Change Up Your Questions
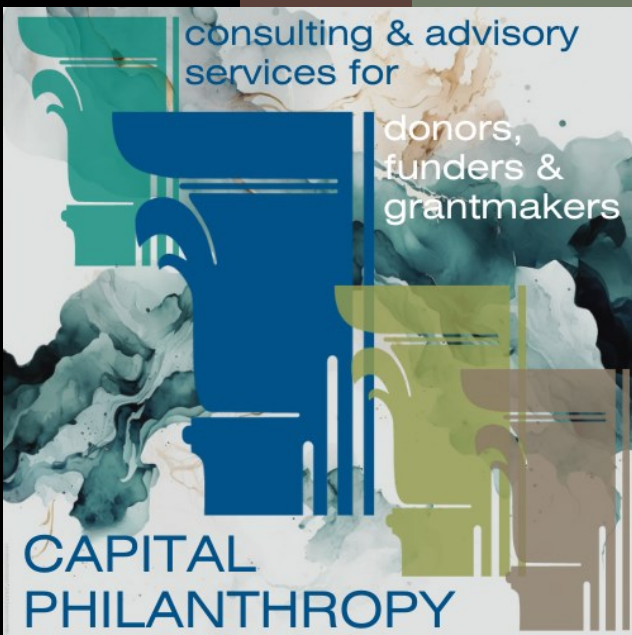
Practicing Your Values & Vision as a Funder

A Resource from CAPITAL PHILANTHROPY

consulting & advisory services for

donors, funders & grantmakers

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A couple of questions for you—

1. *If someone were to review your grant application or listen in to one of your interactions with a grantee partner, such as a site visit, would they be able to tell what your values are as a funder? Would they be able to discern your philanthropic principles?*

No?

2. *Has your board found itself stumped, saying, "We're guessing about this topic. We should have asked specifically about this in our application." Or have they said, "What an incredible response from this partner, we didn't expect that. Wish we could elicit similar responses from grantees in the future."*

Yes?

Perhaps it is time to change up your questions!

Take a thorough look at your application.

For any question or component of your application, you have several options:

- Add elements to it.
- Change it a little.
- Change it a lot.
- Delete it entirely.

Macro-Level Useful Filters/ Screens:

- If you ask a question in your application, be sure you actually use that information in your decision-making process.
- If you don't use the information in your decision-making process, don't ask the question.
- If you discuss information about an organization during the decision-making process that's not currently part of the application, add a question so you get that information consistently, from all applicants.
- If something is equally useful if gathered directly through conversations with the grantee partner, consider eliminating that question from the application to streamline the process.

Application Materials Review

Application Content (online or printed)

- Alter, add, or eliminate questions, ensuring all questions reflect your values and/or guiding principles.
- Simplify or combine questions. If additional explanation is needed, consider adding an FAQs section to your website to provide more information to applicants.
- Alter, add, or eliminate required attachments, or number of copies provided. (If you still require printed copies.)

Application Preparation

- Accept proposals written for other funders, such as "common grant applications."
- If needed, be prepared to provide language assistance for those organizational leaders whose first language is not English.
- Consider using the FAQs to share narrative explanations without packing too much into the application itself.
- Host a webinar/zoom call for all potential grantees at which the application process is explained, including deadlines and logistic issues.

Application Materials Review

Letter of Interest / Initial Inquiry

- Internally, review how the LOI is used in the decision-making process. Is it a requirement for all applicants, even renewing grants?

- Eliminate the LOI or build it into other components.

- Use a simple form or ask for a free-form letter.

- If you accept new, potential grantees, consider creating a very simple letter template/form through which a nonprofit can identify themselves and their work to you.

Site Visit or Other Contact

- Consider whether site visits are a part of the pre-grant decision-making process, or an element of post-award review and evaluation.

- Consider whether other ongoing contact with a partner can provide better/more authentic opportunities to build and strengthen the relationship.

- If a site visit is deemed appropriate:

  - Specify who should attend the site visit.
  - Specify your expectations about things such as hospitality, tours, "goodie bags," etc.
  - Formulate questions that are asked at all site visits.
  - Consider whether site visit questions should be shared in advance with the applicant/grantee.

Road Test and Learn

- Try the changes made to the process, monitor the impact, and make adjustments as needed.

- Seek feedback from grantee partners regarding changes to your process – informally through conversations or formally through surveys.

- Review or refresh your application at least every five years.

Grant Report

- Streamline the process wherever possible.

- Incorporate the report into the renewal application.

- Ask different or fewer questions; ensure that all questions in the report lead to useful insight or information that supports decision making.

- Create an alternative, such as an in-office conversation about results or impact.

- Emphasize that if relationship building is done right, a grants manager is already going to know what's happening with the grantee partner.

Decision-Making Support

- Establish guidelines for how/whether reviewers can use other information they have, but which is not included in the application itself, as they evaluate a proposal.

- Create a "check list" for application reviewers to provide consistency. Check lists can include:

  - *Decision-making factors, listed by issue or topic, such as "Applicant is well respected in the community," or "applicant has allocated sufficient staff resources to address the need," along with a reference to where the answer is found in the application.*

  - *Summary of information that staff may have gathered, such as 990 information or Candid's Guidestar ratings.*

- Create space at periodic board meetings where the decision-making process itself is assessed briefly. Did reviewers feel that they had all they needed to assess the application properly?

This material was originally developed for the presentation "Change Up Your Questions" made by Marshall Ginn at the 2018 Exponent Philanthropy National Conference. It was based on his many years as chair of the Selection Committee for the AIM for Excellence Award (formerly known as the Washington Post Award for Excellence in Nonprofit Management) managed by the Center for Nonprofit Advancement in Washington, DC.

A more comprehensive version of "Change Up Your Questions" is available for download. This expanded, in-depth workbook and action guide includes multiple sections that address many aspects of grantmaking.

Exploring Who You Are as a Funder

What are you setting out to accomplish? What is your guiding purpose? What's important to you? What are your values?

Exploring Your Nonprofit Partners

Do their management practices reflect or align with your values? How do your grantees think of themselves? What has changed and what has remained constant? Are you prepared to be inspired by grantee partners?

Exploring the World in which Your Nonprofit Partners Operate

How has the Ecosystem changed? What are the signs of the times? Are you working with innovative tools to support better grantsmanship, ensuring equitable practices? Are you staying updated on trends, changes, and evolution in the issue areas you seek to address?

Each section of the workbook will incorporate a range of areas/topics to consider, as well as exercises you can undertake to review the suggested topics. Additionally, each section will include a list of tasks you might consider, based on your review and exploration.

For more information, contact

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