



How to run a Successful Grant Program

Impactful Grantmaking

- Review grantmaking history to understand how/where impact is being made in the community
- Consider grants to support operations and not just projects
- Extend personal invitations to minority groups, organizations serving individuals with disabilities, and other underrepresented communities to apply for grants.
- Invite community members to serve on the grant selection committee

Online Grantmaking

CFO is pleased to offer a user-friendly online grant application system for all Affiliate Foundations to host their annual grant round(s) online. This is the preferred method of hosting a grant round.

In addition to simplifying the application process for potential grantees, this online grant portal will allow grant committees to review all applications prior to meeting to discuss and decide on awards.

The grant portal also eliminates the need for paper grantee contracts. All grant contracts and follow up reports are automatically generated by the system and can be submitted online.

Online Grantmaking

To create an online grant application in our system, we need the following information from your Affiliate Foundation. We cannot create an online application without all information provided.

- Date that your grant round will open and close
- Total amount you plan on awarding (all grants total)
- Maximum amount that one organization can request
- Main contact person from the Affiliate Foundation with email and phone number
- Grant review committee contact information (including all names and email addresses)
- (Optional) What is the award timeline? This can help agencies know when they can expect funding if they are a recipient.

Online Grantmaking

Please submit the above information to the Affiliate Services Coordinator at least two full weeks prior to the date your grant round will open.

Once the above information is received, your Affiliate Team contact will reach out to schedule a brief training for your grant committee.

Sample application questions

- Organization Name and Purpose
- Project Name
- Proposed Program Field of Work – sample choices
 - Culture
 - Economic Development
 - Education
 - Environment
 - Family
 - Health & Wellness

Sample application questions

- Description of Grant Request
 - How will it meet community needs?
 - Who will be impacted by the project?
 - What are the goals of the project?
- Scope of Project
 - What is the geographical and financial scope of the program?
 - Is the request a component of a larger program?

Sample application questions

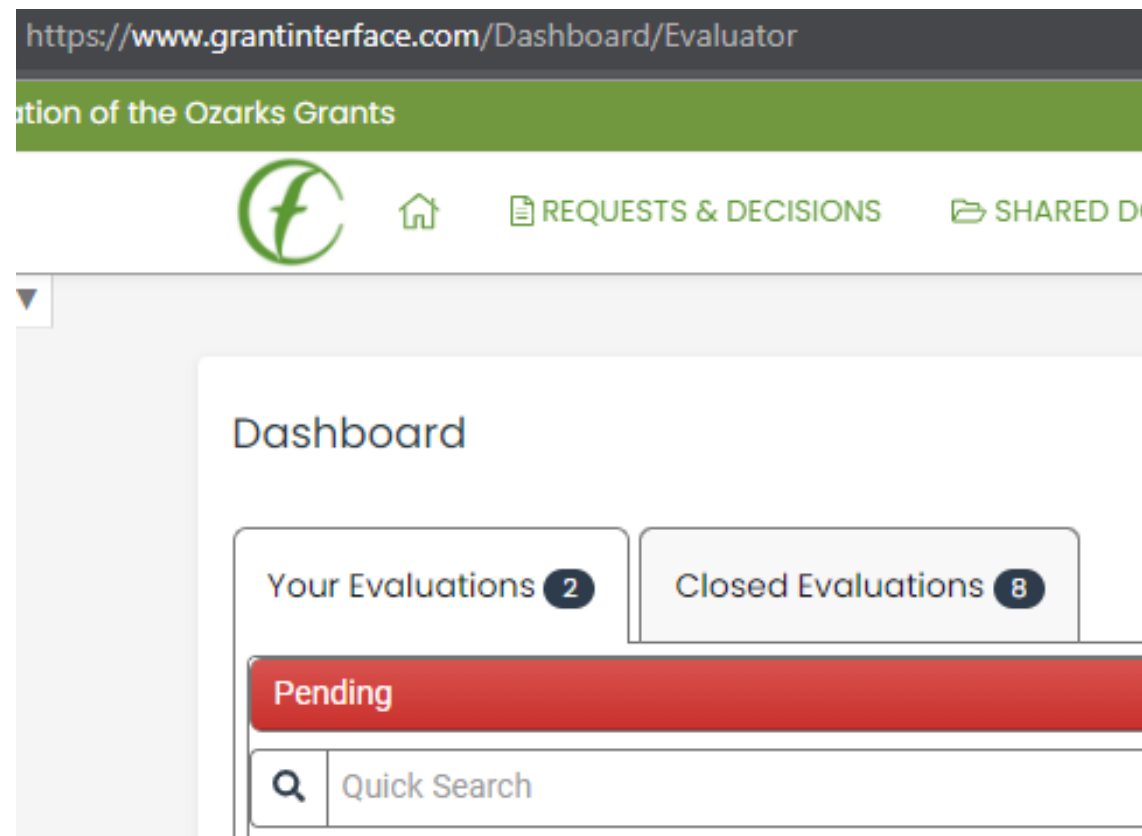
- Future Funding Plans
- Publicizing the Grant
- Project Budget
- Annual Agency Budget
- Other Funding Sources
- EIN Number
- Additional information and agency wants to share

How to review applications

- When it is time to evaluate grants, you will receive an email with instructions on logging in and electronically evaluating grants.
 - If you are new to the system, it will immediately have you change your password the first time you log in.
- The applications will appear on your home page.
- Click on the little 'edit/review' looking picture on the far right side of an application.

How to review applications

On the home page (which you can get to at any point by clicking on the little house at the top left), you will see "Your Evaluations" with a bubble indicating how many applications you have been assigned to review.



How to review applications

You will see a list of applications that you can filter by Form, Process, Organization, Applicant First Name, Applicant Last Name, Project & Score. To begin reviewing you will click on the "Start!" button located on the far-right side of the application listing.

Dashboard

Your Evaluations **2** Closed Evaluations **8**

Pending 2

Quick Search Filter **0**

Form	Process	Organization	Applicant First Name	Applicant Last Name	Project	Score
Affiliate Grantmaking Program Evaluation	Stockton Affiliate Grantmaking Program FY25	Friends of the RB Project	Friends of	RB Project	12 60' Round tables and table dollie	Start!
Affiliate Grantmaking Program Evaluation	Stockton Affiliate Grantmaking Program FY25	Stockton Trails initiative Coalition (STIC) - Stockton Community Foundation	Kim	Schmid	StoryWalk	Start!

How to review applications

Now you're in the review view of the application. The right-hand side has the application; the left-hand side has your evaluation questions. Answer them to the best of your ability. Additional comments can be included or not, up to you.

- Review questions are answered using the score below:
- 1 - Poor
- 2 - Fair
- 3- Good
- 4 - Very Good
- 5 - Excellent
- Click "save" at the bottom when you have finished evaluating an application.

How to review applications

The screenshot displays two side-by-side panels. The left panel, titled "Your Evaluation", contains a section for "Evaluation Questions" with a question about the "Primary Organization Name" and a "Project Name" field containing "Enhancing Early Childhood Learning for Monett's Families". Below this is a 5-point rating scale and two more questions with 5-point scales. The right panel, titled "View Application", features an "AI Generated Summary" section with a "Generate" button and a "Proposed Project Details" section containing explanatory text and a link to a tutorial. At the bottom of the right panel is an "Employee Identification Number" field with a note about its distinction from a state tax exempt number.

Your Evaluation Evaluation Packet

▼ Evaluation Questions

c. Primary Organization Name

Project Name
Name of Project
Enhancing Early Childhood Learning for Monett's Families

Please provide answers to the following evaluation questions using the score as follows:

1 - Poor
2 - Fair
3 - Good
4 - Very Good
5 - Excellent

☰ Does the organization's proposed project align with our grantmaking goals?*

1 2 3 4 5

☰ Will an investment in this organization have a meaningful impact?*

1 2 3 4 5

View Application Document Viewer Application Packet

🔗 AI Generated Summary

Generate

▼ Proposed Project Details

We have enabled a new feature to help you with the grant application process! If you would like another person in your organization to assist you with completing a grant application, you are now able to invite that person to be a collaborator by clicking the blue "Collaborate" button at the top of the form. You will be asked to enter the email address of the person you are inviting and to set the permissions for the access they will have to your application.

Permission levels include the following:

View: The collaborator can view each form in the request that the applicant has access to.

Edit: The collaborator can view and edit each form in the request that the applicant has access to.

Submit: The collaborator can view, edit, and submit each form in the request that the applicant has access to.

After you send the invitation, the individual will receive an email with a link to the application. Note: If your collaborator does not already have an account in GLM, they will be prompted to create one when they receive the invitation to collaborate.







[Click here to access a tutorial for inviting a collaborator.](#)

Employee Identification Number

Please provide your organization's Employee Identification Number. Note: this is not the same as the State of Missouri tax exempt number. All grant applicants should have an EIN, including 501(c)3

How to review applications

Once an evaluation is complete it will be marked with a green check mark. You can update them after you have completed them or come back and finish them.

35%	Update 
	Start 
	Continue 
90%	Update 
100%	Update 
	Start 

Making decisions

After individually reviewing the applications, you should convene with your committee to make a final decision through discussion. The decision does not need to be based solely on the generated evaluator scores.

Contact

Affiliate Services Coordinator- Emily Brittain ebrittain@cfozarks.org

Vice President of Affiliates- Alice Wingo awingo@cfozarks.org

Senior Director of Affiliate Engagement- Joe Kammerer jkammerer@cfozarks.org

Director of Affiliate Engagement- Judy Cantoni jcantoni@cfozarks.org

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