

How to Review Applications Via ZoomGrants™

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

Need a printer-friendly version? https://zoomgrants.com/welcome/reviewerslideshowpf.pdf Please consider sharing the link to this file instead of printing it. Using the link will ensure you have the latest version of this guide (and it'll save paper!).

Want to learn more? Go to http://help.zoomgrants.com/

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.

ZOOMGRANTS



PART ONE: Application Review – Committee Members

Want to learn more? Go to http://help.zoomgrants.com/.

MY ACCOUNT

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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. MY ACCOUNT

The My Account page provides quick access to all Programs to which you have been assigned.

2. PROGRAM DASHBOARD

Click an orange 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 G F My Ar	e nerous oudation comGrants™ rous Foundation ccount Program History Announcements			Welcom	e, Julie Doe <u>Not Julie Doe?</u> HELP LOGOUT A▲▼
		Му Ассо	ount		\bigcirc
	Open Programs	Submitted	Incomplete	Total Awarded	(2)
2)	Grants Department Grants for People Seeking Grants 12/31/2010 - 12/31/2020	3	2	\$ 100.00	Dashboard
	2016 Scholarship 12/31/2008 - 6/15/2019	4	2	\$ 0.00	Dashboard
	Recently Closed Programs	Submitted	Incomplete	Total Awarded	

PROGRAM DASHBOARD – Quick Tour

1. QUICK ACCESS TABS

These tabs provide quick access to Application lists, the Scoring, Financial, and Reporting Reports, and the Data page.

2. MY DECISIONS*

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 one.

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

A. SEARCH

The Search field is here, too, but this time it will just search for Applications within this Program.



*This feature may not appear, depending on the settings chosen by the Want to learn more? GAdministrator.zoomgrants.com/

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APPLICATIONS LIST – Navigation

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1. OPEN AN APPLICATION

Click an orange 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.

The Generous Foundation Powered by ZoomGrants™				w	elcome, Julie Do	e <u>Not Julie Doe?</u> LOGOUT A ▲▼
The Generous Foundation Grants Department\$ 10,000.00 Available 12/31/2020 DeadlineGrants for People Seeking Grants12/31/2020 Deadline						
My Account Dashboard Applications	My Account Dashboard Applications Scoring Financial Reporting Data Search Search					
Submitted Applications Pre-Application	A Voti Includ	ing Decis de: Approved	Sions Undecided	Declined/Not Q	ualified	cisions 💠
Submitted Applications	\$ Requested	(B	My Scores	Mv Vote	Decisions (Committee)	Decisions (Committee)
Emily's Organization	\$ 100.00	Print Pu	39	\$ 50.00	\$ 50.00	\$ 100.00
My Little Nonprofit Agency Grant Application	\$ 750.00	Print PDF		Undecided	Undecided	Approved
Small Nonprofit Agency Our Application	\$ 1,000.00	Print PDF		\$ 75.00	Undecided	Declined
3 Submitted Applications	\$ 1,850.00			\$ 125.00 <u>\$ 9,875.00</u>	\$ 50.00 <u>\$ 9,950.00</u>	\$ 100.00 \$ 9,900.00
Send Email To Selected				\$ 10,000.00	\$ 10,000.00	چ 10,000.00

READING APPLICATIONS – Navigation

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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.

A. QUICK ACCESS TABS

Use these tabs to quickly return to your other pages, including the Dashboard and the Applications list.

The Generous F Grants Departmer Grants fo	r People Seeking Grants	\$ 10,000.00 Available 12/31/2020 Deadline
My Account	Dashboard Applications Scoring Financial Reporting Data Search	Search
Emily's Organ My Appl \$ 100.00 Reques	1	Print/Preview
Application	Application Summary Pre-Application Application Questions Budget Tables Documents Extra	Where did my tabs go?
Post-Decision	Funding Contract Financial Reports	
	Official Decision & Approved + \$ 100.00 Review Tools	2

Application Questions

Demographic Information

1. If you were talking to a six-year-old, how would you describe your program?

Please limit the use of references to ice cream cones and trips to the pool, regardless of how well they relate to your program or the excitement induced by your program - children can be very excitable and we don't want anyone to be disappointed.

We will be working together, using teamwork and working as a team, to do really cool things and make people happier and healthier. There will be lots of smiles, and laughing, and fun, even though we will be also be doing our best and working hard.

2. How many people of each age group will be able to participate in your program?

500 Young People

500 Young-at-Heart People

1,000.00 TOTAL

3. What two (2) are the main goals of your program?

READING APPLICATIONS – Scoring*

1. SCORING*

Click into the Review Tools to view and the scoring criteria set up by the Administrator and to select your scores for the Application.

2. 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.

3. MY SCORING COMMENTS

Add general comments regarding your applied scores in the My Scoring Comments box at the bottom of the Scoring* section.

A. ADMINISTRATIVE SCORING QUESTIONS*

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



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READING APPLICATIONS – Decisions*

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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).

Vote	Recommended Amount
🖌 Approve 🛟	A \$ 10000

READING APPLICATIONS – Scoring Report*

Agency

3 displayed

1. SCORING REPORT*

Click the Scoring tab in the Program-level tabs to view your Scoring Report. Within the Scoring Report, you can view all of your Votes and Scores for all of the Applications to which you have been assigned.

A. CHANGE YOUR VOTE

Use the My Vote dropdown* and the My **Recommend* box to change your decision** or funding suggestion.

B. SORT BY COLUMN

Click a bold column header to sort by that **column.** Click again to reverse the sort order.



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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**).

Grants	s for People Seeking Grants	\$ 10,000.00 Available 12/31/2020 Deadline
My Accourt	nt Dashboard Applications Scoring Financial Reporting Data	Search
	Data	a
2	Custom Data Report	Saved Reports
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	Official Decisions	Custom Data Report
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	 Undecided Declined (and Not Qualified) 	1. Set a Filter
	Program Type -Not Assigned-	Official Decisions
	2. Choose a View	Approved
	Printer Friendly	Undecided
	 Page Break (new page starts with each record) 	Declined (and Not Qualified)
	Horizontal Line (between each record)	Program Type -Not Assigned- \$
	Table (sortable)	
	Totals (Standard Fields not included)	2 Choose a View
	3. Salact the Eiglds	2. Choose a view
	Colort the fields below that you want to include then click Constrate Report	Printer Friendly
	Results will be ordered by Agency Name, then Application Title.	Page Break (new page starts with each record)
		 Horizontal Line (between each record)
	Generate Report	
		U None
	Standard Fields	Table (sortable)
	Agency Name and Application Title will automatically be included	 Totals (Standard Fields not included)
	Requested Amount	
	Agency Details - Address, City, State, Zip, Country, Phone, Fax, Website, EIN, DUNS	3 Select the Fields
	Executive Director - Name, Title, Email	5. Select the fields
	Program Contact - Name, Email, Telephone	Select the fields below that you want to include, then click Generate Rep
	Additional Contacts - Email	Results will be ordered by Agency Name, then Application Title.
	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)	
	Astribul as	
	Activity Log	
	Raw Scores & Comments (Printer Friendly only)	

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TECHNICAL QUESTIONS? We're always happy to help.

Send us an email: Questions@ZoomGrants.com Give us a call: (866) 323-5404 x2

Want to learn more? Go to http://help.zoomgrants.com/



PART TWO: Application Review – Committee Chairs

Want to learn more? Go to http://help.zoomgrants.com/

Committee Chairs:



Committee Chairpersons are a hybrid of ... NORMAL COMMITTEE MEMBER

Committee Chairs review, score, and vote on Applications just as normal Committee Members do.

... AND PROGRAM ADMINISTRATOR.

In addition to reading Applications as Committee Members, Committee Chairs also have limited Administrative authority.

COMMITTEE CHAIRS CAN:

- Change Trial Decisions and Amounts
- Assign Custom Statuses
- Pose Follow-Up Questions via the Activity Log
- Email Applicants
- View Committee Totals and Averages in the Scoring Report

COMMITTEE CHAIRS CANNOT:

- Change Official Decisions and Amounts
- Change the Pre-Application status
- Assign Applications to Committee Members
- Enter Administrative Scores or Comments
- Open Applications for Editing
- View Specific Scores or Comments of other Committee Members
- Manage any Post-Funding Activities

COMMITTEE CHAIR – Trial Decisions

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1. COMMITTEE VOTES

For an individual Application, normal Committee Members can only cast their own votes and enter their own Recommended Amount. **Committee Chairs can also view the votes and average approval amounts for the entire committee.**

2. TRIAL DECISION

Committee Chairs can also change the Trial Decisions and Amount. Trial Decisions and Amounts can be used to try out multiple funding scenarios during committee meetings. Trial Decisions can be changed in the Decisions tab of an individual Application or in the Scoring Report (A).



COMMITTEE CHAIR – Custom Status*

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A. CUSTOM STATUS*

Each Application can be marked with one or two Custom Statuses set up by the Administrator. Committee Chairs can change the Custom Status* of any Application. Click into the Application Summary tab to change the Custom Status fields in the Settings section.

Status Departmen	nt		and the second	
Grants fo	r People Se	eking Gra	ant	
My Account	Dashboard App	lications Scori	Application Summary	
Emily's Organia My Appli \$ 100.00 Reques	zation ication sted		Emily's Organization 1000 Address Street City, CO 80230 Telephone 999-999-9999 Fax Web www.emilysorga	Application 11:20:13 A Pre-Applica 10:29:44 A Pre-Applica continue) nization.org
Application	Application Summary	Pre-Application	on Awesome Person	Applicatio
Post-Decision	Funding Contract	Financial Re	ports Emily ZoomGrants director.emily@zoomgrants.	com Emily Zoon applicant.e
Application	o n Summary	icial Decision 🛛 🕞	ζ Αρι	Tel: 999-95 Additional Email Addr
Emily's	Organization			
1000 Ad	dress Street		Application Submitted: 9/29/2014 11:20:13 AM	Settings
1000 Ad City, CO	dress Street 80230		Application Submitted: 9/29/2014 11:20:13 AM Pre-Application Submitted: 1/22/2015	Settings
1000 Ad City, CO Telephor Fax Web	dress Street 80230 ne 999-999-9999 www.emilysorganiza	ation.org	Application Submitted: 9/29/2014 11:20:13 AM Pre-Application Submitted: 1/22/2015 10:29:44 AM Pre-Application Status: An continue)	Settings Primary Contact Emily ZoomGrants \$ -none-
1000 Ad City, CO Telephor Fax Web Aweson Emily Zo <u>director</u>	dress Street 80230 ne 999-999-9999 www.emilysorganiza ne Person nomGrants emily@zoomgrants.com	ation.org	Application Submitted: 9/29/2014 11:20:13 AM Pre-Application Submitted: 1/22/2015 10:29:44 AM Pre-Application Status: An continue) Application Contact Emily ZoomGrants applicant emily @zoomgran. Tel: 999-999-9999	Settings Primary Contact Emily ZoomGrants \$ -none- V Assistance Awareness Fundraising Service s application or Volunteering

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ly)

Official Decision Comment

Submitted: 9/29/2014 ation Submitted: 1/22/2015 ation Status: Approved (to

n Contact nGrants milv@zoomgrants.com 9-9999

Contacts esses, separated by comma



(Applicant can view Official Decision, and activates Post-Decision functions)

Official Decision Comment

COMMITTEE CHAIR – Follow-Up Questions

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\$ 10,000.00 Availab 12(31(2020 Evailab

Generous Foundation

ants for People Seeking Grants

A. ACTIVITY LOG

Committee Chairs can pose follow-up questions to specific Applicants by adding an activity to the Activity Log in the Application Summary tab.

B. ADD A NEW ENTRY

Use the Add a new entry to Activity Log section at the bottom of the tab to pose the question by selecting the 'Applicant Action Requested' option, typing your question in the description box, and clicking Add Entry. An email will be sent to the Applicant, who will be able to log in to respond to the question in the Activity Log. (C) shows how the question appears once it has been added as an Activity Log entry.

	My Account Dealthcard Applications Booring Financial Reporting Data	
	Crey Coperative My Application Values Values Values Teacours Complications (Transformed Complications) (Transformed Complications)	Documenta (Doca)
Add a new entry to Activity Log Applicant action requested Administrator action requested Administrator action completed Other	Approximation for the second s	112244 112244 Setting Parago Parag
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		ing for approval ing for approval ing to approval toval
	B Address Statistics - Address - Address - Address	

8/7/2015 8:16:26 AM (Julie Doe) Applicant action requested: Please answer this question : How many volunteers have already signed up to help with your program in July?

COMMITTEE CHAIR – Email Applicants

A. SEND EMAIL TO SELECTED

Committee Chairs can send emails to groups of Applicants from the Applications list. Check the box(es) next to the Applicant(s) to whom a message should be sent, then click the Send Email to Selected button to open up the Send Message window (B).

B. SEND MESSAGE WINDOW

Message text can be based on one of the pre-populated templates set up in the Messages tab by the Administrator. Merge Fields can be added to customize each message.



Dashboard

Submitted Applications

Small Nonprofit Agency

Send Email To Selected

Emily's Organization

My Application My Little Nonprofit Agency

Grant Application

Our Application 3 Submitted Applications

Pre-Applicatio

The Generous Foundation Grants Department

Submitted Applications

My Account





-0000--(_)--0000---

Ontions

Merge Fields (optional)	Customize each email by copying these merge field values into your message. Select Field: Select Copy Merge Field Value:
Send me a 'Sent Email Report'	✓ Yes
Send to Executive Director	Yes
Save this Template	Yes
Notified	Check this box to mark these applications as 'Notified' and allow them to view the Official Decision.

A copy of this email will also be sent to all Additional Contacts entered on the application.

Send It

Welcome, Julie Doe Not Julie Doe? HELP LOGOUT AAV

10 000 00 Augliahla

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COMMITTEE CHAIR – Scoring Report*

A. SCORING REPORT*

Click the Scoring* tab in the Program-level tabs to access the Scoring Report*.

B. REPORT TYPE

From the Report Type dropdown in the Scoring Report* select any available view. In addition to viewing their own individual Scores and Votes, Committee Chairs can also view the Committee Totals and Averages. Trial Amounts and Decisions can also be edited in the Scoring Report*.



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