Humanities
MONTANA

Grantmaking Toolkit

BOARD OF DIRECTORS & GRANTS COMMITTEE MEMBERS

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Introduction

To advance humanities programming in Montana we provide financial support to organizations and individuals working to facilitate humanities-focused projects through our grantmaking. We offer several competitive funding opportunities each year and work closely with applicants to ensure project goals and activities align with our mission and vision. This toolkit offers guidance for board members reviewing applications and making award decisions.

Humanities Montana Grantmaking Overview

The National Endowment for the Humanities (NEH), established in 1965, works to advance knowledge and understanding of the humanities and increase public awareness of, access to, and support for the humanities throughout the United States. As Montana's state humanities council, Humanities Montana receives general operating support through the NEH's Office of Federal/State Partnership (Fed/State) and serves as a Pass-Through Entity (PTE) for subawards administered to local and regional organizations and individuals (research fellowships only). As stewards of congressionally appropriated funds, Humanities Montana is responsible for acting in compliance with the Code of Federal Regulations 2 CFR Part 200 and supporting projects and organizations that will…

"…develop and support inclusive, meaningful programming that is grounded in rich, well-vetted humanities content; to engage diverse audiences with humanities ideas, to serve as models of excellent nonprofit management; to maintain open communication, mutual support and collaboration, and shared goals with NEH and other councils; and to exercise responsible and impeccable stewardship of public—and all—funds entrusted to them." *From <https://www.neh.gov/divisions/fedstate>*

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

- **Big Sky Reads** *(HM staff responsible for review and award decisions)*

  $500 stipends to support public book clubs

- **Mini-Grants** *(Executive Director and Board Chair responsible for review and award decisions)*

  Up to $2,000 to support smaller and/or immediate humanities programming needs

- **Community Project Grants** *(HM staff and board of directors responsible for review and award decisions)*

  Over $2,000 and up to $10,000 to support humanities projects

- **Research Fellowships** *(HM staff and board of directors responsible for review and award decisions)*

  Up to $4,000 to support research and public programming (this program is currently under review)

- **Film + Video Grants** (3 stages) *(HM staff and board of directors responsible for review and award decisions)*

  Up to $8,000 for pre-production

  Up to $10,000 for production

  Up to $10,000 for post-production

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

Reviewer Responsibilities

As stewards of federal funding, we are required to conduct a formal evaluation of all subaward applications. The following guidelines are based on 2 CFR 200.205, NEH advisement, and national grantmaking standards.

- Scoring against unpublished criteria or changing criteria without notification to applicants should be prohibited.

- In addition to providing a score, reviewers should be required to provide written comments on each application.

- Reviewers may recommend approval or disapproval.

- Reviewers should be told whether their comments or names will be provided to applicants.

- After the reviewers have completed their ratings, an aggregate numerical list reflecting the relative merit of each application should be prepared.

- This numerical evaluation should be based solely on scores assigned by reviewers.

- Many pass-through entities create summaries of panel reviews or the actual raw reviewer comments for transmission to all applicants. This not only increases the transparency of the funding process, but also gives successful applicants insight to areas where they need to focus attention during project implementation. For unsuccessful applicants, the reviewer comments can help them improve their project design and application for the next funding round.

Board Member Tools & Resources

- ❖ **HM website** grant category pages, grants awarded, and grants resources

  - ○ **Grants Awarded**

  - ○ **Grants Resources**

  - ○ **Grants News**

  - ○ **Big Sky Reads**

  - ○ **Mini-Grants**

    - ▪ Guidelines

    - ▪ Application Question List

  - ○ **Community Project Grants**

    - ▪ Guidelines

    - ▪ Letter of Inquiry (LOI) Question List

    - ▪ Application Question List

  - ○ **Research Fellowships** (under review)

    - ▪ Guidelines (in revision)

    - ▪ Letter of Inquiry (LOI) Question List (in revision)

    - ▪ Application Question List (in revision)

  - ○ **Film + Video Grants**

    - ▪ Guidelines (in revision)

    - ▪ Letter of Inquiry (LOI) Question List (in revision)

    - ▪ Application Question List (in revision)

- ❖ **HM board portal** – grantmaking resources for board members

  - ○ 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.*

❖ **Foundant** – online grant management system

    o View submitted and assigned applications

    o Review, score, and comment on applications

    o Search organization request and award histories

    o 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

Evaluation Best Practices

- Help maintain **confidentiality** of applicant and organization information, by not sharing your Foundant account access with another person and shredding any printed application materials after the review process is complete.

- Help ensure the **integrity** of our grantmaking and evaluation process by acknowledging any known or potential conflicts of interest and recusing yourself as a reviewer when appropriate.

- Foster **accessibility** in our grantmaking by adhering to HM's commitment to IDEA when reviewing applications.

- Exercise **fairness** in the review process by using our guidelines and published scoring rubric to minimize bias and subjective judgement in our decision-making.

- Encourage **excellence** in our grantmaking by evaluating projects according to our expectations that proposals are professional, adhere to our published guidelines, and are feasible.

- Contribute to our grantmaking **efficiency** by reviewing applications thoroughly and in a timely manner.

- Implement **transparency** in our grantmaking by adhering to federal uniform guidance regulations for administering NEH subawards, utilizing funding opportunity resources, and maintaining current board member profiles on the organization's website.

- Critically **assess issues of advocacy** and/or content that may elicit bias from personal ideological worldviews (political, social, cultural, religious, etc.). Consider this commentary on advocacy authored by former board member, Henry Gonshak:

  Humanities Montana realizes the difficulty of devising a just and workable policy on the issue of advocacy, but we also comprehend how crucial it is that we address this question directly and in all its complexity. While Humanities Montana recognizes how important it is not to allocate taxpayer money to projects that push some narrow political, social, or religious agenda, we also understand that if we demand that, in order to receive funding, projects must suppress the expression of any point-of-view whatsoever, we risk receiving proposals which are banal and lacking intellectual rigor. We are also committed to funding projects which express a broad range of social, political and ideological perspectives.

  In short, while Humanities Montana discourages proposal which advance "advocacy" in the sense of openly calling for the implementation of a specific course of social or political action, we welcome proposals which demonstrate "advocacy" in the sense of stimulating critical reflection by employing established scholarly techniques or argumentation and persuasion.

  Proposers and board members concerned about the issue of advocacy might consider some of the following questions:

- Is the proposal admirably provocative and inspiring of heartfelt emotions, without being objectionably propagandistic by stirring feelings alone at the expense of rational thought?

- Has the project avoided a highly sensationalized presentation, while using accepted standards of intellectual discourse (e.g., clarity of expressions, support of views, logical argumentation, etc.)?

- Is the project balanced, thorough and open-ended enough that one's audience is critically engaged, inspired to question and challenge?

- In the case of conference proposals, have the planners made an attempt to solicit participants representing a diversity of perspectives on the topic under discussion?

- And, adds member Joan Hoff, government or other institutional, academic, or media programs that present primarily an *establishment* point of view on any topic must be encouraged to include dissenting voices. Board, staff members, or evaluators should monitor such programs to ensure such balance.
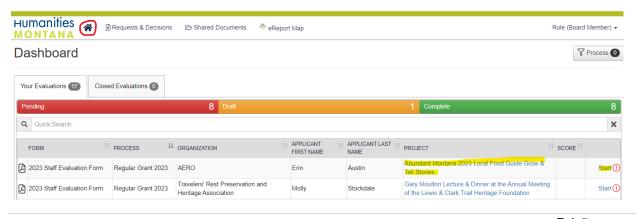
Reviewing, Scoring & Discussing Applications

Step One - Review email from HM Grants Manager

- Read summary of grant cycle and applications received.

- Review grant guidelines, application questions, and scoring rubric.

Step Two – Access Foundant Account

- Watch the following tutorial videos:

  - [Board Member Evaluation Tutorial](#)

  - [General Evaluation Tutorial](#)

- 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*.

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.

Reviewer Tips!

Effective comments …	Poor comments...
✓ are presented in a constructive manner.	☒ simply summarize or paraphrase the applicant's own words.
✓ are concise, specific, and easy to read and understand.	☒ make derogatory remarks.
✓ reflect the resources of the institution.	☒ penalize an applicant because you feel the institution does not need the money.
✓ are specific to the individual application.	☒ offer or ask for irrelevant or extraneous information.
✓ reflect the numeric score assigned.	☒ make vague or overly general statements.
✓ reflect the application's strengths and identify areas for improvement.	☒ question an applicant's honesty or integrity.
✓ are directed to applicants for their use.	☒ are presented as the reviewer's personal or political opinions unrelated to the content of the application.

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

- Review overview of requested amount vs. available funds.

- Review application scores and comments from staff and board reviewers.

- Offer opportunity for committee members to elevate lower scoring applications for consideration and assign new scores accordingly.

- Discuss merit of the highest scoring projects (e.g., 80% or higher) and address questions or concerns.

- Determine semi-finalists for recommendations to the full board of directors.

- Recommend decline rational for all other applications.

- Vote on semi-finalist recommendations.

- Request follow-up with applicants, if needed.

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.

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 (approve and decline rationale).

- 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 applicant, upon request.

Additional Resources

- Decline Rationale document (provided upon request)
- Code of Federal Regulations for Subawarding Pass Through Entities – 2 CFR Part 200

Staff Contact Information

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Humanities MONTANA | *Humanities Montana serves Montana's multicultural communities through stories and conversation. We offer experiences that nurture imagination and ideas by speaking to Montanans' diverse history, literature, and philosophy.*