Change Up Your Questions

Practicing Your Values & Vision as a Funder

A Resource from CAPITAL PHILANTHROPY

APPLICATION MATERIALS REVIEW

Take a thorough look at your application.

For any question or component of your application, you have several options:

- Add elements to it.
- Change it a little.
- Change it a lot.
- Delete it entirely.

Application Content (online or printed)

- Ensure all questions reflect your values and/or guiding principles.
- Simplify or combine questions. If additional explanation is needed, consider adding an FAQs section to your website to provide more information to applicants.
- Alter, add, or eliminate required attachments, or supplemental materials.

Macro-Level Useful Filters/ Screens:

- If you ask a question in your application, be sure you use that information in your decision-making process.
- If you don't use that information in your decision-making process, don't ask the question.
- If you discuss information about an organization during the decision-making process that's not currently part of the application, add a question so you get that information consistently, from all applicants.
- If something is equally useful if it's gathered through conversations with the grantee partner, eliminate that question from the application to streamline the process.

Letter of Interest / Initial Inquiry

- Internally, review how the LOI is used in the decision-making process. Is it a requirement for all applicants, even renewing grants?
- Eliminate it or build it into other components.
- Use a simple form or accept free-form letters.
- If you accept new, potential grantees, consider creating a very simple letter template/form through which a nonprofit can identify themselves and their work to you.

Application Preparation

- Accept proposals written for other funders, such as "common grant applications."
- If needed, be prepared to provide language assistance for those organizational leaders whose first language is not English.
- Host a webinar/zoom call for all potential grantees at which the application process is explained, including deadlines and logistic issues.

APPLICATION MATERIALS REVIEW

Site Visit or Other Contact

- Consider whether site visits are a part of the pre-grant decision-making process, or an element of post-award review and evaluation.

- Consider whether other ongoing contact with a partner can provide better/more authentic opportunities to build and strengthen the relationship.

- If a site visit is deemed appropriate:

  - Specify who should attend and expectations about hospitality, tours, "goodie bags," etc.

  - Formulate questions that are asked at all site visits.

Grant Report

- Streamline the process wherever possible.

- Incorporate the report into the renewal application.

- Ask different or fewer questions; ensure that all questions in report lead to useful insight or information that supports decision making.

- Create an alternative, such as an in-office conversation about results or impact.

- If relationship building is done right, a grants manager is already going to know what's happening with the grantee partner.

Decision-Making Support

- Establish guidelines for how/whether reviewers can use other information they have, but which is not included in the application itself, as they evaluate a proposal.

- Create a "check list" for application reviewers to provide consistency. Check lists can include:

  - *Decision-making factors, listed by issue or topic, such as "Applicant is well respected in the community," or "applicant has allocated sufficient staff resources to address the need," along with a reference to where the answer is found in the application.*

  - *Summary of information that staff may have gathered, such as 990 information or through conversations had with applicants.*

- Create space at periodic board meetings where the decision-making process itself is assessed briefly. Did reviewers feel that they had all they needed to assess the application properly?

Road Test and Learn

- Try the changes, monitor the impact, and make adjustments as needed.

- Seek feedback from grantee partners regarding changes to your process – informally through conversations or formally through surveys.

- Review or refresh your application at least every five years.

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