

Project Streamline

Making More Time for Mission



The cumulative impact of grantmakers' varied application and reporting requirements undermines nonprofit effectiveness, causing grantseekers to devote too much time to seeking funding (often without payoff) and reporting on grants (often without benefit) to the detriment of their mission-based work.

Project Streamline helps grantmakers understand and reduce unnecessary and onerous requirements for grantees while still getting the information they need to make good grantmaking decisions.

Grantmakers Get It

More grantmakers than ever before understand Project Streamline's four core principles:

- 1** Taking a fresh look at application and reporting requirements to ask for only what is needed to make decisions.
- 2** Right-sizing application and reporting requirements to make them appropriate to the size and type of grant and prior relationship with the grantseeker.
- 3** Reducing the burden on grantseekers by simplifying budget requirements, using effective online grantmaking, and accepting existing materials.
- 4** Understanding the importance of clear and straightforward communications about grantmaking.

Grantmakers are Taking Action (but we still have a long way to go)...

Awareness is translating into streamlining action for many grantmakers. Yet our 2013 assessment reveals that, while nonprofits have noticed changes, all still encounter time-wasting practices.

Filters work ~ Nearly three quarters of grantmakers have added time-saving ways to screen grantseekers prior to requesting a full proposal, including letters of inquiry and pre-application conversations...

... yet grantseekers report routinely encountering requirements to submit full application materials, regardless of their likelihood of receiving funding.

Right-sizing on the rise ~ More than half of grantmakers have revised their application or reporting requirements to be “appropriate to the grant size or type”...

... however, many grantseekers feel that small grants still often require more time and effort than the funding warrants.

A move online ~ Most grantmakers are now online or accepting applications via email...

... but going online doesn't equal streamlining. Poorly designed and untested online systems waste grantseekers' time and cause unnecessary aggravation.

Simplified financials ~ Nearly three quarters of grantmakers report efforts to simplify budget and financial requirements, with more than half accepting organizations' own budget and financial information...

... yet many funders still expect grantees to be financial contortionists, transposing their numbers into detailed templates or categories preferred by the grantmaker.

Multiple copies rare ~ With the shift toward accepting electronic submissions, nearly all grantmakers report that they have stopped requiring multiple copies of applications or reports...

... however, grantseekers still encounter practices that should be extinct, not only requests for multiple copies, but even applications that still require a typewriter!

Good communication matters ~ Almost all grantmakers report updating their grantmaking communications to be clearer and more straightforward...

... but until more of them invite two-way communication by asking for grantseeker feedback, grantmakers can't truly assess the quality of their communications and practices.

How do you line up?

Do you . . .

Walk the talk? Streamlined grantmakers align grantmaking practices with values. Most grantmakers believe wholeheartedly in the organizations they support and want to lift them up. Do your practices model the effectiveness and efficiency you care about?

Accept proposals and reports electronically via a well-designed, grantee-tested system that stores grantee information from year to year? Most grantmakers and grantseekers are now online. Whether your setup is as simple as receiving emailed submissions or a complex online system tied to your grants management and evaluation software, be sure it works seamlessly for your grantseekers.

Allow authentic budget and financial information? Recasting financial information to fit grantmaker-specific categories remains a huge burden to nonprofits. Streamlined grantmakers permit nonprofits to use formats and financial categories that make sense to them and serve their needs.

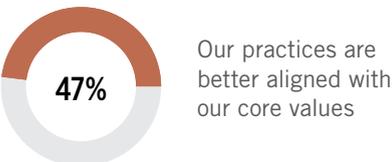
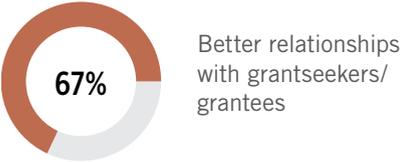
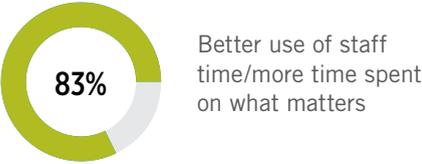
Filter...really filter? Streamlined grantmakers minimize the number of organizations that do a lot of work when they have a small chance of success. They are aware of the proportion of proposals they are declining and work to keep it low. They 1) use clear funding guidelines and eligibility screens that reduce the number of unfitting requests submitted, 2) talk with prospective applicants prior to submissions, and 3) filter with a letter of inquiry that is truly shorter and requires less work than a full proposal.

Eliminate silly requirements? Streamlined grantmakers don't use forms that can only be completed by pulling the typewriter out of the attic, require materials that must be mailed or delivered, ask for unnecessary paperwork like receipts for grant expenditures, or require reports more than twice per year (at most).

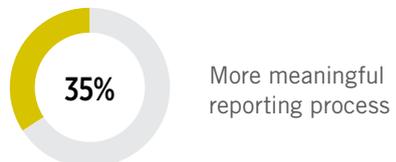
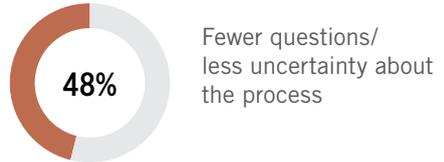
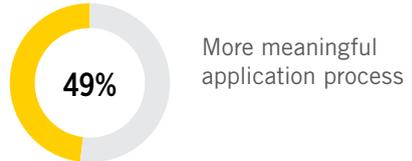
Improve practices based on real information? Streamlined grantmakers periodically review the information they use in their decision-making, assess the efficiency of their internal systems, and seek candid and anonymous feedback from grantees to improve their practices.

Everyone Benefits

Grantmakers report significant benefits when they implement streamlining practices.



Grantseekers say that streamlined requirements support their success.



Project Streamline has what you need

Do you want to learn more about why streamlining matters, take the next step in streamlining, or make the case to your board?

Guide to Streamlining Report Series

How-to Guides focused on the ideas and implementation of streamlining principles can help you:

Get your organization streamlining

Clarify information needed for making grants

Compare grants management products and vendors

Make sure your online system works well

Update budget and financial reporting requirements

Right-size your processes based on grant size and type

Grantmaker Assessment Tool

Benchmark your practices to those of other funders and identify areas for improvement using our free online self-assessment.



To learn more about streamlining, download tools and resources, and share stories and sample documents, visit us at www.projectstreamline.org and follow us on Twitter [@ProjStreamline](https://twitter.com/ProjStreamline).