



COMMUNITY
FOUNDATION
of the OZARKS

Connecting passion to purpose.

How to run a Successful Grant Program

Impactful Grantmaking – Strong communities are built by those who live and work there

- Audit grants made previously to understand how/where impact is being made in the community
- Consider grants to support operations and not just projects
- Personally invite minority groups and organizations serving disabled people 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
- Date that your grant round will close (please avoid closing grants on Friday or Saturday)
- 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
- Assessment time period (when will you be reviewing applications as a committee and what date will you award grants?)

CFO recommends leaving at least two days between the online review deadline and the in-person grant meeting

- Do you plan on reviewing all grants online prior to meeting as a committee?

If so, please provide grant review committee contact information (including all names and email addresses)

Online Grantmaking

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

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

Questions?

Alice Wingo, Vice President of Affiliates - awingo@cfozarks.org or 417-447-5364

Ashley Silva, Director of Regional Engagement - asilva@cfozarks.org or 417-447-5368

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

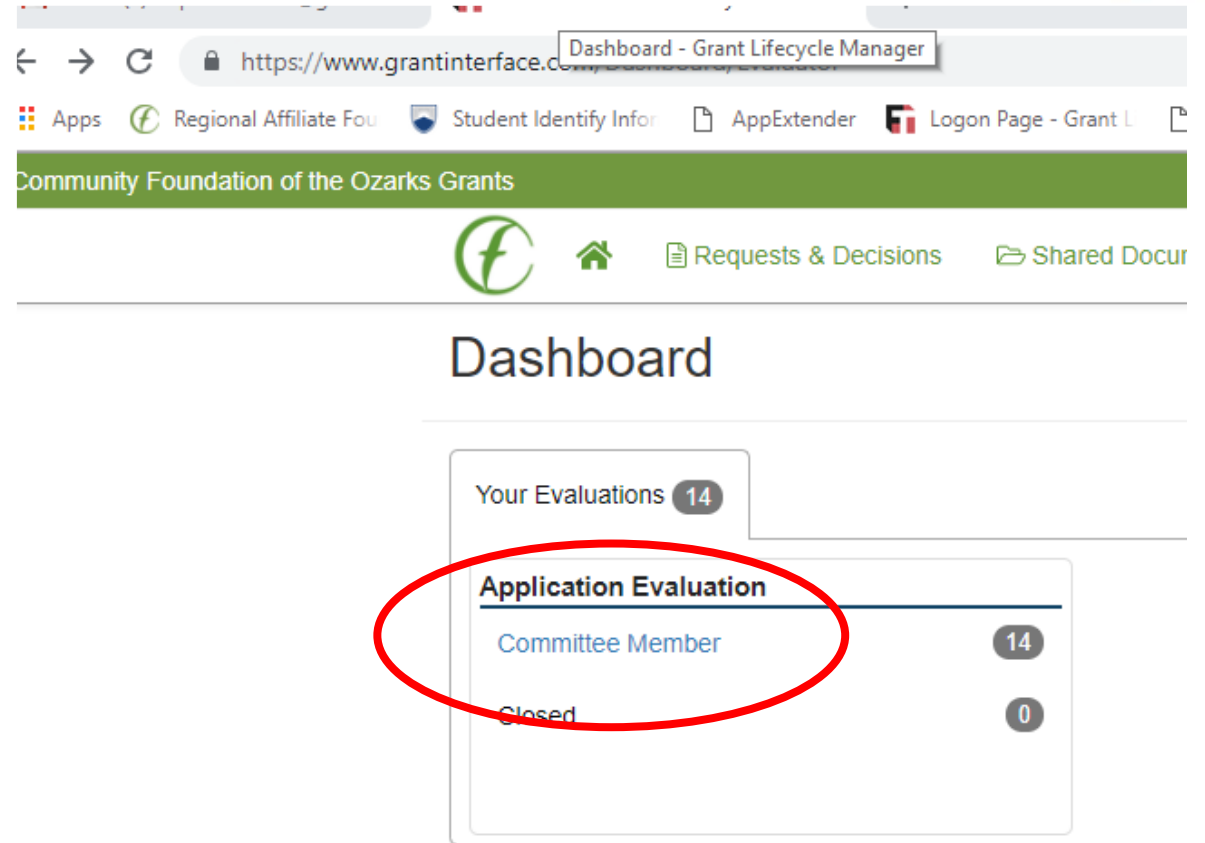
- Future Funding Plans
- Publicizing the Grant
- Current Board Membership
- Project Budget
- Annual Agency Budget
- Other Funding Sources
- Most recent 990 or Relevant Document
- EIN Number
- Additional information and agency wants to share

How to review applications

- Once your application window closes, you will receive an email with login information for the system.
 - Once you log in, it will immediately have you change your password. The applications are listed here in alphabetical order. 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 “Application Evaluation: Committee Member”. The “Committee Member” part is clickable. Click that.



The screenshot shows a web browser window with the URL <https://www.grantinterface.com>. The page title is "Dashboard - Grant Lifecycle Manager". The browser's address bar shows the URL. The page content includes a green header with the text "Community Foundation of the Ozarks Grants" and a navigation menu with a home icon, "Requests & Decisions", and "Shared Docur". The main content area is titled "Dashboard" and features a section for "Your Evaluations" with a count of 14. Below this, there is a table with the following data:

Application Evaluation	
Committee Member	14
Closed	0

The "Committee Member" link in the table is circled in red.

How to review applications

After you click on the “Committee Member” section, you will see a list of all applications. To review applications, click on the icon on the far right (paper with pencil).

Application Evaluation Assigned

Search

Member 14

ORGANIZATION	APPLICANT	PROJECT NAME	SCORE	STATUS	
ural Disaster PREP Grant	Joplin Regional Community F...	Pete Ramsour	Disaster Preparedness Training for Elderly Citizens	100%	✓

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

You will then see a screen that tells you your evaluation has been saved. Click “Continue”.

The evaluation you’ve just done will now have a green check mark next to it. Move on to the next, and so on and so forth!

The screenshot shows a web application interface for reviewing grant applications. The page is titled "Your Evaluation" and shows a form for "Primary Affiliate Applicant". The form includes fields for "Primary Affiliate Applicant" (Joplin Regional Community Foundation) and "Proposed Affiliate Project Name" (Disaster Preparedness Training for Elderly Citizens). Below these fields, there is a section for "Please provide answers to the following evaluation questions using the score as follows:" with a list of scores: 1 - Poor, 2 - Fair, 3 - Good, 4 - Very Good, and 5 - Excellent. The score 5 is selected. There are also two checkboxes: "Aligns with the CFO's disaster preparedness goals.*" and "Provides meaningful benefit to the community.*", both of which are checked. To the right of the "Your Evaluation" panel, there is a "View Application" panel. This panel shows the same "Primary Affiliate Applicant" information and a section for "Does your affiliate have its own 501(c)3 status?". The status is "No, we use CFO's nonprofit status". Below this, there is a section for "If you maintain your own status, please provide your EIN." with an empty input field. The "View Application" panel also includes a section for "Counties Impacted" with a list of counties and checkboxes. The counties listed are: Barry, Barton, Bates, Benton, Bolinger, Butler, Camden, Cape Girardeau, Carter, Cass, Cedar, Henry, Hickory, Howell, Iron, Jasper, Johnson, Laclede, Lawrence, Madison, Maries, McDonald, Phelps, Polk, Pulaski, Reynolds, Ripley, Scott, Shannon, St. Clair, St. Francois, Ste. Genevieve, and Stoddard. The "Jasper" checkbox is checked.