Grantmaking Orientation

Board of Directors 2024

Humanities
MONTANA

Agenda

Introductions

Grantmaking Overview

Board Member Tools & Resources

Reviewer Responsibilities

Application Review Best Practices

Reviewing, Scoring, and Discussing Applications

Humanities Montana Grantmaking Overview

Purpose of Subawards

To advance humanities programming across the state by providing financial assistance to organizations and individuals working to increase public access to humanities topics, themes, and ideas.

Process of Granting Subawards

Humanities Montana serves as a Pass-Through Entity (PTE) for federal funding made available through our General Operating Support (GOS) awards from NEH.

The application process is open to the public and competitive and subject to a limited amount of funding as outlined in HM's annual budget.

Grants Offered

Humanities Montana currently offers the following **five funding opportunities**:

- **Big Sky Reads** $500 stipends to support public book clubs
- **Mini-Grants** Up to $2,000 to support smaller and/or immediate humanities programming needs
- **Community Project Grants** Over $2,000 and up to $10,000 to support humanities projects
- **Research Fellowships** Up to $4,000 to support research and public programming (this program is currently under review)
- **Film + Video Grants** (3 stages)

  Up to $8,000 for pre-production

  Up to $10,000 for production

  Up to $10,000 for post-production

Current Grant Cycles

The current **grantmaking cycle** is as follows:

- **Rolling** application deadline

  Big Sky Reads & Mini-Grants

- **December 1** deadline

  Community Project Grants & (Research Fellowships)

- **April 1** deadline

  Community Project Grants

- **August 1** deadline

  Community Project Grants & Film + Video Grants

Board Member Tools & Resources – BOARD PORTAL

Board Portal

- Grantmaking Toolkit *(board resources folder)*
- Scoring rubric *(board resources folder)*
- Evaluation form questions *(grants committee folder)*

Reviewer Tips!

Board Portal Access

Video tutorial: https://youtu.be/EFWeHW9LqQk

Login information:

- ✓ URL: https://www.humanitiesmontana.org/board-portal/
- ✓ Username: your email address used for all HM communication
- ✓ *Password reset:* Enter any incorrect password in the password field on the login page and you will then be prompted to reset your password.
- ✓ *If you need assistance, email megan.sundy@humanitiesmontana.org.*

Board Member Tools & Resources - WEBSITE

HumanitiesMontana.org

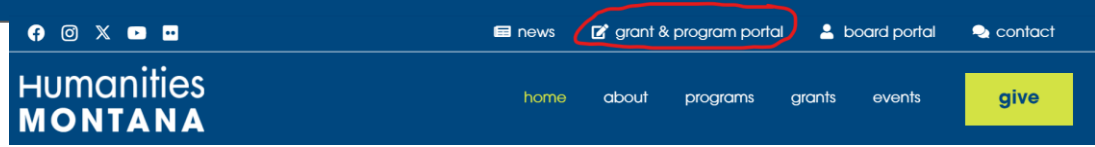
- Grants Awarded
- Grant Resources
- Grants News
- **Grant Guidelines**
- **Application Question Lists**

Board Member Tools & Resources - FOUNDANT

Foundant

online grant management system

- View submitted and assigned applications
- Review, score, and comment on applications
- Search organization request and award histories
- View shared documents



Reviewer Tips!

Foundant Access

Video tutorials:

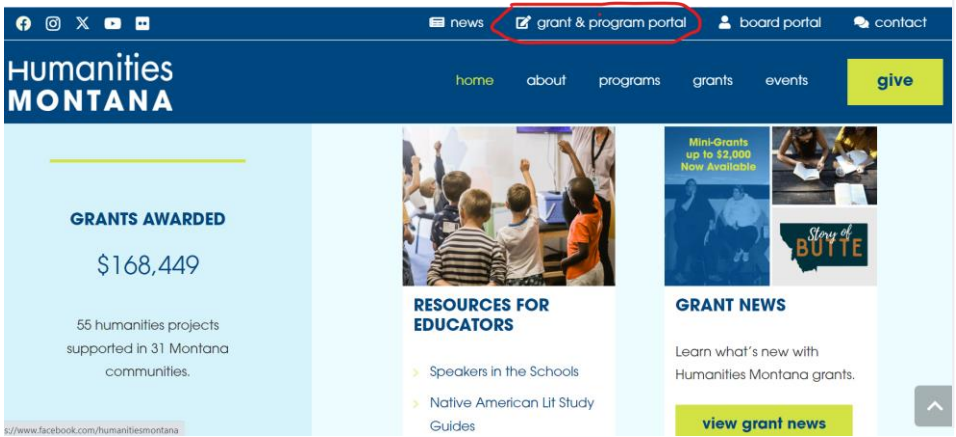
1. Board Member Evaluation Tutorial
2. General Evaluation Tutorial

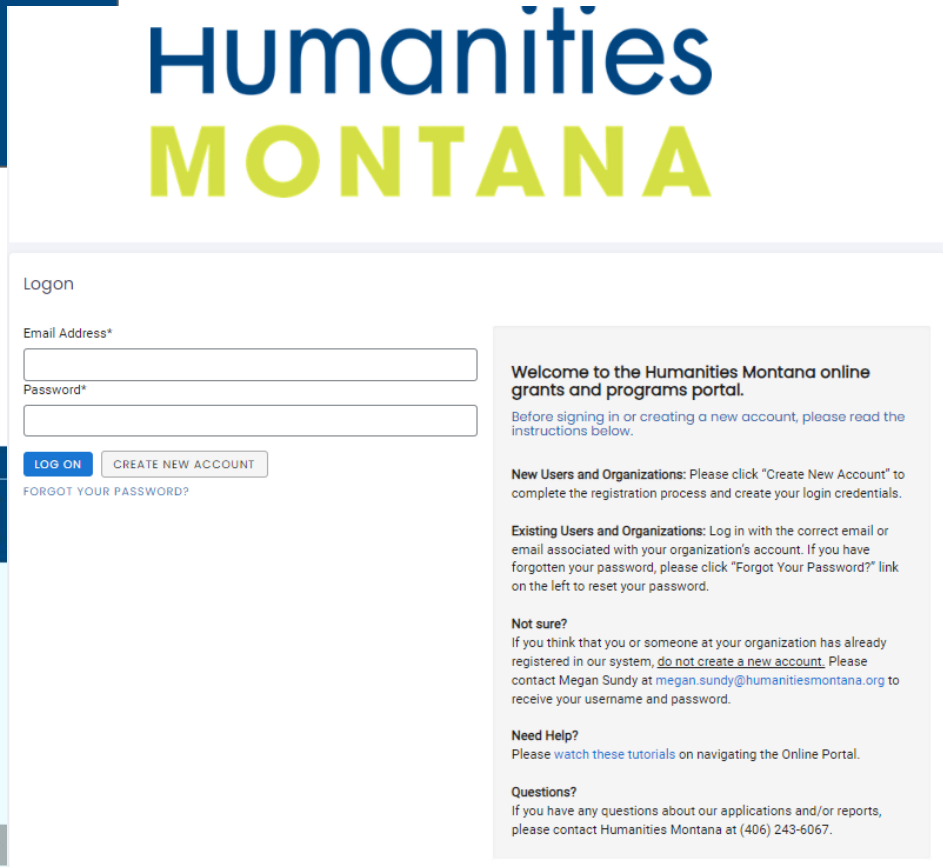
Login information:

- ✓ URL: https://www.grantinterface.com/Home/Logon?urlkey=humanitiesmt
- ✓ Username: your email address
- ✓ Password: montana (new users only)
- ✓ *Forgotten password*: Select "Forgot your Password?" on the login page or email megan.sundy@humanitiesmontana.org

FOUNDANT

Access Foundant from humanitiesmontana.org





Application Reviewer Responsibilities

- Score applications against published criteria (scoring rubric).
- Provide scores and written comments on each application that will help other reviewers and applicants.
- Recommend approval or disapproval of awarding requested funds.
- Review and discuss the merit/numerical evaluation of each application based solely on scores assigned by reviewers.
- Increase transparency of the funding process by sharing comments and scores with applicants as summaries of panel reviews or actual comments.

Application Review Best Practices

Help maintain **confidentiality** by keeping applicant, organization, and application status private.

Help ensure **integrity** by acknowledging any known or potential conflicts of interest.

Foster **accessibility** by adhering to HM's commitment to IDEA when reviewing applications.

Exercise **fairness** in the review process by using our published scoring rubric.

Encourage **excellence** by evaluating projects according to our expectations outlined in the grant guidelines.

Contribute to **efficiency** by reviewing applications thoroughly and promptly.

Implement **transparency** by adhering to federal regulations for administering NEH subawards.

Critically **assess issues of advocacy** and/or content.

Reviewing, Scoring, and Discussing Applications

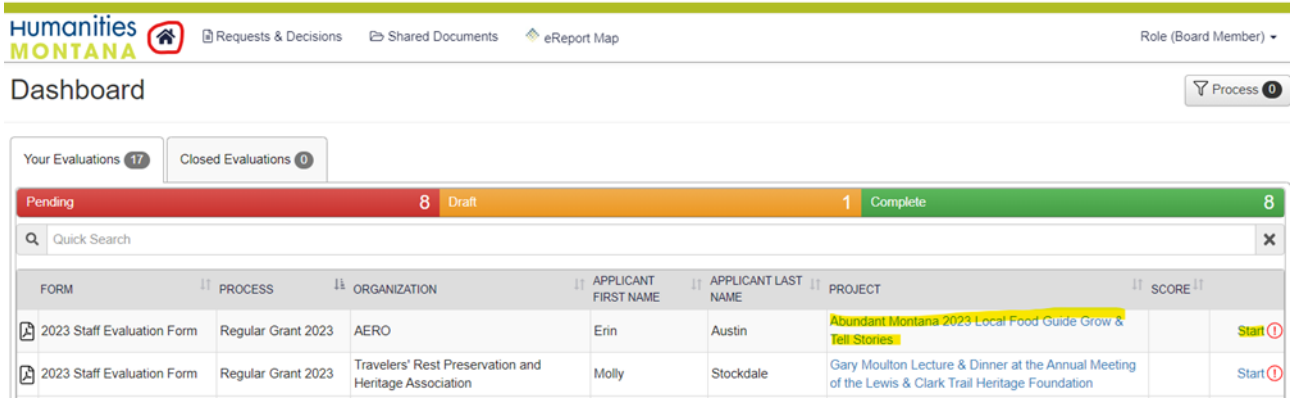
Step One - Review email from HM's Grants and Evaluation Director

- Read summary of applications received.
- Review grant guidelines, application questions, and scoring rubric.
- Add review deadline to your calendar and schedule ample time to review applications.

Reviewing, Scoring & Discussing Applications

Step Two – Access Foundant Account

Log in to your Foundant account and locate applications assigned for your review by clicking on the house button as pictured below, then clicking on Start, Continue, or Update.



Watch the following tutorial videos:

- Board Member Evaluation Tutorial
- General Evaluation Tutorial

Reviewing, Scoring & Discussing Applications

Step Three – Review, Score, and Comment in Foundant

- Identify applications that have not yet been reviewed and/or applications that have been identified as having a low number of completed evaluations.
- Review each application and provide scores and comments using the scoring rubric. Your scores will be tied to descriptions included in the rubric and provided as feedback to applicants upon request.

Crafting Constructive Comments

Reviewer Tips!

Effective comments ...
✓ are presented in a constructive manner.
✓ are concise, specific, and easy to read and understand.
✓ reflect the resources of the institution.
✓ are specific to the individual application.
✓ reflect the numeric score assigned.
✓ reflect the application's strengths and identify areas for improvement.
✓ are directed to applicants for their use.

Poor comments...
☒ simply summarize or paraphrase the applicant's own words.
☒ make derogatory remarks.
☒ penalize an applicant because you feel the institution does not need the money.
☒ offer or ask for irrelevant or extraneous information.
☒ make vague or overly general statements.
☒ question an applicant's honesty or integrity.
☒ are presented as the reviewer's personal or political opinions unrelated to the content of the application.

Reviewing, Scoring & Discussing Applications

Step Four –Discuss Applications & Make Recommendations
(Grants Committee)

- Review requested amount vs. available funds.
- Review application scores and comments from staff and board reviewers.
- Committee members elevate lower-scoring applications for consideration and assign new scores accordingly, if needed.
- Discuss merit of the highest scoring projects (e.g., 80% or higher) and address questions or concerns.
- Determine award and decline recommendations to the full board of directors.

Crafting Constructive Comments

Reviewer Tips!

Discussion comments...
Comments shared during this discussion will be recorded and included in the committee meeting minutes.
The committee meeting minutes will be included in the board packet.
Recorded comments will be provided as feedback to applicants upon request.

Reviewing, Scoring & Discussing Applications

Step Five –Award Decisions (All Board Members)

- Committee Chair provides report to full board of directors during scheduled board meeting and makes recommendations for subaward decisions.
- Full board of directors finalize award decisions.
- Board members' comments are recorded in meeting minutes and will be accessible to the grants and evaluation director for inclusion in feedback to applicants, upon request.

Thank you!

Staff Contact Information

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Grants and Evaluation Director

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megan.sundy@humanitiesmontana.org

LINKS

- Recorded Grantmaking Orientation for Board Members 01/16/2024
- FOUNDANT - Board Member Evaluation Tutorial
- BOARD PORTAL - Tutorial