



**SHARE** new mexico

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## **COMMON ONLINE GRANT APPLICATION**

### **A GUIDE FOR GRANTMAKERS**

September 2018




## Getting Started

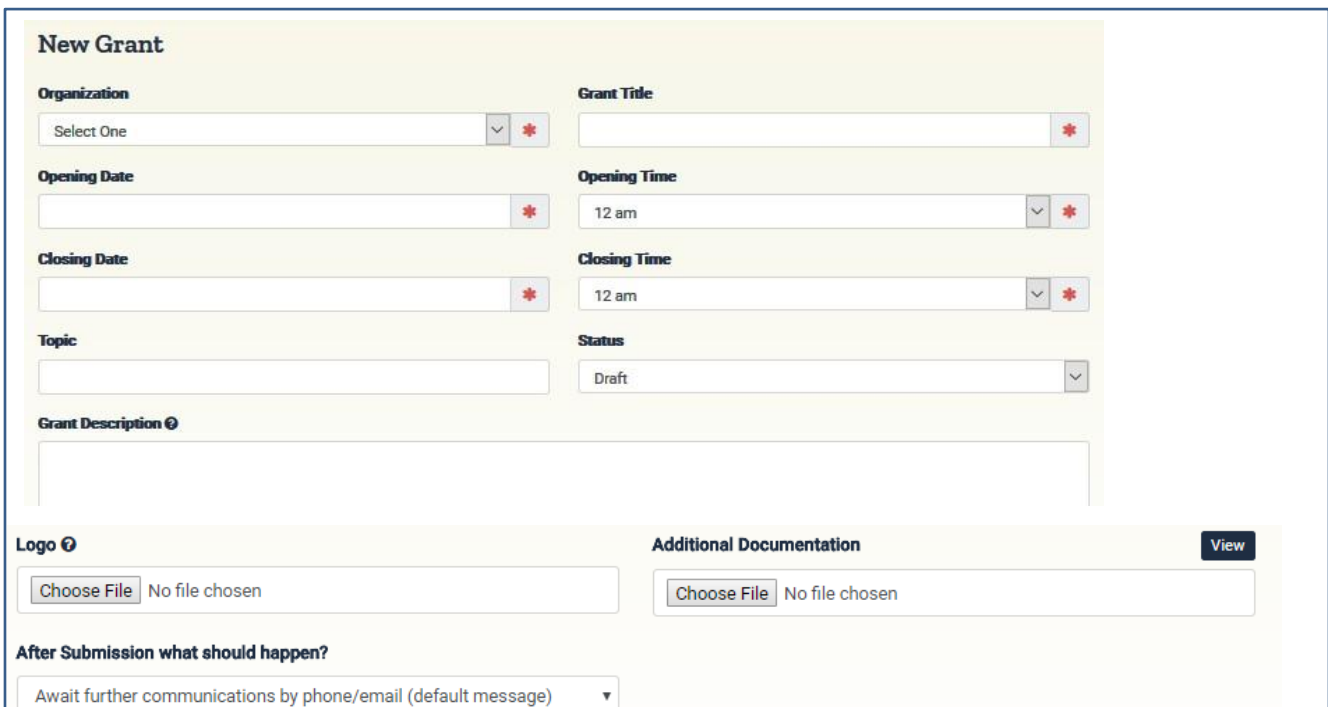
In order to post a grant using the Common Grant Application and Reporting process:

1. Your organization must be in the SHARE Directory with accurate and up-to-date information;
2. You must be registered with SHARE New Mexico and associated with your organization. When you register for SHARE you can select or create the organization with which you are associated. When you edit/save an organization profile, you are also associated with the organization. This organization should appear in your mySHARE/Organizations folder.
3. You must be subscribed to the grantmaking system (contact [Wendy@ShareNM.org](mailto:Wendy@ShareNM.org))

## Add a New Grant

**Step 1:** Log into SHARE New Mexico and open the Grants and Funding page. Under “I’m a Funder,” click on “Add a Grant”

**Step 2 - Grant Description:** A pop-up form will appear, and you can complete the questions describing your grant opportunity. You can also opt to add your logo or additional, more detailed documentation to the grant posting. Click on the  for pop-up help.



**New Grant**

**Organization**  
Select One

**Grant Title**

**Opening Date**

**Opening Time**  
12 am

**Closing Date**

**Closing Time**  
12 am

**Topic**

**Status**  
Draft

**Grant Description**

**Logo**

**Additional Documentation** [View](#)

**After Submission what should happen?**  
Await further communications by phone/email (default message)

**Step 3: Select Documentation.** Select the documents that are required or optional for this grant application. These documents will be saved in a secured SHARE space for future use by applicants. If you required additional or specialized documentation, please describe and add a link to that document in the Grant Description (above).

## Grant Documentation

<b>Audit or financial statement</b>	<input type="radio"/> Required	<input checked="" type="radio"/> Optional	<input type="radio"/> Don't Request
<b>Annual report</b>	<input type="radio"/> Required	<input checked="" type="radio"/> Optional	<input type="radio"/> Don't Request
<b>IRS letter of determination</b>	<input type="radio"/> Required	<input checked="" type="radio"/> Optional	<input type="radio"/> Don't Request
<b>Latest IRS Form 990</b>	<input type="radio"/> Required	<input checked="" type="radio"/> Optional	<input type="radio"/> Don't Request
<b>Proof of current registration with NM attorney general</b>	<input type="radio"/> Required	<input checked="" type="radio"/> Optional	<input type="radio"/> Don't Request
<b>Proof of good standing with NM Secretary of State</b>	<input type="radio"/> Required	<input checked="" type="radio"/> Optional	<input type="radio"/> Don't Request

**Step 4: Common Questions.** The following questions are standard for all grant applications. The common grant application draws from the organization's SHARE profile to pre-populate these fields.

### Application To Test Grant

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**Organization Information**

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<b>Organization</b>	SHARE New Mexico	<b>DBA</b>	
<b>Department/Program/Location</b>		<b>Street Address</b>	2155 Louisiana Ave. NE, Suite 1001
<b>City</b>	Albuquerque	<b>State</b>	NM
<b>Zip Code</b>	87110	<b>Website</b>	www.sharenm.org
<b>Year Founded</b>	2012	<b>Area Served</b>	Statewide
<b>EIN</b>			
<b>Mission Statement</b>	SHARE New Mexico is a free, state-wide community webpace for sharing information and promoting collaboraitve action to improve the quality of life of New Mexicans.		

These questions are also standard for all common grant applications and are answered by the applicant:

**Contact Information**

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<b>Highest Level Official Name:</b> Debi Randall	<b>Highest Level Official Phone:</b>	<b>Highest Level Official Email:</b> debi@sharenm.org
<b>Grant Contact Name:</b>	<b>Grant Contact Phone:</b>	<b>Grant Contact Email:</b>
<b>Fiscal Agent:</b> Debi Randall	<b>Fiscal Agent Phone:</b>	<b>Fiscal Agent Email:</b> debi@sharenm.org

**How does your project achieve the goals of the grant opportunity?**

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**Cover Letter**

I think we should have an education page, because its important and a lot of people are working on this statewide. There are opportunities for collaboration

### Step 5: Adding Custom Questions

In addition to these “common” questions, you have the option of adding questions that are specific to this grant.

1. A “New Question” pop-up form will ask you to indicate the Question Type and Question Text.
2. Click on the “Save” button to **create the answers** to your question (this is not required for a text box or text area question).
3. Select “Back to answer list” to review your answers for each question.
4. Select “Back to all questions” to review and edit your questions. When you have added all questions and answers, click on “Finish.”

### Step 6: Activate Your Grant.

As you are creating your grant, you will want to save it in draft format. When you are ready to post the grant, you can edit your grant and change the status from “Draft” to “Active.”

Active grants automatically become visible to the public at on the “Open Date/Time” specified. However, the “Submit” button will not be available after the “Close Date/Time” specified. The list of submitted applications has a date and time stamp to indicate when the application was submitted.

Note: You can edit your grant at any time, e.g., to extend the deadline. Edits will not apply to grants applications that have already been submitted.

## Make Awards and Create Reports

Your mySHARE/Grants dashboard will store information about all your grants, applicants, and reports.

### Step 1: Access the Grants Dashboard

You’ll find your grant applications listed in your mySHARE/Grants folder. Click on “Edit” to edit your grant application (note that changes will not apply to any applications already submitted). Click on “View” to see the grant as the applicant will see it. You can also Archive old grant applications and repost them at a later date.

TEST GRANT: Sponsor a SHARE Page	11/09/2017 12:00 AM	11/15/2017 07:00 PM	Draft	4 Applications	Edit	View	Process Awards	Archive
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### Step 2: Review Applicants

Click on the “x Applications” button (see above) to get a list of all applicants.

Organization	Submitted By	Status	
SHARE New Mexico	Debi Randall	Draft	<a href="#">View</a> <a href="#">Export Application</a> <a href="#">Export Packet</a>
The Grants Collective	Erin Hielkema	Draft	<a href="#">View</a> <a href="#">Export Application</a> <a href="#">Export Packet</a>
SHARE New Mexico	Wendy Wintermute	Submitted 11/09/2017 08:38:04 AM	<a href="#">View</a> <a href="#">Export Application</a> <a href="#">Export Packet</a> <a href="#">View Report</a>
SHARE New Mexico	Wendy Wintermute	Submitted 11/15/2017 06:31:55 PM	<a href="#">View</a> <a href="#">Export Application</a> <a href="#">Export Packet</a> <a href="#">View Report</a>

Showing 1 to 4 of 4 entries

Previous

[Export All Applications](#) [Export All Packets](#)

At this point you have several options for reviewing these applications:

1. Export Application: produces a PDF copy of a single application;
2. Export Packet: produces a zip file with PDF copies of the application and all submitted documents;
3. Export All Applications: produces a zip file with PDF copies of all applications;
4. Export All Packets: produces zip files with PDF copies of all applications and submitted documents.

You can then save and/or print these or email them to your grant review committee.

### Step 3: Process Awards and Create Grant Reports

Click on the “Process Awards” button to award grants to successful applicants and to create a grant report form.

TEST GRANT: Sponsor a SHARE Page	11/09/2017 12:00 AM	11/15/2017 07:00 PM	Draft	<a href="#">4 Applications</a>	<a href="#">Edit</a>	<a href="#">View</a>	<a href="#">Process Awards</a>	<a href="#">Archive</a>
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A pop-up form will ask you to select successful applicants and create an award.

**Process Awards For TEST GRANT: Sponsor a SHARE Page** [Proceed to Report Questions](#) [Back](#)

Here you can archive any applications that won't be getting an award and then enter award details for those that will be receiving an award. In the next step you will be able to create the grant award report that you will ask each of the grant recipients to complete. Grant reports are made up of standard questions, optional questions, and custom questions.

Actions:  View Options:

Organization	Status	Archived	Award
<input type="checkbox"/> SHARE New Mexico	Submitted 11/09/2017 08:38:04 AM	No	<a href="#">Create</a>

1. Check successful applicants, click on Create to enter the award information for each grantee.
2. Proceed to Report Questions to create a grant report. A number of questions are automatically answered in the grant report. These include information drawn from the original grant application, and information that the grantmaker will add when making the award.

Grant Award Details			
<b>Name Of Grant</b>	TEST GRANT: Sponsor a SHARE Page	<b>Description</b>	Help connect information, ideas, and people to create change in New Mexico. Sponsor a SHARE County or Initiative page.
<b>Funder</b>	SHARE New Mexico	<b>Recipient</b>	SHARE New Mexico
<b>Highest Level Official</b>	Debi Randall	<b>Application Contact</b>	Debi Randall
<b>Contact Email</b>	debi@sharenm.org	<b>Contact Phone</b>	(505) 346-2692
<b>Award Date</b>	11/09/2017	<b>Report Due Date</b>	11/10/2017
<b>Award Amount</b>	\$10,000.00	<b>Award Notes</b>	Welcome aboard
<b>Private Notes</b>	Great!		

In addition, these standard questions will appear on all reports:

- Have all grant funds been spent? (Yes/No)
- Describe any changes to the original grant budget that may have occurred. (text box)
- Final grant budget (upload document)
- What is a “dream tweet” we can share about this project? (text box, 140 character limit)
- Please provide a posting we can use on Facebook about this project.
- Upload one picture and/or video we can share publicly. (upload file)

Next, select from a menu of **optional questions**:

**Grant Report Optional Questions for TEST GRANT: Sponsor a SHARE Page**

Grant reports are made up of standard questions, optional questions, and custom questions. Here you can select which of the optional questions you would like to include in this grant report. In the next step you can create any custom questions that you would like to include in this grant report.

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<input checked="" type="checkbox"/> Describe the program’s activities and to what extent the intended activities were accomplished.	<input type="checkbox"/> How has your organization communicated this grant to the community, donors or constituents?
<input checked="" type="checkbox"/> Explain the impact your program has had on your target population. Put simply, who is better off and how are they better off because of the program?	<input type="checkbox"/> Please share ways the success of your program connects to addressing broader issues in the community?
<input type="checkbox"/> Summarize the key evaluation results related to your intended outcomes.	<input type="checkbox"/> Identify gaps in funding and/or program needs and suggest ways the funder could be helpful (e.g., are there other ways a funder could be supportive going forward that would extend beyond grant dollars?).
<input type="checkbox"/> From what unexpected outcomes and/or challenge(s) did you learn the most and how did this affect the direction of your program?	

Finally, you can add **customized questions**, creating questions and answers as you did for the grant application (see above).

## Notify Grantees

1. You can now advise each recipient of the award and reporting requirements using your standard format and process. The recipient can now log in to [ShareNM.org](http://ShareNM.org) and to view their applications and awards and to access and complete reports.

## Review Reports

When your grantees submit reports, you can find those also on your grants dashboard. Click on “View Report” to see the report, which you can save, print, or share.

SHARE New Mexico	Wendy Wintermute	Submitted 11/15/2017 06:31:55 PM	<a href="#">View</a>	<a href="#">Export Application</a>	<a href="#">Export Packet</a>	<a href="#">View Report</a>
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**Note:** You can return to your grants, applications, and reports at any time and edit any or all of the grant details, e.g., to extend a deadline. Your grants will be stored in mySHARE/Grants.

## Archive Grants or Applications

You can archive grants or applications and retrieve them in the future.

Actions			View Options
<input type="text" value="Archive Selected"/>			<input type="text" value="View All"/>
Organization	Status	Archived	<input type="text" value="View All"/>
<input checked="" type="checkbox"/> SHARE New Mexico	Submitted 11/09/2017 08:38:04 AM	No	<input type="text" value="View Only Submitted"/>
<input type="checkbox"/> SHARE New Mexico	Draft	No	<input type="text" value="View Archived"/>
<input type="checkbox"/> The Grants Collective	Draft	No	<input type="text" value="View Submitted Not Archived"/>
			<input type="text" value="View Awarded"/>

Questions? Suggestions? Contact [Wendy@ShareNM.org](mailto:Wendy@ShareNM.org)