How grantmakers and grantseekers can communicate to change the world

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Introduction by Ephraim Gopin

Heal the world

It was my third day at the new job.

I was a fundraiser and grant writer for a small nonprofit. I had no previous grant writing experience.

My phone rang. A family foundation wanted to donate $100,000 to a specific program my nonprofit operated. They needed a one-pager and budget for the program. Could I get it to them by tomorrow?

To be honest, I was so new that I didn't know what program they were referring to. But I told them they'd have what they needed in 24 hours. I hurried to the CEO's office, learned the facts, and got to work.

The next day, I emailed them the information. A week later, the $100,000 was transferred.

I thought to myself: This grants stuff is easy!

Boy did I have a lot to learn...

Four years later I was working as Global Director of Communications for a global family foundation. On day two, while talking with the foundation's President, he said to me:
"When you know one foundation, you know one foundation."

Very true.

The grants world is accomplishing a TON of good worldwide. Both grantseekers and grantmakers help those who need it most, have a positive impact in every community, and play a role in making the world better.

On the outside, much good being done. But if you're on the inside - as a seeker or maker - you deal with many frustrations, pain points, and challenges.

As someone who has worked on both sides of the table, I dealt with those challenges. That is why I proposed creating a survey and analyzing the pain points felt by both sides.

Introduction by Ephraim Gopin

The goal? Suggest solutions to problems and begin a dialogue between the two sides. When everyone works together towards a common goal, nothing gets in the way. But when we're busy pointing fingers at each other, it comes with a price.

A lot of ground to cover

The survey and subsequent interviews I conducted with field experts raised many problems; the application process, reporting, communication between both sides, to name a few. One ebook is not enough to list them all, let alone solve them (character counts aaaargh!). That doesn't mean I won't try.

In the sections below I discuss challenges and propose potential solutions. I have added quotes so you can read what each side is saying.

Where possible, I have shared both sides of an issue. It's important for grantseekers to understand how funders think and for grantmakers to recognize how grantees view the grants process.

There will be times when you don't agree with me. I can't make both sides happy all the time. But I'm bringing some of the problems to the surface along with solutions and potential talking points so they can be worked out through dialogue between seekers and makers.

No matter how uncomfortable these conversations will be, positive change will only come about through discussion. The goal: A smoother grants process for both sides.

The bridge

When I told one grantseeker my goal was to bridge the gaps, she replied, "it's not a gap. It's a chasm!"

In this eBook I cover the biggest issues facing the grants community. I have also asked experts to weigh in and add their voice. As you read through each section, you'll see that some issues can easily be solved while others will take time, patience, conversation, and compromise from both sides.

Introduction by Ephraim Gopin

But in an eBook full of problems and challenges, I believe it's important to internalize what one funder commented on the survey: ***"We're all just trying to do our best. I think people on both sides of the fence sometimes forget that."***

True true.

So here's to you grantseekers and grantmakers working together to make our world a better place!

Ephraim Gopin
Founder, 1832 Communications

HOLDIN' OUT FOR A HERO: The biggest problem

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Seeker

It is so much easier to submit proposals when there is an opportunity to develop a relationship with the funder prior to applying. When grantseekers and grantmakers talk about the social change they are trying to bring about, it's easier to write about the work. You know the mutual interests and how to focus the proposal. This takes significant stress out of the process.

“

Maker

I think some elements of a good relationship with a grantee are simple. Being able to chat casually with our grantees at events. Receiving organizational updates - not because they're mandatory but because they recognize that we care about and support their programs! Facilitating partnerships between grantees because they trust us to understand how collaboration can be beneficial.

Fundraising and marketing are all about building relationships; relationships based on trust and open communications.

The survey comments and interviews make one thing painfully clear above all else: **A lot of the tension between seekers and makers comes down to a lack of communication and trust.**

This does not mean that your foundation doesn't enjoy wonderful relationships with grantees. I spoke with funders who are partnering with grantees to make lasting impact in their communities. The same goes for seekers, who spoke of the ongoing conversations and assistance they receive from funders.

But as you read the upcoming sections, you'll begin to see that many of the problems raised by the survey relate to communications. There were times when I wondered: Is each side interested in building a relationship or is the seeker-maker relationship merely a transactional one?

HOLDIN' OUT FOR A HERO: The biggest problem

As I mentioned in the introduction, part of why I proposed this project was to create dialogue. It might sound biased, but yes, one of the biggest problems is the lack of communication between the two sides. Let's dive into it.

Vive la difference

In 2010 I applied and was approved for a $50k grant. However, it quickly became apparent that the organization would not be able to operate the program promised in the application.

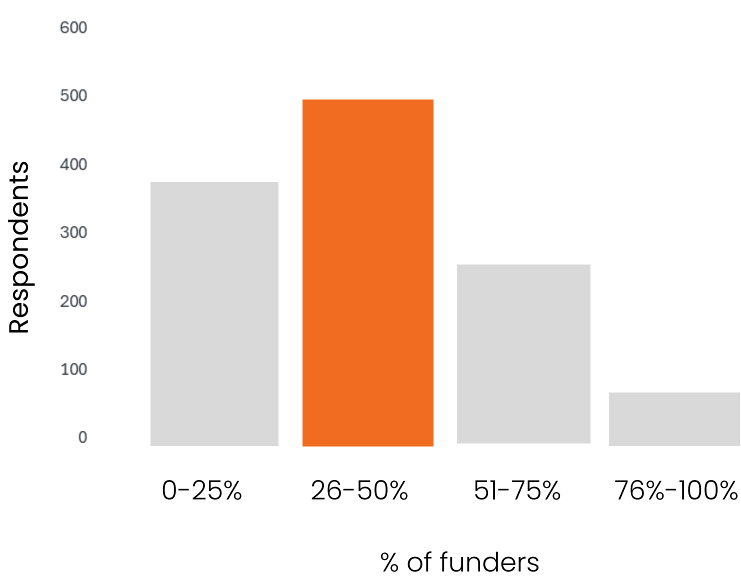
Because we had a good relationship with the funder, I called the head of the foundation and asked for an in-person meeting. The CEO and I arrived, explained the issue, and offered to return the full sum or use the money to boost a current program in the same sphere. The foundation agreed to the latter request. Without that relationship, $50,000 would have been lost.

Survey responses from: 1219 grantseekers

Survey responses from: 305 grantmakers

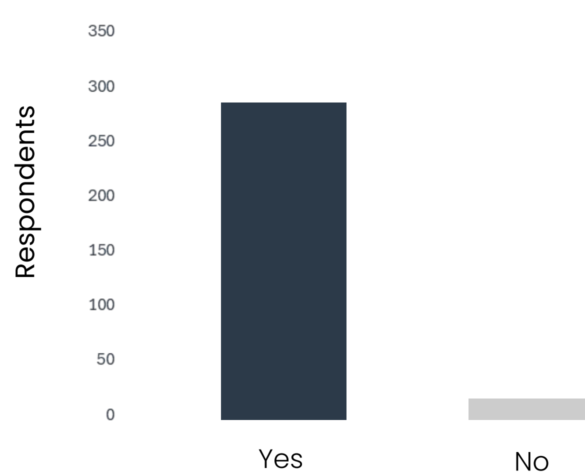
GRANTSEEKER

What percent of funders you apply to or interact with are interested in building a relationship with your organization?



GRANTMAKERS

Do you and or your staff actively work to build relationships with your grantees?



HOLDIN’ OUT FOR A HERO: The biggest problem

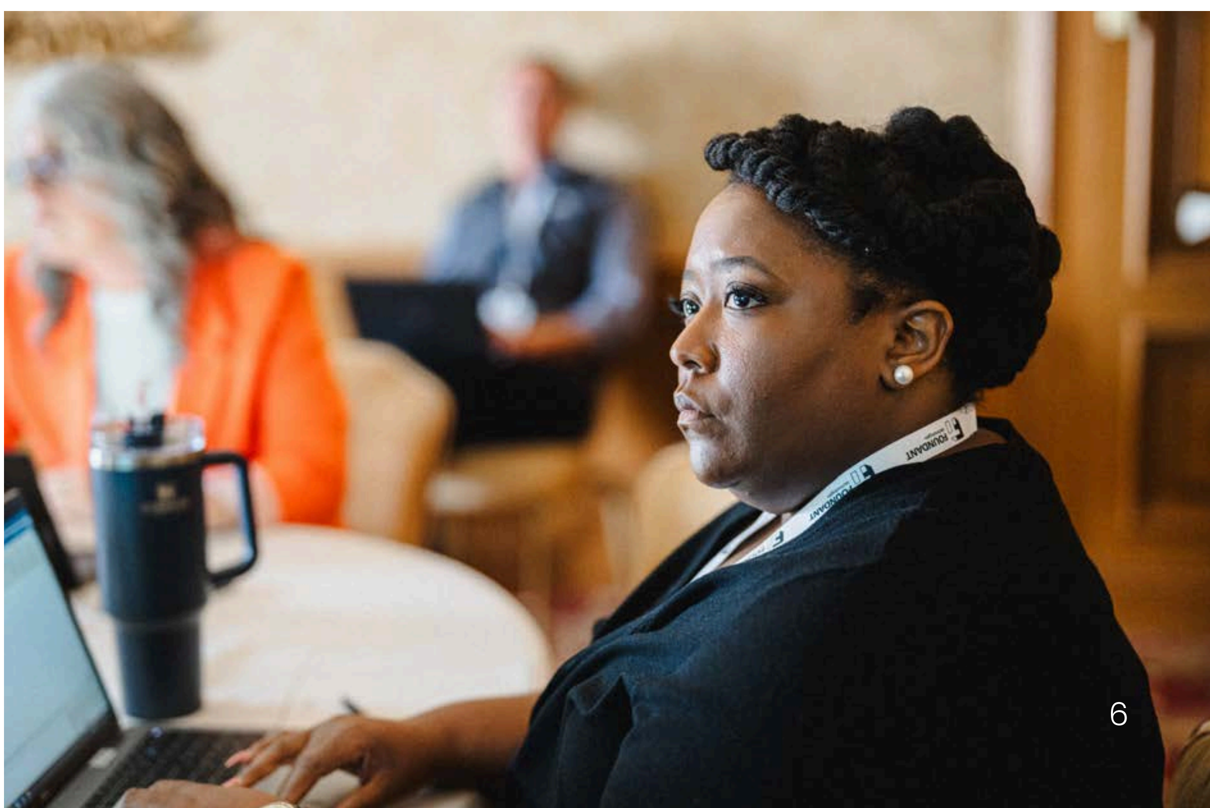
You see it, right? Grantmakers overwhelmingly say they actively work to build relationships. Grantseekers aren’t so sure.

But here’s the thing: It takes two to tango. There are funders who try with seekers who aren’t interested. They just “want the money and then to be left alone.” On the flip-side there are makers who post applications, give out the money, and that’s it. You can’t contact them; you have no way to speak to them.

So what does a good seeker-maker relationship look like?

- Transparent and honest with one another
- Consistent communication to discuss successes and challenges
- You know you can contact your counterpart and they’ll respond in a timely manner
- Both sides are accountable to the other

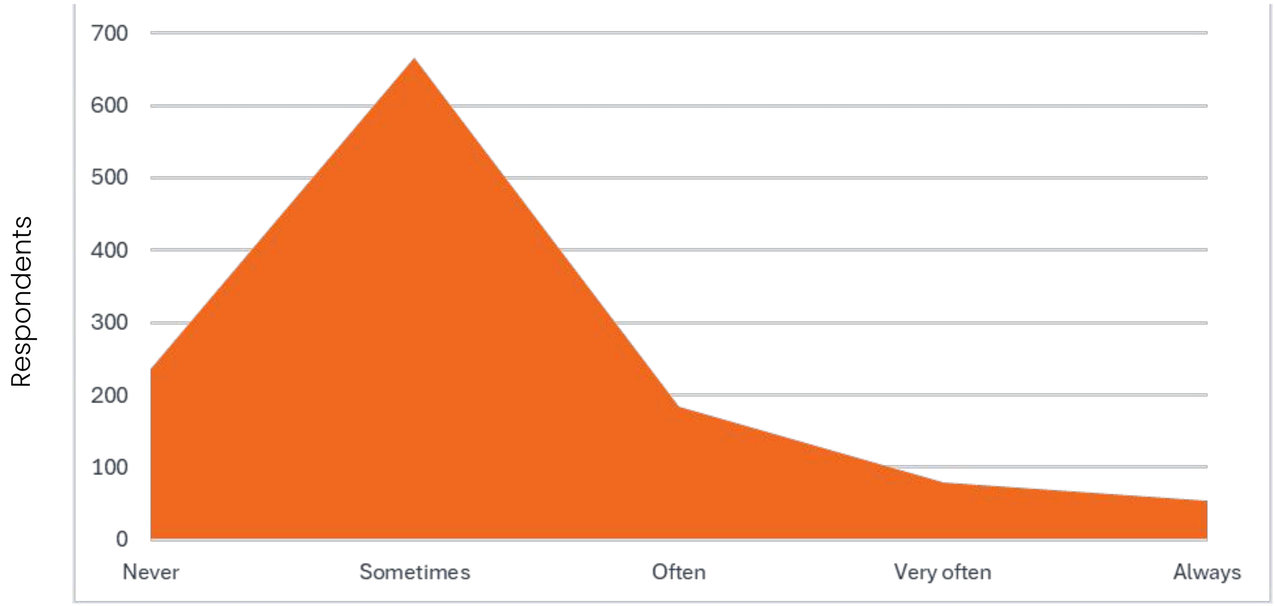
Those are just some of the elements necessary. Throughout the eBook I’ll continue adding to this list.



Negative Feedback

GRANTSEEKERS

When funders ask for feedback, how often do you provide negative feedback?



Frequency of feedback

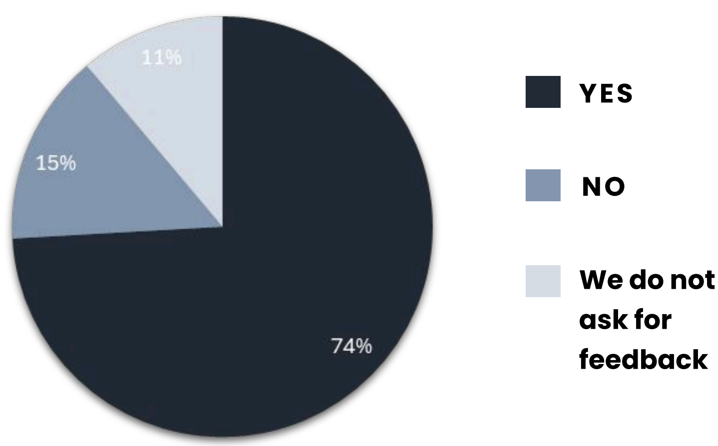
Survey responses from: 1219 grantseekers

I was surprised at how many seekers said "sometimes." I figured, given the fear of losing funding, "never" would win in a landslide!

GRANTMAKERS

When you ask for honest feedback, do you consider that grantees may be concerned about negative feedback hurting their chances for funding?

Survey responses from: 305 grantmakers



HOLDIN' OUT FOR A HERO: The biggest problem

On the other hand, I was glad to see that funders are very aware that seekers may be afraid to provide honest feedback. But that presents a problem: How are they supposed to improve if they're not getting the feedback they need? **Lack of communication.**

M. (anonymous grantseeker) answered that she never gives negative feedback. When asked why she responded:

I won't say this whole process has been a nightmare. Your engagement is challenging and your application is written poorly. You'd be stabbing yourself in the back by doing that. But I also think they don't want authentic feedback. They have the keys to the kingdom and the king doesn't wanna know."

M. (anonymous grantseeker)

Harry Daley of the Greater Saint John Community Foundation knows that some organizations may be concerned that providing critical feedback about the process will hurt their chances of receiving funding.

"I get it. The power dynamic is real, whether foundations want to admit it or not. For awhile we had a "feedback for the Foundation about your experience" section on our application/grant reports and we rarely received any critical feedback. When we reviewed the feedback during our annual strategic check-ins we knew that we weren't getting the full picture. In response, we circulated an anonymous survey seeking feedback on our granting processes, to many of the same organizations and we received the critical, productive feedback we were after!"

Harry Daley of the Greater Saint John Community Foundation

Unrealistic expectations

	YES	NO
Do you feel like funders have unrealistic expectations?	74%	26%
Do you feel like grantees have unrealistic expectations?	67%	33%

Survey responses from: 305 funders & 1219 grantees

Seeker: *They make us jump through hoops for grants of $2,000.*

Maker: *They think we have unlimited funds and should be able to give them more.*

The survey comments and interviews were consistent: Seekers assume funders don't understand how much time they spend filling out each application while funders think that seekers don't understand how foundations, especially community foundations, function.

More and more organizations are applying for grants and the total request can greatly exceed a funder's budget. It's not that seekers aren't valued or not worthy of receiving a grant. Many times, there just isn't enough money to go around for everyone.

Grantees understand that not all applications will be a win. However, what rankles them is the lack of communication from funders before a grant deadline. They have no idea if they're a good fit or not! And then when they're declined, no one at the funder provides feedback as to why their application wasn't accepted.

HOLDIN' OUT FOR A HERO: The biggest problem

The previous issue will be discussed in other sections but for now, the lack of communication is evident.

- If grantees grasped how foundations work, they'd better understand why many applications are rejected. This is something that needs to be taught.

- If funders understood the frustration of a grantee who spent numerous hours on an application only to receive an email that said, "*Your application was not accepted. Due to the high volume of applications received, we can't share the reasons for our decision*," both sides would benefit.

- Education about how foundations operate coupled with pre-application discussions would potentially cut down on the number of submitted applications. Win - win for both sides.

High turnover

This topic is an eBook in itself: The high staff turnover rate at nonprofits.

32% of makers indicated this was one of their top frustrations in working with grantees.

Example: On average, fundraisers switch jobs every 18 months. Building strong and lasting relationships with donors and funders is difficult if the organization has a revolving development door.

High turnover can make it tough for funders when they need to contact a point person at a nonprofit. Additionally, each time a new person comes in, both sides have to "re-establish" the relationship and build trust, and the development person has to get up to speed ("we're doing this again?!" thinks the funder) on programs, processes, and deadlines.

This is a different type of communication shortage but it does cause stress for both sides.

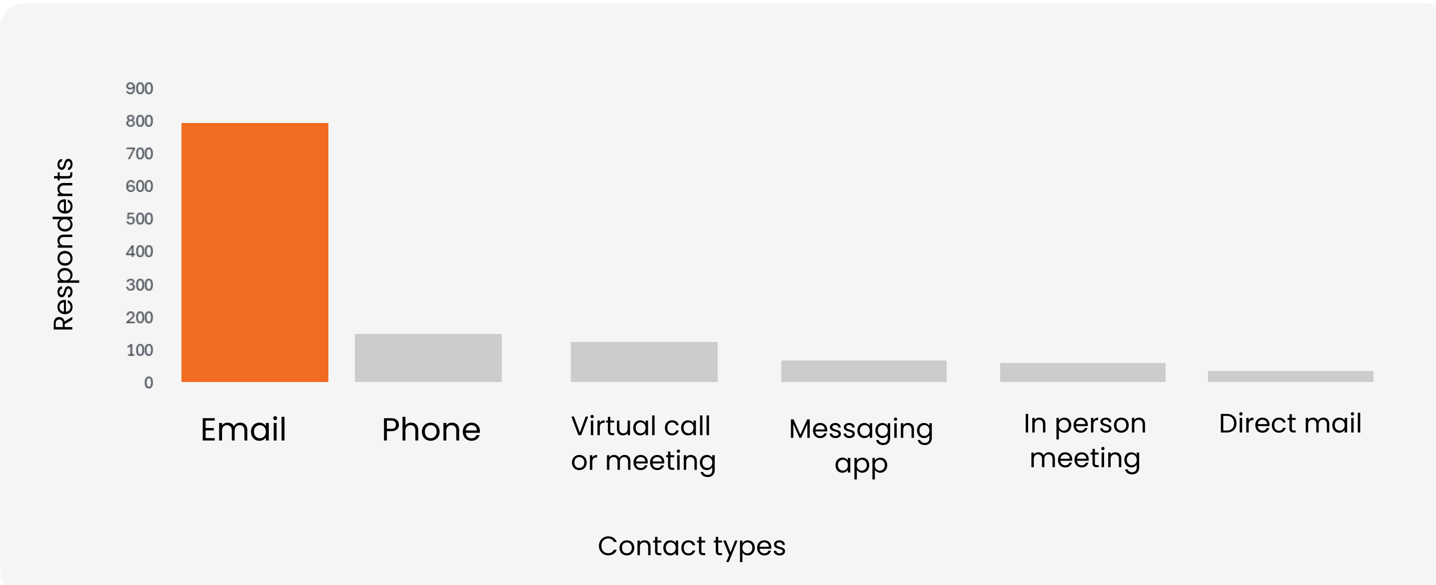
HOLDIN' OUT FOR A HERO: The biggest problem

We have agreement! Well, sort of

I went looking for some agreement between the sides. I found it in email!

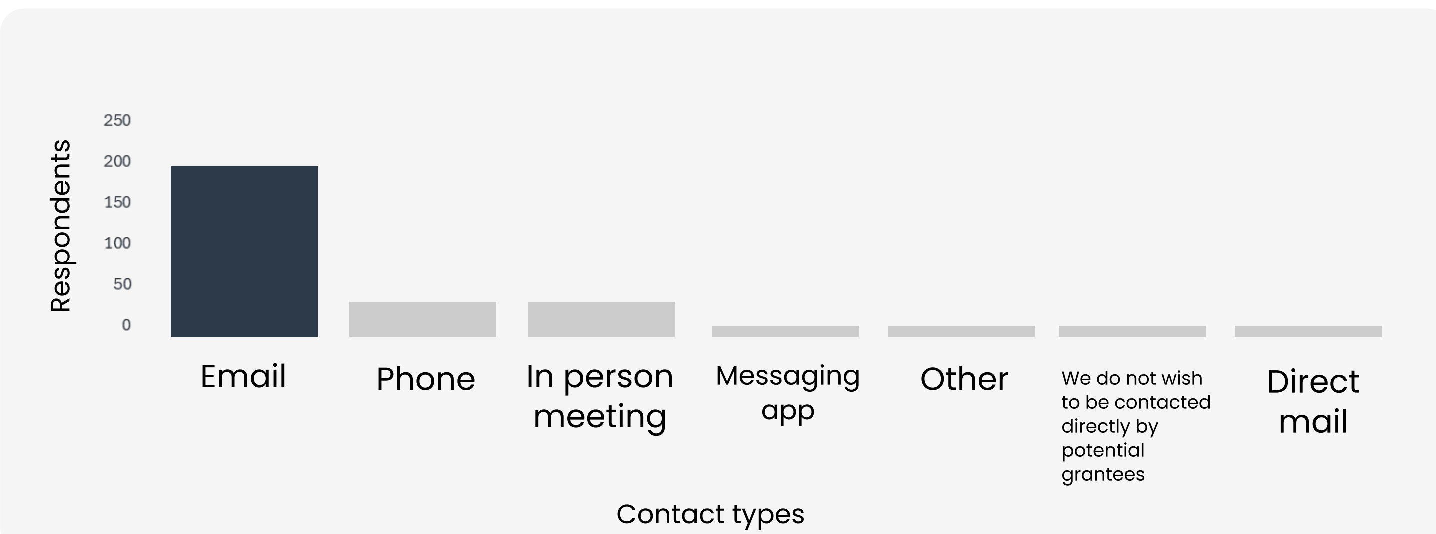
GRANTSEEKERS

How do you prefer to contact a funder?



GRANTMAKERS

How do you prefer to be contacted by potential grantees?



As much as I love email, if the option is available, I think seekers should choose a phone call. It's more personal, and a conversation could be more helpful.

HOLDIN' OUT FOR A HERO: The biggest problem

Although both sides prefer to be contacted by email, they both reported having difficulty contacting the other.

37% of seekers said one of their top frustrations was not being able to find contact information for funders.

32% of funders said they couldn't find contact information for organizations, or they found the information but no one answered the phone or emails.

So yes, both sides prefer to be contacted by email. Well, at least when they can find an actual email address to connect with.

Potential solutions to help strengthen the connection

A solid relationship is built on communication and trust. Here are a few ideas to help both sides build the foundation for consistent engagement.

1. A "no" is not the end of the road. T., a grantmaker, told me: "*If an organization is not given a grant after an application is completed, we give some feedback. But it's rare for that grantee to continue the communication, which they should*." That ending stood out for me. I asked T. why they don't stay in touch. *"No money, no need to keep in touch. Which is too bad. If after getting a "no" you send an email saying, "Thank you for the opportunity, please keep us in mind in the future," that nonprofit will stay on the foundation's potential grantee list*." Be appreciative!

2. Low-hanging fruit: Grantseekers - funders are checking you out. There's information they're looking for. And yet they can't find it! Here are some of their top frustrations in working with grantees:

   - Website lacks basic information
   - Not clear what their mission is
   - No data online about their impact
   - Little or no information about who their current funders are
   - No contact information
   - Contact information but no one answers emails or phone calls

Grantees - these are all easily fixable! The easier it is for funders to find what they need, the better your chances of building a relationship.

HOLDIN’ OUT FOR A HERO: The biggest problem

3. Funders should meet quarterly with Executive Directors in their space - whether you fund them or not - to learn more about what’s happening in the space. This will provide a chance to build relationships and open up lines of communication.

4. Both sides should offer educational opportunities which would be beneficial to everyone. An organization brings in a top expert and invites all funders in that space to attend the lecture.

HOLDIN’ OUT FOR A HERO: The biggest problem

And finally…

Sometimes a relationship is built through the beneficiaries served by the seeker and funded by the maker.

M., who works in higher education, shared this with me about building relationships with funders: *“It primarily happens through our named scholarship program. We offer donors and funders the chance to provide funding/scholarships for one student for one year.*

We try to nurture that relationship in some ways. For example, students write a personal thank you letter to funders. We create a personal profile of each student so we can share family background, career goals etc. with the donor. This gives the donor a sense of who the student is.

Some of the donors get that thanks letter from the student and write a letter back to them. That’s a sign that our donors are serious about engaging with our mission and have the wellbeing of the students at heart.”

That’s how you build relationships!

HOW WILL I KNOW: Before the application process

"

Seeker

I wish they understood how beneficial it is to have a grants database on their website. As an organization that works with many partners, this is key research in our prospecting and determining which funders are the best fit for us.

47%	of seekers found funders who did not provide detailed information about deadlines, the application, and/or reporting requirements.
70%	of makers said they provide information about the reporting process and the application.

48%	of grant seekers have found funders who are unclear about what they will and won't fund.
77%	of funders said their website clearly states what they will and will not fund.

This issue is a major problem. Some funders may not be listing the information seekers need to make an informed decision whether to apply or not. (You'll see that this was done on purpose.) This has implications:

- More and more seekers will apply if they think their mission is near the mission of the funder (or at least whatever they can discern during their research). The hope is to get more positive answers.

- This, of course, means more applications for funders to review - more applications that aren't necessarily close to their funding areas.

Everyone is losing because certain information isn't readily available. Let's dive into what goes on before opening the application

HOW WILL I KNOW: Before the application process

Transparency

91% of seekers said viewing the application and reporting guidelines in advance would help them decide whether to apply. Yet many funders do not post these on their websites.

For many seekers, applying is like taking a shot in the dark rather than knowing in advance if their mission and values match those of the potential funder.

As one seeker said: Don't be like Oz behind the curtain. Be transparent about your priorities and what you're looking to fund, and share the application in advance. Give us a chance to decide whether it's worth investing our time - and yours as well.

If you're a funder, consider posting at least the application and reporting requirements online ahead of time. Please give organizations the chance to make an informed decision.

Drilling down

This was a MAJOR issue in the survey comments and in my interviews with both grantmakers and seekers.

Many funders say they fund education, the environment, or alleviating homelessness. But those are too broad!

If it's education, does that mean literacy? Grades 1-6? Middle school? High school?

Side A: Funders don't want to drill down to avoid being boxed in. They leave room to learn about new projects out there and consider funding them. If they drilled down, they wouldn't get certain applications and they'd miss some programs. It could also mean not having to update their website and related materials every grant round.

Side B: By not drilling down, funders receive many applications that aren't even in the ballpark regarding their funding priorities. They get 100 applications but they can only fund 10. They're a small team and they must read all those applications! If they drilled down, they'd get fewer applications.

As a small - staffed foundation, they can't respond and tell the other 90 applicants why they were rejected. But grantees NEED that feedback!

Round and round it goes.

Drilling down means organizations don't have to guess if a funder is a good fit. Funders want flexibility with their funding and don't want to be locked into a framework of only funding specific things.

And even if they did drill down, would that stop some organizations from applying? Not necessarily. When nonprofit CEO's mandate "*get as many applications out the door as possible*," it won't stop the applications from being submitted even when there's no chance of being accepted.

I understand both sides and I don't have a solution. I hope that by sharing how each side views this topic, we can use this as a starting point for dialogue.

HOW WILL I KNOW: Before the application process

Listing past grantees/winning grants

59% of makers would consider publishing proposals they have accepted in the past. The goal would be to allow potential grantees to see what a successful application to their foundation looks like.

This is great! Viewing past grantees and the “winning” proposals would benefit seekers doing research. This communicates what funders are seeking and gives applicants a benchmark to understand what constitutes a strong application.

However, the issue is a little more complicated than just posting a PDF of proposals. It would have to be anonymous, permission granted by the nonprofit who composed the application, and financial and personal information redacted. This could be cumbersome to maintain and very time-consuming.

Additionally some funders commented:

“

It might discourage an organization from applying for something not related to the posted proposals.”

“

The asks would be the “same old thing” (copies of what’s on the website) rather than being creative and new.”

“

Sharing one winning proposal over another might be perceived as preferential treatment of one nonprofit over another.”

“

There’s no context. Why did this proposal earn the applicant $50,000? Was it a special grant? Was it their fifth year with that particular foundation? Listing amounts may cause seekers to make assumptions not based in reality and ask for more than they should/the funder can give.”

HOW WILL I KNOW: Before the application process

On the flip side funders mentioned:

It helps applicants who received a “no” improve future applications.”

They can offer example responses for specific questions on the application.”

Posting winning proposals is a great way to improve transparency.”

Once again seekers and makers have very valid reasons and arguments for their positions. This is another area for dialogue to discuss potential options to satisfy both sides.

HOW WILL I KNOW: Before the application process

Pre-application workshop/webinar

48% of seekers said they had participated in a pre-application workshop or webinar. Excellent! Pre-application communication is critical for both sides: Seekers can understand the funding priorities of the funder, and makers can clarify what they're looking for and answer questions from attendees.

However, in interviews, some grantees told me the workshops were a waste of time. Everything the funder says can be found in the RFP. So why attend? "*So the funder can see I showed up.*"

I asked Kristen Runk, Founder of Kristen Runk Consulting, if pre-application workshops eased the workload a bit because now applicants have a better understanding of what the funder is seeking.

> *"I do find these very helpful, especially when those running the webinar/ workshop are candid and honest about what they're looking for. More than once, these have led me to decide NOT to apply for a grant and that can be just as helpful as learning your project aligns perfectly. It's all time consuming and no one wants to put effort into something that just isn't the right fit."*
>
> **Kristen Runk, Founder of Kristen Runk Consulting**

HOW WILL I KNOW: Before the application process

Harry Daley of the Greater Saint John Community Foundation told me they have a phone call with each applicant before applying so they are aware of all steps in the process and are set up for success. I asked him what advantages that has for a foundation.

> *"First, we get a clearer picture of how many and which types of organizations will apply. We have limited funds and it's a competitive process so the phone calls give us a better understanding of the landscape and what to expect logistically in terms of the review. But perhaps more importantly it's a great opportunity to have open honest conversation with the organizations to get a better feel for what their needs are. We exist to support organizations doing the work in the community. The phone conversation gives us an opportunity to learn about their unique needs and ensure applying makes sense for them. Finally, it is also an opportunity for us to help connect some dots between organizations that may have similar aspirations or needs and invite them to collaborate on future applications."*
>
> **Harry Daley of the Greater Saint John Community Foundation**

Communication before the application process is opened is beneficial to both sides!

HOW WILL I KNOW: Before the application process

Are they a fit?

Grant pros are very, very busy. Whether they're full-time grant writers or wear seven other hats, their time is limited. They want to submit the best application possible that matches the funder's funding priorities, mission and values.

This means grantees have a question: Are we a good fit or not?

The issues and ideas raised previously would help seekers answer the above question. Another way to help them is through an LOI - a Letter of Intent (or as some funders call them Letters of Introduction).

The advantages of an LOI:

- Nobody wastes their time filling in a full application if the LOI makes clear the organization isn't a good fit
- Helps funder guide the organization to build a more successful application
- Funder staff have a smaller "application" to review and decide who should move on to submitting the full application
- Efficient for both sides
- Not a big burden on organizations
- No budgets or other documents to upload
- Funder can see what's out there, meet new organizations in the community, consider all ideas and then narrow down who should apply to fit their priority areas

HOW WILL I KNOW: Before the application process

One other benefit where available: LOI answers can be copied to the actual application so applicants don't have to reenter answers.

An LOI can be a good way for both sides to be more efficient while offering a funder the chance to open a line of communication with a new organization.

BONUS FOR GRANTSEEKERS:

Read this post by Alice Ruhnke, President of GrantStation, on how to evaluate grant opportunities (especially since everyone has limited time).

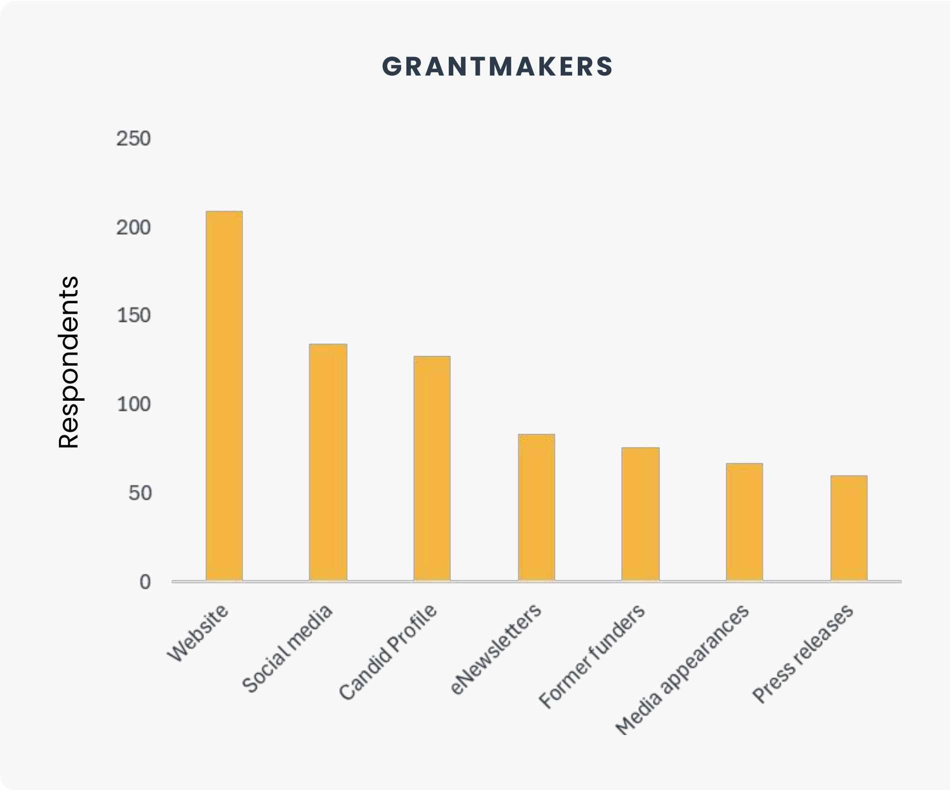
HOW WILL I KNOW: Before the application process

Funders are vetting you...

Grantseekers - do you realize that potential funders are checking you out?

They want to see what's out there about you and make sure they're not partnering with an organization whose reputation is less than stellar.

When vetting a potential grantee, aside from the application, what other sources to you look at?

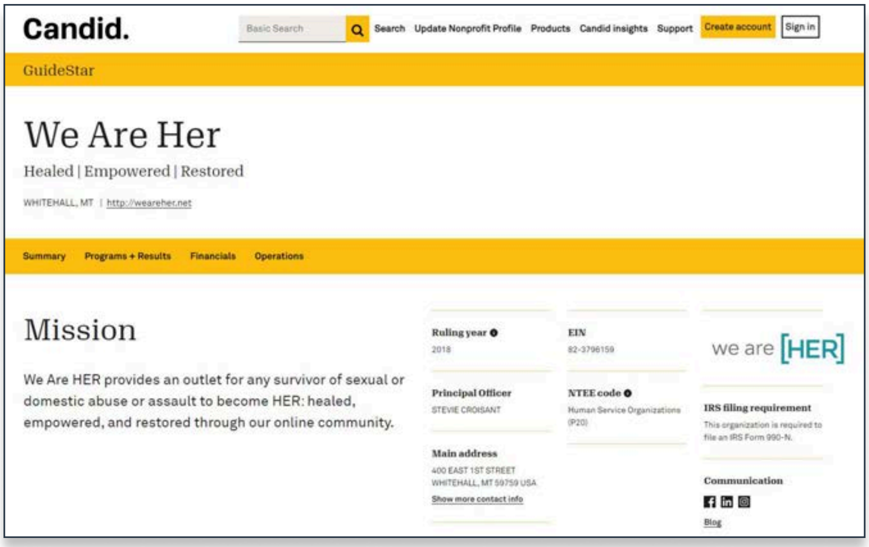


A few recommendations for grantseekers:

Check your website.
Does it have impact stories? Data about your work? Updated information about programs and services? Your website is your window to the world and it's the first place a funder will go to learn more about you. Make sure the website is updated!

List current and former funders on your website.
A former funder has vetted you and hopefully can give a positive recommendation if asked.

Make sure your Candid profile is up to date.



Tight deadlines

Grantseekers have had to deal with it: A funder opens their portal and announces that organizations have three weeks to apply.

To the funder three weeks sounds like a long time. But to the grant pro who has to gather information, data, budget numbers, stories, program updates and a hundred other things, three weeks isn't enough.

Seekers raised this issue in the survey comments. I can recommend that funders lengthen the application period, but that's not always going to happen.

Seekers - check out the "I'm walkin on sunshine" section where grants expert Bethany Planton GPC offers advice on what you should always have at the ready. This can save you some time when deadlines are tight.

HOW WILL I KNOW: Before the application process

Potential solutions to make the decision process - apply or not apply? - an easier one

1. Funders: Please post more information on your website. It can mean fewer applications and the applications you do get will be on target for what you're seeking.

Here's a suggested partial list of what to list on your website:

- Funding (priorities, eligibility, and restrictions).
- PDF of the application.
- Reporting requirements.
- What percentage (average) of applications are accepted and funded.
- What percentage of grants are given to returning grantees vs. new organizations.
- The maximum amount you can give out to one grantee.
- FAQ from past rounds of questions. Even if your foundation can't answer phone calls or emails, people will still be able to get at least some of their questions answered.

2. Pre-application workshop/webinar: Allows funders to lay out the blueprint of what they're looking for. Seekers can get their questions answered. Both sides benefit.

3. How to write a proposal session: Help new organizations without grant writing experience learn how to complete an application. I understand that this type of session is probably only applicable to large foundations with a large staff. Some funders did mention that they are receiving applications from new organizations that have clearly never written a grant application. If you can help them to submit better applications, do it!

HOW WILL I KNOW: Before the application process

4. Grantees: Stop the "spray and pray" approach! Don't apply to every funder who opened their application process. Research. Learn about funders to see if your mission matches theirs. Be strategic about your grantseeking! (For more see the "I'm walkin' on sunshine" section)

And finally...

Some funders told me that no matter how much information they post on their site, they are still inundated with applications, many of which "aren't even in the ballpark."

I mentioned "spray and pray" above. Many organizations are chasing the almighty dollar, and they assume funders have a lot to give away. So, grant writers are being asked (their boss is demanding) to write and submit as many applications as possible, even if it's not a fit.

This hurts both sides: The organization is not being strategic and the funder is stuck with applications that have nothing to do with their priorities or mission.

Why is this happening? That's for a larger discussion of how the nonprofit sector operates.

But one data point: Donor retention in the sector hovers around 40%. Abysmal. All those donors lost each year? Organizations must make up the lost revenue somehow. They have identified foundations as a possible source of income and so let the avalanche of bad applications roll in.

Not great.

LAND OF CONFUSION: The application process

Seeker

Program staff at foundations should have to apply for funding from their grant program, receive those grant funds and complete all reporting requirements in addition to managing the actual project. Filling out the application only represents a small fraction of the total time commitment of seeking grant funds AND successfully managing grant funded projects. Filling out their own application form is really the bare minimum in terms of understanding grant funding and managing grant-supported projects and programs.

Maker

A common application sounds nice but it's the intellectual property of the nonprofit. Also, do we really want all our grant applications to mimic one another?

Wanna see a grant pro get animated and riled up? Talk to them about the actual application they have to fill out. To say the least, there are a lot of issues.

Let's discuss not only the application but what seekers can and cannot apply for.

LAND OF CONFUSION: The application process

There's only so many ways...

Here's what Joelle, a grantseeker, said:

> *When I am training people to write grants I sigh and tell them if they feel like they are repeating themselves, they are doing it right."*

Grant writers get frustrated when they have to answer three very similar questions in three different ways. Writing "as noted previously" is passive-aggressive and could upset a reviewer. So instead writers have to find different ways to say the same thing.

As Joelle said: *"It's a lot like spinning wheels and takes too much time."*

It's ok for a funder to ask for the information they need. Funders may not view it as questions repeating themselves. In their mind, each one has a purpose.

This goes back to communication. A pre-application session where attendees have already reviewed the application would allow them to ask funders to explain the differences between the potentially repetitive questions, saving both sides a lot of time.

LAND OF CONFUSION: The application process

The portal itself

Here are just some of the issues seekers have with the online portals used by funders for the application process:

- Can't save
- Can't go back
- Can't copy from Word into the PDF
- Allowable document upload size is way too small
- Can't see the full application one last time before hitting submit

Here are a few solutions funders can consider to make the process more user friendly:

Provide a Word version in advance, which seekers can fill in and then copy and paste the answers into the application portal.

Provide an easy-to-share PDF version of the application in advance. That allows seekers to draft their answers offline, and multiple staff can work on it simultaneously.

Make sure the downloadable version includes the actual space limitations, size limits, and character counts that will be used on the application.

Allow organizations to print/download the entire application as a Word doc/ PDF so writers can review it before final submission.

Make sure the system confirms when documents have been uploaded.

Does the application have many different screens? Allow people to jump rather than requiring them to complete screen one before moving to screen two. For example, if questions overlap, an answer to question 23 would fit better for question 3 - which means skipping back six screens. Make it easy to navigate through the entire application.

“Small” grants

I will step on a landmine here, but I feel it should be addressed.

Story: A homeless man saw the CEO of a local United Way picking up donated food in the soup kitchen van. He walked up to the CEO and said, “*I want to make a donation*,” and handed her a quarter. “*This is lovely*,” she replied. “*I’ll make sure the soup kitchen gets it.”*

A month later, they met again, and he said, *“It’s time for me to make a donation again.” He gave her a quarter. She said, “Well, now it’s official, you’re a monthly donor!”* He walked away with a grin on his face.

I share this story not only because I love it but because it teaches us an important lesson: **No amount is too small.** A quarter was 100% of what that man could give. His donation needs to be celebrated just as much as if he donated $25,000.

75% of seekers said that funders have unrealistic expectations about what they expect from grantees for the amount of support being offered.

In the survey comments and interviews, I read and heard multiple times that the amount of time spent on the application should match the grant amount. “Small” grant of $5,000? Short application. “Large” grant of $50,000? Long application.

I wonder how funders in the $5,000 range feel reading that when $5,000 is 100% of what they can give! They, too, deserve attention. Yes, their applications may be long, but that’s what they need for their internal reporting and bookkeeping.

In my opinion, this is part of a larger overall issue that the nonprofit sector suffers from: Low donor retention. The average retention rate has hovered around 40% for years, while the first-time donor retention rate sits at 18-20%.

Abysmal.

LAND OF CONFUSION: The application process

This is what happens when everything becomes about the almighty dollar. Grant writers will jump through hoops if "*the amount is worth it*." Organizations are chasing the big bucks.

The "small" grants? Not worth our time. Or if we must fill it out, then cut the application in half. And don't have reporting requirements that take up time.

When you feel that way about "small" grants, you won't treat the funder's staff or their generosity with the respect it deserves. Which gives the foundation no reason to approve a grant the next time you apply. You don't build relationships this way.

Treat a $10 donor like a $10,000 donor. You'll receive more grants and have a stronger connection with funders, something that can prove very helpful to your organization now and in the future.

<rant over>

LAND OF CONFUSION: The application process

New vs. old I - new programs

Trying new things? Great. Innovation? Awesome. Different approaches to a problem? Let's go.

But when it comes to applying for grants, the question is if funders are willing to fund current programs or are only looking for the latest and greatest.

Every funder is different, but for this section, let's concentrate on funders who are only or mostly interested in funding new programs.

As one grantee told me: *"Our current programs work because we've tested and refined them over many years. We've adopted best practices and we're having significant impact in the community. We need funding to continue doing what's successful, not to reinvent the wheel. If it ain't broke don't fix it."*

Additionally, seeking new programs affects sustainability. There's no guarantee the new program will work, and it could take a few years to see if it's sustainable or not.

Will funders be willing to fund multi-year grants and have the patience to wait and see the results?

On the flip side, seekers need to understand why makers want new programming, ideas, and services. Funders want to be on the cutting edge of creating new and innovative solutions to longstanding problems. They may also want to differentiate themselves from other local/national funders who fund organizations in the same mission space.

There's nothing wrong with wanting to try something new! It forces organizations to look at the issue they advocate for from multiple viewpoints, learn from the data and their experience, and consider fresh solutions.

LAND OF CONFUSION: The application process

How do we reconcile the desire for new versus wanting to fund what's already working?

I suggest that funders consider a mix of new and old programs. Grant a certain percent of funding to new programs and a certain percent to current programs/ services. Make sure to clearly state this breakdown on the funder's website.

Additionally, grants for new programs should be multi-year (where applicable). It takes time to determine whether a new program works and is sustainable.

That could lower some of the criticism leveled at funding new programs.

Organizations appreciate multi-year grants as they give them peace of mind regarding funding, allow them to plan more long-term, and feel comfortable about hiring the necessary staff.

The above is just one possible solution. The issue of new vs. already running programs should be part of the dialogue between makers and seekers.

New vs. old II - separate or same application for returning

Only 41% of funders said they have separate applications for new and returning grantees.

I thought it would be much higher. After all, the funder doesn't need the same information from a current grantee who's applying again. They already have the information from last year's application!

I figured that a separate application for returning grantees would benefit both sides. A shorter application means less time spent filling it out and less time reviewing it.

Turns out, what sounds like a good idea in my head might not be practical in the real world.

JoAnne Krick of the Niagara Community Foundation told me: *"We fund year by year so last year's application may be for a different project and not relevant to this year's application. That's why we don't have separate applications for new and returning grantees. Keep in mind that at some foundations there's a different grant reviewer each year. That person may not be familiar with last year's application so they need all the details."*

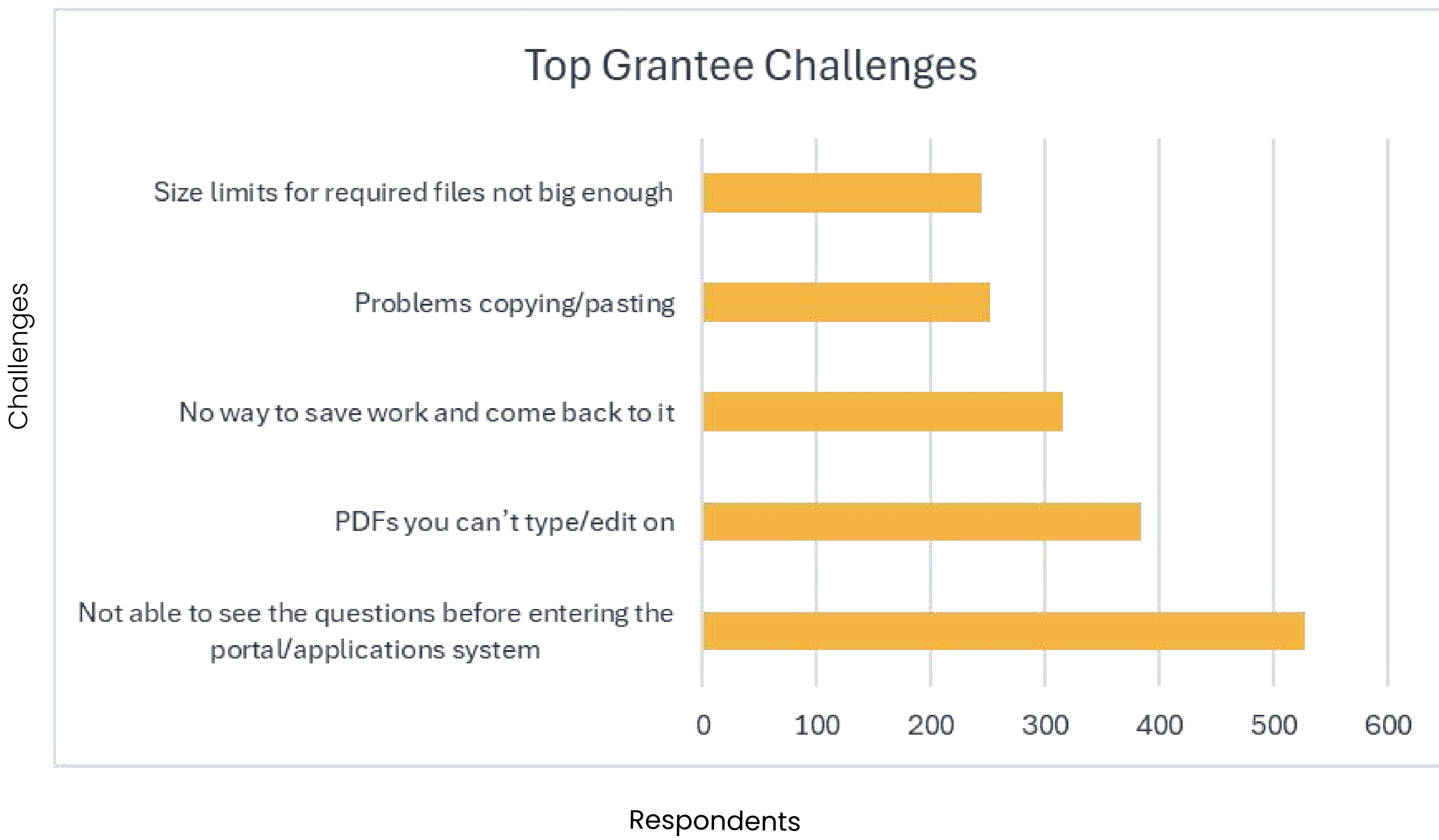
41% did say they have separate applications. Each funder must decide if such an idea would work for them given the way they fund organizations and review applications. Something for funders to think about.

Potential solutions

I want to share a few big ideas that will help make the application process easier and less time - consuming.

The low hanging fruit

Earlier I mentioned the issues grantseekers have with the application portal and potential solutions. Take a look at the data from the survey:

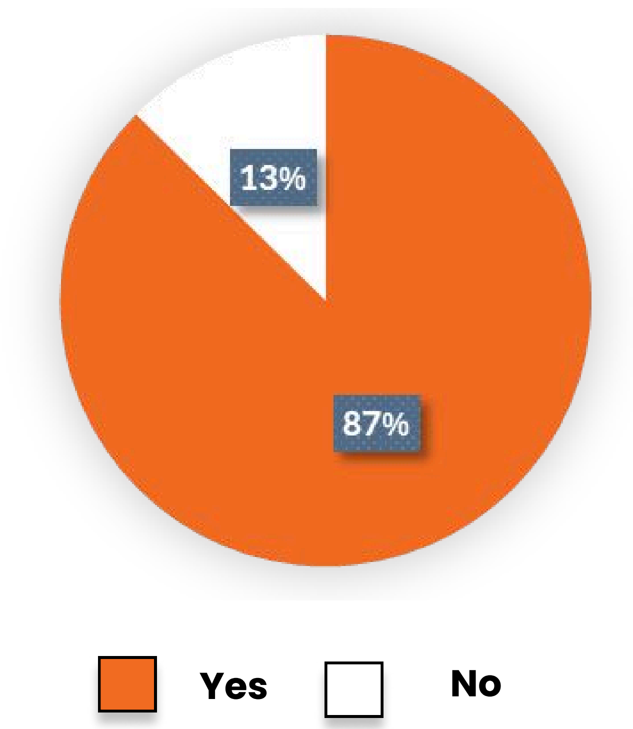


All of those are easily fixable and will reduce seeker frustration with the process.

Fill in your own application

GRANTSEEKERS

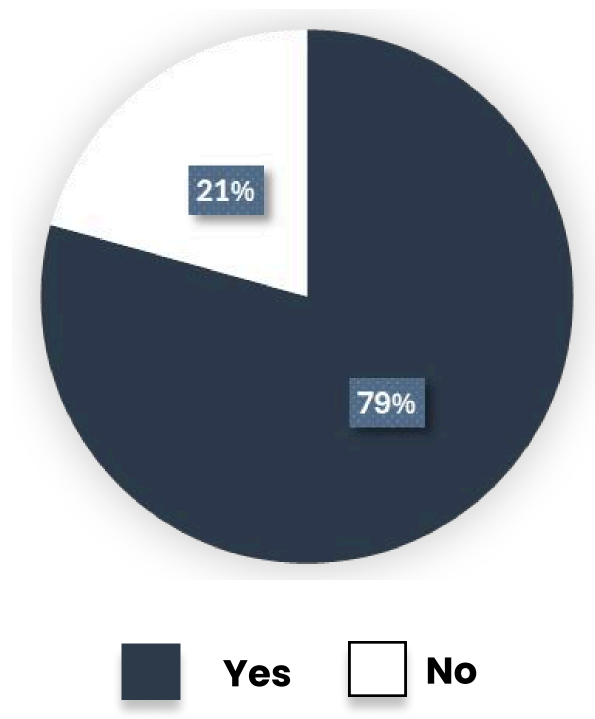
Should funders have to fill out their own application?



Survey responses from: 1219 grantseekers

GRANTMAKERS

Have you filled out your application?



Survey responses from: 305 grantmakers

LAND OF CONFUSION: The application process

Overwhelmingly, seekers think makers should have to fill in their own applications. The thinking is that a funder will realize how many hours it takes, how much is requested and maybe cut down on some of the questions.

Of course, 79% of funders said they've filled out their own applications, yet we have a whole section dedicated to issues with the application itself.

Let's look at something else which could be helpful to both sides.

When funders were asked when's the last time you reviewed and made significant changes to your application...

63% answered in the last twelve months

28% answered in the last 1-3 years

Application changes have been made recently. This is good! A follow-up question might be **why** they made those changes: In response to user feedback? A change of funding priorities? It's been a while, and the application needed to be refreshed? (This is a topic for the next survey. Oy!)

The user experience matters a lot. If the application is too convoluted or difficult to understand and fill in, fewer organizations will apply, and/or the quality of the applications will suffer. This creates problems for funders.

A possible solution could be WHO fills out an application prior to it being opened to applicants. Funders should consider asking three outside grant pros to fill in the application from start to finish and provide honest feedback.

This would help with repetitive questions, character counts, questions that are confusing, how one moves from section to section, editing, and much more. In short, it would do wonders for the user experience.

If organizations know that the application was checked and graded by outside grant pros, they will trust the process more. Trust is important to building relationships.

Win-win.

Pro tip:
Before an organization launches a public campaign, I always advise having "outside eyes" review it. Find five people not associated with your organization and ask them to take ten minutes to review the campaign, slogan, visuals, content, etc. Because they're not in your inner circle, they may see things you didn't, things which, if not fixed prior to launch, could damage your organization's reputation.

(I have entire presentations based on just the above.)

This is another reason to have people on the outside review the grant application before it's opened to the public. Yes, the funder needs these questions answered but the application is being created for others - grantseekers. Their needs, experiences, and abilities must be taken into consideration.

LAND OF CONFUSION: The application process

Common application

This is another one of those ideas that sounds good on paper but, in reality, is hard to implement.

70% of funders indicated they would consider using a common application, defined as "all foundations of a certain category or geographic area using the same application."

Obviously, for seekers, a common application would save a TON of time and effort. It could bring some equity to the grant making process. But is it doable?

Funders are willing to consider it, but there are a lot of issues and potential obstacles to overcome:

- When you know one foundation, you know one foundation. Each one is unique and different. Could their grant applications be the same?
- Diversity is helpful. What works for community A may not work for community B. Applications that reflect that diversity is a good thing.
- Funders might miss niche or industry-specific information because they use a common application and can't ask all the questions they want/need to.
- The information needed for a general grant vs. capital campaign vs. specific program vs. sponsoring an event is very different.

The biggest obstacle is getting numerous funders to agree on what to ask and how to ask it. It's not easy to get everyone to agree.

I spoke to funders who use a common application. They are grateful that applicants spend much less time on the application and have more time to focus on other things to help their organizations grow.

Looking for an examole grant application?
Grant Application Example | Foundant Technologies?

But again, it's not going to happen across the board.

I'd like to offer one possible solution to solve part of the issue: A "bank" where organizations could upload the documents that every funder requires. Instead of uploading them for each individual foundation, makers could simply enter the document portal and view the documents they need.

These documents could include:

- IRS 501 (c)(3) determination letter (or the equivalent)
- Bylaws
- Current strategic plan
- Diversity, equity and inclusion statement/non-discrimination statement
- Two most recent 990s
- Most recent audited financial statements (if they exist)
- W-9 for the current calendar year
- List of Board members and their affiliations (job title and place of employment)
- Board demographics - gender, ethnicity, age range
- List of staff members and resumes/job descriptions

This saves the seeker a lot of time - they only have to upload once - and the funder still has access to what they need. It's not a common application but it's a start.

And finally...

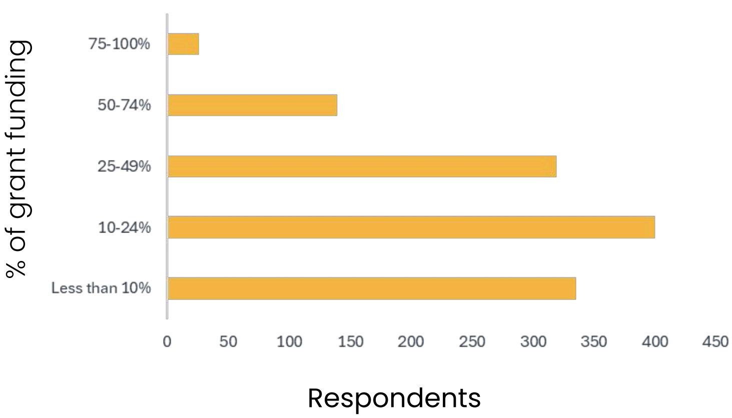
LAND OF CONFUSION: The application process

The elephant in the room

On another question, 55% of funders said they cap general support/overhead funding. Overhead is a very heated issue and one that has been discussed and debated for decades.

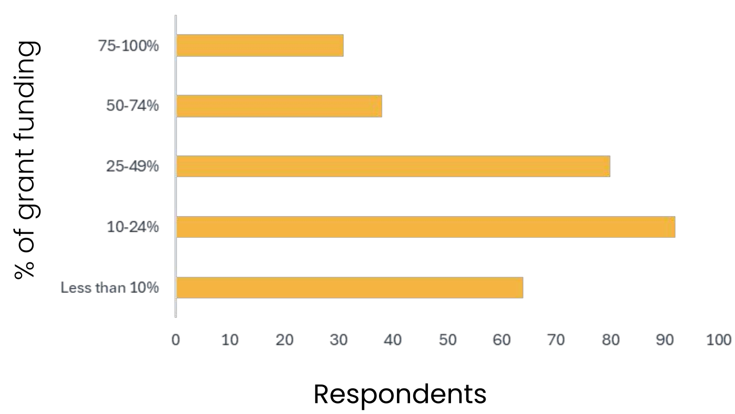
GRANTSEEKERS

What percent of grant funding your organization receives is for general operating/unrestricted funding?



GRANTMAKERS

What percent of your grant funding is used by grantees for general operating/unrestricted funding?



I'm sure many of you remember when certain websites/platforms would use percent of overhead as part of how they measured the efficacy of a nonprofit. I'm also sure that many seekers have run into funders who cap overhead asks on grants to 15% or below.

I have decided not to tackle overhead. Although it was mentioned on both surveys and discussed in the comments and interviews, it is a much, much bigger issue that needs to be tackled separately.

LAND OF CONFUSION: The application process

Each side has reasons why they need it, ask for it, grant it, or don't grant it.

Communication between grantmakers and grantseekers includes discussing topics which are difficult and uncomfortable. Overhead certainly falls into that category.

However, I believe that dialogue between the sides is needed to deal with the issue of funding overhead and providing general support.

I'M WALKIN ON SUNSHINE: The healthy grant pro

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Seeker

I am not only a full time grant writer, but also the entire social media team; the event support team; the development and marketing team. I am the "rapid response" person who is creating social media as things happen here; things that funders want to see pictures of and posts about.

Whether full time or one of ten responsibilities, grant writing is hard. To help the grant writers reading this - whether you're a seasoned pro or new on the job - I asked Bethany Planton GPC, a grants expert, to answer a few questions that will help you at work.

I’M WALKIN ON SUNSHINE: The healthy grant pro

Whether in house or as a consultant, what tips do you have for building relationships with funders?

First, remember, people give to people. Do not treat a grantmaker like an ATM.

When doing prospect research, note if the grantmaker allows communication and if so, who is the contact and their preferences. Follow all guidelines related to communication.

If the grantmaker allows communication:

- Start as soon as you know you might be applying for funding. It could take a while to get a meeting set up.
- Check to see if any of the nonprofit’s Board of Directors or staff have a personal connection to the grantmaker. They can help create a warm introduction instead of a cold call.
- Develop talking points. Seek clarification, but don’t ask questions that are addressed in the grantmakers’ guidelines.
- Attend events where the grantmaker might be.
- Call or email based on the grantmaker’s preference.

I’M WALKIN ON SUNSHINE: The healthy grant pro

Plenty of people on the survey complained about tight deadlines: A funder opens their portal to accept applications and the deadline is 4 weeks later. It’s not enough time! How can grant pros be ready for this? What should they have prepared in advance?

The grants industry is almost entirely deadline - driven, so grant professionals must create systems and processes to manage the deadlines.

1. Create a Grant Calendar - a place (spreadsheet, calendar, project management tool) where the deadlines live. Add all your already known deadlines for LOIs, applications, relationship building, site visits, reports, etc. When you research an opportunity that is a best fit, add the deadline(s) to the calendar.

2. Gather foundational documents in a shared folder and update them as necessary

    - IRS 501(c)(3) determination letter (or the equivalent)
    - Bylaws
    - Current strategic plan - doesn't have to be five years, just a guiding document to show what the overall organizational goals are
    - Diversity, equity, and inclusion statement/non-discrimination statement
    - Board-approved annual organizational budget
    - Two most recent 990s
    - Most recent audited financial statements (if you have them)
    - W-9 for the current calendar year
    - List of Board Members and their affiliations (job title and place of employment)
    - Board Demographics - gender, ethnicity, age range
    - Board giving for the last fiscal year - what percentage of the board donated to the organization? What was the total amount donated?
    - List of staff members and resumes/job descriptions
    - Anything else that you need to add regularly

3. Create an answer library - Grant applications tend to ask for the same information in slightly different ways. Use an answer library document that contains the common elements of an application:

I'M WALKIN ON SUNSHINE: The healthy grant pro

☐ Contact information
☐ Mission statement
☐ Organization history
☐ Diversity, Equity and Inclusion (Accessibility)
☐ Project Title
☐ Problem or needs statement
☐ Project description
☐ Activities/timeline
☐ Goal and objectives
☐ Evaluation
☐ Impact/community benefit
☐ Population served
☐ Key personnel and partners
☐ Project budget/narrative
☐ Sustainability

Design a new program before you have a funding opportunity - this helps ensure that the nonprofit is not chasing the money and that the grant professional has the information they need to develop an application. You can use a logic model or a project/program information sheet to gather information about new and existing projects and programs to help you build an answer library.

I'M WALKIN ON SUNSHINE: The healthy grant pro

Many nonprofits, especially small ones, don't have a professional development budget. How can grant pros upskill: Keep up with the latest laws, compliance issues, regulations, best practices etc.? Are there enewsletters, publications, conferences, societies they should join and learn from?

The Grant Professionals Association is the place for anyone actively working in grants. The membership is affordable and includes a variety of benefits. The Grant Professionals Foundation offers competitive scholarships for GPA membership and GrantSummit, GPA's annual conference.

Foundant offers a range of free resources for nonprofit professionals.

CharityHowTo offers premium, live, and on-demand webinars for nonprofits.

Fundraising HayDay is a bi-weekly podcast about grants and such from the dynamic duo of Amanda Day, GPC, and Kimberly Hays de Muga, GPA. They also have a weekly newsletter with more resources.

Federal Grants:

- Grants.gov has a plethora of information, from its blog and monthly newsletter to tutorials.
- Sign up for the agency(ies) email that is a good fit for your organization. (This applies to other government funders as well.)
- MyFedTrainer offers expert training for confident federal grant administration from pre-award to close-out.

I'M WALKIN ON SUNSHINE: The healthy grant pro

For new grant writers: What websites and databases should they be using in order to find potential funders in their area (and outside their area)?

There are many subscription databases available to find prospect funders and grant opportunities. These databases allow you to save time and effort by filtering the opportunities through the criteria you set up (focus areas, geographic boundaries, accept unsolicited proposals).

- Foundation Directory: access Candid's resources for free at one of their community partners
- Foundation Search
- Grants.gov: free for all federal grant opportunities
- Grant Gopher
- GrantStation: subscription included in a Grant Professionals Association membership or with Foundant's GrantHub products
- GrantWatch: subscription
- State and local funding: Some states have a database similar to Grants.gov for that state's opportunities, and some you have to follow for each agency you want to apply to.

Healthy grant pros: Grant writing is exhausting. Researching, gathering information, contacting funders, filling out applications, reporting and a thousand other tasks. How can grant pros maximize their time while also getting the right amount of rest and relaxation? What are some ways to prioritize self-care and manage the stress?

Three out of four grant professionals have experienced burnout. Burnout is a syndrome conceptualized as resulting from chronic workplace stress that has not been successfully managed. It is characterized by three dimensions:

- feelings of energy depletion or exhaustion
- increased mental distance from one's job, or feelings of negativism or cynicism related to one's job
- reduced professional efficacy

I'M WALKIN ON SUNSHINE: The healthy grant pro

Burnout is a societal problem that is not your fault, but we can create strategies, habits and boundaries that lead to happier, healthier lives.

"*We have to let go of exhaustion, busyness and productivity as status symbols and measurements of self-worth.*"

- Brenè Brown

Resources

- Burnout in the Grants Profession: An Initial Analysis by Trish Bachman, GPC, Bethany Planton, GPC, & Johna Rodgers, GPC
- BIGGER than Burnout: Strategies for Winning the Silent Battle by Trish Bachman, GPC, Pat Duboise, GPC, Bethany Planton, GPC, & Johna Rodgers, GPC
- Healthy Grant Professionals in the Real World by Trish Bachman, GPC, Pat Duboise, GPC, Bethany Planton, GPC, & Johna Rodgers, GPC
- How to recover from burnout by Calm
- Burnout Assessment by Calm
- Nonprofit Burnout Assessment by Beth Kanter & Aliza Sherman
- 2-1-1 to connect with mental health professionals in your area

Bethany M. Planton, GPC, is the Founder and CEO of bmpconsulting, a capacity-building firm established in September 2016. Bethany helps nonprofit leaders and grant professionals build and maintain strategic and sustainable nonprofits AND have fun along the way. She brings over 16 years of nonprofit experience and a $12 million track record in awarded grants from foundations, corporations and local, state and federal governments. She is a Grant Professionals Association Board Member, GPA Approved Trainer, mentor, and co-author of three seminal works on burnout in the grants profession, published in the Journal of the Grant Professionals Association.

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Seeker

In social services it can be difficult to quantify impact especially when participants are engaging in long term services. Feels like we're asked to produce oak trees within six months to a year of planting our acorns.

When I speak to nonprofiteers, I always remind them: A donation is never the end of the road. It’s just the beginning. Now you have to say thank you, share stories, demonstrate impact, keep donors informed and feeling good about their gift. Consistent and constant communications. Build the relationship and trust. Only then can you make another fundraising ask.

Post-application brought up numerous issues in the survey and interviews. Let’s look at a few of them and how they’re connected to communication between the two sides.

Feedback

The number one frustration for seekers with the grants process? Lack of feedback.

Seekers have no idea why an application was rejected. At most, they'll receive an email with boilerplate language: "*We received many applications, and at this time, we cannot respond to each of you why your application was rejected*."

It's understandable why smaller foundations can't get back to everyone with detailed feedback. Providing feedback can be time-consuming. With so many organizations turning to foundation funding, foundations get overloaded with applications. The smaller ones don't have the staffing hours to reply to each applicant and explain why they were declined.

That said, feedback can be a positive for both sides. If I know why I was rejected, I can decide not to apply next year or I can improve the application (not repeating the same mistakes lessens the time funders spend reading ineligible applications).

Additionally, feedback can be passed by the grant writer to their boss. Otherwise, the boss just hears of another rejection and assumes the grant pro isn't doing their job.

Feedback is about communication. I understand why many foundations can't provide it, but those who can should. The feedback itself might frustrate the grant writer, but at least they'll know.

I've listed some potential solutions below, but the truth is, this is another issue which must be addressed when seekers and makers meet. Dialogue around the issue could have positive results for both sides.

Reporting/demonstrating impact

Reporting after receiving a grant should be something seekers want to do. Funders donate to have an impact and change people's lives. It's important that seekers keep funders updated on what's going on and how their grant is creating impact on the ground.

But like everything else in this eBook, reporting was an issue of contention. Comments raised the issues of both what is being asked for in the report and the report format.

Let's start with funders. They need post-grant reports submitted in a certain way. Funders also have stakeholders - family members, Board members, and donors (for those that raise funds). Makers must report impact, and they have created a system for grantees to share data.

That reporting system and its requirements can clash with how nonprofits gather and share data. The funder wants it a specific way and seekers have to "manipulate" what they have to fit the funder's process. That doesn't help build the relationship.

Keep in mind that funders WANT to promote their successes and spotlight the grantees they work with. They do this through the media, their website, social media, newsletters, and annual reports. Gathering and sharing impact data benefits grantees.

One issue that came up during interviews was demographic data. That may be data the organization doesn't collect. (For example, grantees won't ask participants if they belong to the LGBTQ community, even if that's something a funder wants to know.)

How to bridge that gap?

Another issue is what story the data tells. If impact becomes a numbers game, then the goal will be to show more and more people impacted from year to year. Except, for some organizations, the goal is to provide services so that fewer people turn to them.

THAT'S WHAT FRIENDS ARE FOR: After the application

An organization that does its job well is DECREASING the number of people locally who need assistance. This is great, but it won't show what is being requested: A year-to-year increase.

Obviously, the above is a little exaggerated. A funder would be thrilled at that impact.

But the point is that numbers don't always tell the full story. As Mary Jane Eisenhauer of First Things First Porter County told me: *"What story are we telling - the number of kids who learned to swim or what is different in our community because these children know how to swim."*

Which leads us to transformation. Let's be honest: A $50,000 grant isn't going to cure cancer. But that doesn't stop seekers and makers from discussing it like it is possible.

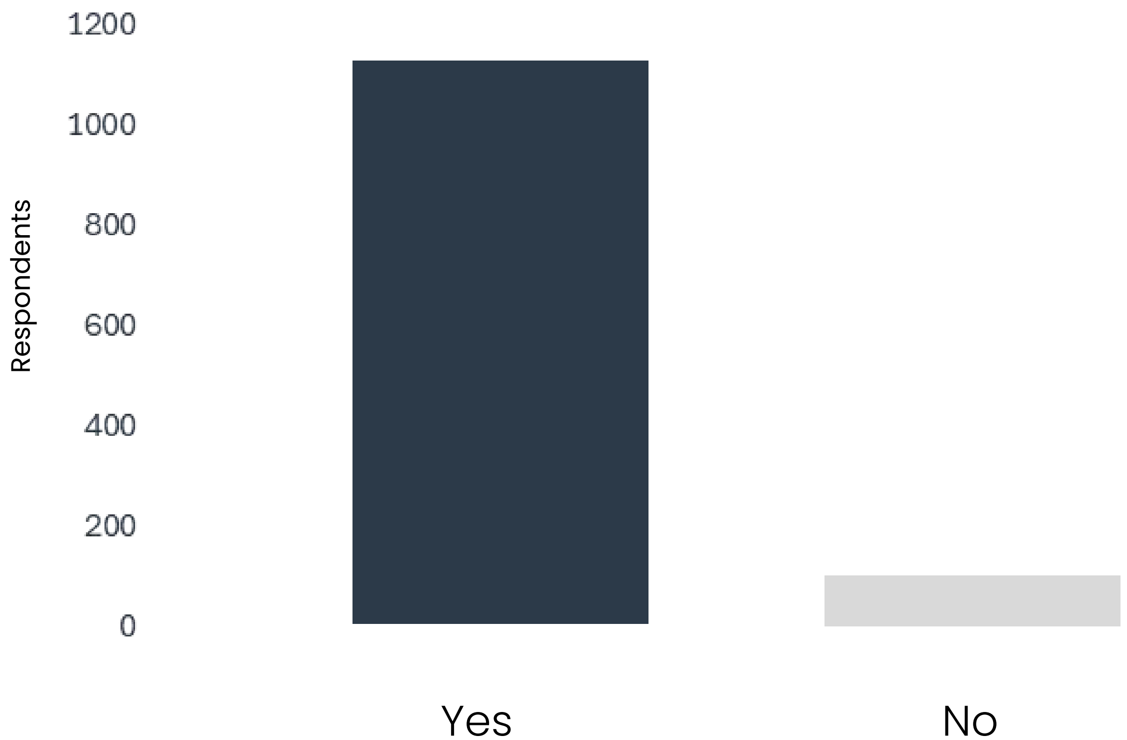
If both sides were committed to true, honest and open communication, the issues of how to report and what demonstrates impact could be settled over a cup of coffee.

BONUS FOR GRANTSEEKERS:
Here's how to manage the post grant process

Stewardship of money

SURVEY TO GRANTMAKERS

Overall, do you believe funders trust your organization to steward their money responsibly?



This is a good thing!!!

One year vs multi-year grants

Should more multi-year grants be offered by funders?

Grantseekers claimed they're very hard to come by. If true, let's consider why from the funder's perspective.

- The funder doesn't know your organization. Only after a relationship is built will they feel more comfortable funding you for more than one year at a time.
- The funder doesn't know how you'll steward their money. With limited amounts to give, they can't commit to giving out multi-year grants without knowing in advance that the funds will be put to good use.
- Multi-year may not necessarily mean more successful programs. Sure, it has advantages for the grantee (long-term planning, hiring staff knowing funds will be there beyond year one, etc.) but that doesn't mean the organization will be more successful at implementation.
- Funders may be risk averse. They don't want to commit funds to something that they can't immediately measure against the probability of success.

The flip side is the many benefits a multi-year grant provides:

- When launching a pilot program it takes a few years to see results. Having the funds available to run the full pilot is invaluable.
- Seekers don't have to worry about the funder changing priorities, leaving a budget hole for some programs (which will no longer be funded).
- It allows for program growth and sustainability planning without the extra burden of finding funding each year. This allows development staff time to fund other programs and find replacement funding.
- Builds the relationship, as now you'll be working together with the funder for longer than twelve months.
- Multi-year means the ability to plan with a clear head and hire the right staff knowing the funding will be there after year one.

THAT'S WHAT FRIENDS ARE FOR: After the application

As a former grant writer, I do believe that multi-year grants provide nonprofits with the breathing space they need… which in turn means more time dedicated to programs/services and hopefully more impact and better results.

Is there a middle ground between the concerns of funders and the benefits to seekers?

Let me offer two ideas:

- Let the foundation fund year one, and if it's successful, they'll fund the next two.

- Funders should consider allocating X percent per year of overall grants for pilot programs - which will be multi-year grants. This will allow for testing of new ideas and approaches to see what works and what doesn't. This testing allows the foundation to show how they want to be at the forefront of solving problem X.

THAT'S WHAT FRIENDS ARE FOR: After the application

Potential solutions

I'm going to present ideas for three areas discussed above.

1. Feedback

   This is a tough one to crack. Many foundations don't have the time and/or people power to explain rejections. But they can:

   - Report on the review process. Share who got funded, why (briefly) and provide organizations which bucket they belong to: 1) Not enough funding but love what you do 2) Like what you do but not sure you are a fit as written in your proposal 3) Interesting, but we aren't a good fit. Just that information alone is important for considering whether to apply for the next grant round.
   - Provide a rubric on scoring for all applicants showing how the applicant scored as well as the average total score of funded projects.
   - For funders with larger staffs, if you're sending an email telling seekers their application was declined, add a link to your calendar and invite the organization to choose a 30-minute time to discuss why the grant was rejected.

2. Demonstrating impact/reporting

An anonymous grantee told me:

"Our organization manages a crisis hotline. It's hard at times for us to measure impact because the people we speak to are anonymous.

While we offer follow up calls to those who had suicidal thoughts to confirm their continued safety, regular call backs are not part of our service.

We will answer 13,000 Lifeline calls this year plus another 8,000 on our warm line and almost no one lets us know how they are doing, though we have very occasionally received thank you calls.

Foundations want proof that their donation is making a difference. But it's hard for us to show impact unless it's indirect.

We share outputs: How many calls we got or answered. We can share how many calls came from each county we serve. We know why people call and we can share that.

Sometimes we capture quotes from callers. When the caller says something meaningful, we can use it as anecdotal indication of what impact we had.

If the funder wants hard numbers, we share X number of volunteers answering the calls and how many people we train to become volunteers answering calls."

Even when funders have specific reports that they want, and the grantee can't provide them, having a good relationship with the funder means being able to jointly find other ways to show success and impact.

3. Building relationships post-application

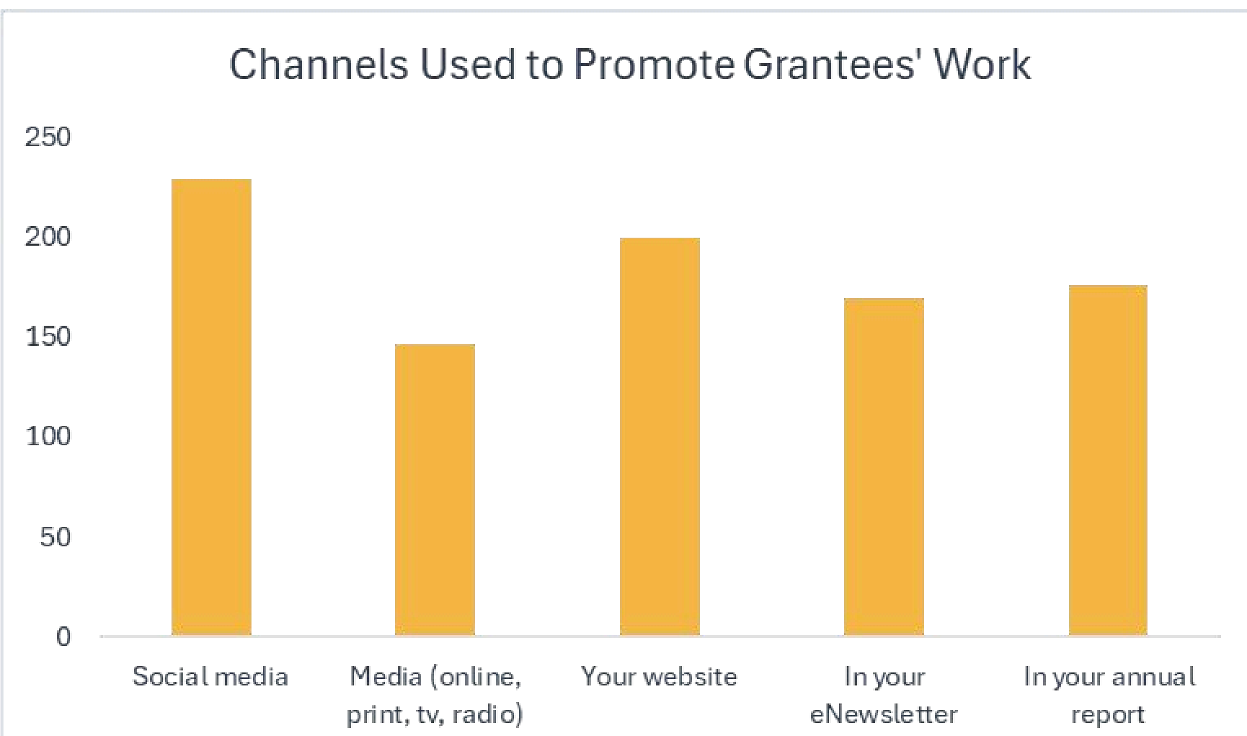
Here are some ideas to allow both sides to strengthen the connection:

- Let each grantee meet the foundation's Board for 15 minutes
- In-person site visits
- Celebration event for all grantees
- Funder volunteers as a team at grantees location of services
- Connect organizations so they can work together
- eNews to everyone in their specific field
- Attend events held by grantees
- Have grantseekers speak to granting committees

And finally...

When your organization receives a grant, you want to promote it. Funders will do the same. How do funders get the word out?

GRANTMAKERS



THAT'S WHAT FRIENDS ARE FOR: After the application

Pro tip: If you aren't already, your nonprofit should be following your funders on social media, subscribed to their eNewsletter and on the mailing list to receive their annual report.

When they mention your organization publicly, you should send a note to your contact at the foundation thanking them, and you should also share the mention on social media and elsewhere when applicable.

As for grantees, here are some ideas to highlight funders:
- List them on your website (and depending on the layout you can mention which program/service their grant is funding)
- Shine a spotlight on them on social media
- Thank them in your eNewsletters
- Feature them in communications sent out by your CEO

Part of building a relationship with a funder is showing gratitude for their contribution to helping people in the community.

THE FINAL COUNTDOWN: Character count

My two favorite teachers were Mrs. Joan Greene (grades five and six) and Mrs. Brenda Freedman (grade 13. That grade existed in Ontario high schools in the late 80's).

Mrs. Greene was old school, but she taught me the value of doing things right. When writing in script, you lost a point if you looped a "d" or "t" or if you forgot to dot an "i" or "j." So yes, I have the neatest handwriting of all my siblings.

She also taught me how to manage projects, how to be organized, find and digest information, keep notes and produce final products that shined. All of this was useful when I was a fundraiser and grant writer and it's still useful today. Given all the data and comments I had to work with, being organized really helped me compose this eBook.

Mrs. Freedman taught me the valuable skill of editing through writing a precis. A precis is a summary of something's main points.

She would hand out a five-page story, ask us to read it and then give us class time to summarize it all into 150 words. At the start of the year, it seemed an impossible task. By year's end, I had mastered it.

It's a skill that proved invaluable to me when completing grant applications with word/character counts.

Ah yes. You didn't think I'd write an entire eBook about the grants process and just skip over the character count debate, did you?

Actually, I was going to. As I told people when I interviewed them, *"I am going to try and bridge gaps and make the grants process a smoother one. But some things are beyond dialogue. Character counts being one of those things."*

Or maybe not. I don't like to back away from a challenge. And since seekers checked character counts as the third biggest challenge they face with online applications, I decided to briefly address the issue.

Great editing tools

Way back in the late aughts and early 10s, Twitter was one of the best editing tools out there. You had to post a coherent thought in 140 characters or less.

At the same time Vine - one of my all - time favorite platforms- was challenging people to create video stories in six seconds or less. I loved it!

If there's one thing that unites almost all grantseekers, it's their universal hatred of character counts. I certainly didn't like them when I was a grant writer.

But they have a purpose! It's a good editing tool. They force the writer to focus and only share what's most important and necessary instead of droning on and on. There's value in that.

For the grantmaker - many of whom are inundated with applications - it's helpful for reviewers as it keeps answers on the short side and to the point.

The problem is with the usage. A question such as "please list and describe all your organization's programs" needs more than 250 characters. "*Please share your mission statement*" doesn't need a maximum of 7,000 characters.

If grantmakers won't get rid of character counts (and I'm telling you, they won't), then meet in the middle: Make sure the character count posted matches the question and the amount of information being requested.

This is why, as suggested earlier, it's critical for outside professionals to test the application. They'll be able to determine if the various character counts across an application match the question they're attached to.

Clarity is key. Grant writers need to know where to add nuance and detail and communicate certain messages. Character counts let the writer know where to go long and where to keep it tight.

See that? They do have a purpose.

I may value character counts as an editing tool but I still don't like them. Not one bit.

Conclusion

Dear Reader,

A common theme we see at Foundant Technologies when working with people from across the spectrum of philanthropic and charitable organizations is communication. If you work with or survey any industry, communication will likely remain a common frustration and an "opportunity for improvement" across the board.

This is because humans are not inherently good at putting their own perspectives aside to see others' and understand how best to communicate with one another. We tend to specialize in our roles — for good reason! It's important to have people focused on doing the work where they are strongest and have the most experience. But how do you bring those roles together to communicate better and more effectively?

Technology can bridge the gap in this challenge. We see communication as an opportunity across every size, type, and location of organizations we work with.

As a SaaS technology company serving your inspiring sector, our clients' voices are the most important factor in our decisions. This is where we learn the most, explore pain points, and solve problems together.

While we can't solve all the frustrations outlined in this report and beyond, we are committed to working with you to understand and act in the right way, at the right time.

Our journey to better understanding not only the challenges in grants management but also challenges across this sector do not end here. We will continue to ask and listen, and we invite you to continue to share your frustrations.

With gratitude,
Kristin and the Foundant Team
P.S.
I'd love to hear from you!
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Kristin Laird | Foundant Technologies
Director, Marketing Communications

DON'T YOU FORGET ABOUT ME: Gratitude

Thank you to the grant experts below who helped craft the survey. Their expertise, knowledge and experience were invaluable as the process for this project was created.

Laura Cochran GPC

Laura has been a grant professional for nearly 20 years, a member of GPA for 14 years and a GPC for 12 years. She has spent the majority of her career as Grants Manager at the Indianapolis Neighborhood Housing Partnership, using her grant expertise to help INHP create innovative programs to increase access to affordable housing in Indianapolis. Laura lives near Indianapolis with her husband, two teenagers and doggo.

Connect with Laura: LinkedIn

Amanda Day GPC

Amanda Day, GPC is a national trainer and speaker with 20+ years of grant prospect research, writing and management experience. She is well versed in federal and private grant funding, as well as educating up and using your professional network to best build your career path. Amanda is co-founder of HayDay Services, a grant training and coaching company and co-host of Fundraising HayDay, a podcast about grants and such. In 2024 she was inducted to the Grant Professionals Class of Distinguished Fellows.

Connect with Amanda: LinkedIn

Bethany M. Planton, GPC

Bethany M. Planton, GPC, is the Founder and CEO of bmpconsulting, a capacity-building firm established in September 2016. Bethany helps nonprofit leaders and grant professionals build and maintain strategic and sustainable nonprofits AND have fun along the way. She brings over 16 years of nonprofit experience and a $12 million track record in awarded grants from foundations, corporations and local, state and federal governments. She is a Grant Professionals Association Board Member, GPA Approved Trainer, mentor, and co-author of three seminal works on burnout in the grants profession, published in the Journal of the Grant Professionals Association.

Alice Ruhnke

Alice Ruhnke is the President of GrantStation. She is passionate about grantseeking and helping the nonprofit community secure funding to execute their missions. Before joining the GrantStation team, Alice founded and owned The Grant Advantage, raising over $45 million and training thousands of individuals in grant proposal writing.

Connect with GrantStation: Twitter | LinkedIn | Facebook

Connect with Alice: LinkedIn

1832 Communications

Ephraim Gopin, a fundraising and marketing expert, is the founder of 1832 Communications, an agency which partners with nonprofits to help them build more relationships so they can raise more money, serve more people and have more impact in their community.

Ephraim crafts custom strategies so your nonprofit is in the best position possible to fundraise from your target audience.

The goal? Stabilize revenue and provide sustainability for programs.

The organizations Ephraim partners with move from survival to thrival mode and experience growth.

🌐 : 1832 Communications website

📨 : Contact Ephraim

Foundant Technologies

Foundant's mission is to **maximize the impact of the philanthropic community** through innovative software and exceptional client experiences designed to meet the unique needs of grantmakers, scholarship providers, community foundations, and nonprofits. Our easy-to-use cloud-based solutions streamline day-to-day tasks, create connections, and enable collaboration—making your work easier and freeing up capacity to focus on your mission. Dedicated to your success, we partner with philanthropy to empower change-makers to make the world a better place for all.

🌐 : Foundant Technologies website
📨 : Contact Us

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