



**STREAMLINING
GRANTS APPLICATIONS
AND REPORTING**



*Southern California Grantmakers
2010 Annual Conference and Members' Meeting*

Streamlining Your Application and Reporting

Southern California Grantmakers Conference
November 3, 2010



Session Agenda

Welcome, agenda, and session framing

Flaws in the system

Making streamlining stick

Streamlining stories

Opportunities for streamlining and next steps

Adjourn

Project Streamline

Representing Grantmakers

Grants Managers Network (lead partner)

Association of Small Foundations

Council on Foundations

Forum of Regional Associations of
Grantmakers

Grantmakers for Effective Organizations



Representing Grantseekers

Association of Fundraising Professionals

Foundation Center

National Council of Nonprofit Associations





**Project
Streamline**

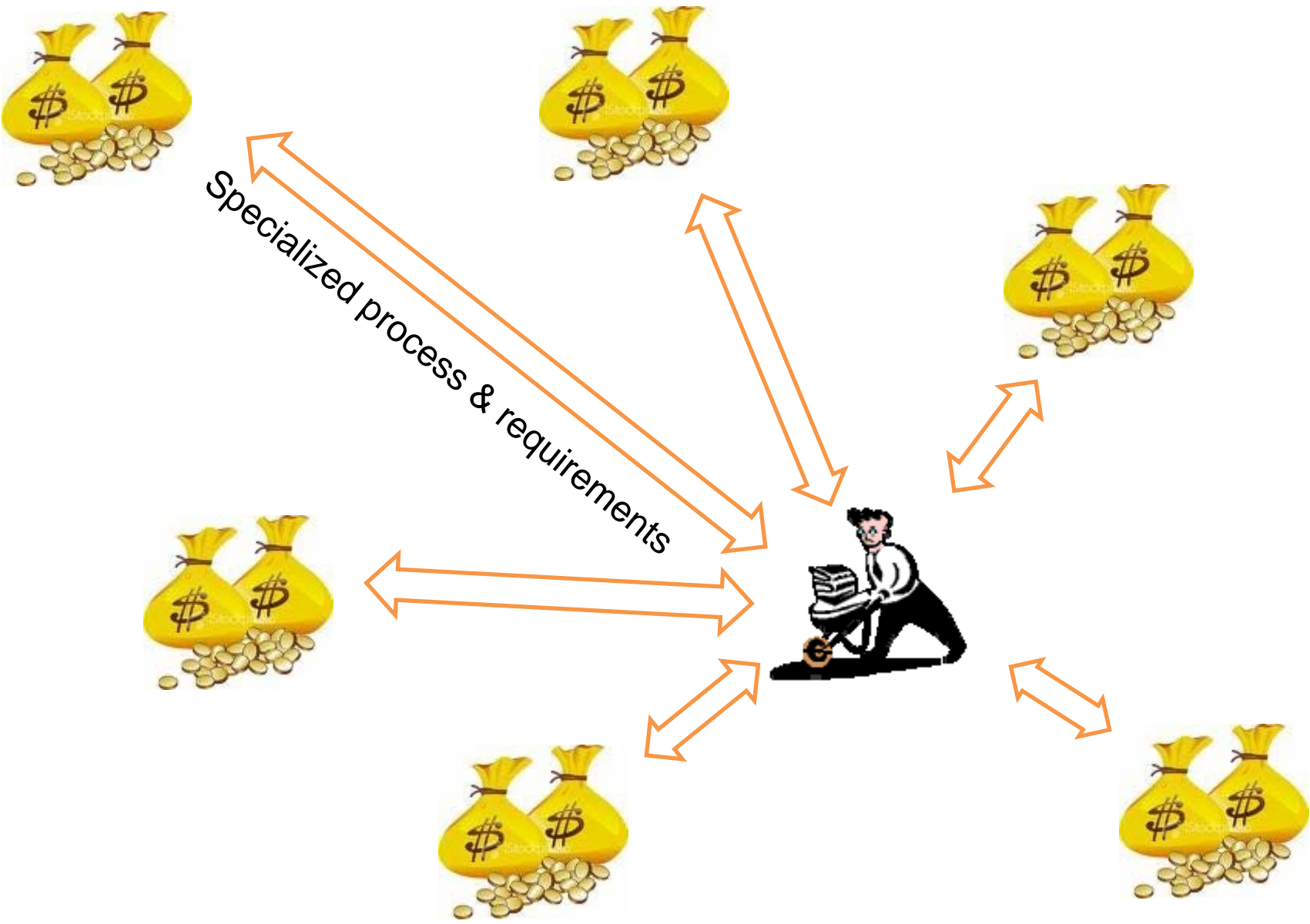
The diagram features a large blue arrow pointing to the right, which serves as a background for three colored boxes. Above the arrow, there are two horizontal lines: a light green one on top and an orange one below it. In the top right corner, there is a dark green circular badge with a white border and a drop shadow, containing the text 'Project Streamline'.

**Phase 1: Defining the
Problem**

**Phase 2: Developing
Principles and
Resources**

**Phase 3: Adopting
the Principles**

The Problem



So many grant reports... I
just couldn't read them all.





Ten Flaws in the System

- 1. Enormous Variability**
- 2. Requirements Aren't "Right-Sized"**
- 3. Net Grants Too Small**
- 4. Outsourced Burden**
- 5. Trust Undermined**
- 6. Reports on a Shelf**
- 7. Fundraising Gymnastics**
- 8. Due-Diligence Redundancy**
- 9. Double-Edged Swords – *Online systems & Common Grants***
- 10. Time Drain for Grantmakers**

DISCUSSION

Which of the “flaws” do you struggle with in your own work?

What kinds of stories do you have about your experiences with these realities of the grantmaker/grantseeker relationship?



Core Principles

- 1. Take a fresh look at information requirements**
- 2. Right-size expectations**
- 3. Relieve the burden**
- 4. Straightforward & clear communications**



Streamlining Drivers and Barriers

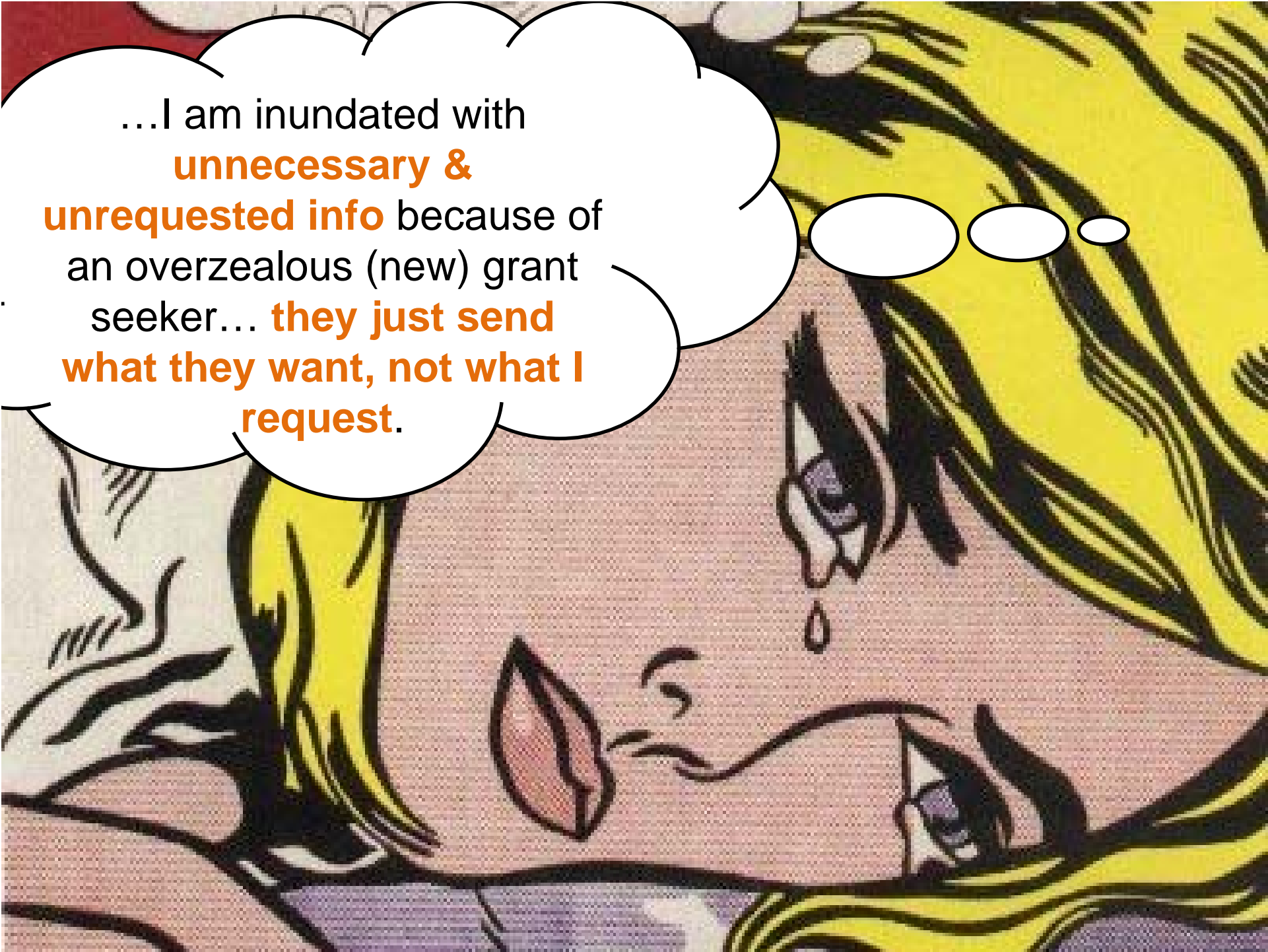


Benefits of Streamlining


- 1. Reduce redundancies & spend time on what matters**
- 2. Build more meaningful and trusting relationships**
- 3. Make more time for mission**

A comic book illustration of a woman with blonde hair, shown in profile, crying. Her eyes are closed, and a single tear is falling from her right eye. Her hair is rendered in bright yellow and black stripes. A large white thought bubble is positioned in the upper left quadrant of the image. Inside the thought bubble, the text reads: "Today's **problems** come from yesterday's **solutions...**". The background is a textured, light brown color.


Today's **problems** come
from yesterday's
solutions...



...I am inundated with
**unnecessary &
unrequested info** because of
an overzealous (new) grant
seeker... **they just send
what they want, not what I
request.**



...we just make everyone go through the same process **just in case**, even though it seems like a waste of time for some of these grants.

A comic book illustration of a woman with blonde hair, shown from the chest up. She has a distressed expression, with her eyes closed and a single tear falling from her right eye. Her hair is styled in a voluminous, wavy manner. A large, white, cloud-shaped thought bubble is positioned in the upper left quadrant of the image, containing text. The background is a simple, light-colored wall with some faint, illegible text visible in the top left corner.

Since Grantseekers need our money, we rarely see or hear any negative comments about our organization.



DISCUSSION

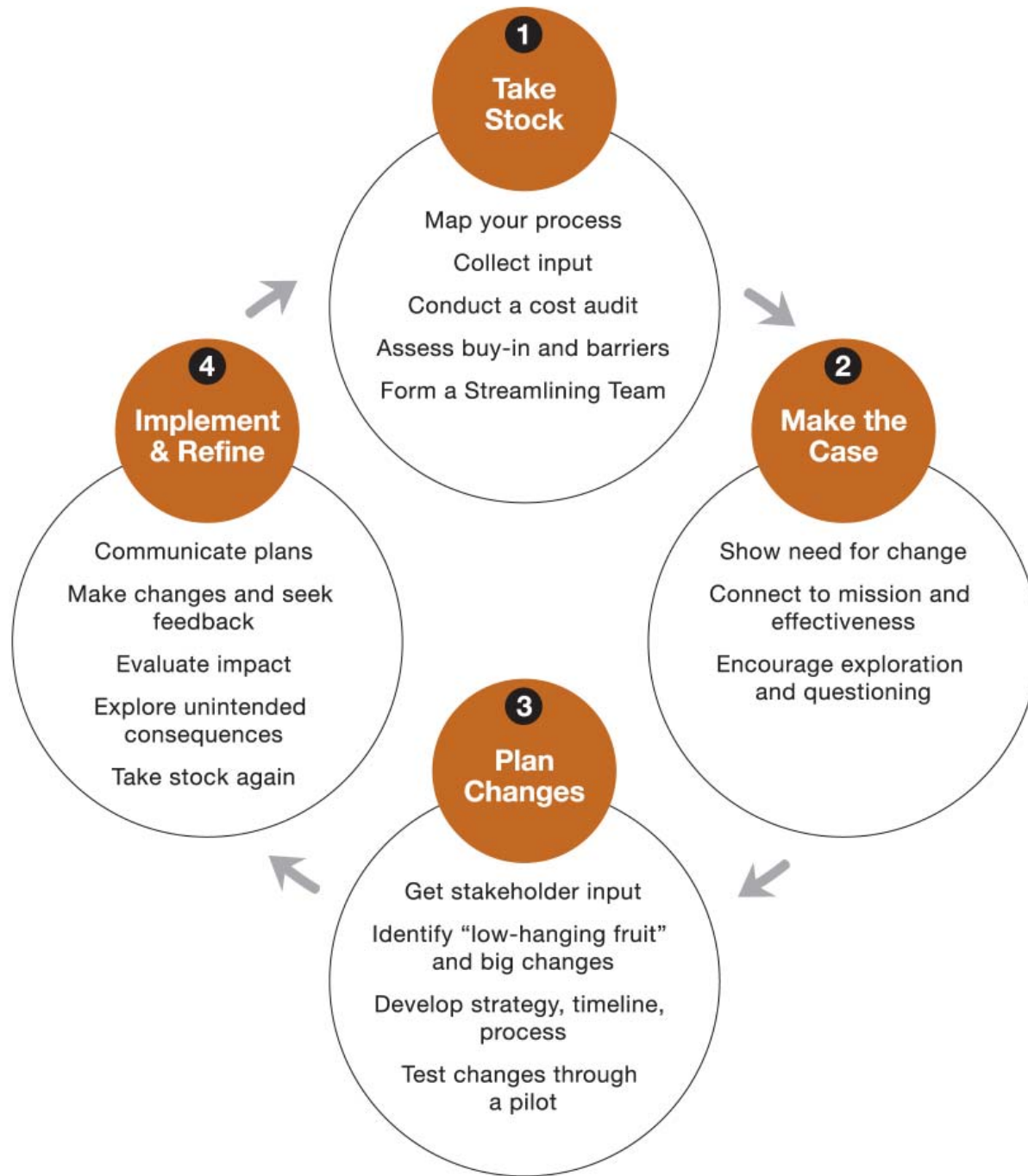
What kinds of stories do you have about running into and/or overcoming these barriers in your own organization?

What does successful change require?



SUCCESSFUL CHANGE:

- **High level support (executive and board!)**
- **Thorough understanding of the problem**
- **Identify benefits on both sides**
- **Participatory approach**
- **Clear communication**
- **Iterative/built in assessment mechanism**



DISCUSSION

What is your Streamlining Story?

1. **What do you know about your current practice?**
2. **What have you tried?**
3. **What have you learned so far?**

Streamlining Nuts & Bolts

Streamlining self-assessment

Guide to Streamlining Series

- Making Streamlining Stick
- Due-diligence
- Right Sizing
- Grant Budgets and Financial Reports
- Online Application and Reporting



Top 10 Streamlining Tips

- 1.** Know your current process and its impact
- 2.** Eliminate redundant and unnecessary questions
 - ✓ Do we really need it?
 - ✓ Is there any other way to get it?
 - ✓ Have we sufficiently explained why we need it?
- 3.** Accept emailed and online submissions

Top 10 Streamlining Tips

4. Make sure your online system works for the user!
5. Reporting should be annual unless special concerns arise.
6. Budgets and financial reports in grantee format and on grantee calendar.

Top 10 Streamlining Tips

- 7.** Right size it! Small grant = small process
- 8.** Find ways to filter
- 9.** Stage your requirements – not everything from everybody at the same time
- 10.** Make the copies



Questions...

... Answers



What's Next?

1. One small thing you will do when you return to your desk
2. One longer term project to pursue
3. One ally to enlist

These are tears of
happiness... I only wish I'd
streamlined sooner.





www.projectstreamline.org