Report on paper vs. online grant submission systems

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Introduction

CommUlinks of Colorado has been in the grant writing business since 1999. In the last few years, we have witnessed many changes in foundation guidelines and submission processes. The most significant change has been in the conversion to online application processes by many foundations. We believe that while the horse has left the gate on the move to online systems, there is still time for those of us who use these systems every day to have some input into improving them.

As professional grant writers, we have a unique perspective on the many different systems used by foundations. After utilizing a variety of online and paper systems, we began to realize that it would be helpful to collect information from nonprofits and other grant writers about their experiences with the systems currently in use. We also wanted to gain the perspectives of foundations as to how they select the system they use and why.

This report is based on a survey conducted in January and February 2013, which collected responses from nonprofits, professional grant writers and foundations about paper vs. online grant application processes. The report is meant to be helpful and informative to foundations in determining which systems are most useful to nonprofits and for nonprofits to understand the reasoning of foundations in selecting certain systems.

It should be noted that this is not a scientifically valid survey. It is simply meant to give the honest perspectives of survey respondents. We reached out to nonprofits, grant writers and foundations through our own contacts, associations, LinkedIn, Facebook and Twitter to obtain as many responses as possible.

Please help to improve future grant application processes by sharing this report foundations, especially those considering a switch to an online process as well as companies selling the products they use.

Sincerely,

Renée M. Beauregard

CommUlinks of Colorado

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EXECUTIVE SUMMARY

- There were 82 responses from nonprofits to the portion of the survey about using online vs. paper grant systems. Unfortunately, there were only eight responses from grant-making foundations to the foundation section of the survey, but they did provide valuable information.
- Survey respondents were located in Colorado (63.4%) and outside of Colorado (36.6%)

The survey shows there is a disparity between what users of online and paper grant systems prefer to use compared to their views about ease of use:
- 63.1% of all respondents prefer online grant systems over paper but only 44.6% agree or strongly agree that they are easy to use compared to 64.5% who agree or strongly agree that paper systems are easy to use.

There is a vast difference between how professional, contracted grant writers responded to the same questions about preference and ease of use, compared to staff working inside nonprofit organizations:
- Only 40% of contracted grant writers prefer online grant systems over paper. Only 33% of them agree or strongly agree online systems are easy to use compared to 71.5% who agree or strongly agree that paper systems are easy to use.
- 70% of nonprofit staff respondents prefer online grant systems over paper. Only 48% of them agree or strongly agree online systems are easy to use compared to 62.6% who agree or strongly agree that paper systems are easy to use.

Positives and negatives about online systems (all respondents):
- The best things about online systems are that they are ecologically friendly (80%) and use less paper (72.3%). Only 29.2% said they take less time and 29.2% said they are easy to edit.
- The worst things about online systems are that foundations use different systems (72.3%), it takes a long time to cull down paragraphs to meet character/word limits (72.3%) and some systems are difficult to use and not intuitive (72.3%). Many (56.9%) find it difficult to share the grant proposal with others in the organization before it is submitted.

Positives and negatives about paper systems (all respondents)
- The best things about paper systems are that they are easy to share with others in the organization (79%) and easy to save for reference and use later (75.8%).
- The worst things about paper systems are that they use so much paper (75.8%) and copying grants and attachments takes a lot of time (62.9%).

SURVEY RESPONSES

Background information on respondents:

1. What type of organization do you represent?

      501c3 nonprofit: 92.1%

      Grant-making foundation: 7.9%

(Nonprofit section)

2. Which title best describes your position at the organization?

      Executive Director: 22.8% Assistant Director: 3.8%

      Development manager/director: 10.1%   In-house grant writer: 26.6%

      Contract grant writer: 20.3%   Volunteer in charge of grants: 2.5%

      Other: 13.9%

3. What is your role in writing and submitting grants?

      I write and submit them completely on my own: 49.4%

      Someone else writes them but I review and submit them: 11.4%

      I write them but someone else reviews and submits them: 15.2%

      *Other: 24.1%

      *Most responses in the Other category describe some element of a team effort. Some only review what has been done by others.

4. Which statement best describes the approximate volume of grants you write or submit per year:

      Very high volume (hundreds per year): 5.1%

      High volume (Under 100 per year but not less than 50): 25.3%

      Medium volume (25-49 per year): 25.3%

      Small volume (5-24 per year): 30.4%

      Very small volume (under 5 per year): 13.9%

5. Have you ever submitted a grant using an online, web interface?

      Yes: 89.7%   No: 10.3%

(Foundation Section)

1. What is your position title?:

      Executive Director: 25%

      Program Manager/Director: 25%

      Grant administrator: 25%
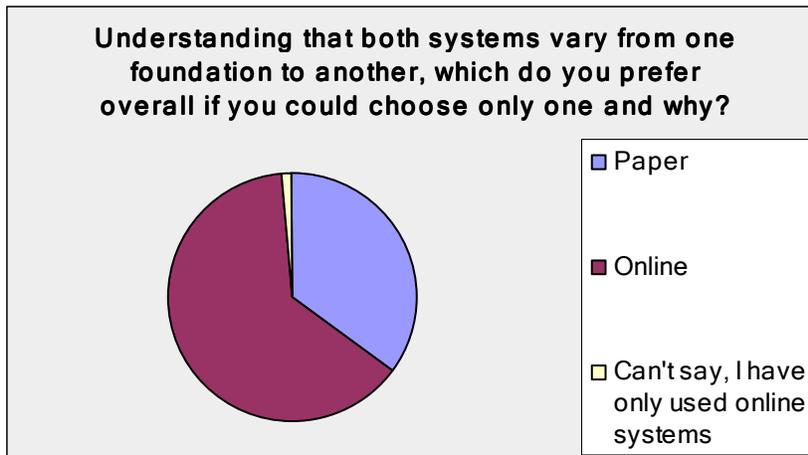
      Other: 25%

2. What are your responsibilities relative to receiving grants from nonprofits? (choose all that apply).

      I receive grant applications: 87.5%

      I review grant applications: 87.5%

      I distribute grant applications to the board: 87.5%

Paper vs. Online Preferences

Understanding that both systems vary from one foundation to another, which do you prefer overall if you could choose only one and why?

- Paper
- Online
- Can't say, I have only used online systems

In this section of the survey, respondents are asked why they prefer the choice they made. Later in the survey, respondents were asked questions about the two systems, whether or not they preferred them. We have organized this report into paper vs. online systems no matter where they appear in the survey.

Paper systems

Those who **prefer paper** mostly prefer it by comparison to problems they have encountered with online systems. We've created this word cloud to show their most frequently mentioned reasons for the paper preference. The full responses can be found on the next 2 pages.

adequate space   allows more creativity
more reliable   less data loss
more organized   better flow
less glitches   less chance of errors
no character counts

Open-ended responses
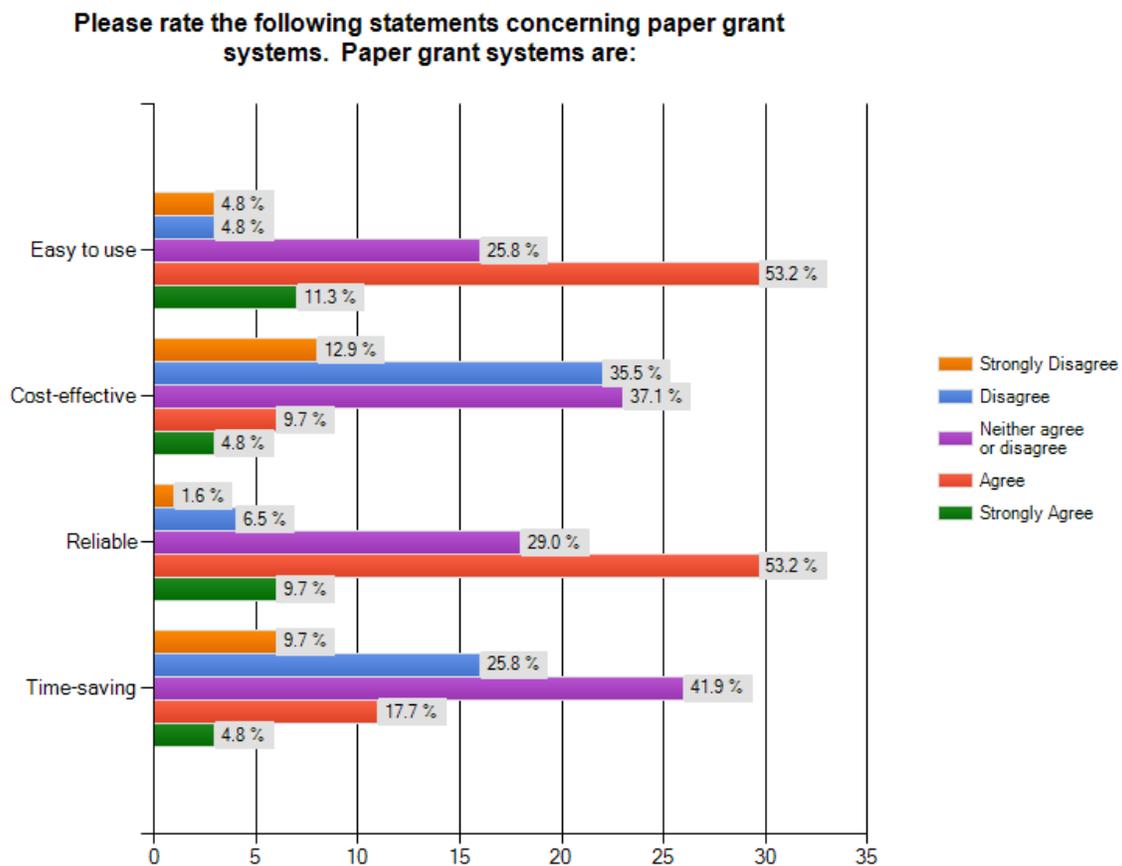
Why do you prefer a paper system?

- The online systems don't allow space for additional information that could make a difference in whether you receive the grant. There is usually not a print option to be able to keep a copy of the application in the office.
- I feel I can do a better job of making my case - possibly using charts or graphics. Paper also gives me more flexibility in organizing my materials.
- 1. Less chance of errors. 2. You can see the whole application at once rather than piece-meal. 3. You can usually work on different parts of the application as you are developing. 4. With online, if you make a mistake you usually don't catch it until later and then you may have to start from the beginning again.
- Often the space limitations for online applications don't fit the agency. With paper submissions, I can vary the section lengths according to the agency's needs and still stay within the overall page limits.
- It does depend on the grant and what system online is used. Sometimes paper is easier to deal with.
- I have been very concerned by all the glitches in the online forms--not all, but enough to cause consternation. It is ridiculous to have to fill out a 12 page form without being able to save parts and return when you get the necessary information. It is also frustrating to see a 500 word limit, but be cut off at 300 words or at 500 characters. Finally, not being able to submit without two electronic signatures when the board officer will not allow an electronic signature makes life difficult.
- The online applications give little opportunity to fully explain the project or program for which funding is being sought. The technical interface between the online application and the grant writer is often flawed and difficult to use, causing a great deal of time spent trying to solve these problems, rather than providing information. Paper grant applications are not subject to these difficulties.
- Online methods are frequently unreliable or cannot be saved in their original format. I find it more difficult to work collaboratively with community partners when using online methods. In addition, one generally cannot include charts, graphs or other graphic examples that enhance the proposal and make it more understandable.
- I have submitted various different online applications and while some are fairly easy and straight forward, others are cumbersome and not very user-friendly. With the online systems we still have to use yet another program (generally Word) in order to compose the narrative sections, as frequently there are word or character limits and online systems do not allow easy editing. Additionally, most "paper" applications can be submitted by email as a PDF. While I understand that these would still need to be printed out for review, there is only paper involved on one side typically. Also, it's possible that many online applications are also printed out for review, which would negate the paper-saving aspect of online applications. Depending on how user-friendly an online application is or isn't, may also determine whether or not it is time-saving. In my experience the online applications rarely actually save time, as many items need to be put into very specific fields, which is not always the way they are organized at the organization applying for the grant.
- Most of the time, I believe that paper provides more flexibility in crafting and arranging information. Strict word limits, unclear instructions, and often seemingly random arrangement of information in online applications can make it very challenging to effectively communicate our needs.
- Online applications are often the opposite of user-friendly. I have seen many types that don't function as they should. It's also tough to create a compelling narrative within the confines of text boxes. It's hard to create flow, to be creative, and to weave my points together when I'm confined to answering specific questions in small spaces. Many online applications often have very tight word counts, which also makes it hard to be thorough. Finally, the majority of online applications use the same online system. Because I work for multiple nonprofits, I have to keep all of the generic web addresses separate--it's very confusing!
- The (named) online system can be so difficult that there is the chance that you can completely miss a deadline. If the online systems were more user-friendly I would absolutely use them. They should be easier to use!
- I find online applications are often too restrictive when identifying goals and outcomes.
- The bigger foundations have now improved their systems so there are fewer "crashes" and data loss, but there is still the issue of hours wasted fiddling with word counts in tiny boxes. The most frustrating thing is the proposals that have dozens of little text boxes - it takes so much time to reformat the material. The other issue is sharing the draft with the client - most clients prefer to see a word document so again it takes hours of cutting and pasting the narrative.
- Some of the online grant systems are so rigid, with character and word limits and text boxes. I understand wanting to limit the amount of material, but rather than limiting each text box to 50 characters or 50 words, limit the entire application. An online app also means that the grant narrative is choppy and disoriented. A paper grant app is usually structured in a way where each section connects, or you can reference material on a previous page. Text-box online apps also eliminate formatting, spacing, bullets, bold text, etc., that can make it easier to read. It also means we have to create the app in a choppy offline document and make sure we copy and paste every time we make an edit. We can't share or work collaboratively If it's a matter of uploading a word doc or PDF to an online grant app, I have no problem with the online format. But many are going to the text box format.
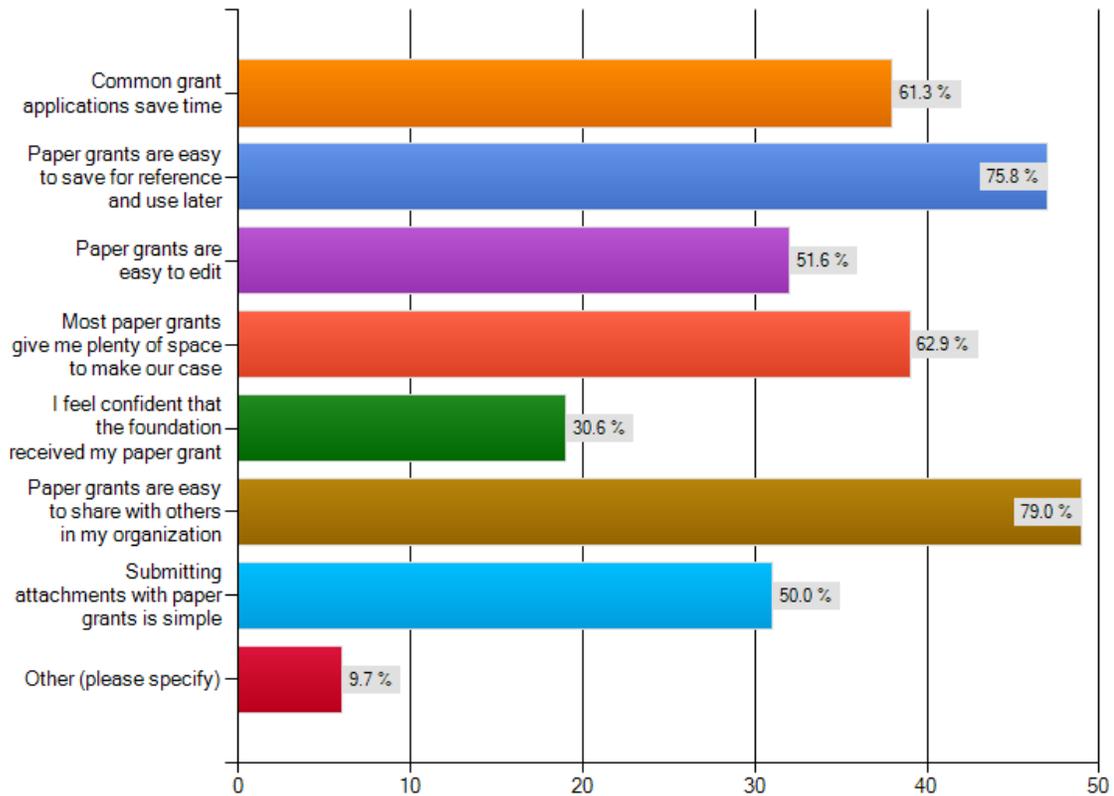
Why do you prefer a paper system? (continued)

- Paper is more concrete, you know what you sent in, and easier to know what you sent into the foundation (if words are limited, or there are other constraints that aren't in the CCGA). To know what you sent in, you have to cut and paste into a new document for internal records.
- Often allows for better narrative opportunities. Also, on-line are not consistent with technological applications.
- I don't like the formatting for online systems and it's harder to review what you have written and submitted. Reading the proposal on a computer screen is awkward, and I still have to print it to make sure it looks right and to proofread.
- I had an electronic grant vanish from a website last week, so now have to start all over.
- I am OK with online but currently the questions asked are often repetitive, don't follow the common grant format, and are restrictive in how you can answer.

The following survey questions were answered by those who indicated that they have submitted grants using paper systems (95.4% of respondents).

Please rate the following statements concerning paper grant systems. Paper grant systems are:

Category	Strongly Disagree	Disagree	Neither agree or disagree	Agree	Strongly Agree
Easy to use	4.8 %	4.8 %	25.8 %	53.2 %	11.3 %
Cost-effective	12.9 %	35.5 %	37.1 %	9.7 %	4.8 %
Reliable	1.6 %	6.5 %	29.0 %	53.2 %	9.7 %
Time-saving	9.7 %	25.8 %	41.9 %	17.7 %	4.8 %

Paper Systems (continued)

What are the BEST things about PAPER grants? (Choose all that apply)

Category	Percentage
Common grant applications save time	61.3 %
Paper grants are easy to save for reference and use later	75.8 %
Paper grants are easy to edit	51.6 %
Most paper grants give me plenty of space to make our case	62.9 %
I feel confident that the foundation received my paper grant	30.6 %
Paper grants are easy to share with others in my organization	79.0 %
Submitting attachments with paper grants is simple	50.0 %
Other (please specify)	9.7 %

Other comments:

- Many people can write sections for grant professional to merge and edit -- and then send whole proposal or just their section to original writer and others who provided information for confirmation.
- If only there were more common grant applications!
- It's really nice to be able to flip through all of your pages in a packet - it makes it easier to see if you've forgotten one attachment, or something silly like that. I find it easier to catch errors in my grant applications on paper.
- When you have staff transitions, it is also very easy for anyone to reference what was used in the past. Sometimes on the computer it's harder to tell which version of something was the final version.
- The reality is that paper grants are most common experience for grant writers and more experience with online grant submission will help
- I'm only checking the Confidence that the foundation received my grant because I typically HAND DELIVER the application. Our Audit is over 60 pages so that makes for a very expensive mail package.
- You can read the entire application prior to beginning.

Paper grant systems (continued)

What are the WORST things about PAPER grants? (Choose all that apply)	
Answer Options	**Response Percent**
Foundations have different guidelines and formats	51.6%
Common grant applications are too limiting	19.4%
Some foundations have requirements for paper sizes and colors that make them difficult to do	46.8%
I am not confident my paper grants reach the foundations	27.4%
The cost of mailing is prohibitive	29.0%
The use of so much paper is not ecologically friendly	75.8%
The use of paper is expensive	46.8%
Copying the grants and attachments takes a lot of time	62.9%
Paper grants take much more time to do than online grants	29.0%
Other	8.1%

Which paper systems do you like best? (an open-ended question).

In this section, respondents were able to tell us specifics or speak in generalizations. Because there were so many responses to this question, we have distilled the answers down to a summary by topics mentioned most.

Colorado Common Grant Application (CCGA) - Most of the comments on the CCGA were positive. However, many respondents mentioned that many Colorado foundations are not using it. Those who like it feel that the CCGA saves a lot of time. They also appreciate being able to use what they have written again. Some feel there is plenty of space to make their case, but others say it is limiting. Some feel the amount of attachments that need to be copied and mailed with the application can be cumbersome.

pdf files vs. mailing - A few respondents mentioned they really like emailing or uploading "paper" pdf files as opposed to sending paper copies by mail.

Fewer attachments - Several mentioned they prefer the applications which require fewer attachments.

Simpler formats - Several mentioned they prefer paper grant applications that have simple formats.

Specifics - A few mentioned that they prefer it when foundations have very specific formats they require, which are outlined in their guidelines.

Mentioned specifically - Two state departments of Education (Illinois and New York) were mentioned as good paper systems, along with the Daniels Fund and Kinder Morgan. These were the only specific ones mentioned.

Which paper systems do you like least? (Open-ended question)
In this section, respondents were able to tell us specifics or speak in generalizations. Because there were so many responses to this question, we have distilled the answers down to a summary by topics mentioned most.

Read-only pdf forms - This item speaks for itself, but recreating forms or finding a typewriter can be difficult.

So many copies - Several respondents commented on the number of copies of the grant applications they must send, and the number of attachments they need to copy.

Unreasonable space requirements - Because it is such a great comment, here is the quoted comment: "A one to two page letter to explaining 10 or more questions."

Colored paper - Several respondents mentioned they have had great difficulty with various grants which require different colors of paper to be used. Some of these actually are "forms" that are sent to them in color, and they must "type" on only those forms. Others mentioned foundations that require the grants to be printed on various colors of paper.

"Tailored" Common Grant Applications - Several respondents mentioned applications which are hybrids between the CCGA and the foundation's own guidelines, which are different than the CCGA. They often have requirements for additional attachments. Respondents have difficulty going back and forth between the foundation's additional requirements and the CCGA.

Specific foundations by name - We told people in this survey that if they mention a foundation by name in a negative way, we would look at their guidelines and see if we can discern the problem, rather than mentioning them by name. Several people mentioned some Colorado grant makers by name. What we know about them is that they all have complicated grant applications requiring many attachments. One also have a process that is so completely different than what everyone else is doing and so much more complicated, it is extremely difficult to apply.

Government grants - Throughout the survey, respondents wrote about great difficulties with government grants at all levels of government, all over the country.
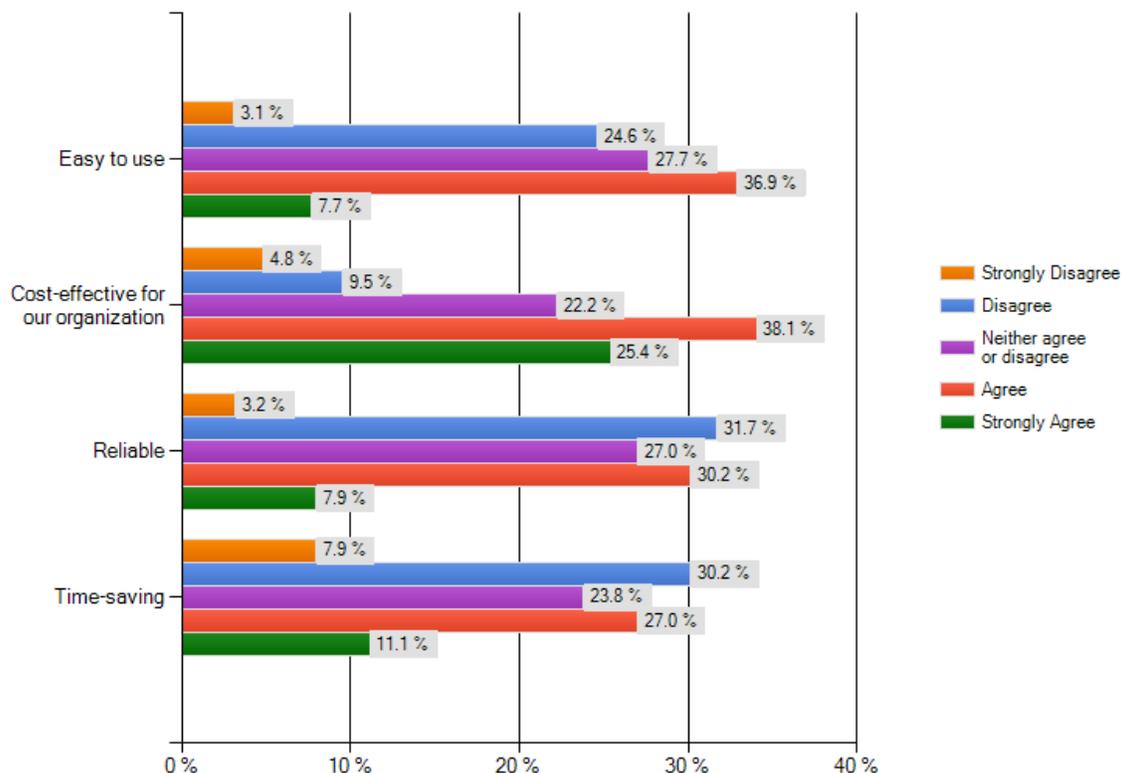
Online grant systems

Those who **prefer online systems** often mention that they prefer them *if* the system is well-designed and working properly. Below is a word cloud of their responses. The full responses can be found on the next page.

No copying
No typewriters!
Can't forget attachments
Don't need to factor in mail time
No rushing to the mailbox   Saves time
No collating
More convenient Less paper
Saves postage
Accessible to screen readers

The following survey questions were answered by those who indicated that they have submitted grants using online systems (95.4% of respondents).

Please rate the following statements concerning online grant systems. Online grant systems are:

Easy to use
- Strongly Disagree: 3.1 %
- Disagree: 24.6 %
- Neither agree or disagree: 27.7 %
- Agree: 36.9 %
- Strongly Agree: 7.7 %

Cost-effective for our organization
- Strongly Disagree: 4.8 %
- Disagree: 9.5 %
- Neither agree or disagree: 22.2 %
- Agree: 38.1 %
- Strongly Agree: 25.4 %

Reliable
- Strongly Disagree: 3.2 %
- Disagree: 31.7 %
- Neither agree or disagree: 27.0 %
- Agree: 30.2 %
- Strongly Agree: 7.9 %

Time-saving
- Strongly Disagree: 7.9 %
- Disagree: 30.2 %
- Neither agree or disagree: 23.8 %
- Agree: 27.0 %
- Strongly Agree: 11.1 %

Legend:
- Strongly Disagree
- Disagree
- Neither agree or disagree
- Agree
- Strongly Agree

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Why do you prefer an online grant system?

- I would chose online, but ONLY if the system is easy to use, as in easy to log onto and to reenter when needed.
- I'm very comfortable working on the computer and find that it's just easier to submit on-line versus having to make so many copies, rush to the mailbox, the funding organization (if near by) or FedEx. Also, when submitting paper, you have to make sure that each copy is correctly collated and that all sections are included. It's easy to make mistakes in this area especially if you're rushing.
- In general, online systems are much more convenient and save time and resources--no extra copies, no postage. You can basically complete online applications without leaving your desk.
- The online systems appear to be easier. What I don't like about the ones I have used thus far is that there is no program officer or contact person for questions. That is frustrating. Without a contact person, especially for corporate community involvement grants finding out why the request wasn't funded is impossible.
- Even with paper systems, there are page limits. With the small online systems with very limited word or character limits, no real formatting is required. That saves some time. These also force the writer to really focus on essential wording and that is a good thing.
- Much less time involved.
- Online forms are great because you no longer need to have a typewriter in the office.
- Save us $ need to mail grants, can work on it until the day it is needed, takes some of the rush out of it.
- It seems more efficient.
- I have more time to spend working on the application because I do not have to factor in the time for ground mailing. It also saves money for both postage and printing. I can write more proposals because I'm not spending lots of time assembling paper copies.
- More reliability of on time delivery. Assurance of being reviewed.
- The online format meshes well with my digital work lifestyle. Character/word limitations hard-coded into the application help the writer focus ideas while helping reviewers with more manageable review packets.
- Cheaper, easier and can be submitted closer to the deadline.
- I prefer online if there are no glitches and checks and balances such as word/character counts are realistic, and instructions are very clear and easy to understand; however, I have rarely found this to be the case.
- I prefer online systems that still allow you to upload documents - not that limit every answer to character counts. I prefer to submit online rather than paper submissions - saves time, money and is reliable.
- If the online application is well-structured and allows enough space to make an adequate presentation it is easier and less time-consuming to use.
- A little less hassle, barely--because some haven't been tested or have glitches sometimes, and then it's more frustrating than a paper application!
- I am legally blind. If the online form is accessible to screen readers, I can complete my duties without assistance.
- I like both...
- It's super frustrating when you spend hours trying to get something to submit online, only to have the foundation's website crash. But I think in terms of long term sustainability overall that online is a better choice for most situations. Questions for online systems seem to be less standardized than written ones, which can mean more work. It's not always as clear what to put into each section, and what to leave out.
- As long as the online process is consistent and most importantly the foundation has included all elements for submission including copies of submissions for our records and electronic verification of receipt..
- If properly designed an online system is generally easier to manage.
- The time savings are usually significant enough to outweigh reliability concerns.
- Less paper and harder to forget an item
- Quick, easy, fast turnaround.
- Saves time, paper and money!
- Cost effective and time saving.
- Depending on how user friendly the system is, it is usually a more efficient and time-saving way to submit proposals. It also eliminates the stress of trying to deliver or mail a proposal on time.
- IF the system is a good, it can save time and certainly trees.
- Ease. Though, it is always nice when you can see the entire application at one time before starting to work on the grant.
- I prefer online because they save time and are cost-effective for our organization.

What are the BEST things about ONLINE grant systems? (Choose all that apply)
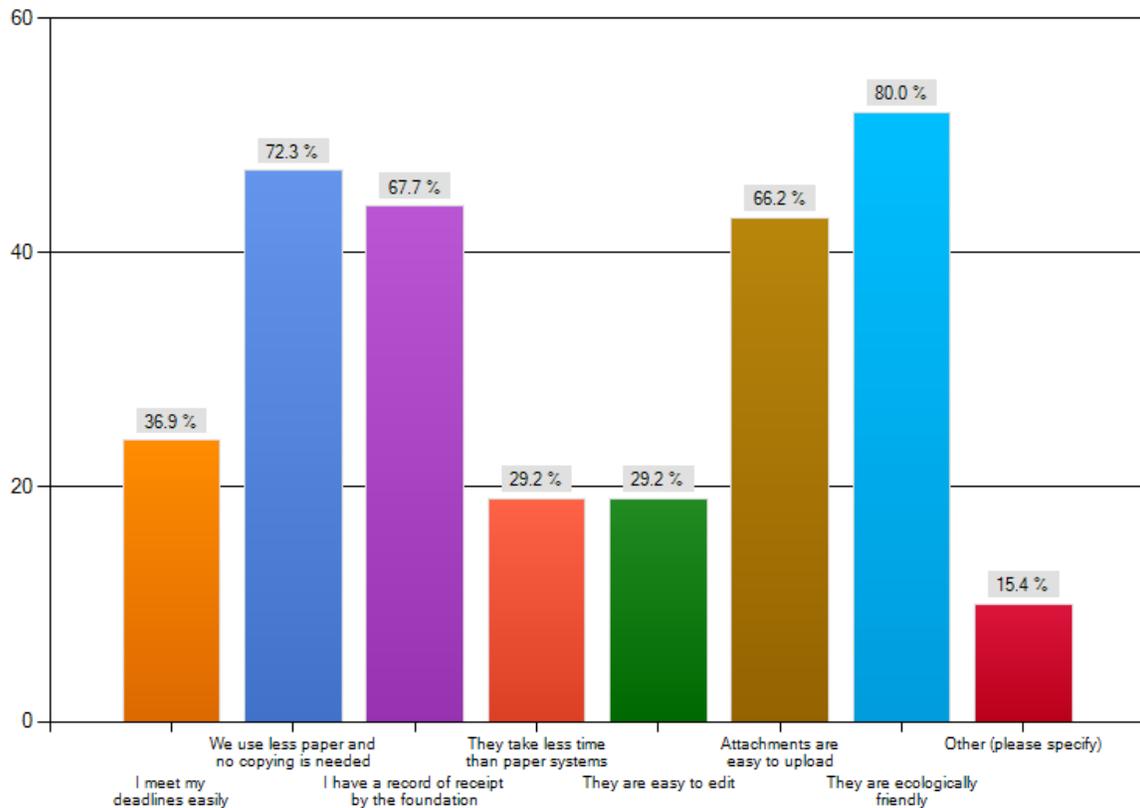
"Other" comments

- I have not found any of these choices to be true. I can't think of anything that I like about online systems.
- No typewriters.
- I really do not like them but they make delivery much easier as well as timely. I also know it has been delivered which may sometimes be difficult with paper.
- I like the idea of online grant systems. Unfortunately, most that I have used so far are aimed at satisfying the funder's needs and ease of use. It appears in most cases there is limited testing on the input user's side to make sure the online application is user friendly, the program effectively identifies errors on the application so the user knows and understands where the error is and what needs to be done to resolve the error, and that parameters such as word/character count are realistic.
- If the online application is accessible, it expands the job duties of people with print disabilities.
- When a foundation allows you to start from last year's grant application, that is a huge time saver. When you have to start from scratch for whatever reason, it becomes a much bigger time suck instead!
- Presently, too many online grants are new and have errors in the process. Once systems have been used the "bugs" will be worked out but presently it has some challenges as every one is slightly different in how they set up their process
- So long as there is the ability to save and go back and continue, on-line provides good alternatives.
- None of the above.
- I always create the grant proposal as a word document and then copy and paste it into the online application. The word document is easy to share with others in my organization before I submit.

What are the WORST things about ONLINE grant systems? (Choose all that apply)	
Answer Options	**Response Percent**
Foundations use different systems	72.3%
Creating and saving so many logins and passwords is a problem	60.0%
It is difficult to share the grant proposal with others in my organization before we submit	56.9%
Character/word limits are too limiting	69.2%
It takes a lot of time to cull paragraphs down to meet character/word limits	72.3%
Some systems are difficult to use and not intuitive	72.3%
I get thrown out of some systems after too much inactivity and lose what I have input	46.2%
I have to create a word document and then copy and paste it into the online system	50.8%
Online systems take much more time to do than paper systems	18.5%
Online systems make it more difficult to use what we wrote again later	44.6%
Uploading attachments is difficult	10.8%
Other (please specify)	20.0%

Other responses:

- Sometimes I can't save a copy of what has been submitted.
- The online systems I have used thus far are much more time-consuming than paper applications because they are not user friendly. Two examples; unrealistic word/character restrictions (write the narrative in 500 characters or less -- yes, I really had an online app with this restriction!) or on (named), you have to re-verify the budget every time you make a change, but the directions do not clearly state you must re-verify (I missed a deadline and had to have the help desk override the late submission because the instructions, at least at that time, did not say anything about re-verifying the budget, the system just kept giving me an error without explanation. In addition, many times when you write something in a Word document and then cut and paste, the online application's cut and paste function doesn't work properly and you end up having to retype. And, lastly, some online systems I've used don't have any way to print a final copy of what you have submitted -- which is very important because often times when transferring information from a Word document into an online application, you have to make adjustments for word/character count, etc., and the online application information ends up being different than what you had saved in your Word document.
- Some forms are graphical and cannot be recognized by screen reader and other adaptive software.
- Government grants are the worst...horrible to submit
- When the system for uploading attachments works well, then its great. But those that require you to use your email system, and require a lot of attachments, tend not to work for those of us on gmail and other cheap email servers.
- With most online systems it's harder to look at all of your answers to all of the questions to make sure you are both including everything important and not repeating yourself.
- The true challenge is how to transfer from one online system to another to re-use similar questions and answers.
- Some systems don't allow you to save and come back to the application later
- Have only done one so far, but I haven't really encountered any challenges.
- The proposal is less cohesive, it's difficult to format the proposal or use tables/charts, some funders allocate plenty of characters/words for one text box, and then too little for another text box. Many grants are a collaborative process among staff and a proposal writer, and this makes that much more difficult.
- A process like the Anschutz Family Foundation or Coors Foundation, where you upload your key application materials, bypasses all of this and is not that difficult to deal with. It actually makes it easier.
- Have to create a document to keep for internal records.
- The most frustrating applications are those that do not show character limitations before-hand but give you error messages when you try to paste your information. Also, frustrating are applications that force you to answer questions which may not apply to your organization, without opportunities for explanation.
- Not being able to see the applications prior to even starting as it is nice to see all questions so you know what you will have to answer. And, then being forced to fill out things to get onto new screens ... when just looking for an overview of the grant. Often times, I just enter random keys to force the screen onward and then forget to go back.

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Which online systems do you like best? (Open-ended question)
In this section, respondents were able to tell us specifics or speak in generalizations. Because there were so many responses to this question, we have distilled the answers down to a summary by topics mentioned most.

Systems that give users the ability to:
- Upload pdf proposals and excel spreadsheets instead of filling in text boxes
- Email pdf proposals
- View all questions in a downloadable form before starting the proposal
- Save and return later to finish and with auto save for reach page as you move forward
- Share the document between several writers
- Repopulate organization information from previous applications
- Provide all necessary information without character and word limits (or at least much more room than the ones currently in use. Word limits preferred over character limits)
- Cut and paste text into the form online
- Print and save the completed application
- Use the common grant application as a base
- Talk to someone at the foundation if there is a problem

Several respondents mentioned some specific sites they find easy to use:
- Adolph Coors Foundation
- Amgen
- Anschutz Family Foundation (mentioned several times)
- Bank and corporate foundations
- Boulder Community Foundation
- Chris Reeve Foundation
- Commongrantapplication.org
- Cox Foundation
- Cybergrants.com (mentioned several times)
- GrantRequest.com
- Sempra Energy
- Vail ECHO
- Xcel Energy Foundation
- Zoomgrants

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Which online systems do you like least? (Open-ended question)
In this section, respondents were able to tell us specifics or speak in generalizations. Because there were so many responses to this question, we have distilled the answers down to a summary by topics mentioned most.

Respondents least like systems that:
- Force you to download a specific budget form and upload it
- Require you to start the application in order to see the questions and fill out all items before you can proceed to see the rest of the questions
- Don't allow users to share and work together to fill out the application
- Do not have auto save
- Don't allow you to save and come back later
- Don't allow enough character or word space
- Make it very difficult to upload required documents which are often larger in size than the limit (some audit files are much larger than the allowed limit)
- Require all documents to be saved into one pdf file.
- "Time out" after inactivity (because usually the inactivity is the grant writer working in another window to prepare what to input on the form).
- Integrate document uploads in different sections of the application, instead of in one place where you can see what you need to gather and upload them following a list.
- Make you go through an eligibility quiz every time you log on to get back to your application
- Break up the application in very small sections
- Don't allow you to log in on the day the grant is due!

Some respondents had some very interesting points to share:
The ones I like the least are the ones which have the little boxes which are very limiting to the amount of words you can use. Some of these types do not let you save so unless you go ahead and do the text on Word and then copy and paste into the box, you lose your work. When you do that, it is like doing the same one twice so why can't you just submit what you have written in Word?

One other problem comes when I am not available. Very few staff are trained to submit online, and if I'm out for sickness or just not available, my passwords and authority often is not available to others. It creates a funnel that in the old hard copy days didn't exist. I could have worked on the grant application, and someone else could make sure it got out the door. Now its me or its panic

Some mentioned some specifics (again, when respondents mention one by name in a negative way, we won't name them. Instead, we reviewed the guidelines to see what they mean):

Government grants—users are having MANY problems with many government entities and their grant systems. Many noted they have lost entire applications in process, systems have crashed completely and the systems are extremely complicated and time consuming.

One particular national foundation—has a very difficult system where goals are in a completely different section than the objectives that go with them and it is very difficult to go back and forth.

Important Note: Some online systems were mentioned in **both** the like best and like least sections.

What recommendations would you make to foundations that want to make the change from paper system to an online system? (Answers distilled into ideas mentioned several times).

- Use an online version of a common grant application
- Don't use word or character counts or at least provide much more than what most online systems are doing now. Allow as much space as paper applications do.
- Make the entire process clear in a format that can be read without logging in
- Allow users to save and return later
- Make it possible to use graphs, charts, timelines in body of narrative
- Keep the application accessible after the grant deadline
- Consider letting organizations submit on paper or online, giving them the choice that makes it easier for them
- Consistency with other foundations (as possible) would be very appreciated
- Have several people from outside the organization complete the application before going live to ensure that it makes sense an it works. Several respondents suggest you contact previous grantees and some professional grant writers to test your systems first.
- Consider using a system that allows several people to share the applications and work together on them
- Provide a contact number for technical problems
- Keep your online system similar to your paper system
- Allow room on budget forms for line-item descriptions
- Provide instructional webinars on how to use your system
- Please be as user-friendly as possible
- Provide free text space with data fields
- Create a really great paper system where questions do not overlap and allow needed space. Then pay someone to put your system online.
- Keep in mind that many organizations have limited computers and outdated computers
- Allow different formats for uploads so that individuals can choose the ones they have
- Allow the application to be saved on our computer
- Send notification of receipt
- Don't have size limitations on uploads
- Don't use drop-down menus with predefined goals and objectives
- Allow for the major narrative to be uploaded instead of input into text boxes
- If you must use text boxes, be sure you allow formatting of the text for bullets, etc.
- Don't assume that online is always better. One of the goals should be to make it easier for users, not harder

Some just said:
Please don't! (switch to an online system)
Go for it!
Please do!

Foundations

This survey included a section for foundations. We had very few foundation responses (eight) to the survey but the information they did supply is very helpful. (Thank you to the foundations that took the time to respond).

What are your responsibilities relative to receiving grants from nonprofits? (Choose all that apply)	
Answer Options	Response Percent
I receive grant applications	87.5%
I review grant applications	87.5%
I distribute grant applications to the board	87.5%
Other (please specify)	0.0%

Which system do you use to recieve grant applications from nonprofits?
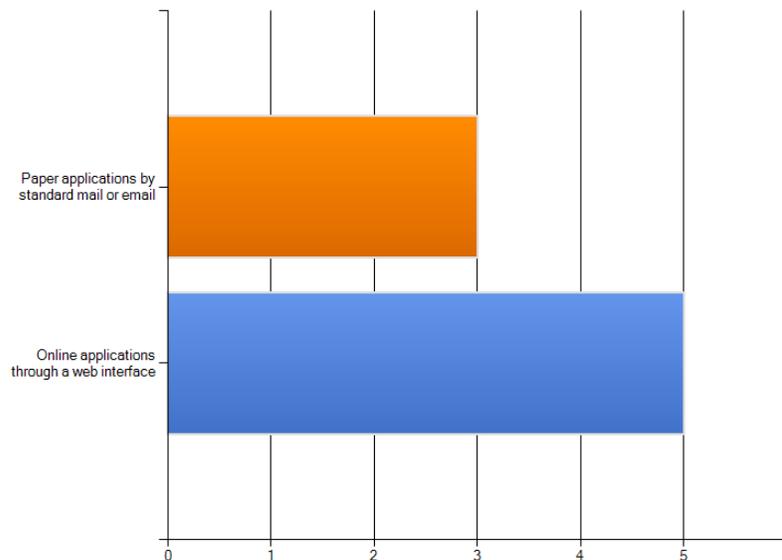
Those who accept paper applications (3 foundations):
2 Accept a common grant application or other formats
1 Has their own format

2 Use this format for ease of use for the foundation
1 Uses this format for ease of use for nonprofits

Description of internal review processes:

- One copy is required from applicant, which is distributed to the program officer after being checked for completeness and acknowledged by mail or email.
- As executive director, I read them first. If the grant request does not meet our guidelines, I call the prospective grantee. If the grant was received before deadline, the grant may be resubmitted. I copy the grants and distribute to our grants committee to read. Then the committee meets to evaluate the grants.
- When we have open granting opportunities we collect applications electronically and after screening for completeness forward them to the appropriate review committee. In most instances this has entailed printing out hard copies for all. In a few other instances we were able to forward the applications for review electronically.

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Foundations (continued)

Why does your foundation use the paper format?
We have limited resources to develop an online system—1 response
Simplicity—1 response
Other—We are in the process of going online with our application—1 response

Is your foundation considering a switch to an online system:
Yes—2
No—1

Foundations that accept online applications (5 foundations)
What type of web application are you using for online grants?
Existing system used by many foundations—3 (actually 4, see other)
System we created to our specifications—0
Other:
We use Commongrantapplication.com
We require electronic submissions (email)

| Why does your foundation use this particular format? (Choose all that apply)		
Answer Options	Response Percent	Response Count
Ease of use for the foundation	100.0%	5
Ease of use for nonprofits	100.0%	5
Standardization for nonprofits	60.0%	3
Cost effectiveness	80.0%	4
Other (please specify)	80.0%	4

Other:
- Save paper, time, costs and effort
- Ability to share applications with board members
- Streamlines administration, provides database for mining and trends
- Efficiency and accuracy in grant processing, data entry and record retention

Description of internal review processes:
- All applications are received online. I then run a report out of the Common Grant Application website pulling relevant fields to present to the board. Then I manage the grants on the Common Grant Application by declining, approving, grant agreements, grant reports and grant payments.
- Everything is electronic - no paper is used
- Copies are not made. I read them first then they go to the board, all electronic. Board members can print the applications if they wish.
- We are attempting to be paperless as much as possible. In most instances, proposals are not printed and can be reviewed on the computer screen. Program Officers review the application first, conduct a full review and site visit before presenting the proposal to a board review committee and ultimately the full board of Trustees.

Foundations (continued)

During the process of determining which system you would use, did you do the following:
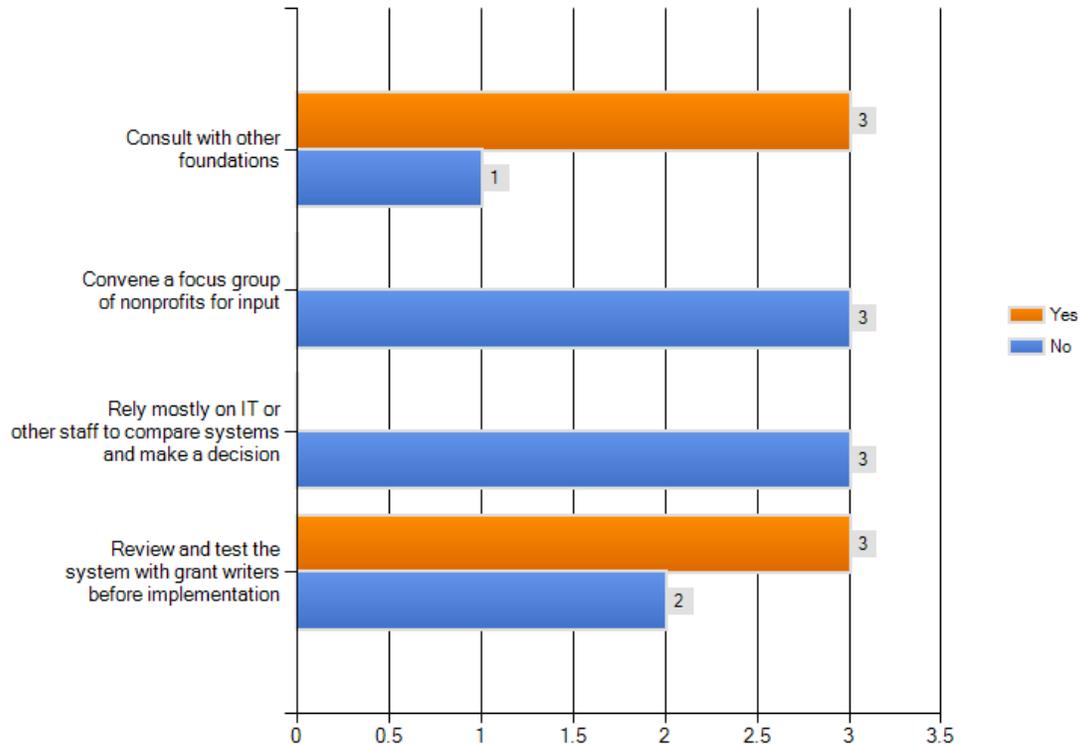
2 Selected Other:
- There's a report out that reviewed the options when we were looking to transition from paper to electronic grantmaking.
- We compared numerous systems in terms of functionality for both grantseekers as well as foundation staff and Trustees, as well as cost comparison.

Would you consider changing your system?
Yes—1
No– 4

Comments:
- In choosing an online application system, we worked very hard to limit any additional steps or burdens for grantseekers. We intentionally chose a system that would allow applicants to upload the Common Grant Application materials with limited duplication of efforts (e.g. No copying and pasting of narrative answers).

- We will launch our new online application July 1, 2013

Professional Grant Writers: What foundations need to know about how we work (Editorial notes and observations from the creator of this survey).

In doing this survey, we have also paid particular attention to the responses of professional grant writers like ourselves. It is very important for foundations to know how we work with our clients in order to create either paper or online systems that do not cause us to spend more time than is necessary to do our work, which costs our clients more money. You may have noted in the Executive Summary that professional grant writers currently like online applications far less than nonprofit professionals do. That is because of the way that we work.

Professional grant writers:
- Typically work from a different location than our clients
- Sometimes collaborate with our clients and other staff to write the actual grants, but mostly by email or sharing documents back and forth—sometimes by phone but often not in person
- Write the grants, but our clients review, edit and submit them
- Create the accounts and logins online for our clients, and have to keep track of them
- Fill out all of the forms for our clients, but they edit them
- Sometimes ask clients to create the budgets and other attachments
- Aren't always responsible for putting grant packages together, including attachments
- Are not always working on the grant applications when our clients are available to talk to us about them.
- Write grants in advance of the application deadlines.
- Right now, most grant writers are having to create WORD documents for our clients to read first, then copy and paste them into online forms.

With the above in mind, these points are important for paper and online application processes to work well:

Paper applications. It would help us very much if you would:
- Use fillable pdf or WORD forms, but only if they can be saved and edited again later
- Avoid using printed paper forms of any kind
- Consider utilizing an existing Common Grant Application format or, at minimum, familiar types of formats

Online applications. It would help us very much if you would:
- Not require email verification to continue applications **or**
- Not us a system that uses unique logins for applications
- Choose a system that accommodates sharing and editing
- Think about how the system will work in a way that allows the grant writer to save the end product in addition to the client
- Not require an entire grant application to be done in one sitting (allow saving and returning)
- Provide an attachment list that we can share with our clients before they log on to the online application
- Not use text boxes, if possible. They are causing us to have to create our grants twice (with a WORD document and then online).
- Not use character or word limits that cut off. We are spending extraordinary amounts of valuable time culling paragraphs and characters.
- Provide access to the online applications before the "window" opens for submission so that we can prepare them in time for our clients.

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Other stories and comments from users:

- Our organization once missed a grant deadline because an error message from the electronic submission went to someone's spam email folder, and was not discovered until after the deadline had passed.

- The worst online application gave me 100 spaces for history for an agency that is 45 years old, changed their name three times and has multiple programs. The same application wanted me to write the program section in 1,000 characters when there were three partners providing different services and an innovative coordination design.

- It wasn't funded, but the first grant I submitted was to (a federal agency). It was paper. I had to copy, collate, and staple all 15 copies myself. I was working up to the last minute. Fortunately, the secretary helped me to get the postage on it so I could get it to the main post office to put in overnight mail. The main post office was open until 8 PM. Can't remember the exact time, but it was around 7 PM, but I made it. That was my introduction to grant writing.

- I submit almost 85% of my grants on line now. Something that is a must is having the adobe software, it makes all the difference. Using the typewriter feature I can number all the pages, I can combine documents when I need to, and I can separate documents when I must.

- (On a government application): Had trouble getting it to accept. Finally accepted entire grant. Did not provide me with receipt. I resubmitted, would not take it indicating it had already been submitted. Tried to locate a staff, left numerous messages. It was too late to fed ex. By time staff returned my call it was past due date and they could not find the submission on their system.

- The combination of interactive PDF files with online systems, while admittedly attractive, can cause serious issues to those applicants who might not have access to the version of Adobe necessary to use the forms. Also, the size of interactive PDFs, when completed, can tax computer resources and broadband connections. This might force crashes, data corruption, etc. I have had all of these things happen to me as a result of huge PDF files, old computers, and spotty rural bandwidth. These things may be overcome by maintaining a tight schedule and submitting early, but grant writers all know that that is often the ideal, rather than the rule.

- My worst experience was with a local governmental agency. The process was riddled with errors:

1. Many of the text blocks took the cursor to the left side of the middle of the block. The text did not wrap, so there was no way to proof for errors as I worked.

2. Each answer that exceeded the text block space (or failed to work, as above) had to be submitted on a separate piece of paper and interlevered into the application packet.

3. The packet had to be submitted electronically and printed with 13 copies and hand delivered!

4. This same submission required two electronic signatures to be able to submit and there was no way to save your work as you completed sections.

5. The application was 12 pages long! It was all or nothing, which I did not discover until Monday morning after coming in for four hours on Saturday to complete nearly all of the form.

6. I thought I had saved my work and forwarded to my supervisor, but she received a blank document. Stupidly, I did not print my work before shutting down, so I lost it all and the grant submission deadline was mid-afternoon on Monday. Very frustrating!!

7. I can't imagine many individuals or non-profits having the time and/or resources to apply for these pass-though Federal funds when the process was so flawed. Perhaps that was the desired outcome, but I doubt it.

- There is a foundation that requires you to use reports that are specific to the financial industry. Most NPO employees can't even read these reports, much less apply them to their programs. The information the foundation wants is simple...what percentage of the clients are under a certain income limit. Just give us the income limit, and forget the link to the 200 page report.

- Really, the worst are applications of either type that are really lengthy or just ask too much, for a relatively small reward. Online systems are overall better IF they've been tested and vetted both internally and externally. Foundations should do a dry run with a real applicant or applicants before throwing the whole process open to the general public!

- I always appreciate the opportunity to spell check so phrases like, "the items will be distributed" don't accidently get submitted as "the items will be disturbed" :-)

- Having helpful grant/program officers who can either coach folks through the process, or help troubleshoot problems with an online system, is key. Those folks rock my world.

Other stories and comments from users (continued):

- Thanks for doing this survey. The biggest concern for me is when funders institute systems that they say are "simple" but are actually hugely complex for the nonprofit. For nonprofits paying a contract grantwriter, this translates to "more expensive." Then, foundations turn around and wonder why fund raising costs are so high…

- I've spent hours preparing an online submission only to have the foundation's system tell me repeatedly that it can't process my application right now. The systems that let you save after every step are really smart.

- I've definitely had text boxes that limited us in describing our program to 500 characters, and then the funder allows 1,000 characters for something that's not that important (what in-kind donations do you receive or something like that).

- It is difficult to often create a sense of urgency with some of the limitations placed upon non-profits in applications. Use of testimonials and multi-media information is always of assistance.

- One of the most frustrating things for me as a contract grant writer is that some foundations are using systems that cannot be saved. The grant must be done in one sitting. Since I write grants and then my clients submit them, I have to do the entire application on paper and then have clients copy and paste in one sitting. Additionally, I spent an entire day on an online application once, only to have the grantmaker's system fail. I lost everything I had done. It didn't matter that I had transferred everything to paper as well. It took that long just to work through that particular system. Broadly speaking, online applications are taking 2-3 times longer for me to do, which is going to become costly for my clients.

CONSLUSIONS

Analysis of all survey responses lead us to these conclusions:

- Although online grant submission systems are preferred by users, there are many problems with online systems that, if fixed, would improve them vastly.
- Contracted professional grant writers have a much more difficult time working with online systems because they must create ways to share what they have written with their clients. Online systems are taking more time to do for contract grant writers, which costs their clients more.

After reviewing all of the responses and recommendations from this survey and comparing them to all of the grant submission processes we have used, there are very few systems that actually match the recommendations of users in this survey. However, there are a few that we know of that do match what users have found most helpful. They include...

Paper Systems:

The Colorado Common Grant Application, or similar, (without any additional attachments and for some foundations, with less required attachments) is still very user-friendly. There are other states with common grant applications, too. The only problems with them are that a lot of foundations don't accept them and there still could be some improvements made to them.

Online:

In Colorado

The Anschutz Family Foundation's online system matches much of what users of online systems have recommended in this survey. Their system took the common grant application which has been used for a long time and made an online format of it. It provides the summary form of the applicants in an online format, and everything else, including the proposal, is uploaded. They created a format that is very familiar to local nonprofits and grant writers and still lessened all the use of paper.

Nationally

Unfortunately, as much as some systems are now becoming familiar to users and we are adapting to them, most of the nationally used systems that we know about need more work to completely match what users have recommended in this survey. Commongrantapplication.com may come closest. Our hope is that this survey helps them to understand and make the necessary changes.

A very important finding of this survey is that many online applications are readable by screen readers for low-vision and blind individuals.

How Can *CommUlinks of Colorado* **Help You?**

We provide a variety of services related to communications such as grant writing, strategic planning, developing marketing and fundraising plans and more.

A list of our services is located on our website at:

www.commulinks.com
services@commulinks.com
303-400-3456

We are willing to volunteer to help any foundation that wants to test a new application system. Please do not hesitate to contact us.