Discretionary Grant Work Flow

Updated 6/26/2018

FOUNDATION receives Letter of Inquiry (LOI) from organization via GLM.

LOI is reviewed by Program Officer (PO) in consultation with President & CEO, if necessary. Organization is invited to submit a discretionary grant application if meets FOUNDATION's funding guidelines.

PO contacts organization with questions/comments/suggestions prior to submission of online application

FOUNDATION receives Discretionary Grant application via GLM.

Program & Communications Asst. (PCA) reviews the application, non-discrimination policy and budget, and then runs a GuideStar Charity Check Report on the applicant organization. Once all information is confirmed as correct, the application is marked complete.

PCA assigns the review/evaluation to the PO. Once the PO completes her review, she assigns a review/evaluation to President & CEO.

Grant approved or declined

If approved:

- PO contacts applicant w/ decision
- If approved for amount less than requested, grantee must submit a revised budget.
- Contract negotiated by PO (w/ assistance of President & CEO if necessary)

PO will notify the PCA of the disposition of the application and inform her of any special conditions for the approved grant. PCA approves grant in GLM verifying the grant amount, and assigning reporting requirements. (Approval email will be sent automatically when grant agreement is assigned.)

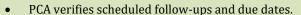
If declined:

• PO. phones applicant with decision



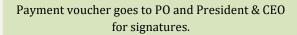
PO notifies Prog. Asst. of the disposition of application. Prog. Asst. marks application as declined in Foundant GLM.

Program Asst. sends declination email to applicant.

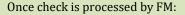


 PCA confirms electronic grant agreement has been sent to appropriate contact, after completing the above approval steps

DGM reviews signed grant agreement and creates payment voucher.



Payment voucher goes to FM. Signed PV is scanned and uploaded to GLM.



- DGM posts grant payment in GLM. FM posts to program budget.
- DGM verifies organization's CharityCheck report
- PCA generates cover letter and signs
- PCA sends check to Grantee (include cover letter).
- PCA attaches scanned copy of signed cover letter and a copy of the check to the request in GLM.