

"Right Sized" requirements are appropriate to the size and type of grant and the prior relationship with the applicant. Simplified requirements are especially important for repeat or renewal grants and for small grants where a burdensome process significantly reduces the "net grant," leaving less money for real work.





Project Streamline Cheat Sheet

One Simple Premise: the cumulative impact of grantmakers' distinct and often laborious application and reporting requirements undermines nonprofit effectiveness, causing grantseekers to devote too much time to seeking funding (often without payoff) and reporting on grants (often without benefit) to the detriment of their mission-based work.

Four Core Principles

1. Take a fresh look at information requirements: request only what is used in decision-making.
2. Right-size requirements: align application and reporting to the size and type of grant.
3. Reduce the burden on grantseekers: minimize unnecessary and onerous practices.
4. Straightforward and clear communication with grantseekers.

Six Key Questions

1. Do we really use this information (document, requirement) to make funding decisions?
2. Do we need it from all applicants or just some applicants?
3. Do we use this information at the beginning, or do we need it as we get closer to final decisions?
4. Do we know how long our process takes grantseekers?
5. Is there any other way we can get this information?
6. Have we sufficiently explained why we need it to applicants?

Five Practices That Matter Most

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2. Budget and financial reporting requirements that allow them to maintain their own financial categories.
3. Clear and regular communications, including responsiveness to phone and email inquiries.
4. Staged processes with techniques like a brief and simple letter of inquiry (or online inquiry form) prior to inviting a full proposal from groups most likely to receive funding.
5. Simplified application for small grants and repeat or renewal grants.

