Grants Application & Process Review – Spring 2020

During the Spring 2020 granting process, some problems were encountered regarding the design and function of the Foundation's application. Also, during our last granting session we received poorly formatted and incomplete applications which make it more difficult for the granting committee to do its job. With an increasing number of applications each year, we require properly formatted and complete applications to make the process run smoothly.

Planned changes to the Grant Application:

- Increase space for responses for questions 1, 2 and 3. for the applicant to answer the questions in more detail.
- In many cases applicants run out of space because they copied text from another program and the font size was larger reducing their available space. We need to determine if our application can allow the applicant to paste as "unformatted or plain text", if not add then a caution about copying and pasting.
- Ensure the budget spreadsheet calculates, we found it wont calculate if values were separated using commas. As well explore if there is an option for the applicant to add lines.
- Make the first line of budget spreadsheet an example as it seems that many applicants are unsure what goes under the heading "Provider/Quote".
- In the "Grant Application Checklist" we need to separate a "Copy of Organization's most recent statements of financial position (balance sheet) and operations (income and expenses)". In several applications, one or the other document seems to be missing.

The requirements for completing the Foundation's application are listed under the heading "All Applications must include the following in separate electronic files:" We have been relaxed about imposing these rules, however many applications are unacceptable for the reasons listed below and moving forward will not be accepted.

- Hand written applications
- No spaces between words in text
- Application scanned and rotated 90 degrees
- Budget and Funding spreadsheets in the application aren't complete and don't reconcile.
- Missing supporting documents without explanation.
- All documents scanned into a single file.

By accepting poorly formatted or incomplete applications we are setting the bar very low and enabling this behavior. We are going to write a sample application and make it available to applicants, so they have a better idea of what the Foundation expects.

The possibility of contracting out to get a more professional application created has been discussed as well as the option of an online software. In the research for a new Donor Management Software (to replace Income Manager) we have found some software provides the option of grants management and online submissions. There are also companies out there that provide separate software for this but it comes at too high of a cost.

Our plan is to work on our current application to try and make it as straightforward and easy to use, increasing space, adding examples and testing it more, before the next granting cycle in the Fall. We will have a new donor management system integrated into our operations prior to the Spring Granting Cycle in 2021 and hopefully that will either include a grants management portion or an online application form. If it doesn't then we will need to come up with an easier and more professional application option.