Trust-Based Philanthropy Checklist for Choosing a Grant Management Software

Practicing trust-based philanthropy is ultimately a strategic decision that requires the commitment of your entire grantmaking organization. But the right technology can help. When it comes to evaluating grant management solutions, look for the features below to help you follow these key principles outlined by the Trust-Based Philanthropy Project.

Give multi-year, unrestricted funding

- ☐ **Additional forms:** Stay in touch and ask for what you need, when you need it.
- ☐ **Well-organized portal:** Keep all data easily accessible, even across a lengthy relationship.
- ☐ **Robust reporting:** Identify bias in who receives unrestricted funding (then work to redress it).

Do the homework

- ☐ **Internal forms:** Supplement applications with publicly available information and more.
- ☐ **Candid integration:** Gather tax information automatically based on a nonprofit's EIN number.

Simplify and streamline paperwork

- ☐ **Diverse file types:** Collect proposals written for other funders or in the formats the grantees' use themselves, as well as pave the way to verbal check ins.
- ☐ **Eligibility screening:** Ensure that only qualified candidates take the time to fill out your full form.
- ☐ **Ease of use:** Don't risk losing great applicants who are turned off by a clunky process.
- ☐ **Mobile-friendly:** Maintain a positive user experience for all applicants.
- ☐ **Editable:** Avoid any headache when applicants need to make changes or correct a mistake.
- ☐ **Collaborative:** Make it easier for remote teams to work on applications together.
- ☐ **Auto-save:** Help your applicants avoid the risk (and frustration) of losing their work.

Be transparent and responsive

- ☐ **In-app communication:** Keep an open dialogue without having to dig through your inbox.
- ☐ **Rich text guidelines:** Transparently communicate your organization and program objectives.
- ☐ **Rick-text instructions:** Provide in-context examples and link to FAQs as needed.
- ☐ **Technical support for applicants:** Run a process accessible to users with all levels of technical comfort.

Solicit and act on feedback

- ☐ **Concealed responses:** Encourage honest feedback through anonymous surveys.
- ☐ **Impact reporting:** Identify trends across your grantmaking organization.