Changes to our grantmaking – find out what happens to your application step-by-step

(5 minute read)

Published: 27 May 2021

Written by: Philee Ang-Chen, Grants Assistant

The pandemic-induced shift towards online working has inspired a number of changes to our grantmaking process. We introduced our new online application system in September 2019, and since then we have aimed to streamline our grantmaking process as much as possible. This has involved mapping out our process step-by-step and interrogating if it is fit for purpose, or can be enhanced further.

Previously, applications were received online and reviewed by the Grants Team as soon as they were retrieved. My Line Manager, Dorothée Irving (Head of Grants), and I would meet and determine which of these applications were eligible against our Funding Guidelines. Those eligible would be handed over to the rest of the Grants Team; Sufina Ahmad (Director), Gareth Clayton (Grants Manager) and Dorothée, to assess fully before what is referred to internally as a **Sifting Meeting**.

Sifting Meetings – then and now.

At these monthly meetings, our two Trustees used to come to the office and look at the first-stage applications and the staff comments. They would discuss and assess the applications to determine which should be taken to second stage. This meeting would typically last three or four hours. Once the decisions were made, the team were informed, and I would invite the successful applications to second stage. The unsuccessful applications list would be shared with the remaining Trustees to review, before then contacting unsuccessful applicants over email to let them know our decision.

This process now takes place **completely online**. A few weeks before the monthly Sifting Meeting, Gareth and I complete an eligibility review of all applications, with a final check carried out by Dorothée. I then virtually distribute the eligible applications to our Grants Team for them to assess and comment on using our online database. Once these are complete, the applications and their associated staff comments are sent to our Trustees through our online portal. The two Trustees then review the applications in their own time, which gives them the space to research and ruminate on the applications and their decisions prior to the meeting.

Trustees and the team meet for the Sifting Meeting over Zoom for around 90 minutes to discuss the applications, comparing notes and feedback, and making decisions. I give the good news to the successful applications. Gareth contacts the unsuccessful applicants, offering feedback based on the online comments and discussion during the Sifting Meeting. Our team and Trustees have adapted smoothly during the transition from face-to-face to online which, we believe, has led to a more efficient and more in-depth review of first stage applications. We hope to continue with this process in the future.

What happens next then?

At **second stage**, applicants are required to submit a more detailed grant proposal and meet with our Trustees and/or a member of staff. Before the pandemic, we would visit the organisation in person, meet their team and speak to them about their organisation and their application to us.

The meeting allows applicants to clarify and expand on any aspects of the grant application, which in turn, help us learn and understand more about the cause area and need for funding. This visit now occurs via Zoom. Unlike the other parts of our grantmaking processes that have transitioned very well to online and digital ways of working, this is one we would like to bring back in person. Whilst we feel incredibly positive about the grants we have made in the last 14 months, we don't think that Zoom quite replicates the same energy and excitement that comes along with visiting a new organisation and learning from the team involved in their real-life environment in which they work in. Digitally or in person, we think that these visits are a great learning experience for us and help kick-start any relationship with potential grantees.

After the meeting, visiting Trustees and/or member of staff write a report which documents their experience of meeting with the organisation. These visit reports are included in our Board papers and are shared with all staff and Trustees to review, discuss and make decisions on at our Board Meetings, which take place every two months. Again, our Board Meetings are now online, but we do hope to experiment with this as lockdowns ease further. Perhaps we will opt for hybrid options, or alternate between online and in-person meetings.

These recent changes to our grantmaking process have definitely led to a more efficient and structured practice. Some have been more positive than others. Ultimately, we do hope to regain the richness of real-life experience balanced with some online efficiency in the future.

Since becoming permanent in the new role of Grants Assistant in September 2020, I have increased my involvement in our grantmaking cycle from start to finish. I now take on pre-application enquiries, attend second stage application visits with Trustees and review Final Reports before closing a grant. This involvement in various stages of the grantmaking cycle has given me first-hand experience of our Funding Guidelines in practice, as well as a more holistic understanding of the experience of applying for and receiving a grant with us. Apart from the required yearly reporting and six-month check-ins, I have learnt that the extent of the grantee-grantmaker relationship is led by what is preferable to the charity being funded, due to our team's light-touch approach. Some organisations provide detailed information during the required reporting periods, some email regularly and others call or meet with us occasionally. No two grants are the same, and this, in combination with our flexible and personable team, lead to really interesting learnings and exciting relationships with our grantees.

We're really proud of the progress we have made so far in our grantmaking. We have completely digitised our two-stage application process to one that is more structured, and used the time this has saved to provide more in-depth assessments and application support whilst people are applying. Our team and Trustees have adapted well to these changes too.

We want to keep improving our grantmaking, and know there's more we can do. Recently, our Grants Team started 'action learning' meetings where we discuss specific ideas, issues and trends that we are noticing in discussions within our networks, and within the applications, progress reports, and final reports we receive. Other things that we are currently exploring include transferring our grantee reporting to our online portal, which will link progress reports to applications in one online space, and make it easier for grantees to complete their reports. We want to communicate more regularly using digital formats, like webinars or videos, about some of the common reasons for rejecting an application.

As a team of four in a medium-sized grantmaker, our ambitions don't always match our capacity! But, we aim to utilise the resources we have to streamline our processes such that we deliver better grantmaking processes, whilst navigating this everchanging world.