

FORMS

2016 TABLE HOTSPOT RESOURCE: HOW TO MAKE YOUR FORMS CLEARER AND SIMPLER



Grantmakers' ideas on how they could make forms clearer and simpler covered both printed and electronic forms.

“Grantmakers should only ask for stuff they need.”

“Applicants often ask us why they have to keep giving the same information to us. They want to just enter the information once and re-use it.”

“Align questions on forms with the missions and goals of the program.”

TOP TAKEAWAYS

- Only ask for information you need.
- If you are using electronic forms, employ pre-populated fields for basic information such as the name of the organisation or individual.
- Use conditional logic to show or hide certain sections of electronic forms based on applicants' responses to questions.
- Foster the logical flow: Program guidelines should shape application forms. Acquittals should be linked back to applications. Guidelines -> application forms -> acquittals.
- Use hint text in your forms. When posing a question, provide an example of an answer to give applicants an idea of what is expected.
- If running multiple grants programs, align your forms. It means you can shift applications between programs if applicants have applied for the wrong grant.
- A good process for building winning forms:
 - Start with standard fields first.
 - Use conditional logic as much as possible.
 - Eliminate duplicate and unnecessary data.
 - Review, wait a week, re-review.
 - Have people test and use the form.
 - Ongoing refinement – learn from previous rounds.