

# ZoomGrants

**Application Planning and Grant Management Best Practices**

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# ZoomGrants - Who we are

- ZoomGrants is a subscription-based, pre-built internet-based software platform with no hardware to purchase, install or download. Setup and training can all be done remotely with assistance from ZoomGrants onboarding and support staff.
- ZoomGrants has been assisting cities, counties, state agencies, foundations, and other organizations across the country since 2002 with accepting online grant and scholarship applications.
- Tracks the full application and grant management cycle for multiple grant programs and funding sources.

# ZoomGrants Grant Program Types

- CDBG
- HOME
- ESG
- HOPWA
- Continuum of Care
- City/County General Fund Grants

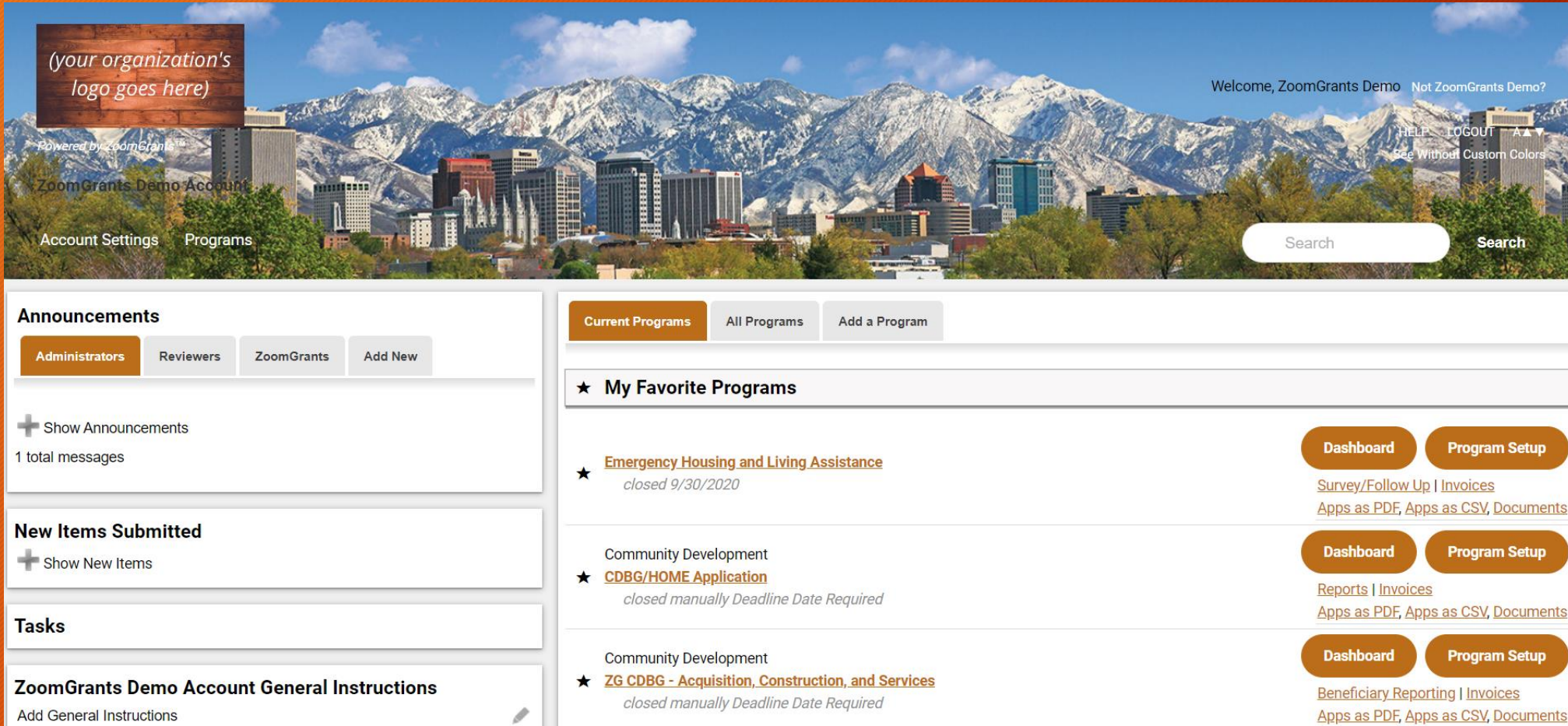
- ARP, CARES Act & CRF Funding for
  - CDBG-CV
  - ESG-CV
  - Small Business Assistance Grants
  - Economic Development
  - Microenterprise/ Workforce Investment

## Foundation Arts & Cultural Grants

- Transit Grants
- Homeowner down payment and housing rehab
- Health, Education and research grants/scholarships
- Cultural & Heritage, Conservation grants
- Tourism and marketing grants



# ZoomGrants - What It Can Do



The screenshot displays the ZoomGrants web application interface. The header features a cityscape background with a wooden sign placeholder for the organization's logo. Navigation links include 'Welcome, ZoomGrants Demo', 'Not ZoomGrants Demo?', 'HELP', 'LOGOUT', and 'See Without Custom Colors'. A search bar is positioned on the right. The left sidebar contains sections for 'Announcements' (with tabs for Administrators, Reviewers, ZoomGrants, and Add New), 'New Items Submitted', 'Tasks', and 'ZoomGrants Demo Account General Instructions'. The main content area shows 'Current Programs' with tabs for 'All Programs' and 'Add a Program'. It lists three programs: 'Emergency Housing and Living Assistance', 'CDBG/HOME Application', and 'ZG CDBG - Acquisition, Construction, and Services', each with a 'closed' status and a 'Deadline Date Required' note. Each program has a 'Dashboard' and 'Program Setup' button, along with links for 'Survey/Follow Up', 'Invoices', 'Apps as PDF', 'Apps as CSV', and 'Documents'.

(your organization's logo goes here)

Welcome, ZoomGrants Demo Not ZoomGrants Demo?

HELP LOGOUT A A A

See Without Custom Colors

Account Settings Programs Search Search

### Announcements

Administrators Reviewers ZoomGrants Add New

+ Show Announcements

1 total messages

### New Items Submitted

+ Show New Items

### Tasks

### ZoomGrants Demo Account General Instructions

Add General Instructions

### Current Programs All Programs Add a Program

#### ★ My Favorite Programs

★ **Emergency Housing and Living Assistance**  
closed 9/30/2020

Community Development

★ **CDBG/HOME Application**  
closed manually Deadline Date Required

Community Development

★ **ZG CDBG - Acquisition, Construction, and Services**  
closed manually Deadline Date Required

Dashboard Program Setup

[Survey/Follow Up](#) | [Invoices](#)  
[Apps as PDF](#), [Apps as CSV](#), [Documents](#)

Dashboard Program Setup

[Reports](#) | [Invoices](#)  
[Apps as PDF](#), [Apps as CSV](#), [Documents](#)

Dashboard Program Setup

[Beneficiary Reporting](#) | [Invoices](#)  
[Apps as PDF](#), [Apps as CSV](#), [Documents](#)

# ZoomGrants - What It Can Do

**Neighborhood Services Department** Neighborhood Services Department

2020 County Program Support Grant

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

**Dashboard** Applications Scoring Funding Allocations Financial Reporting Data Program Setup

## Program Dashboard

### Announcements

Administrators **Reviewers** Applicants

Add New

+ Show Announcements

0 total messages

### Applications

Approved Declined Undecided Not Submitted

Category	Approved	Declined	Undecided	Not Submitted
Official Decisions	11	4	0	5
Pre-Application Decisions	20	0	0	0

\$ 66,500.00 Approved

15 Submitted [View All](#)

### Financial

Paid Approved Pending Remaining

\$ 70,000.00

[Show Financial Details](#)

### New Items Submitted

Hide New Items

Click column header to sort [Mark All as Read](#)

Date Submitted	Item	Application
6/16/2020	<a href="#">Report</a>	Homelessness Prevention Program
6/16/2020	<a href="#">Report</a>	Veterans Emergency Assistance Program
6/16/2020	<a href="#">Report</a>	Rotary Club
7/17/2020	<a href="#">Report</a>	Youth Mentoring Program

### Monitoring Status

Not Assigned Monitoring Visit Scheduled Monitoring Visit Completed No Monitoring Visit Required

Status	Count
Not Assigned	3
Monitoring Visit Scheduled	2

### Saved Reports

Agency Contact Information	<a href="#">View</a> <a href="#">Export</a>
Scoring Report	<a href="#">View</a> <a href="#">Export</a>
List of Applicants	<a href="#">View</a> <a href="#">Export</a>

### Activity Stream

11/17/2020 7:35:49 AM 138739-118470 (Seniors Helping Seniors) Reimbursement Requests 1234 submitted by recip@zoomgrants.com

11/12/2020 6:49:48 AM 138867 (Therapy Services Program) Report 4 submitted by recip4@zoomgrants.com



# ZoomGrants

## Top 10 Best Practices for Grant Administrators

# ZoomGrants' Top 10 Best Practices for Grant Administrators

#10

## 10. Rely on Community Partners

- Instead of creating a new grant program, collaborate with local partners (non-profits, faith-based organizations, local chambers of commerce, etc.) to help disburse funding:
  - Systems and staff capacity in place to provide assistance to applicants of direct assistance grant programs, perhaps which maintain existing waitlists for those eligible for services.
  - Established relationships with households in the community, including hard-to-reach and underserved low-income populations and small business owners.
  - Lead grant administrator provides application materials, training on procedure to create consistencies in the monitoring/oversight across agencies.



# ZoomGrants' Top 10 Best Practices for Grant Administrators

#9

## 9. Plan ahead

- For high-volume grant programs, do some research to get an estimate of how many applications you could receive, compared with how much funding there is to allocate.
- Create a hard limit of how many applications you will accept, how you will prioritize funding.
- Consider a pre-application or eligibility quiz before letting anyone officially apply.
- Make sure you capture EVERYTHING you need from the applicants. It is very hard to go back to them to get more information!



# ZoomGrants' Top 10 Best Practices for Grant Administrators

#8

## 8. Hire Consultants/Subcontractors if needed

- Consulting Agencies already have knowledgeable staff with technical expertise.
- More cost effective for temporary hiring needs and staff transition.
- Consultants can often be hired more quickly.

# ZoomGrants' Top 10 Best Practices for Grant Administrators

#7

## 7. Don't Try to Reinvent the Wheel

- Use a neighboring jurisdiction organization's successful grant program as a model or template for your own application and grant management process, which creates data consistencies.
- Saves administrators time by allowing Grant Funding Opportunities to launch more quickly and be processed more quickly.



# ZoomGrants' Top 10 Best Practices for Grant Administrators

#6

## 6. Communicate Clear Instructions to Applicants

- Although they may not all read them, be sure to include clear and redundant instructions to applicants about eligibility, required documents, deadlines, expected timeframes for decisions, etc.
- Create a 'Frequently Asked Questions' document, provide link on your website or within the online application.

# ZoomGrants' Top 10 Best Practices for Grant Administrators

#5

## 5. Set Realistic Timeframes for Review, Decisions and Disbursements

- Applications require extensive administrative review and time to verify the information presented by applicants - especially if additional information is required.
- Reviewers/Committees who evaluate and score applications may need ample time to review and/or score.
- Communicate these timeframes to Applicants.



# ZoomGrants' Top 10 Best Practices for Grant Administrators

#4

## 4. Use an Online Cloud-based Software to Manage Applications and Grant Compliance

- You will save an enormous amount of administrative staff time and costs.
- With more people working from home, paper-based applications and grant management monitoring responsibilities are more difficult without the proper application and grant management software.
- Assists in staff transition as all records are organized in one place.

# ZoomGrants' Top 10 Best Practices for Grant Administrators

#3

## 3. Procure from companies in the United States.

- In reviewing purchase of software options or evaluating consulting services and subcontractors to remotely assist, be sure that the vendor selected to provide services is **designed, built and supported in the United States.**
- Important to consider how and where your data will be stored, file types accepted, admin, applicant and reviewer technical support needs, and how your organization's funds will be invested.



# ZoomGrants' Top 10 Best Practices for Grant Administrators

#2

## 2. Keep it Simple

- Build questions and content which will be easy to understand and make sense to the applicant, the reviewer, and admins. Consider how data reports may be created easily by reviewers and administrators using that data.
- Ask only for the information that the admin and reviewer needs to evaluate the application for eligibility, or report on outcomes and beneficiary data. As the saying goes, don't ask a question you don't want or need to know the answer to!

# ZoomGrants' Top 10 Best Practices for Grant Administrators

#1

## 1. Ask Questions

- Reach out to fellow members of Ohio Conference of Community Development (OCCD) and other associations you may belong to.
- Contact neighboring colleagues and organizations in the public and private sector operating similar programs nationally.
- Contact ZoomGrants staff to connect you with peers or to see if we have a best practice template programs with grant application and grant compliance monitoring content to help you get started.



# ZoomGrants Questions?

Visit the ZoomGrants website for more info:

[www.zoomgrants.com](http://www.zoomgrants.com)

To request a demo, proposal with pricing, or help answer questions you may have, please email [Sales@ZoomGrants.com](mailto:Sales@ZoomGrants.com) or call (866) 323-5404 ext. 1.