

How to Review Applications Via ZoomGrants™

Tips and Tools for Reviewing, Scoring, and Voting on Applications

2 Quick Things to Know:

THE AUTO-SAVE FEATURE

ZoomGrants™ automatically saves your progress, so you can log out and log back in as many times as you need to in order to complete your review. Whenever you make a change in a field then click outside of that field (such as a Scoring Comment or My Notes) or change your selection in a radio button or dropdown menu, you'll see a flash of the 'Saving' screen as your change is being saved.

(Note: If you see the 'Saving' message for more than a few seconds your Internet connection may have blinked for a moment during the saving process and the change may not have been saved. Double click anywhere on the page to cancel the save and make a note of the change that you made. If you made the change in a text field, tweak the answer slightly, then click outside of the field to try the save again. If you selected a radio button or dropdown, select a different dropdown or radio button, wait for the save to occur, then make your original choice again. If you continue to have difficulty, check your Internet connection. You can also call our Technical Support team – (866) 323-5404 x2.)

THE TAB SYSTEM

ZoomGrants™ predominantly uses a tab system to set apart the different sections and features of the system. You can click on each tab to access the content housed there.

About This Tutorial:

To provide instructions for reviewing, scoring, and voting on Applications while also giving a tour of the ZoomGrants™ system, this tutorial uses two different colors to denote the different types of information provided.

ORANGE NUMBERS

These are **sequential instructions** that can be followed by users who just want to know how to review Applications via ZoomGrants™.

BLUE/GREEN LETTERS

These are **extra notes** regarding the ZoomGrants™ system and its features.

Application Review – Committee Members

MY ACCOUNT

In order to serve on a Review Committee, you must have a ZoomGrants™ account. The Program Administrator for the funding organization will set up your account using your email address and he or she will also create your password.

1. PROGRAM DASHBOARD

Click a Program title or the Dashboard button to access that Program.

A. SEARCH

Use the Search field to quickly find Applications by entering part of the Application title, Application contact, etc. You will only be able to access Applications and Programs to which you have been assigned as a Funding Committee Member.

The screenshot shows the ZoomGrants account dashboard for the ZG Giving Foundation. The header is orange and contains the logo, user name 'Welcome, Josey Doe', and navigation links for 'HELP', 'LOGOUT', and 'See Without Custom Colors'. Below the header, there are buttons for 'Account Settings' and 'Programs'. The main content area is divided into several sections: 'Announcements' with a 'Reviewers' button and a message count of '1 total messages'; 'New Items Submitted' with a 'Show New Items' button; 'ZoomGrants 1 General Instructions'; 'Current Programs' and 'All Programs' tabs; 'Open Programs' section showing 'none'; 'Recently Closed Programs (within 18 months)' section with a '1' notification badge and a list of programs: '2021 County Program Support Grant' (closed 1/31/2021) and 'Scholarship Program' (closed 6/15/2020). Each program entry has a 'Dashboard' button and links for 'Report | Invoices' and 'Apps as PDF, Apps as CSV, Documents'. The '2021 County Program Support Grant' entry also has a 'Progress Reports | Invoices' link.

PROGRAM DASHBOARD – Quick Tour

1. QUICK ACCESS TABS

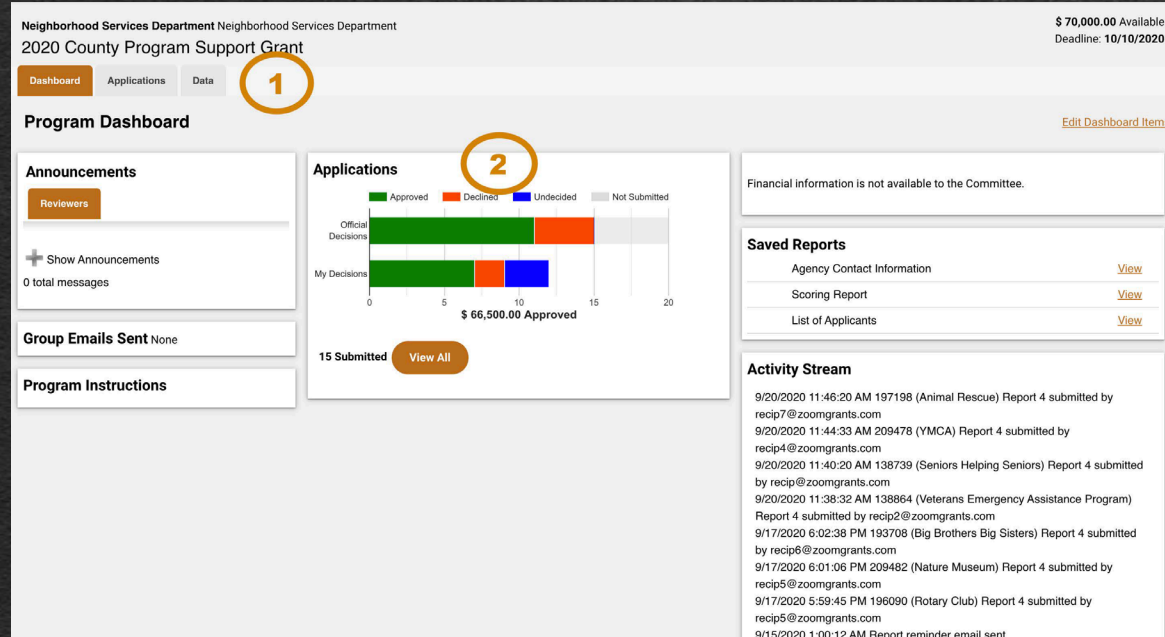
These tabs provide quick access to Application lists and the Data page.

2. APPLICATIONS CHART

Depending on the settings chosen by the Administrator, you may be assigned to review all or some specific Applications, or you may have access to all of the Submitted Applications.

Click the color-coded bars in the My Decisions section to view lists of Applications with the selected vote. The screenshot to the right, for example, indicates that this Committee Member has voted to Approve several Applications, Decline several, and is still Undecided about some.

To view a list of all of the Applications that you've been asked to read, click the View All button at the bottom of the Applications section.



*This feature may not appear, depending on the settings set by the Administrator.

APPLICATIONS LIST – Navigation

1. OPEN AN APPLICATION

Click an Application title to open that Application to view the content.

A. SET FILTER*

Use these checkboxes to determine which Applications are included in the list.

B. MY SCORES*

As you score each Application, the My Scores column in the Applications list will display either a progress bar (if you are not finished assigning a score for *every* criterion) or the total score that you gave to that Application. This is another way to keep track of your progress.

C. SORT BY COLUMN

Click a bold column header to sort the Applications list by that column. Click again to reverse the sort.

Neighborhood Services Department Neighborhood Services Department

2020 County Program Support Grant

\$ 70,000.00 Available
Deadline: 10/10/2020

Dashboard Applications Data

Applications

Submitted Applications Pre-Application

Number Rows Per Page: All

Sort By: Alphabetical

Submitted Applications	Date Submitted	\$ Requested	My Scores	My Recommendation	Trial Decisions (Committee)	Official Decisions (Committee)
A Large NonProfit Agency Animal Rescue	5/24/2020 1:55:17 PM	\$ 10,000.00 Print PDF	61	\$ 5,000.00	Decline	
A Large NonProfit Agency Save Our Library <small>New</small>	6/17/2020 7:34:58 AM	\$ 7,500.00 Print PDF		Undecided	Undecided	\$ 1,500.00
A Local Nonprofit Agency Summer Day Camp for Kids	5/19/2020 10:54:35 AM	\$ 60,000.00 Print PDF	39	Decline	Decline	Declined
A Local Nonprofit Agency Therapy Services Program	3/8/2019 9:10:50 AM	\$ 7,500.00 Print PDF	90	\$ 55,000.00	\$ 7,000.00	\$ 2,000.00
Local Nonprofit Agency YMCA	6/17/2020 7:23:09 AM	\$ 10,000.00 Print PDF	N/A	\$ 4,000.00	\$ 4,000.00	\$ 5,000.00
A Microscopic Nonprofit Agency Big Brothers Big Sisters	5/19/2020 10:45:07 AM	\$ 10,000.00 Print PDF	63	\$ 8,000.00	\$ 5,000.00	\$ 3,000.00
A Mini Nonprofit Agency Homelessness Prevention Program	3/8/2019 9:09:06 AM	\$ 30,000.00 Print PDF	89	\$ 95,000.00	\$ 15,000.00	\$ 13,000.00
A My Little Agency Seniors Helping Seniors	3/8/2019 7:12:59 AM	\$ 25,000.00 Print PDF	70	\$ 25,000.00	\$ 22,000.00	\$ 20,000.00
A National Nonprofit Agency Be the Light <small>New</small>	5/24/2020 2:03:02 PM	\$ 35,000.00 Print PDF	N/A	Undecided	Not Qualified	Not Qualified
National Nonprofit Agency Youth Mentoring Program	6/17/2020 7:41:03 AM	\$ 12,000.00 Print PDF	N/A	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
Petite Nonprofit Agency						

READING APPLICATIONS – Navigation

1. APPLICATION TABS

Click through the Application tabs to view the Application content.

2. REVIEW TOOLS

The Administrator may set up several helpful Review Tools – My Notes*, Discussion*, Internal Research*, Scoring*, and Decisions – that you can use as you work through the Applications. Click on the button to access those features.

The screenshot shows the 'My Little Agency' application page for 'Seniors Helping Seniors'. The requested amount is \$20,000.00. A navigation bar at the top includes tabs for 'Application', 'Application Summary', 'Pre-Application', 'Application Questions', 'Budget', 'Tables', 'Required Documents', 'Follow-Up', and 'Results'. A 'Post-Decision' section contains 'Contract' and 'Reports' tabs. A green status bar indicates the application is 'Approved' and 'Notified of Official Decision'. A 'Review Tools' button is highlighted with a red circle '2'. The main content area is titled 'Application Summary' and is divided into three columns: agency contact information, application submission details, and a 'Settings' sidebar. The 'Settings' sidebar includes fields for 'Primary Contact' (Non-Senior Admin), 'Assigned Employee' (Anika), 'Funding Type' (Local (BCSG)), 'Monitoring Status' (Monitoring Visit Scheduled), 'Zip Code' (75069), and 'Official Decision Comment'. An 'IRS Verification' box shows the agency is a 'Verified Exempt Organization'. An 'Applicant History' table shows 11 approved, 4 declined, and 8 undecided applications.

My Little Agency
Seniors Helping Seniors
\$ 20,000.00 \$25,000.00 Requested

Print/Preview
Previous Submitted Application
Next Submitted Application

Application Summary

Official Decision Approved \$ 20,000.00 Notified of Official Decision (Applicant can view Official Decision, and access Post-Decision functions) Review Tools

Application Summary

My Little Agency
102 Independence Ave
#165
Washington, DC 02000
United States

Telephone (866) 942-0212 x55
Fax (866) 942-7739
Web web.com
EIN 66-0769994
DUNS 192237977

Executive Director
Joe Smith
joe@web.com

Application Submitted: 3/8/2019 7:12:59 AM
Pre-Application Submitted: 3/7/2019 9:26:13 AM
Pre-Application Status: Approved (to continue)

Application Contact
Inita Grant
recip@zoomgrants.com
Tel: 555-128-2013

Send Email (includes Additional Contacts)

Additional Contacts
Email Addresses, separated by comma
none entered

Applicant History
11 Approved (\$316,550.00)
4 Declined
8 Undecided

Settings

Primary Contact
Non-Senior Admin

Assigned Employee: Anika

Funding Type: Local (BCSG)

Monitoring Status: Monitoring Visit Scheduled

Zip Code: 75069
 Open for Editing
(post-Deadline, this application only)

Official Decision Comment

IRS Verification
✓ Verified Exempt Organization

*This feature may not appear or may have a different label, depending on the settings chosen by the administrator

READING APPLICATIONS – Scoring*

1. SCORING QUESTIONS*

The Administrator creates Scoring Questions based on relevant criteria. For each question, select a score in the Score dropdown. If applicable, you can also enter a Comment on each Scoring Question

2. SPLIT SCREEN

The full application is viewable next to the scoring section to make it easy to refer back to as needed.

3. ADDITIONAL FEATURES

Administrators may choose to collect a Conflict Statement and/or allow committee members to hold group discussions on each application. You may also keep private notes on each application that you review.

Some funders choose to set up separate Committee and Administrative Scoring Questions*. Administrative Scoring Questions* can only be completed by Administrative users.

The screenshot displays the 'Scoring' interface for 'Community Relations Committee Scoring'. It features a table with columns for 'Score', 'Weight', and 'Ext. Score'. The table lists five scoring questions with their respective scores and weights. A 'Conflict Statement' section is visible, with radio buttons for 'I certify this statement is true.' and 'I have a conflict. (explain below)'. Below this is a 'My Private Notes' section and a 'Committee Discussion' section.

Community Relations Committee Scoring	Score	Weight	Ext. Score
Organizational Profile and Capacity			
Application Quality Scores			
1 Application Quality Comment (limit 250 char.) This application was very well written!	5	X 1 =	5.00
2 Project Description and Need Comment (limit 250 char.)	9	X 1 =	9.00
3 Capacity to Manage Program Comment (limit 250 char.) I am somewhat concerned about the recent turnover in staff but I believe the agency still has proper capacity.	7	X 1 =	7.00
4 Ability to Serve Cole County Residents Comment (limit 250 char.)	4		
5 Proposed Outcome Measures Comment (limit 250 char.)	7		

Conflict Statement

I certify this statement is true.
 I have a conflict. (explain below)

COPIED CONFLICT STATEMENT: I agree to recuse myself from scoring applications from any agency in which I am affiliated with as an active client, through a family relationship, or membership on the board of directors. Furthermore, I agree to disclose my affiliation with these agencies to the Chair of the Community Relations Commission.

AG - 3/8/2019 10:54:55 AM funding3@zoomgrants.com 104.187.76.246

My Private Notes

Your Notes will NOT be viewable to anyone else.

Great application. This program has been funded for 5+ years and has never had any issues or concerns. The residents love the program and it would be difficult to find any other agency to meet these specific community needs if this agency isn't funded.

Committee Discussion

Your comments will be added when you click the 'Add Comment' button.

Jerry Doe - 6/16/2020
I was very impressed with the presentation and the application content.

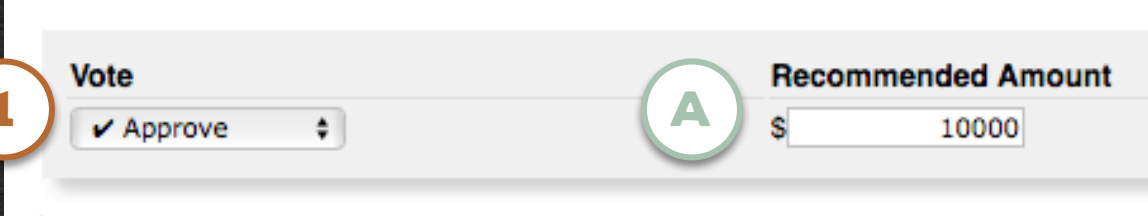
Jerry Doe - 6/16/2020
Is anyone else concerned with the turnover in the Program Manager position? It seems like the new Program Manager will be able to handle the duties as required, even though he is very new to the position.

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

READING APPLICATIONS – Decisions*

1. MY DECISION*

Once you've completed your Review, you may cast your vote at the top of the Review Tools. If you vote to Approve an Application, be sure to enter the Recommended Amount, too (A).



The screenshot shows a user interface for casting a vote. On the left, a large orange circle with the number '1' is positioned next to the 'Vote' section. The 'Vote' section contains a dropdown menu with '✓ Approve' selected. To the right of the dropdown is a green circle containing a white letter 'A'. Further right is the 'Recommended Amount' section, which includes a dollar sign '\$' and a text input field containing the number '10000'.

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

READING APPLICATIONS – Data

1. DATA

Click into the Data tab in the Program-level tabs to generate customized reports to use as you compare applications and make your considerations.

2. CUSTOM DATA REPORT

1. Set a Filter – Choose which Applications you'd like to include in the Report.

2. Choose a View – Tell the system how you would like the results presented.

Please note: some fields (such as Tables) are limited to select views.

3. Select the Fields – Scroll down and click the checkbox(es) next to the field(s) that you'd like to include in the Report (A).

The screenshot shows the 'Data' tab interface for 'The Generous Foundation Grants Department'. The page title is 'Grants for People Seeking Grants'. The top right corner displays '\$ 10,000.00 Available' and '12/31/2020 Deadline'. The navigation bar includes 'My Account', 'Dashboard', 'Applications', 'Scoring', 'Financial', 'Reporting', and 'Data'. The 'Data' tab is active, showing a 'Custom Data Report' configuration screen. The screen is divided into three main sections: '1. Set a Filter', '2. Choose a View', and '3. Select the Fields'. Callout 1 points to the '1. Set a Filter' section, which includes a dropdown for 'Official Decisions' (with 'Approved', 'Undecided', and 'Declined (and Not Qualified)' selected) and a 'Program Type' dropdown (set to '-Not Assigned-'). Callout 2 points to the '2. Choose a View' section, which includes a radio button for 'Printer Friendly' (selected), with sub-options for 'Page Break (new page starts with each record)', 'Horizontal Line (between each record)', and 'None'. Callout A points to the '3. Select the Fields' section, which is a list of fields with checkboxes. The first checkbox is checked, and the field is 'Agency Name and Application Title will automatically be included'. Other fields include 'Requested Amount', 'Agency Details - Address, City, State, Zip, Country, Phone, Fax, Website, EIN, DUNS', 'Executive Director - Name, Title, Email', 'Program Contact - Name, Email, Telephone', 'Additional Contacts - Email', 'Pre-Application Decision', 'Trial Decision', 'Trial Amount', 'Official Decision', 'Official Amount', 'Decision Fund Date', 'Decision Funding Instructions', 'Decision Comment', 'Budget (Printer Friendly only)', 'Document Attachments (Printer Friendly only)', 'Activity Log', 'Raw Scores & Comments (Printer Friendly only)', and 'Program Type'. A 'Generate Report' button is located at the bottom of the configuration screen.

*This feature may not appear or may have a different label, depending on the settings chosen by the Administrator.

TECHNICAL QUESTIONS?

We're always happy to help.

Send us an email: Questions@ZoomGrants.com

Give us a call: (866) 323-5404 x2