

Tips for Submitting E-Grant Applications

An Exchange of Ideas from TGCI's Alumni Forum

TGCI trainer Barbara Floersch recently started a thread on TGCI's online Alumni Forum dealing with the subject of e-grants. "Since funders are increasingly requiring electronic submission of proposals, it's important for grants professionals to become savvy in this arena," she wrote. "I thought it might be beneficial for Forum members to share tips." Among Floersch's recommendations:

- Don't wait until the day of the deadline to submit. Everyone who works with computers knows that glitches happen! Set your own deadline to submit your proposal—and make it one or two days early. You'll avoid the last-minute panic that comes when you can't get technical assistance, and you'll maintain your sanity.
- Many funders will require that you begin working with them a few weeks ahead of time in order to establish a secure account on their Web site through which you will make your submission. When reading the application instructions or other guidance, be alert for this requirement. If you wait too long, you may have trouble establishing the account.
- Most funders will provide a number to call for technical assistance. Even if you don't plan to submit your proposal right away, begin filling out some of the basic information on the electronic submission form. This way, you'll get a heads-up as to basic technical problems—and you can call the help desk early to work them out. If you wait until the day before the deadline, the technical assistance people may not get back to you in time.
- Formatting preferences aren't always indicated in the application guidelines. Will the funder accept a document that was composed in WordPerfect? Or does it have to be in Word? What kinds of spreadsheets will be accepted? Get this kind of information early.
- Some funders require that a long list of attachments be submitted as a single document—not in one file, but as one continuous document. Be prepared for this. It can take a long time to put together.

Since Barbara Floersch's original posting, other Forum members and TGCI staff have added their own pointers for electronic submission:

- In the e-mail cover memo, it's a good idea to state the number of pages, type size, margin size, etc. and ask the grantmaker to notify you if

— Page 1 of 3 —

Copyright © 2003, The Grantsmanship Center.

This article may not be reprinted, reproduced, or retransmitted in whole or in part without express written consent of The Grantsmanship Center.

<http://www.tgci.com> (800) 421-9512 [Join Our Mailing List](#)

there are any changes. The process of electronic transmission can do strange things to a document. When there are specific format requirements, you want the reader to know that the proposal as submitted did meet the guidelines. (It's also helpful to provide a list of attachments).

- Keep your own printout to verify that a proposal has been submitted electronically. Sometimes the receiving agency may have no record of it. One applicant to whom that happened did have a printout indicating the date and time of submission, filed an appeal, and was able to get back in the competition.
- If you're having trouble entering information into a particular field (i.e., the system is rejecting your entry), the problem may be as simple as punctuation. Apostrophes, in particular, don't work with certain databases.
- Some application forms give no indication of the maximum text allowed. Don't take that as *carte blanche* to go on endlessly. The database into which your text is being entered may cut you off in mid-paragraph—and you wouldn't even know it.
- As you fill out an online proposal, instructional prompts usually appear on your screen. But it's important to have a printed copy of any program announcement and/or instructions as well. The printed announcement helps you to keep the big picture in mind. And most online application systems don't include the detailed instructions that the printed guidelines provide.
- Fields such as "User ID" are likely to be case-sensitive, meaning that you can't use upper-case and lower-case letters indiscriminately. If you type in "MARYJONES" when you've registered as "maryjones," you'll get an error message. In fact, you should probably assume that all fields are case-sensitive even if you haven't been specifically told that they are.
- Many application forms fail to specify how certain types of data (e.g., phone numbers or standard abbreviations) must be entered. That can also result in error messages. If you do get an error message, try entering the data another way (without extensions, for example, or without parentheses). If you're familiar with e-commerce, try some of the same tricks you've picked up doing those transactions.
- At certain sites (including the National Science Foundation's FastLane, which is supposed to serve as a model for the federal government's use of interactive technology), passwords automatically expire every year. If you haven't been in regular contact with a particular funder, don't be surprised if your old password is rejected and you have to create a new one.

- Exiting an online form does not automatically save it. Always press the "Save" button before exiting. Sometimes you'll see a "Save and Continue" tab at the bottom of each page. Even if such a tab isn't available, you should ALWAYS save a page before proceeding. It's all-too-easy to lose the data you've just input.
- With most Web-based application systems, a user is automatically logged off if there has been no activity for a while. Again, save your work frequently. You don't want to come back and discover that all has been lost while you were out to lunch!
- If you change a password, keep a record of the new password and share it with any colleagues who may be working with you on the application. Especially when facing tight deadlines, it's enormously frustrating if someone has to call the help desk, prove his or her bona fides, and wait for the correct password to be e-mailed back.
- Text documents (e.g., proposal narrative, budget justification) can be prepared in advance with standard word-processing software. Once the documents have been completed to your satisfaction, you can usually paste them into the appropriate boxes on the online application form. But don't expect the online system to preserve your text formatting (boldface, italic, font size, etc.).
- In a worst-case scenario, you could finish a proposal, hit "Submit," get an error message, return to the previous page, and find that all your data has vanished. Always print out a hard copy before pressing "Submit." And preserve as much of the proposal as possible on diskette in word-processing, Excel, or some other appropriate format.
- Most online application systems don't stay up and running 24 hours a day. Check the hours of operation before planning your work schedule.
- If your computer's browser won't support JavaScript and you've turned off cookies, you probably won't get very far. Online systems generally depend on cookies and JavaScript, so make sure they're both enabled in your browser.