

**BUILDING A**



# Fair & Efficient

**GRANT REVIEW PROCESS**



# Table of Contents

- Introduction** **3**
- 8 strategies for a fair and efficient review process** **4**
  - Build a detailed rubric **5**
  - Be transparent with applicants **8**
  - Assemble an inclusive review team **9**
  - Provide thorough training for reviewers **11**
  - Make thoughtful assignments **12**
  - Hide sensitive information **14**
  - Build consensus **15**
  - Use a numerical strategy **16**
- 8 benefits to a digital process** **18**
  - Create accessible, user-friendly forms **19**
  - Pre-screen for eligibility and accuracy **20**
  - Streamline and automate review workflows **21**
  - Anonymize sensitive information to minimize bias **21**
  - Host data in a centralized and secure system **22**
  - Facilitate clear communication and easy feedback **22**
  - Leverage insights from reporting and analytics **23**
  - Collaborate with a true partner **24**
- Conclusion** **25**



**EVERY GRANT PROGRAM'S SUCCESS HINGES ON**

what happens behind the scenes. Though it's not visible from the outside, the administrative work that underpins a grant program has a big effect on outcomes.

And it all starts with the grant application.

The grant application is often the first touchpoint grantees have with a funding organization. It sets the tone for the rest of the partnership.

Getting the grant review process dialed in is essential. Grantmakers have to strike a balance. They need to make space for a thoughtful, thorough evaluation of applicants, while also not overburdening their team—or their grantees. And the grant review process itself must be equitable, inclusive, and fair.

This guide is your roadmap to a better grant review process. We'll explore eight essential strategies for conducting unbiased, efficient, and effective assessments. Beyond that, we'll also delve into the role technology plays, with an exploration of how the right grant management platform can improve the experience for your team and your applicants.



# 8 strategies for a fair and efficient review process

1 Build a detailed rubric

2 Be transparent with applicants

3 Assemble an inclusive review team

4 Provide thorough training for reviewers

5 Make thoughtful assignments

6 Hide sensitive information

7 Build consensus

8 Use a numerical strategy



# 1 Build a detailed rubric

The first step in most smart grant review processes is the creation of a thorough rubric that aligns with program goals. Rubrics are detailed outlines for how each application will be read and scored. A comprehensive rubric helps reviewers stay consistent, minimizes personal bias, and provides a useful reference.

**Create your rubric before finalizing your application to ensure you only request necessary information.** This saves time for both applicants and your team.

According to Brown University's Harriet W. Sheridan Center for Teaching and Learning, there are a series of vital steps to creating a successful rubric. Here are six steps they identified, refocused for grant review:

## Holistic Rubric

SCORE	DESCRIPTION
4	Application is complete and all materials are excellent. Applicant is clearly a great fit for the grant.
3	Application is complete and most materials are above average. Applicant is a potentially good fit for the grant.
2	Application is mostly complete with materials of variable quality. Applicant is an unlikely fit for the grant.
1	Application is incomplete and/or most (if not all) materials are of poor quality. Applicant is a poor fit for the grant.

**1. Define the rubric's purpose.** Consider the components of your application and how each applicant should be assessed. What would an outstanding application include? How detailed do you want to be with scoring? Should each application component receive a distinct score?

**2. Choose between a holistic and analytic rubric.** A holistic rubric is easier to put together, but offers less detail than an analytic rubric regarding specific strengths and weaknesses within an application. For example, a holistic rubric might ask reviewers to assign a score of 1-4 for the application as a whole (where a Level 4 application includes great mission alignment, excellent organization history, and an outstanding plan). An analytic rubric would assess those three components using distinct scales and criteria.



## Analytic Rubric

	<b>BELOW AVERAGE 1</b>	<b>AVERAGE 2</b>	<b>ABOVE AVERAGE 3</b>	<b>EXCELLENT 4</b>	<b>SCORE</b>
<b>APPROACH</b>	Project plan does not have a reasonable approach or build on relevant work in the community.	Project plan may not be scalable or replicable. It may not build on other relevant work.	Project plan appears reasonable, scalable, replicable, but does not build on other relevant work.	Project plan appears reasonable, scalable, replicable, and builds on other relevant work.	
<b>INNOVATION</b>	Project plan clearly lacks any innovation or fresh ideas and lacks implementation.	Project plan lacks clear innovation and implementation.	Project plan contains new and exciting ideas, but not a clear line toward implementation.	Project plan contains new and exciting ideas and proposals, with a clear line toward change.	
<b>ALIGNMENT OF VISION</b>	Project outcomes do not line up with either the grantmaker's mission or community needs.	Project outcomes somewhat line up with both the grantmaker's mission and community needs.	Project outcomes line up well with both the grantmaker's mission and community needs.	Project outcomes line up extremely well with both the grantmaker's mission and community need.	
<b>REPORTING PLAN</b>	Reporting plan is not feasible and is not acceptable.	Reporting plan lacks detail or implementation information.	Grantees have a feasible and acceptable reporting plan.	Grantees have an extensive and actionable reporting plan.	



**3. Define the rubric criteria.** These criteria identify each component for assessment. For grants, common review criteria may include:

- Approach
- Innovation
- Justification
- Alignment of vision
- Feasibility
- Reporting plan
- Sustainability

**4. Design the rating scale.** Most commonly, rubrics for grant review use 3-5 numeric levels for easy summing.

**5. Write clear descriptions for each rating.** To guide reviewers as accurately as possible, focus on measurable observations for each rating level, and include the degree to which criteria are successfully met.

**6. Finalize your rubric.** Format your rubric for easy access and reference, gather feedback, and revise as needed.



**ADDITIONAL TIPS:**

- Assess your rubric carefully for language that could be misinterpreted. It's important to avoid assumptions about reviewers, especially regarding how they will process the criteria, rating scale, and descriptions you provide.
- Steer clear of industry jargon or acronyms. Use plain language and where possible, give examples to solidify what you want to say.
- Determine the relative weight of review criteria. For example, will innovation be more or less important than sustainability? Design your rating scale accordingly.



## 2 Be transparent with applicants

Anyone who takes the time to apply for your grant wants to submit the best possible application. Unfortunately, every grant application process is different, and prospective applicants may not know what your organization is looking for.

Sharing clear information about your assessment criteria and timeline is a huge help to all. By being transparent, you'll receive more relevant applications, reduce applicant inquiries, and build trust with your potential grantees.

Here are a few ways to implement transparency effectively in your grant review process:

- Publish clear assessment criteria. Share your rubric or key evaluation point. Explain what makes a strong application, and what exactly you're looking for.
- Provide a detailed timeline. List key dates like application deadline, review stages, decision announcements, etc. Explain when and how applicants will receive updates.
- Create an accessible FAQ or step-by-step guide. Address common questions about eligibility, application process, and necessary materials. Write all applicant-facing materials in simple, jargon-free language.



## 3 Assemble an inclusive review team

Your review team must reflect the diversity of your community. By bringing together reviewers with varied backgrounds, experiences, and perspectives, you create a more equitable evaluation process that better serves both your mission and your applicants.

Although it can take time to assess your current resources and practices, [conscientiously assemble a diverse team](#), foster collaboration, and achieve consensus, research shows the outcomes are worth the effort. Mounting evidence also concludes that an inclusive team will lead to better outcomes, including increased innovation, [retention](#), [ethical standards](#), and [competitiveness](#).

To foster a [more diverse grant review board](#):

### **Inventory your workplace culture**

Begin by assessing how valued diverse viewpoints are among your current team. Daily micro-decisions can be telling. For example, whose opinions are regularly sought out? Who is invited to meetings? Who is included in the organization's target applicant group? Answering these kinds of questions internally will allow you to make adjustments and help ensure all reviewers

feel comfortable, included, respected, and valued. If you're bringing in outside reviewers, this will be easier if you've done internal work towards inclusivity first.

### **Define your goals**

Define specific ways that diversity will influence your review process. Additional voices and perspectives will likely push at the boundaries of what your organization has done previously. You'll need to be ready to embrace these changes. Your goals should also go beyond surface-level optics—establish a goal centered around diverse viewpoints and, ultimately, improved applicant selections.

### **Recruit strategically**

One of the best ways nonprofits and foundations can ensure that their review teams reflect the diversity of their applicants is by recruiting community members to be part of the process. If someone on staff has connections to a particular group, this can be the easiest way to put a call out. Or reach out to other organizations that serve particular communities, and ask them to help you solicit reviewers. Consider creating a press release about openings on your review board opportunity and share it widely.



### **Communicate clearly**

Be upfront about expectations for grant application reviewers, such as workload, time commitments, and duration of service. Share what, if any, compensation is available. Be honest about what you can offer when you are soliciting assistance and avoid asking for free labor from historically underpaid groups. Even modest compensation is a way to show your reviewers that you value the work they are doing for your organization.

Alternatively, get creative about other ways you can provide compensation—you might offer reviewers paid lunches, a discount, service, gift card, or organize a thank you event for them.

### **Focus on inclusive values**

Building a diverse review team is not about checking the right boxes. Diversity for diversity's sake will leave reviewers feeling tokenized. Nothing is more off-putting to a review team member than realizing she is the only woman on the team or the only Black person in the room.

Practice authentic inclusion that connects a diverse review team to your organization's goals. Create structured opportunities for all voices to be heard during meetings, and develop leaders who know to recognize and mitigate their own biases, while seeking out and valuing diverse perspectives.

### **Embrace broader diversity**

Diversity isn't just about ethnicity, gender, age, ability, or sexual orientation. True inclusivity also involves a consideration of socioeconomic status and background, education, professional and personal experience, and political ideology, among other things.

As you assemble your review team, be sure you're not reducing diversity to a few data points. Take a more holistic approach to think about how each reviewer brings a unique perspective to the process.





## 4 Provide thorough training for reviewers

Once you have a review team that reflects your community, you need to invest time and resources in comprehensive training for them. By doing so, you set the stage for high-quality reviews and ultimately, better funding decisions.

**Educate reviewers on your grant review process.** Walk reviewers through each step of your [grant review process](#), from initial application screening to final decision making. Critically important here is a thorough explanation of your evaluation rubric. Break down each criterion and scoring level, providing clear examples of what constitutes different scores. To ensure everyone understands how to apply the rubric consistently, practice scoring a sample application as a group.

**Provide hands-on software training.** Familiarize reviewers with your grant management platform. Conduct a detailed

demonstration of the software, showing how to navigate the interface, access applications, input scores, and leave comments. To reinforce learning, guide reviewers through evaluating a sample application together, addressing questions and concerns as they arise.

**Address bias and ethics concerns.** Provide specific training on recognizing and mitigating implicit bias, using real-world examples relevant to grant review. Discuss confidentiality expectations in detail, and outline procedures for handling potential conflicts of interest.

By implementing a comprehensive reviewer training program, you create a more positive experience for both reviewers and applicants by ensuring consistency and clear expectations for everyone involved.

## 5 Make thoughtful assignments

Once your team is fully trained and ready to review, distribute applications equitably. Create a review process that leverages the diversity of your team, while also providing fair, comprehensive evaluations for every applicant, regardless of where their submission falls in the queue.

**Use review teams vs. individual reviewers.** A review team, as opposed to a single reviewer or two, will ensure a fairer assessment for every applicant. Whether you provide multiple grants or not, having more than one reader in your review committee is vital to keeping the process fair.

For a single grant, aim to have two or three readers assigned to each application. For multiple grants, consider:

- Grouping reviewers into teams
- Grouping applications by category
- Rotating reviewers and applications throughout the process

Note that your number of reviewers or rounds of reviews will depend heavily on your organization's specific needs and resources.

**Implement staged review.** Consider a multi-stage process where different groups of reviewers handle different phases of assessment. A typical multi-stage review process may involve the following steps:

- Screening applicants for your eligibility criteria to save your review team time.
- A first pass review with a simple [thumbs up or thumbs down](#) rating.
- A second round of review with a detailed review rubric.
- A final round of approval with qualitative feedback.



A staged review allows for assignment of reviewers to their areas of expertise (e.g., financial experts for budget review) and improves efficiency by filtering out ineligible or weak applications early. It also provides multiple checkpoints to ensure each application gets a thorough and fair evaluation.

**Avoid reviewer fatigue by managing workloads.** Effective reading and scoring of applications calls for rigor, undistracted attention, and considerable effort—and reviewers are often tasked with reading a significant number of applications for large blocks of time. However, overwhelmed reviewers may give a fair and thorough review to the first handful of applications but will likely review later applications with less diligence if they're fatigued.

No matter where an application falls in the queue, it deserves an equally involved assessment. On the administrative side, make sure to give reviewers enough time to balance reviewing against other responsibilities so that they have time and energy to give each application the attention it needs.

**Stagger deadlines.** Reviewing across days, as opposed to completing all reviews in a single, long session, is more likely to yield a greater uniformity (and fairness) in your results. Encourage reviewers to divide and conquer over time by assigning in batches or rounds, or by establishing multiple deadlines and check-in points along the way. Online review software can be vital in giving reviewers the flexibility to spread out their energy and work at their own pace.

## 6 Hide sensitive information

Despite whatever training you may provide reviewers with on ignoring their biases, **implicit bias** is largely unconscious. As such, review teams need to have preventative measures in place—namely, anonymizing applications.

Consider how much of a candidate's information reviewers really need to see and how the information could influence final choices. To minimize the risk of implicit bias or favoritism, pinpoint which elements are absolutely essential for reviewers to make their decision—and which aren't. Potentially biasing details may include applicant names, organization names, geographic locations, demographic information, and past funding history.

Leverage your grant management software's anonymization features to hide designated fields from reviewers. By hiding this information, you can drastically reduce the risk of “similar to

me” unconscious bias or other harmful associations—allowing reviewers to score applicants more objectively and based on their relevant merits and suitability to the program.

Consider implementing different levels of anonymity based on the stage of review. For example, you may have a completely anonymous first stage of review focusing on project merit, and then reveal necessary identifying information for final decision-making.

Even if applications are coming from organizations or groups instead of from individuals, **lots of different forms of bias** can still exist, so it's worth it to think hard about what information in an application can sway the review board unintentionally.



## 7 Build consensus

While differences of opinion can be uncomfortable, they indicate an engaged grant review process where, ultimately, individuals grow and learn from one another—and where the group makes smarter decisions.

Fostering agreement (rather than deciding on behalf of your team) is worth the effort. The following strategies can help:

**Lean on the rubric.** The more detailed, thorough, and consistent your rubric is, the more useful it becomes in cases of dissension. Guide conversations back to established criteria whenever possible, with the awareness that thoughtful debate may recommend revision to the rubric as you go.

**Designate a facilitator.** For deliberation, choose a person to actively and conscientiously mediate conversations, even if you're remote and/or online. Ideally this individual does not have power over the review team members—and keep in mind, you can use the same person in every meeting or rotate facilitators. Facilitators should be skilled at keeping any debate open, kind, and safe, while encouraging those who aren't vocal to share their opinions.

Establish thoughtful protocols. Encourage all group members to practice active listening, avoid interrupting, and ask questions to aid their understanding. Empower reviewers to resolve their own problems through open conversation about what priorities matter the most to them.

**Favor open-ended questions.** The best way to understand a team member's perspective, and to help them understand one another, is to use broad questions that allow for a comprehensive response. For example, ask why reviewers favor a certain application rather than just collecting a list of names. What ideas do group members have for how to arrive at the best decisions?

**Allow for time and build trust.** Arriving at consensus can take time, but the outcomes are worth it. Build time into your process to allow for reviewers to consider one another's view points, talk (or type) openly, and allow for dissension. It can take time to foster a culture within your organization where disagreement is embraced and divergent opinions are encouraged. Make it safe for individuals to be “wrong,” change their mind, fumble, fail, and learn from one another.



## 8 Use a numerical strategy

There are two main approaches to capturing which applications are top contenders.

One strategy for scoring applications fairly is through a point system defined by your rubric. This type of averaging system is typically used for standards-based processes, which makes it

extremely useful for scoring grant applications.

Calculate an average by adding all scores together and dividing by how many times the application was read. This ensures that each reviewer's assessment has an equal weight.

**AVERAGE FORMULA =**



Total Sum of All Numbers

Number of Item in the Set



*Average application score = Sum of scores from all reviewers / Number of reviewers*

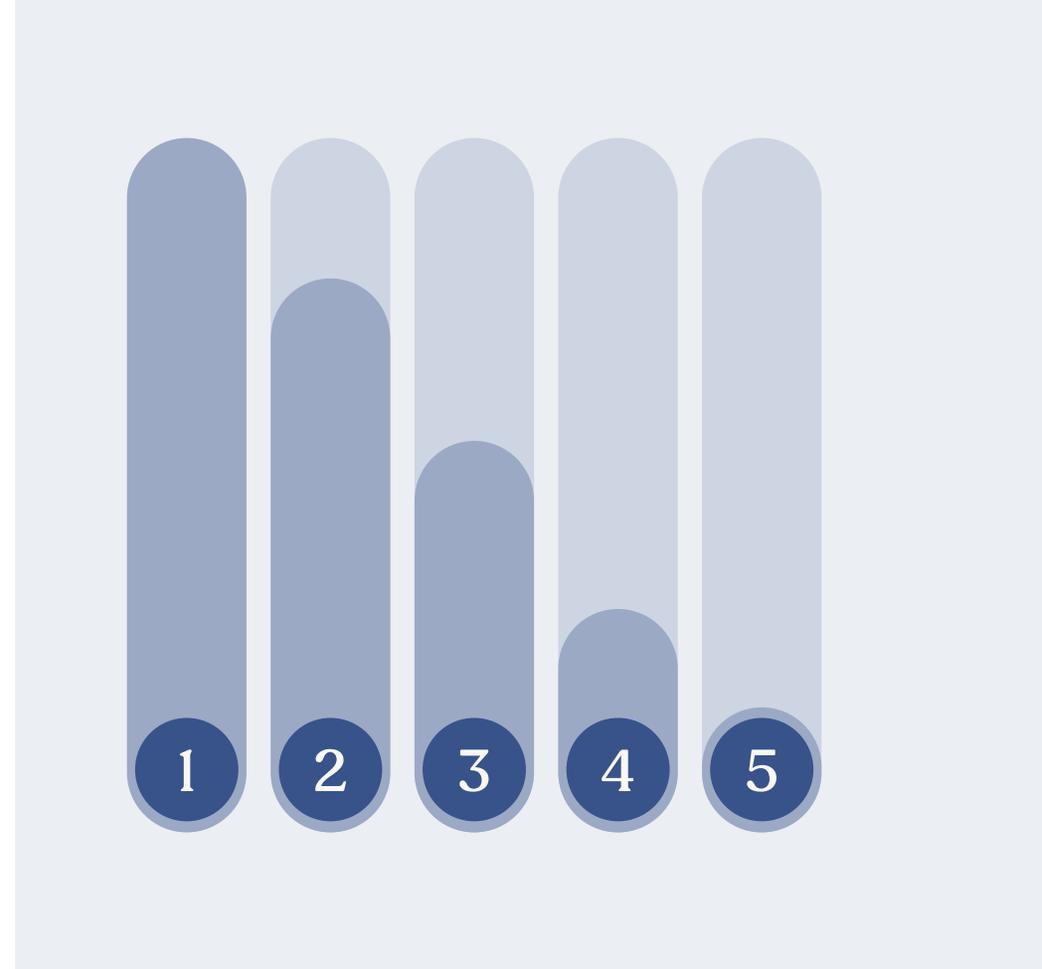


A ranking system can be another great collaborative way to select grant winners. Using this strategy, readers are assigned a set number of applications to read and rank in quality order. Let's say a reader is reviewing five applications—the best one would score a 1, the next best a 2, and so on, with the least favorite receiving a 5.

Then, each set of applications is passed on between other readers, who will also rank in order of quality. If reviewers are tasked with a high volume of applications, this method can help alleviate the pressure.

To find the strongest applications, add up the scores among all applications—the ones with the highest scores are ranked highest collectively.

Whether you use averages or ranking, ideally each application gets a once-over from multiple reviewers. This takes the strain off each individual reader, ensures greater impartiality, and simplifies the process of selection. When passing along applications for multiple rounds of reviewing, keep the previous score or ranking hidden to avoid unconscious influence.



*In this ranking example, three reviewers rank the same five applications between 1 and 5 (with 1 being highest). After an average is taken, the application represented in light blue, for example, has the highest average ranking across reviewers.*

# 8 benefits to a digital process

To make the review process more efficient, it's crucial to eliminate manual work and streamline repetitive tasks wherever possible. Implementing a grant management software, such as Submittable, can greatly benefit both your organization and your applicants by automating many aspects of the process and providing powerful tools for collaboration and evaluation.

1

Create accessible, user-friendly forms

2

Pre-screen for eligibility and accuracy

3

Streamline and automate review workflows

4

Anonymize review to minimize bias

5

Host data in a centralized and secure system

6

Facilitate clear communication and easy feedback

7

Leverage insights from reporting and analytics

8

Collaborate with a true partner



# 1 Create accessible, user-friendly forms

Your grant application form should never be a barrier for applicants. Everyone who qualifies should be able to apply. As such, you want to use [grant management software](#) that is easy to access and straightforward to use.

The people and organizations applying are often doing important work in the community. Every minute they have to spend on a grant application is one less minute they can focus on that work. Your goal should be to minimize their administrative burden as much as possible.

With grant management software like Submittable, you can provide the simplest possible start-to-finish applicant experience. Nonprofit applicants can simply enter their EIN number a single time and their organization's details will automatically populate via the Charity Check feature.

All back-and-forth communication and requests for additional information live within the platform, so nothing gets lost in an email inbox. And when the review team views an applicant, they have access to all relevant files and messages in one place.

No matter who your applicants are, it's imperative that your application process is accessible. Submittable supports [Voluntary Product Accessibility Template \(or VPAT\)](#) compliant forms, accommodating applicants with a wide range of disabilities, including:

- Visual impairments
- Hearing impairments
- Learning disabilities
- Cognitive limitations
- Mobility challenges
- Speech disabilities
- Photosensitivity



## 2 Pre-screen for eligibility and accuracy

A digital application process prevents wasted time for everyone. Your team can avoid reviewing ineligible or incomplete applications. And you ensure applicants who don't meet your program's criteria don't spend time applying.

**Eligibility screenings** help applicants pre-qualify themselves before even setting foot in the main form, meaning applicants know immediately if they don't qualify, rather than finding out at the end of a long application process.

At the same time, required form fields save administrators from

having to track down missing materials. They also help grantees ensure their application is complete while weeding out applicants who fail to provide necessary materials.

Incorporating form logic in a digital process allows administrators to include, for example, a box applicants must check to verify specific information before they continue their application. Or you can create different application tracks for different types of applicants. Smart forms that respond to applicant responses save individuals on both sides of the process substantial time and energy.

### 3 Streamline and automate review workflows

No one wants the review process to last longer than it needs to. By streamlining and automating workflows you ease the burden on your team and provide clarity to applicants as quickly as possible.

With a grant management platform, not all manual tasks need to be done manually. You can automate repetitive tasks and streamline communication, moving important steps out of inboxes and eliminating file cabinets.

A smart digital grant application process will include features

like automatic confirmation for candidates when their application is received, auto-labels that differentiate applications from one another as they come in, and auto-assignments for review teams. **Distribute assignments to reviewers** based on, for example, applicant type or reviewer speciality. Assign automatically, manually, in rounds, or randomize assignments.

With grant management software, administration and review teams can leave tedious, repetitive tasks to the platform and direct more focus on mission and impact.

### 4 Anonymize sensitive information to minimize bias

An online process allows administrators to oversee reviewer permission levels and access. It's simple to hide applicant information from reviewers, hide reviewer comments from other reviewers, and keep reviewer scores confidential, viewable to administrators only.

Having this kind of control is imperative. It prevents an applicant's personal details from unfairly influencing grant award decisions. It also keeps reviews from being swayed by other reviewers' opinions.



## 5 Host data in a centralized and secure system

When the applications come in, they're likely to include a significant amount of sensitive information and documents, depending on your grant. Using an online system allows you to collect and safely store application and proposal data in addition to all relevant documents in one centralized location—with no email attachments and no downloads. For organizations that are subject to regulations such as [HIPPA](#), this level of security is non-negotiable.

Administrators and reviewers don't have to worry about the security of a shared file or about misplacing something. Plus, reviewers can see all application materials in one place, side-by-side with their review.

## 6 Facilitate clear communication and easy feedback

Often, the most impactful funders view their partnerships with grantees as relationships rather than transactions. Those relationships often start within the grant application, making effective communication essential from the very start.

Your grant review process inevitably involves multiple lines of communication. Administrators communicate with reviewers (and vice versa), reviewers collaborate with each other, and applicants communicate with your institution (and await your response). This communication often begins before proposal submission and continues long after funds are awarded.

improves these exchanges and captures a central record of important correspondence—while saving your inbox from the drama. Having all communication centralized means that as organizations evolve and people change roles, no communication is lost in the shuffle.

Effective communication is the foundation of [trust in the grantmaking process](#). It gets all parties on the same page, creates an avenue for two-way feedback, and ultimately makes the entire process smoother for everyone involved. By leveraging a centralized online platform, you can build relationships with applicants that are rooted in transparency and mutual respect.

An online platform with [in-app messaging](#) and automated emails



## 7 Leverage insights from reporting and analytics

A data-driven approach to grant management can significantly enhance your decision-making process and overall program effectiveness. By leveraging advanced reporting and analytics tools, you can gain valuable insights into your grantmaking operations and outcomes.

Modern grant management platforms offer robust [reporting features](#) that allow you to track and analyze various aspects of your grant cycle. You can easily generate reports on application volumes, reviewer progress, funding allocations, and project outcomes. These insights help you identify trends, assess the

efficiency of your review process, and measure the impact of your grants over time.

Furthermore, analytics tools can help you uncover patterns that might not be immediately apparent. For example, you might discover correlations between certain types of projects and successful outcomes, or identify bottlenecks in your review process. Armed with this information, you can make data-informed decisions to refine your grantmaking strategies and maximize your organization's impact.



## 8 Collaborate with a true partner

The right grant management platform does more than provide a technical solution. It gives you a true partner to collaborate with as you develop and execute on your grantmaking strategy.

Submittable offers a wealth of support and training materials designed for all users of the platform, not just administrators. Everyone involved in the grant review process—from applicants to reviewers to your internal team—has the resources they need to succeed.

With one-on-one [implementation services](#) and a dedicated [customer success](#) team, you have an experienced group that can help guide you as you build your application and review processes. They provide insights about how the software maps to your mission, while helping you refine your vision and lay the groundwork for the future.



# Make strong choices with a successful process

Launching a grant based on a review process that's fair, rigorous, and efficient relies on intentional planning and thoughtful execution.

Just as your programs are unique, a review process that's both fair and rigorous will look a bit different in every institution. The most important areas to focus on are a strong rubric, transparency, inclusivity, and a balanced, numbers-based process that minimizes bias.

**Grant proposal selection** can be both a labor-intensive and delicate task, and the stakes are high. A digital platform like Submittable can make it that much easier to establish or fine-tune your outstanding application and review process, so that both your applicants and your team feel confident in the results—and you can get to the good work that comes next.





### **ABOUT THE AUTHOR**

Hsing is a content marketer and ex-journalist who writes about tech, DEI, and remote work. Beyond the screen, she enjoys building custom mechanical keyboards and playing with her dog. You can find more of her work at [hsingtseng.com](https://hsingtseng.com).

Submittable 

Since 2010, Submittable has helped organizations collect nearly 20 million applications for thousands of customers all over the world.

[submittable.com](https://submittable.com) | 855.467.8264