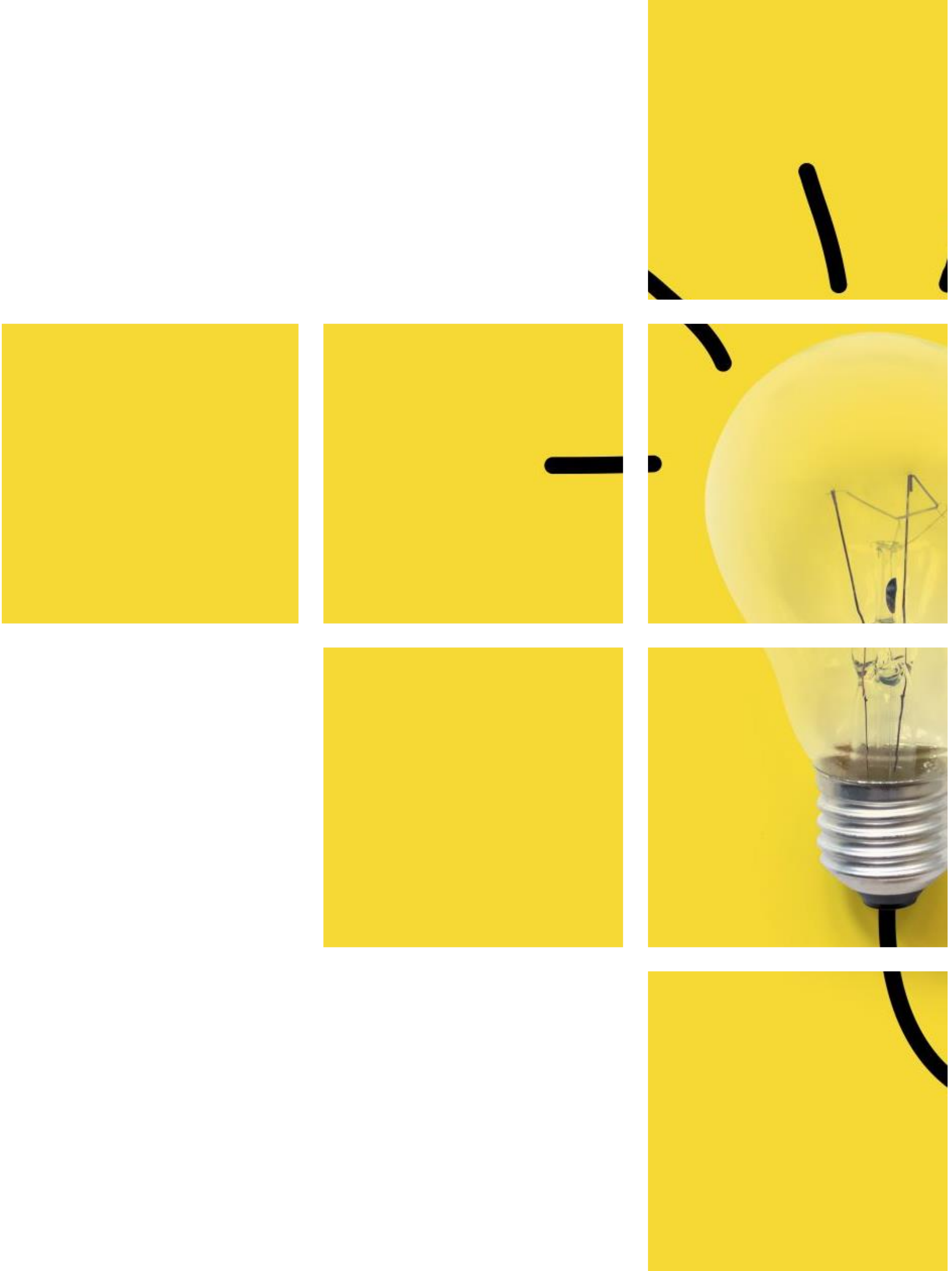
FOUNDANT technologies

Example Grant Process Guide

This is one example of how Grant Lifecycle Manager (GLM) can collect common information throughout the grant process. Use this as a starting point to craft your application(s), but each organization should customize its forms to meet its specific needs, goals, values, workflow, and more.

Whether you're a client or not, we'd love to help. Current clients, you can have the Success Team add this process directly to your site. If you are not yet a client and would like additional information or a demonstration of how this process works, please reach out to our team.



EXAMPLE APPLICATION GUIDE

Contents

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Before you begin.

Admin tips: advice as you get started

- Clearly communicate eligibility requirements and goals of the funding.
- “Right-size” your application: Is the time to complete reasonable compared to your applicant's potential gain? Do you use all the data you’re collecting?
- Consider allowing returning grant partners to complete an abbreviated application.
- Take time to consider what is necessary to know versus what is nice to know. Consider removing or making nice-to-know questions optional.
- Use publicly available information, when possible, rather than asking applicants to spend time on it. Utilize the Candid integration within GLM to pull fields from a nonprofit’s Candid profile. Or utilize internal-facing questions to allow you to answer publicly available information on an applicant’s behalf.
- Share the complete application with applicants on your website. You can download a question list as a PDF to share outside of the Foundant solution.

Other resources: PEAK Grantmaking, Exponent Philanthropy (EP), #FixTheForm, and the Trust-Based Philanthropy Project

Application fields and questions.

On the next several pages, you'll find fields and questions crafted to help you build a best practice application for your grantees. Use these examples as a starting place and then update to best suit your organization's unique needs.

Whether you're a Foundant client, or not, we'd love to help. Current clients, you can [have the Success Team] add this process directly to your site. If you are not yet a client and would like additional information or [a demonstration] of how this process works, please [reach out to our team].

Grantee instructions.

These sample instructions will help your grantees get started and oriented to the system:

- *As you work on this application, you can save a draft and return to finish your work anytime. To do so, click "Save" at the bottom right side of the form.*
- *When you return, your draft application will be on your dashboard. Click "Edit Application" to return to your draft.*
- *You can collaborate* with colleagues on your application using the blue "Collaborate" button in the upper right corner.*
- *If you have applied for a grant with us before, use the Copy Request* button in the top right corner to copy answers from a previous application. Be sure to review and update any copied answers.*
- *We have set all text responses to the maximum character limit to allow you the most flexibility in answering the question. We do not expect you to fill all the space provided.*

Admin tips.

- If you have specific eligibility requirements for a grant process, consider adding questions requiring applicants to actively confirm they are eligible at the beginning of your application.
- Provide instructions not to proceed if applicants are not eligible. This will help save time for you and your applicants.
- If you use an Eligibility Quiz* or other workflows to prevent ineligible applicants from applying, this may not be needed.

Foundant creates articles and tutorials you may link to for additional instruction for your applicants.

Making it easier.

[suggested messaging for your instructions to grantees]

Candid integration information for your grantees:

- *You may use your Candid profile to help populate your application form. Before doing so, please ensure your Candid profile contains the most up-to-date information.*
- *To auto-populate your form with Candid profile answers, click the "Copy Candid Profile" button in the top right corner. Simply choose which answers you want to pull into the form by clicking the checkbox next to the applicable answer. When finished selecting, click the "Copy Answers" button in the bottom right of the pop-up and the Candid data will be pulled in the applicable fields in the form.*
- ***Please note:*** *Copying answers will not overwrite any existing answers, and any answers pulled from Candid that populate into your form can be edited and updated. If you do not have a Candid profile, you may simply answer the questions by typing or copying/pasting your response.*

Learn more about [Demographics via Candid](#).

Organizational information.

Organization type*

If you select "Fiscally sponsored by a 501(c)(3)," you will be required to respond to an additional set of questions about your fiscal sponsor.

If you select "None of the above," you are ineligible for this grant process and should not proceed. Please reach out to xxxx@xxx.org with questions.

Choices

- 501(c)(3)
- Fiscally sponsored by a 501(c)(3)
- Government or Tribal entity
- None of the above – ineligible to apply, DO NOT PROCEED

Mission Statement

Character Limit: 10,000

Fiscal Year Start

Character Limit: 250

Total Expenses

Character Limit: 20

Fiscal Year Start

Character Limit: 250

Total Assets

Character Limit: 20

Total Revenue

Character Limit: 20

These fields can as candid for Grant Application questions, which allows your grantees to populate their answers from their Candid profile into GLM. See page six (6) for instructions for your grantees to leverage this feature. If you'd like to learn more, check out this help article.

Fiscal sponsor detail.

These questions are required *only* if you have a fiscal sponsor.

Fiscal Sponsor Name*

Character Limit: 250

Fiscal Sponsor Address*

Character Limit: 250

Fiscal Sponsor EIN*

Character Limit: 25

Name of Contact Person*

Fiscal Sponsor – first and last name

Character Limit: 250

Title of Contact Person*

Character Limit: 100

Contact Email*

Character Limit: 250

This is a “branched” group. You can use branching questions to serve applicants pertinent fields depending on their answers to previous questions. Branching is now available in all standard and higher license levels.

**If you’d like to learn more about the best strategy for your organization, connect with our team. Clients, contact your Success Team to chat about your workflow.*

Demographic information.

Admin tips:

Collecting demographic data can be critical for funders to understand the organizations they are funding. However, it can also be burdensome and sensitive for nonprofits to collect. If you are collecting this data, be transparent about why and how it will be used.

Foundant has partnered with Candid to help reduce the burden by integrating with Candid's demographic fields. Nonprofits can report their demographics in one place and one format on their Candid profile. This data can then be pulled into their application in Foundant.

Demographic info upload: Another option to reduce the burden for applicants in providing this information, is accepting files/reports they have previously created for other funders. This saves applicants time from having to reformat this information and allows them to provide what they already have. You can see a sample of how to provide this option on page 11 of this eBook.

Learn more about Demographics via Candid.

Demographic information.

Sexual Orientation (#)

	Board Members	Staff	Senior Staff
Gay, Lesbian, Bisexual, or other sexual orientations in the LGBTQIA+ community			
Heterosexual or Straight			
Decline to state			
Unknown			

This blog post about tables on forms explains how they help make things easier for applicants and staff.

**If you'd like to learn more about our tabling feature, connect with our team. Clients, contact your Success Team to chat about your workflow.*

Demographic information.

Race & Ethnicity(#)

	Board Members	Staff	Senior Staff
Asian American/Pacific Islanders/Asian			
Black/African American/African			
Hispanic/Latino/Latina/Lantinx			
Native American/American Indian/Indigenous			
White/Caucasian/European			
Multi-Racial/Multi-Ethnic (2+ races/ethnicities)			
Decline to state			
Unknown			

Demographic Info Upload Option

If you have prepared this information for another funder, please upload it here instead of answering the above questions. Please indicate "see attached" for any required questions.
File Size Limit: 5 MB

Ask for feedback.

Anything else?

Is there any further information you would like to share with us? Feel free to upload a file or share via the text field.

Character Limit: 10,000 / File Size Limit: 10 MB

How are we doing?

We are always striving to improve our processes. Please let us know how we're doing by submitting an **anonymous** review on GrantAdvisor.org.

Once you submit your application, you cannot edit the form. Please review your answers before submitting.

After you submit this application, check your email for the submission confirmation.

You can expect to hear from us in [**insert time period*****].***

Curious to see how you're stacking up to other funders? Check out the reviews on GrantAdisor's Funder Profiles.

Internal review.

Due Diligence Checklist (ADMIN ONLY) *

Have you done the following?

- ❑ Run a Charity Check
- ❑ Confirmed applicant is eligible to receive grants based on their tax status

Choices

Yes

No

Staff Notes

Enter any notes from phone calls with the applicant.

Character Limit: 10,000

You can add internal-facing questions to be completed by staff after the applicant submits. Be sure to mark these questions as internal visibility only.

Post-Application forms.

Next, dive into best practice form templates for evaluations, approvals, installments, grant agreements, and final reports. Use these examples as a starting place and then update to best suit your organization's unique needs.

Whether you're a client or not, we'd love to help. Current clients, you can have the Success Team add this process directly to your site. If you are not yet a client and would like additional information or a demonstration of how this process works, please reach out to our team.

Evaluation form.

Project/Request Name*

Name of Project.

Character Limit: 100

Please use the following scoring rubric:

10 - Excellent
7 - Good
3 - Fair
1 - Poor

Mission Alignment*

Is this organization's mission and funding request in alignment with the grant funding goals?

Scoring Options: 1-10

Financial Need*

Will this funding significantly impact this organization's success and outcomes for the community served?

Scoring Options: 1-10

Would you fund this grant?*

Choices

Yes

No

Additional Comments*

Character Limit: 10,000

To assign requests to evaluators, you must assign an evaluation form. This form can be customized to meet your needs such as an optional place for evaluator notes or a list of scored questions. When using system scoring questions, the system will automate a score based on the total awarded points divided by the total possible points.

Approval form.

Project/Request Name*

Name of Project.

Character Limit: 100

Decision Date*

Character Limit: 10

Award Type*

Character Limit: 250

Choices

- One Time
- Installment
- Matching

Amount Awarded*

Character Limit: 20

Special Conditions*

Character Limit: 2,000

This form is internal-facing and will be completed for each approved request. If you have specific items you need to track/tag requests internally for reporting purposes, this is a great place to do so. For example, if you need to tag awarded grants by service or focus area (not indicated by the applicant on the application), you can add fields here to document this.

*NOTE: Amount Awarded will be linked to the total scheduled installments.

*NOTE: Special Conditions can be shared to the grant agreement follow up to note any special conditions.

Installment Form.

Installment Due Date*

Character Limit: 10

Installment Amount*

Character Limit: 20

Installment Conditions*

Character Limit: 250

The installment form is used to schedule an intended payment. If you make one time payments, you will schedule a single installment. If the award has multiple intended payments, you will schedule multiple installments. Foundant's Implementation Specialists or Success/Support can talk through your specific needs. This form can be customized. However, you cannot share questions to or from an installment form.

Grant Agreement.

Project/Request Name*

Name of Project

Character Limit: 100

[Insert contract introduction for your organization.]

I. Use of Funds*

[Insert Use of Funds agreement for your organization.]

Choices

I agree to the above

II. Non-Profit Status*

[Insert non-profit status guidelines for your organization here.]

Choices

I agree to the above

III. Regulatory Compliance Cooperation*

[Insert regulatory compliance language for your organization.]

Choices

I agree to the above

Special Conditions

Character Limit: 2,000

Amount Awarded

Character Limit: 20

Use instruction fields to share your standard grant agreement language. The example language provided demonstrates how this might be done.

Any details specific to a request need to be entered as fields on the Approval form and added as a shared question.

Grant Agreement.

IV. Acceptance of Terms & Conditions*

[Insert acceptance and terms & conditions language for your organization.]

Choices

I Accept the Grant Terms and Conditions

I Decline the Grant Terms and Conditions

Signature (please type your name)*

Character Limit: 100

Job Title at Grantee Organization*
Character Limit: 150

Date Signed*

Character Limit: 10

[Insert electronic signature language for your organization.]

Please verify with legal counsel whether an e-signature is an appropriate option for your organization.

Final report.

Project/Request Name*

Name of Project.

Character Limit: 100

Final Report Preference*

How would you like to complete your final report?

Choices

- Complete form below
- Schedule a call with us to verbally discuss the questions below: Call (xxx) xxx-xxxx to schedule
- Submit a recorded video answering the questions below (upload below)

This form can be completed by the grantee or by someone within your organization. If completing it internally, schedule a visit or phone call with your grantee to gather their answers to these questions. Internal Follow Ups can help reduce the burden on grantees and can help build relationships with your nonprofit partners. Internal Follow Ups require the Advanced GLM license, however, even with a lower license level, a follow up can be completed on a grantee's behalf using proxy.

Final Report.

As a reminder, you shared the following **description** and expected **impact** with us in your request for funds. We'd love to know how it went – both to celebrate your successes and better understand how to support you and our other partners moving forward.

Request Description

How will you use the funds? *(Answer from original application populated here.)*

Character Limit: 10,000

Impact

What do you hope this funding will help you achieve? What would success look like? (*Answer from original application populated here.)*

Character Limit: 10,000

Successes

Character Limit: 2,000

Challenges

Character Limit: 2,000

How can we support you in the future?

Character Limit: 2,000

Final report.

Can we highlight you?

We'd love to promote your work on our social media, website, and/or newsletter.

Please share any photos, links, stories, etc. we can highlight.

Character Limit: 10,000 / File Size Limit: 10 MB

Anything else?

Is there anything else you'd like to share with us?

Character Limit: 10,000

Video/Audio Upload

Please upload your responses here if you chose to answer the above questions via audio or video.

You can upload the file directly or provide a link to the file.

Character Limit: 10,000 / File Size Limit: 50 MB

Whether you're a client or not, we'd love to help. Current clients, you can have the Success Team add this process directly to your site. If you are not yet a client and would like additional information or a demonstration of how this process works, please reach out to our team.

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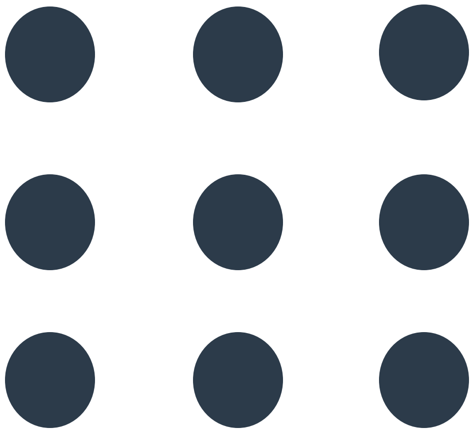
Did you know?

Ask us to add this process

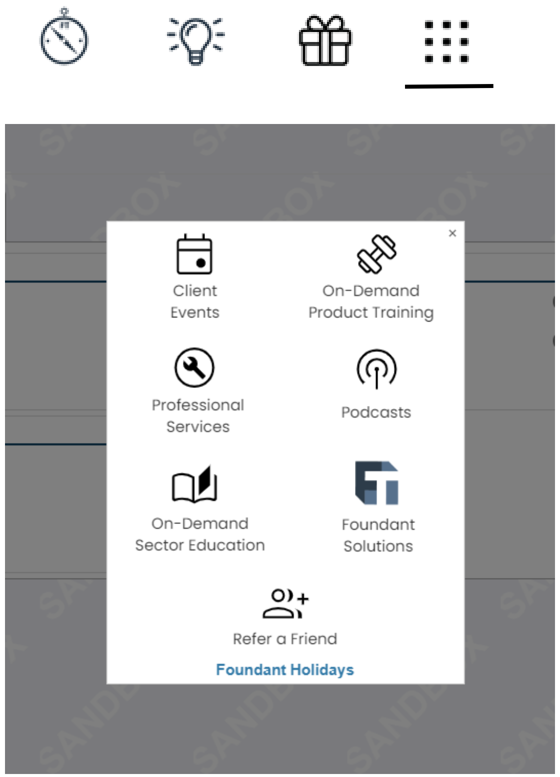
Reach out to your Success Team and ask to add this entire project to your site. Save yourself and your grantees countless hours.

9 Dot

Did you know there are all sorts of useful resources in the "9 Dot" right in your site! Check out all the options over there.



Resources in-product



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Learn about our solutions

Grant Lifecycle Manager

Online grant management and application building for grantmakers

GrantHub & GrantHub Pro

Online pre- and post- award grant management for grant professionals

CommunitySuite

Integrated fund accounting, CRM, online donations, and events management for Community Foundations.

Scholarship Lifecycle Manager

Online scholarship management and application building for Scholarship Providers.

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