Blackbaud Grantmaking Application Programs

Grant programs allow you to manage the applicant/grantee experience and workflow. Each application workflow is recommended have a corresponding program set up.

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# Create Grant Program

The following are required when initially creating a new program:

## Default Program Language

This language will be set as the default program language in translations and cannot be changed after the program is created. Available languages will be limited to those enabled in the Portal Settings:

|  |  |  |  |
| --- | --- | --- | --- |
| Catalan | French (Canada) | Korean | Spanish (Spain) |
| Chinese (Simplified) | French (France) | Malay (Malasia) | Swedish (Sweden) |
| Chinese (Traditional) | German | Polish | Turkish |
| Czech | Greek | Portuguese (Brazil) | Ukrainian |
| Danish | Hindi | Portuguese (Portugal) | Welsh (United Kingdom) |
| Dutch (Netherlands) | Hungarian | Romanian (Romania) |  |
| English (British) | Italian | Russian |  |
| English (Canadian) | Japanese | Spanish (Mexico) |  |

# Program Details

A program's name, description, and other high-level details are typically the first view an Applicant has of a program when applying. These elements help to communicate the mission and purpose of the program.

## Program Name:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Time Zone:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Specify the time zone.

## Do not show cycle dates in applicant portal:

\_\_\_\_\_ Yes \_\_\_\_\_ No

Enable the **Do not show cycle dates in Applicant Portal** option to hide the program cycle dates from the Applicant. **Note:** If this option is disabled (i.e., left unchecked), then the program cycle dates will appear in the program's details in the Applicant Portal.

## Program description:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The program description will be visible to Applicants as well as Grant Managers, Internal Admins, etc. You can include details about the nature of the program, what the Applicant may expect during the application process, and even links to your organization's resources such as privacy policies.

## Program guidelines:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This can be a link to an external webpage or online document.

## Program Logo

Include file attachment

The recommended size for the image is 200 pixels by 200 pixels.

**Note:** The following file types are accepted: WEBP, TIF, TIFF, SVG, BMP, GIF, JPG, JPEG, and PNG.

**Program Background**

Include file attachment

The recommended size of this image is 1920 pixels by 1080 pixels.

**Note:** The following file types are accepted: WEBP, TIF, TIFF, SVG, BMP, GIF, JPG, JPEG, and PNG.

# Program Settings

Default settings for **Recipients**, **Collaboration**, **Program Emails**, and more are automatically configured when a program is created. These settings can be updated to further customize each program based on an organization's needs.

**Note:** Edits made to a program on the Program Detail page are saved automatically.

## Recipient

Specify who will be receiving and benefiting from the funds awarded for this program:

Select one of the following:

* **An individual applicant**
* **An organization**
  + Selecting **An organization** allows the system's search to access all the organizations registered.

## Organization Options

Allow Applicants to add organization not found in the database.

* The **Organization Options > Allow Applicants to add organization not found in the database** option can be enabled to allow Applicants to add their organizations if not found in the NPO database.

\_\_\_\_\_ Yes \_\_\_\_\_ No

## Organization Locations

Specify which countries and/or regions are eligible for this program. Only organizations in these locations will appear in the organization search.

Country(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Region(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Eligibility of Recurring Applications

Specify how many applications each organization can submit by selecting one of the following options:

* Allow multiple applications
  + Note: This is the default setting.
* Limit to one application for this program
* Limit to one application per cycle
* Limit to one application in the current cycle if there was an approved and awarded application in the previous cycle

If an option to limit applications was chosen, you can customize the error message that will appear to any applicants who choose an ineligible organization when creating their application. **Note:** A placeholder message for each option is provided in the Message to display text box. No message is needed if ‘**Allow multiple applications’**is selected.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Collaboration

By default, **Allow applicants to add additional applicants to aid in completing forms** is selected. Disable to prevent applicants from adding collaborators to the application.

\_\_\_\_\_ Yes \_\_\_\_\_ No

It is considered a best practice to have this option enabled.

## Program Emails: Logo

Use program logo for all emails related to this program:

\_\_\_\_\_ Yes \_\_\_\_\_ No

## Program Emails: Sender Display Name

Update the **Sender display name** if it differs from the organization’s default name. This name will be used in email body (where applicable), email signature, and in the **From** field for all outgoing emails associated with this program.

**Sender display name**:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Draft application reminder

Specify the number of days before a cycle ends when an email should be sent to all Applicants who have not submitted their draft applications: \_\_\_\_\_\_\_\_\_\_\_\_

## Form due reminder

Specify if Applicants should receive Form due reminder emails. These apply to additional forms added in the workflow that are given Due Dates. For forms related to requirements, standard Blackbaud Grantmaking reminders and email templates can also be used.

* Form Due – Applicant - Email is sent at a frequency set here after an application enters a workflow level and form is sent.
  + Enable: \_\_\_\_\_ Yes \_\_\_\_\_ No
  + Number of days before Due Date: \_\_\_\_\_\_\_\_\_\_\_\_
* Form Overdue – Applicant - Email is sent at a frequency set here after the form due date if form has not been submitted.
  + Enable: \_\_\_\_\_ Yes \_\_\_\_\_ No
  + Number of days after Due Date: \_\_\_\_\_\_\_\_\_\_\_\_

# Program Cycles

A program cycle is the period in which a program is accepting applications. The length of time will differ based on the program or client. This is useful if you want a program to open/close for a period of time, then reopen again at a later date.

**Tip:** All programs have at least one cycle. It is recommended to create meaningful cycles to aid in reporting - even for continuously run programs.

## Name:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provide a name for the cycle. **Note:** This is for internal use only. This will not be shown to applicants.

## Duration:

From \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Specify the period in which the program will accept applications by choosing the Start date and time and End date and time.

**Warning:** The Start and End dates should not overlap with another cycle in the program. If they do, an error message will appear prompting you to update the time frame.

You can set a program cycle to be Always Open if appropriate. Should the cycle always be open:

\_\_\_\_\_ Yes \_\_\_\_\_ No

## Budgets and Processing

*The default Budget (****Cash****) should be selected.*

# Program Forms

Grant programs typically use two primary forms that serve as the application. This includes the **Eligibility Form** (optional) and the Default Form (required). **Note:** These forms are managed in the **Forms** tab on the program's Program Detail page.

## Eligibility Form:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Select the appropriate eligibility form is applicable. If added, the messages for Successful Eligibility Submission and Unsuccessful Eligibility Submission can be set.

## Default Form:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Select the form to be used with this program.

# Workflow

When setting up a program, you are required to select a workflow to establish the flow of applications within the program. The **Default Workflow** is selected when the program is first created. The **Default Workflow Level** is the first workflow level to which applications are sent when they are first submitted.

Additional forms can be added that are a part of the workflow, forms with a Due Date can receive Form Reminders as listed previously.

Forms are categorized as follows:

|  |  |
| --- | --- |
| Request Forms | Requirement Forms |
| LOI | Additional Documentation |
| Request | Grant Agreement |
| Nomination | Progress Report |
| Other Applicant Form |  |

# Communications

System emails are automatically assigned to a program once it is created. These emails can be tailored for each individual program, allowing organizations to better customize how a program's mission and guidelines are communicated with Applicants and Grant Managers alike. This includes creating customized copies of email templates and assigning them to the program as well as deactivating any unrelated emails to ensure they are not sent.