Submittable

Improve Equity with #FixTheForm
Agenda

- Introduction
- Quick poll
- #FixTheForm overview and real life examples
- Lessons and next steps: Q&A with Sam and Karl
- Q&A/live form assessments
- Resources
- Survey
GrantAdvisor.org

Honest feedback you won’t find anywhere else!
Individual Profiles with Specific Insights

Mcknight Foundation

Location: 710 South Second Street, Minneapolis, 55401 MN
EIN: 41-0954635

How many hours did the grant application process take?
- Less than 5: 18 hours
- 5 to 10 hours: 6
- 10 to 15 hours: 1
- More than 15: 7

What was the overall relationship with the funder?
- 93%
- 7%

How would you rate this funder’s accessibility?
- 93%
- 7%

How successfully do you think the funder is accomplishing its current philanthropic goals?
- 100%
- 0%

Fix the Form

GrantAdvisor
2,500 Reviews Reveal Key Themes...

1. Grantmaking processes may have unintentional impacts

"Technology is neither good nor bad; nor is it neutral."
-Melvin Kranzberg's first law of technology
2,500 Reviews Reveal Key Themes...

2. Small changes can result in big outcomes: 20-30% of nonprofits' time lost on 'technical time-wasters'
2,500 Reviews Reveal Key Themes...

3. Those most impacted by the systems have solutions BUT it's hard to give feedback to someone you're asking for money from
So... we were thinking...

What can we do about this?
Hey grant folks, let's #FixTheForm!

What is this? A brief survey to identify top pain points in grant applications, to influence funders to change.

Why now? 2020 has brought epic disruptions to our ways of being and doing, with special attention on power differentials and systems that perpetuate inequities. Grantmaking systems have the potential to increase access or create barriers to crucial resources. Small changes (ie. eliminate word limits!) can have big impacts (reduced tech barriers and time costs, increasing the likelihood that smaller, resource-limited charities can and will apply). Let's use this window of opportunity to work together to learn and do better.

Why you? As a fundraiser, you are the community most impacted by how grant applications are designed. Your experience and voice have power. The grantmaking community is ready to hear your feedback.
1. Please pick up to 3 pain points and how much they impact you:

*Mark only one oval per row.*

<table>
<thead>
<tr>
<th></th>
<th>1 - needed a cup of tea after</th>
<th>2 - mildly annoyed</th>
<th>3 - vented to a colleague</th>
<th>4 - had a little cry</th>
<th>5 - considered changing my profession</th>
</tr>
</thead>
<tbody>
<tr>
<td>word/character limits in online forms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>unclear eligibility requirements</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>requiring information that's already publicly available</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>forms that you can't save and return to</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>not being able to see the full application ahead of time (i.e. surprise pop-up questions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>not having the application in an easy to edit and share document</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Who Replied

500 Grantseekers in Nine Countries
#FixTheForm Results

**Equity**
- "For many organizations, especially ones that are Black- or Brown-led and far more likely to be chronically under-funded, these are particularly harmful [practices]"

**Effectiveness**
- "These changes will really help us be able to spend less time and money on form filling and more on the causes and people we support"

**Efficiency**
- "I have literally lost hundreds of hours to troubleshooting and navigating poorly designed grant applications and portals"
#FixTheForm Results

500 grant professionals in nine countries said:

1. Not being able to see full applications ahead of time
2. Time taken to apply is disproportionate to funding awarded
3. Forms that can't be saved and returned to
Specific Example
Arts and Education Council PNC Program Grant Application
What's Working

Nonprofits can see the full application ahead of time!
#FixTheForm Full Results

- Not being able to see the full application ahead of time (i.e. surprise pop-up questions)
- Time taken disproportionate to funding amount awarded
- Forms you can't save and return to
- Repeating same or similar questions and expecting different answers
- Word/Character Limits
- Poor and nonsensical formatting (i.e. requiring manual entry of each board member)
- Not being able to use your own templates for attachments (i.e. budgets, board members, etc.)
- Not having the application in an easy to edit and share document
- Unclear eligibility requirements
- Online form doesn't save formatting (i.e. bullet points or underlining)
- Questions are different between online form and downloadable version
- Requiring information that's already publicly available
- Fixed multiple choice options/fields with no "other" option to explain or self-describe
- No one to answer the phone or email (technical assistance, priorities clarification, etc.)
- Needing to register/create an account to apply
- Use of jargon or uncommon phrases

1-Least Negative Impact, 5-Greatest Negative Impact
## What's Working

Nonprofits can upload their own templates!

### Supporting Documents

- Please Attach the Following: Financial Statements, W-9, Organization Logo, and Program Budget with Justification (*.pdf, *.jpg, *.mp4, *.mov, *.mp3)
- Last Year's (2020) Actual Income Statement *
  - Choose File
  - (maximum size 300MB)
- Last Year's Balance Sheet *
  - Choose File
- Current Year's (2021) Board Approved Budget *
  - Choose File
- Detailed Program Budget and Program Budget Justification *
  - Choose File
#FixTheForm Full Results

- Not being able to see the full application ahead of time (i.e. surprise pop-up questions)
- Time taken disproportionate to funding amount awarded
- Forms you can’t save and return to
- Repeating same or similar questions and expecting different answers
- Word/Character Limits
- Poor and nonsensical formatting (i.e. requiring manual entry of each board member)
- Not being able to use your own templates for attachments (i.e. budgets, board members, etc.)
- Not having the application in an easy to edit and share document
- Unclear eligibility requirements
- Online form doesn’t save formatting (i.e. bullet points or underlining)
- Questions are different between online form and downloadable version
- Requiring information that’s already publicly available
- Fixed multiple choice options/fields with no “other” option to explain or self-describe
- No one to answer the phone or email (technical assistance, priorities clarification, etc.)
- Needing to register/create an account to apply
- Use of jargon or uncommon phrases

Each bar represents the negative impact of each issue, with 1 being the least negative impact and 5 being the greatest negative impact.
What's Working

Form provides "Other" option

Board Demographics

Below Please Enter Percentage of Ethnic/Racial Makeup of Board Members. If You Don't Have Any Members of a Particular Category, Please Enter Zero (0).

African-American /Black

Caucasian /White

Latino/Chicano/Hispanic/Latinx

Asian

Native American

Native Hawaiian/Pacific Islander

Other
#FixTheForm Full Results

- Not being able to see the full application ahead of time (i.e. surprise pop-up questions)
- Time taken disproportionate to funding amount awarded
- Forms you can't save and return to
- Repeating same or similar questions and expecting different answers
- Word/Character Limits
- Poor and nonsensical formatting (i.e. requiring manual entry of each board member)
- Not being able to use your own templates for attachments (i.e. budgets, board members, etc.)
- Not having the application in an easy to edit and share document
- Unclear eligibility requirements
- Online form doesn't save formatting (i.e. bullet points or underlining)
- Questions are different between online form and downloadable version
- Requiring information that's already publicly available
- Fixed multiple choice options/fields with no "other" option to explain or self-describe
- No one to answer the phone or email (technical assistance, priorities clarification, etc.).
- Needing to register/create an account to apply
- Use of jargon or uncommon phrases

1-Least Negative Impact, 5-Greatest Negative Impact
What's Painful

16 characters over the limit

Change "transformational impact" to "outcome"

How Will the Program be Implemented?

programs)

Word Count: 0 / 300

Fix the Form
#FixTheForm Full Results

- Not being able to see the full application ahead of time (i.e., surprise pop-up questions)
- Time taken disproportionate to funding amount awarded
- Forms you can’t save and return to
- Repeating same or similar questions and expecting different answers
- Word/Character Limits
- Poor and nonsensical formatting (i.e., requiring manual entry of each board member)
- Not being able to use your own templates for attachments (i.e., budgets, board members, etc.)
- Not having the application in an easy to edit and share document
- Unclear eligibility requirements
- Online form doesn’t save formatting (i.e., bullet points or underlining)
- Questions are different between online form and downloadable version
- Requiring information that’s already publicly available
- Fixed multiple choice options/fields with no “other” option to explain or self-describe
- No one to answer the phone or email (technical assistance, priorities clarification, etc.)
- Needing to register/create an account to apply
- Use of jargon or uncommon phrases

1-Least Negative Impact, 5-Greatest Negative Impact
What's Painful

- Non-standardized demographic categories
- % vs. whole #
- Potentially publicly available info
#FixTheForm Full Results

1. Not being able to see the full application ahead of time (i.e., surprise pop-up questions)
2. Time taken disproportionate to funding amount awarded
3. Forms you can't save and return to
4. Repeating same or similar questions and expecting different answers
5. Word/Character Limits
6. Poor and nonsensical formatting (i.e., requiring manual entry of each board member)
7. Not being able to use your own templates for attachments (i.e., budgets, board members, etc.)
8. Not having the application in an easy to edit and share document
9. Unclear eligibility requirements
10. Online form doesn't save formatting (i.e., bullet points or underlining)
11. Questions are different between online form and downloadable version
12. Requiring information that's already publicly available
13. Fixed multiple choice options/fields with no "other" option to explain or self-describe
14. No one to answer the phone or email (technical assistance, priorities clarification, etc.)
15. Needing to register/create an account to apply
16. Use of jargon or uncommon phrases

1-Least Negative Impact, 5-Greatest Negative Impact
What's Painful

Evaluation

Explain in detail how the impact of the proposed program will be measured, and documented. *

Word Count: 0 / 300

What Are the Goals/Objectives for the Proposed Program? *

Word Count: 0 / 300
THE ASK:
1. Create an editable, downloadable version of application (Word is preferred)
2. Make it available on publicly accessible website - - crucial first step

Outcomes:
- 133 forms shared
  - Increase accessibility & transparency of grant funding
  - Increase funder awareness of grantee experience
  - Inspire process improvements, simplification, streamlining
- Field Building: Analysis showed grant applications have 39% similarity
Opportunities Facing the Field

1. Equity in Philanthropy – Role of grantmaking processes

2. Effectiveness & Efficiency – Small changes to grant application & report forms can build a more effective nonprofit sector

3. No data, No Justice! The power of standardized, expanded demographic data in research and advocacy for the field
Wrap Up

Thank you!

Special thank you to Arts and Education Council
PNC Program Grant Application

Kaanestad@grantadvisor.org
@AanestadKari
Forms getting it right

- **Pain point:** No one to answer the phone or email (technical assistance, priorities clarification, etc.)
  - Example: Robert W. Deutsch Foundation

- **Pain point:** Unclear eligibility requirements
  - Example: Native Arts and Cultures Foundation

- **Pain point:** Not being able to use your own templates for attachments (e.g., budgets, board members, etc.)
  - Example: Documentary Heritage and Preservation Services for New York

- **Pain point:** Time taken disproportionate to funding amount awarded
  - Example: Fund for Public Education, Teton County, Wyoming
Resources

- #FixTheForm
  - http://blog.grantadvisor.org/fixtheform/

- GrantAdvisor.org: Register as a funder on GrantAdvisor and start using your foundation's custom survey link to gather community feedback today. It's free, and the platform has proven to leverage the power of community voices to enact impactful change.
  - Your foundation's custom survey link is: https://grantadvisor.org/survey.php?ein=xx-xxxxxxx (example ein=47-0834133)
  - Register as a reviewer on GrantAdvisor: https://grantadvisor.org/register/reviewer.php
  - Grant Application self-assessment: https://forms.gle/pq5AY5nKMs4P6K7
Resources

- **Impact Audio**: Impact Audio features short conversations (and a few longer ones) with social impact experts and practitioners. We cover the world of philanthropy, nonprofits, corporate citizenship, and social change.
  - [submittable.com/impact-audio/](https://submittable.com/impact-audio/)
- **Choosing a Grant Management Software to Help You #FixTheForm**
  - [blog.submittable.com](https://blog.submittable.com)
- **So. Much. More!** ➔ [submittable.com/resources/](https://submittable.com/resources/)