NAVIGATING FOUNDANT

Boone Impact Group

Boone County Children's Services Fund

Columbia/Boone County Public Health & Human Services

HEART OF MISSOURI UNITED WAY

BOONE IMPACT GROUP (BIG) CONTACT INFORMATION

- **Boone County Community Services Department**:
  - communityservices@boonecountymo.org
  - (573) 886-4298
- **Columbia/Boone County Department of Public Health & Human Services**:
  - humanservices@como.gov
  - (573) 874-7488
- **Heart of Missouri United Way**:
  - communityimpact@uwheartmo.org
  - (573) 443-4523

INTRODUCTION

- This guide is to assist organizations applying or receiving funding for Boone County Children's Services Fund, City of Columbia's Social Services funding, and/or Heart of Missouri United Way.
- The Boone Impact Group (BIG) partners share the same web-based funding management system, operated by Foundant Technologies.
- The BIG partners switched to Foundant in 2025.

Boone County Children's Services Fund

city of Columbia

Columbia/Boone County Public Health & Human Services

HEART OF MISSOURI UNITED WAY

GENERIC GUIDES FOR APPLICANTS PRODUCED BY FOUNDANT

- GLM* Applicant Tutorial – Review materials under the tab "GLM Applicant Tutorial (New Dashboard)" only
  - https://support.foundant.com/hc/en-us/articles/4479853059991-GLM-Applicant-Tutorial
- Applicant Tutorial – Collaboration
  - https://support.foundant.com/hc/en-us/articles/4523887747223-Applicant-Tutorial-Collaboration
- Applicant Tutorial – Collaborator Tutorial (review 'Collaborator Experience (New Dashboard)' section)
  - https://support.foundant.com/hc/en-us/articles/28664505675927-Collaborator-Tutorial
- Applicant Tutorial – Submit a Follow Up Form
  - https://support.foundant.com/hc/en-us/articles/12131768824087-Applicant-Tutorial-Submit-a-Follow-Up-Form
- Applicant Tutorial – Copy Request
  - https://support.foundant.com/hc/en-us/articles/4523861991575-Applicant-Tutorial-Copy-Request

*GLM = Grant Lifecycle Manager (Foundant product term for BIG's funding management system)

- Some pages may refer to SLM (Scholarship Lifecycle Manager), which has a similar navigation to GLM

FOUNDANT GLOSSARY

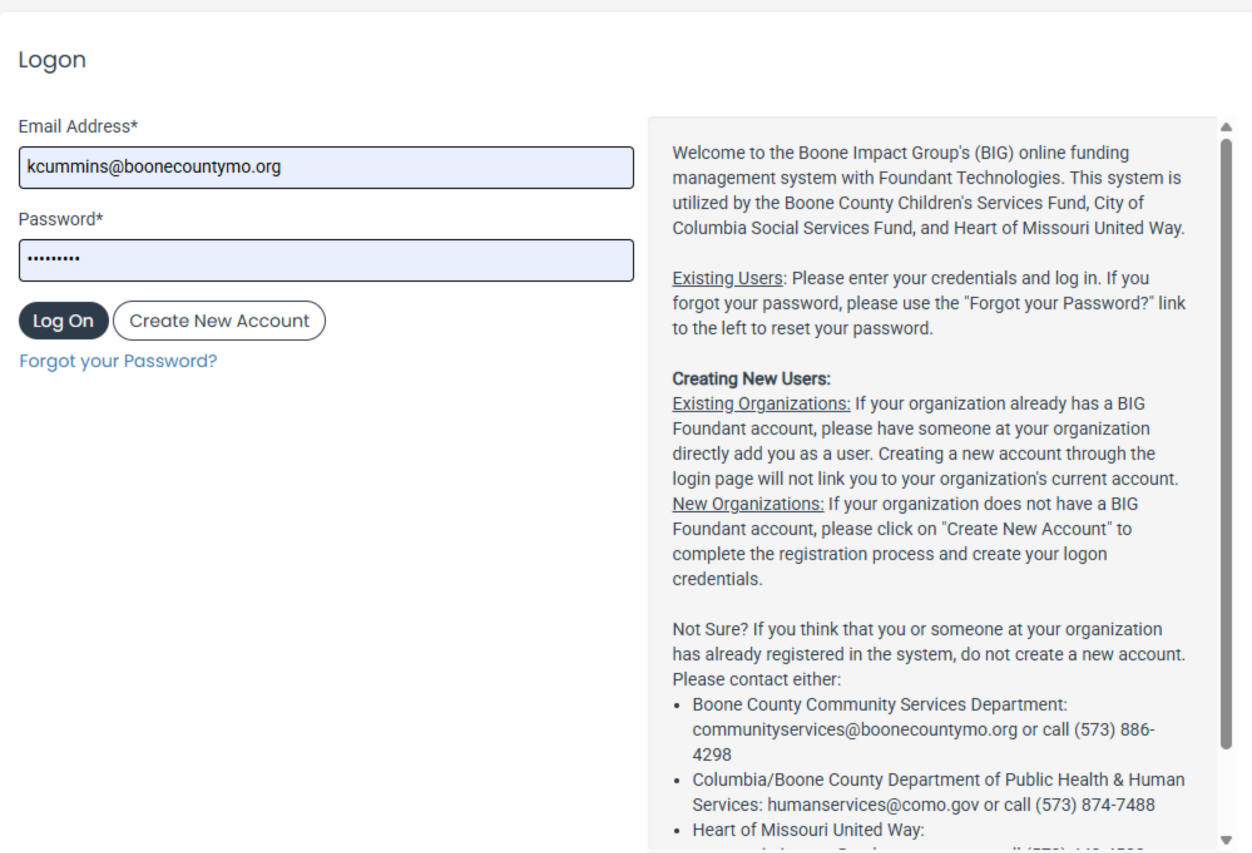
- **Dashboard -** When a user logs into the system, they land on this page.
- **Organization -** In a GLM site, each applicant is connected to an organization. At registration, each applicant provides information about their organization, establishing a record for that organization in the site. BIG Administrators can also add applicants and users.
- **Process -** The set of stages that a request goes through during its lifecycle. BIG Administrators build and customize each process before opening it to applicants. Typically, each funding opportunity is built as a separate process.
- **Request -** When an applicant starts the first form in a process, a request is created. The request houses all forms and information related to that request for the funding opportunity.
- **Request Status -** The status of a request reflects where it is located on its lifecycle in a GLM site.
- **Request Summary -** This page can be reached by clicking a request's project name.

ACCESSING THE SYSTEM AND CREATING AN ACCOUNT

ACCESSING THE SYSTEM

- BIG Foundant Site: https://www.grantinterface.com/Home/Logon?urlkey=boonecountymo
- Please make sure you login using your existing individual account before creating a new account.
- Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password?" link to the left to reset your password.
  - **Make sure you add the administrator@grantinterface.com email address to your safe senders list and check for any other security settings that could be blocking the email. Then request the link again.**
- **Creating New Users:**
  Existing Organizations: If your organization already has a BIG Foundant account, please have someone at your organization directly add you as a user. Creating a new account through the login page will not link you to your organization's current account.
  New Organizations: If your organization does not have a BIG Foundant account, please click on "Create New Account" to complete the registration process and create your logon credentials.

Boone Impact Group



CREATE AN ACCOUNT/LOG ON

If you clicked Create New Account, you will be asked to complete registration information for yourself and your organization. You will need the following information:

- Organization Information
  - Organization Name – please make sure the name is exactly how it appears with the State of Missouri.
    - Missouri Secretary of State – Business Entity Search: https://bsd.sos.mo.gov/BusinessEntity/BESearch.aspx?SearchType=0
  - EIN/Tax Id
  - Telephone Number
  - Address, City, State, and Postal Code

Once required fields are completed, click "Next" to enter User Information

- User Information
  - If your organization already has an account in the BIG GLM system, click "Copy Address from Organization" if it's the same for you.
  - First and Last Name
  - Position Title
  - Email/Username (plus re-entry for confirmation)
  - Preferred Contact Number

Once required fields are completed, click "Next" to enter Head of Organization Question

CREATE AN ACCOUNT/LOG ON (CONTINUED)

- Head of Organization Question
  - Answer Yes or No if you are the head of the organization.
  - If Yes, click "Next" to create your Password
  - If No, an additional section appears. Click "Next" to complete "Additional Head of Organization Information".
- Additional Head of Organization Information
  - Click "Copy Address from Organization" if it's the same information from the "Organization Information" section.
  - Provide First and Last Name
  - Position Title
  - Email

Once required fields are completed, click "Next" to create your Password.

Create your user password. Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#$%*()_

Click "Create Account". A new page will ask for an email confirmation. You will be receiving emails from the BIG GLM system about your request(s). To ensure you receive emails from this system we have sent you an email to confirm your account was created successfully. If you do not see an email from Boone Impact Group <administrator@grantinterface.com>, look in your junk or spam folder.

Select one of the options and click "Continue".

DASHBOARD & APPLY PAGE

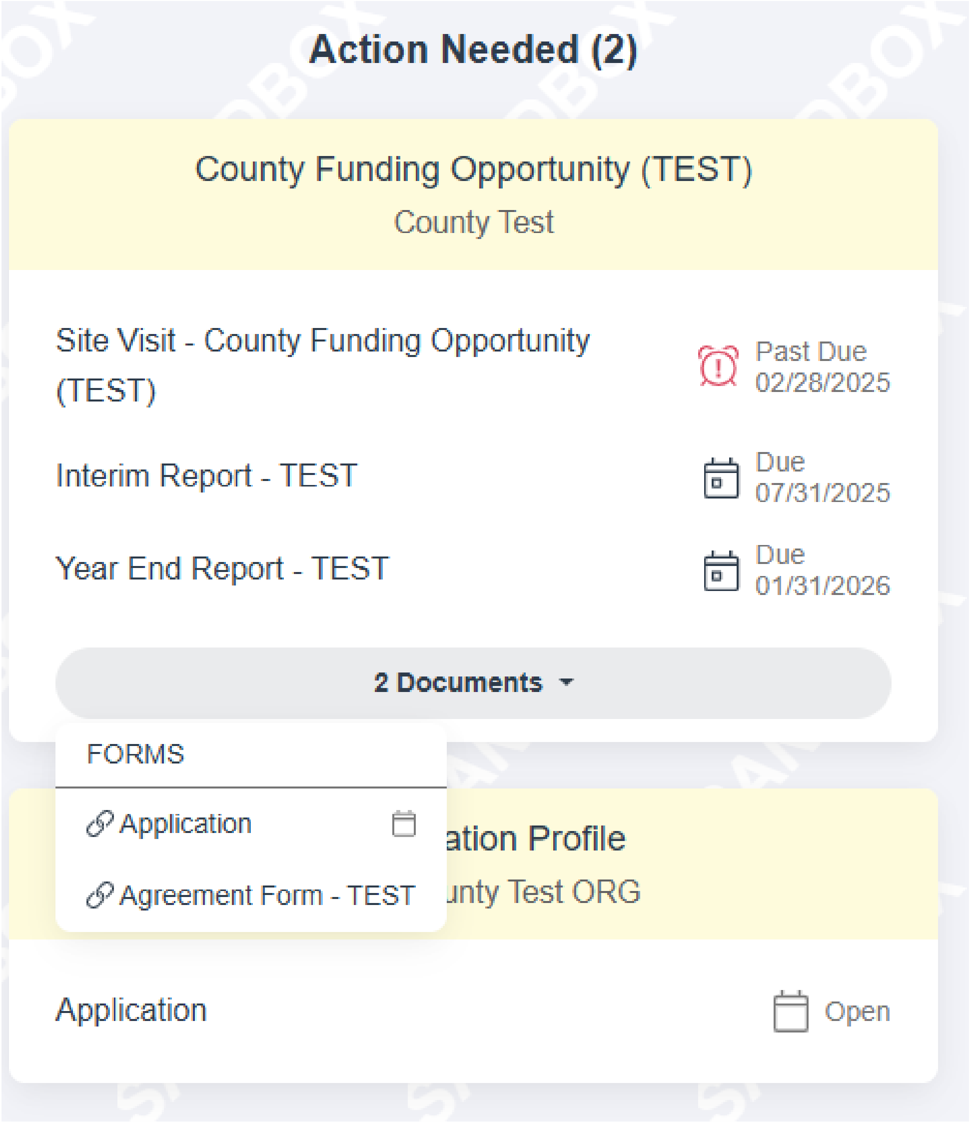
DASHBOARD & APPLY PAGE INTRODUCTION

- The dashboard can be accessed by clicking on the Home icon at the top of the webpage.
- Funding opportunities will only appear on the dashboard page if the user and/or organization started a Letter of Intent (LOI) or Application for a specific process.
- The area on the far left is a list view of items that need to be completed with two tabs titled "Assigned to You" and "Upcoming". The option will refer to which form needs to be completed, the funding opportunity it belongs to, and a due date. The button to select will either be to start the form or continue if the form has been started already.

MANAGING YOUR REQUESTS

- There are three columns on your Dashboard:
  - Action Needed – contains your draft requests and any approved requests that still need action.
  - No Action – contains requests that do not need further action from the applicant as administrators process the request/submitted form.
  - Completed/Historical – contains any of your other requests that are finalized or no longer active.
- Additional documents that have been submitted/completed can be accessed by clicking on the drop down on the card.

*Additional users must be added as a collaborator by a user that has access to a process and/or forms



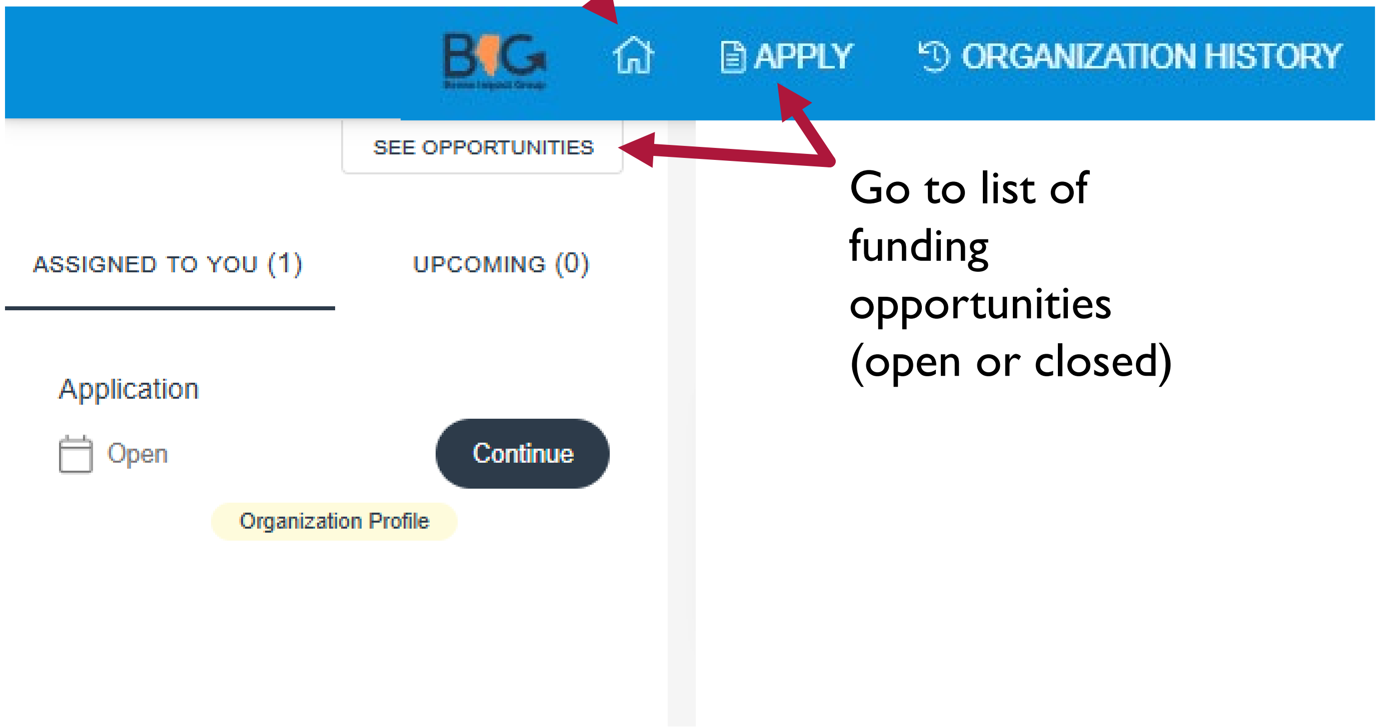
NAVIGATING TO APPLY PAGE

- The dashboard can be accessed by clicking on the Home icon at the top of the webpage.
- Funding opportunities will only appear on the dashboard page if the user and/or collaborator started a Letter of Intent (LOI) or Application for a specific process.
- To access funding opportunities:
  - Apply at the top of the webpage

  Or

  - "See Opportunities" on the far left-hand side on the Dashboard page

Home button to go to Dashboard



Go to list of funding opportunities (open or closed)

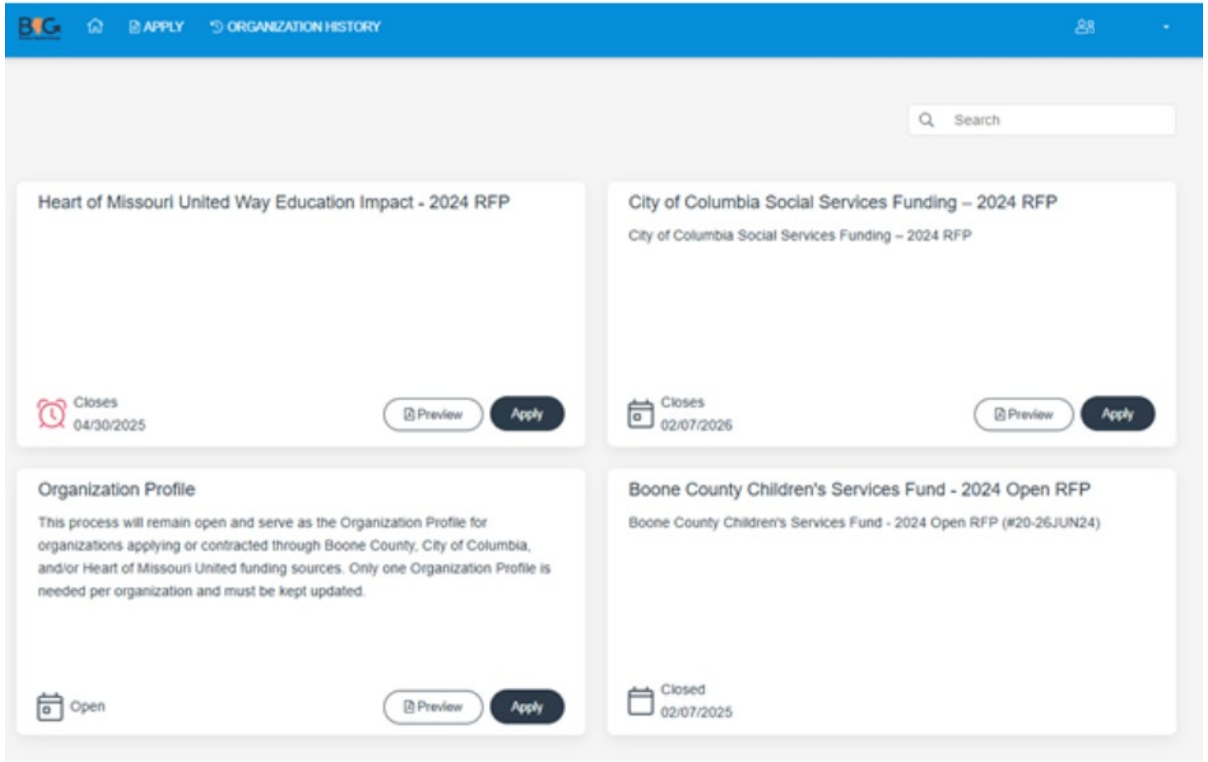
APPLY FOR FUNDING OPPORTUNITIES

Organization Profile

- The Organization Profile process will remain open and serve as the Organization Profile for organizations applying or contracted through Boone County, City of Columbia, and/or Heart of Missouri United funding sources. Only one Organization Profile is needed per organization and must be kept updated.
- The form allows organizations to only provide the materials once instead of resubmitting the same information each time they apply for different funding opportunities.

Funding Opportunities

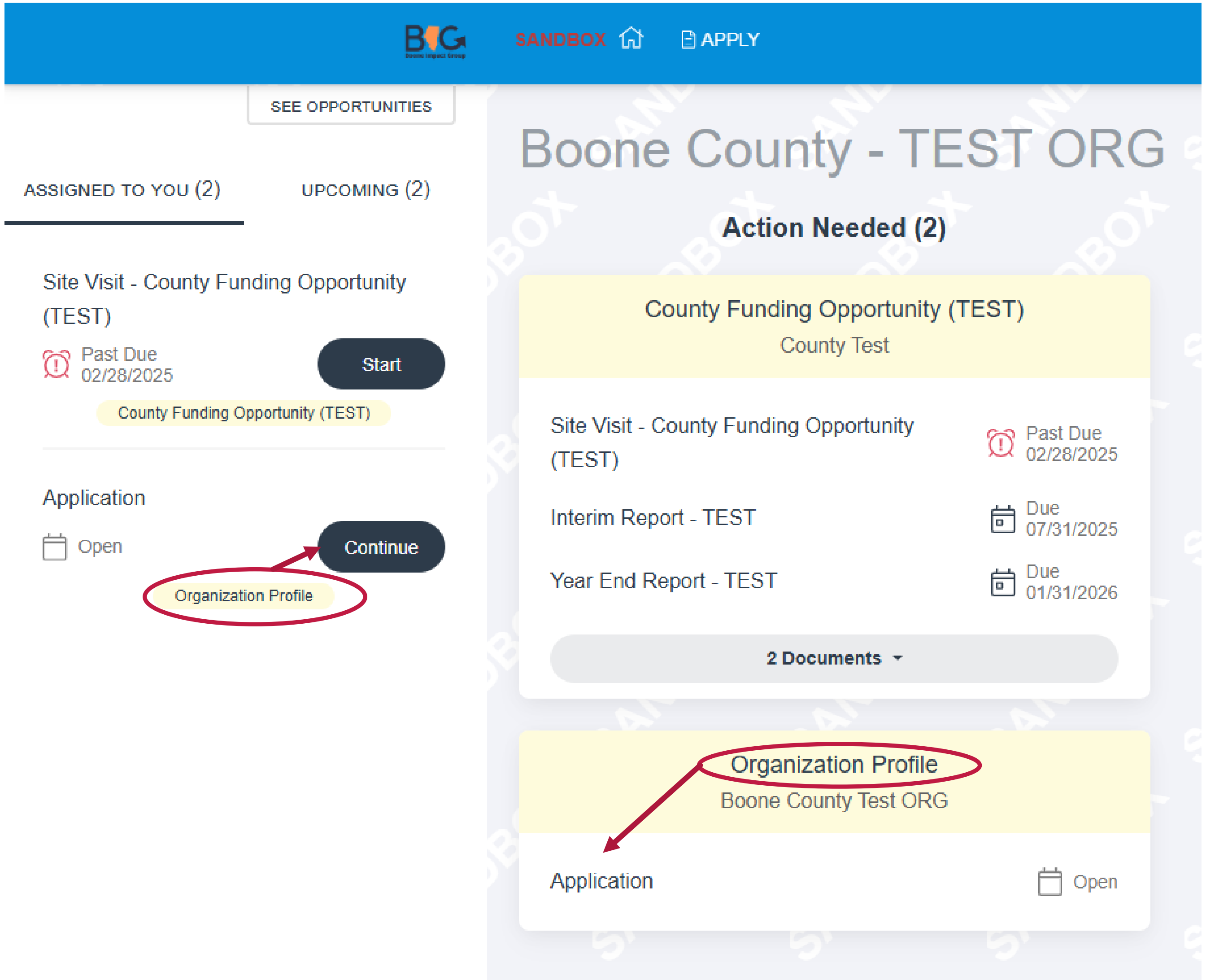
- The Apply page will list cards for funding opportunities that have been added by the BIG partners. The card will have the funding opportunity name, description, and whether it is open or closed.
- If the opportunity is open, you can click on the 'Apply' button on the card.



ORGANIZATION PROFILE

NAVIGATING TO ORGANIZATION PROFILE

- An Organization Profile has already been created for organizations funded by one of the BIG partners at the beginning of 2025. The easiest way to access the form and update it is by navigating to it from the home dashboard page.
- Click on 'Continue' for the option on the far-left side of the screen or click on 'Application' for the option listed in the middle of the screen.
- If you try to open the Organization Profile from the Apply page, click the 'Apply' button on the card. A dialogue box will appear notifying there is an existing request. Click the link in the box to edit the existing form instead of the 'Apply Again' button.



UPDATING ORGANIZATION PROFILE

- Update all the applicable information in the Organization Profile, including uploaded documents.
- The Organization Profile must be complete and up to date when submitting a proposal. Proposals may be considered unresponsive if any applicable fields are incomplete.
- Additional Tips:
  - Form uploads are limited for the file size. Try condensing the file or remove any pages that may not be necessary.
  - The Governing Board section requires the Governing and Advisory Board Spreadsheet to be completed. There is a link in the instructions to download the required spreadsheet.
  - There are two sections at the bottom of the page that are specific to either Heart of Missouri United Way or Boone County funding. Please make sure the applicable section(s) are completed if your organization is applying to that funding source.
- The form will automatically save when you click outside one of the fields. When you are finished updating the form, you may want to click **'Save Application'** at the bottom of the page. Please <u>do not</u> click 'Submit Application' for the Organization Profile form. The Organization Profile will always remain open to allow organizations to keep information updated. <u>If you accidentally hit submit, please reach out to one of the BIG partners so they can revert it back to the application phase</u>.
- You <u>do not have to submit the Organization Profile</u> when submitting a proposal through a funding opportunity. The information just needs to be up-to-date.

SUBMITTING A FUNDING OPPORTUNITY APPLICATION

STARTING A FUNDING OPPORTUNITY APPLICATION

- Click on either 'Apply' at the top of your screen or on 'See Opportunities' when on the home dashboard.
- Click on 'Apply' on the applicable funding opportunity card or 'Continue' if there's an application already started.
- Some funding opportunities may allow your organization to submit multiple applications.
- After clicking 'Apply':
  - You will be sent directly to the application page if you have not started an application yet.
  - A pop-up window will appear if an application has been started. The proposal name will be listed as a link to take you to the application already started or you can start a new application if your organization is submitting multiple proposals.

NAVIGATING THE APPLICATION

- The form automatically saves when you click outside a field or every few seconds. There is also a 'Save Application' button at the bottom of the page.
- Fields that have * indicate it is a required field.
- Make sure you expand each section to make sure you complete all the required and/or applicable questions. Click on the light blue bar with the heading to expand or collapse a section.
- Additional questions may appear based on a response or may need additional information. Make you sure you review all the questions in the application.
- You can download the form with information currently entered and uploaded documents by clicking "Application Packet".
- You can download a list of the proposal questions as a PDF by clicking on 'Question List' at the top of the application form.
  - Tip: Select the Fund Source first to generate the list of questions required for that funder before downloading the Question List PDF. This tip can also be applied for the program services. Detailed information is required only for the services being proposed to be contracted/funded. Select 'Yes' to the question "Is your organization requesting funding for this service?" for each Program Service section(s) that you want to see the question list for.

COMPLETING AN APPLICATION – QUICK VIEW INFORMATION

- Quick View Section:
  - Provide the name of the project or program you are applying for
  - **Select the fund source that you are applying for. It's important you select the correct funder. Additional fields will appear based on the response.**
  - Provide the primary contact information for the proposal. This contact will be used for any follow up questions throughout the Request for Proposal (RFP) process.
  - The funder will either approve and deny the request. Additional information be provided by the funder. All proposals, either approved, denied, or abandoned, can be accessed on the home dashboard. The status will appear on the card.

COMPLETING AN APPLICATION – CONSUMER DEMOGRAPHICS

- Complete each of the demographic categories:
  - Residence - City of Columbia (Only)
  - Residence – list of counties
  - Race
  - Ethnicity
  - Gender
  - Income
  - Age – different section will appear based on the funder
- The number entered in each field should be the anticipated number of unduplicated individuals to be served by the whole proposed program. The totals for each section should all match.

COMPLETING AN APPLICATION – PERSONNEL

- Complete the table for each position that is involved in delivering the proposed program.
- The fields in the table are narratives to provide context. There are examples in the column headers.
- There are two narrative questions below the table that asks for information on primary responsibilities and minimum qualifications for each staff position listed in the table.

COMPLETING AN APPLICATION – BUDGET

- The budget section should reflect funds to be utilized as described in the RFP and any other funds from other funders that will be utilized to support the proposed program.
- The Program Budget should be only for the proposed program, not the overall organization budget.
- Each item for which figures are entered, the corresponding narrative field must be completed.
- Include revenue that is secured and/or being pursued.
- The budget should reflect the first year of the project, if funded.
- The Total Revenue and Total Expenses should ideally be aligned.
- Make sure the amount entered for the funder you are applying to matches the sum requested across the program services and Development/Start Up Funding (if applicable).

COMPLETING AN APPLICATION – OUTCOMES

- At least on outcome is required for the proposed program.
- Only outcomes listed on the Boone Impact Group's Common Outcomes may be selected. A link to the Common Outcomes is provided in the application or can be found on one of the BIG partners' websites.
- Information on the type of data that will be collected and tools that will be utilized must be provided in the corresponding narrative fields for each outcome.
- A performance measures logic model will be completed at a later date, if the funder determines to contract the proposed program.
- For accuracy, copy and paste as plain text (ctrl + shift + V) into the applicable Program Outcome field in the application.

Common Outcome

Common Outcomes with Examples of Contributing Services

<u>Achieve/maintain permanency (reunification, adoption, guardianship)</u>

- Examples: Family Development, Home Visiting, Out of Home Respite – Child

<u>Are able to successfully navigate the justice system</u>

- Examples: Advocacy, Case Management, Legal Services

<u>Born at a healthy birth weight</u>

- Examples: Health Education, Home Visiting, Prenatal Care

<u>Develop and/or make progress towards goals to address identified needs</u>

- Examples: Case Management, Clinical Case Management, Family Development, Home Visiting

<u>Develop healthy relationships with family members/caregivers</u>

- Examples: Family Development, Family Therapy, Individual Therapy – Adult, Individual Therapy – Child, Parenting Skills Education

COMPLETING AN APPLICATION – PROGRAM SERVICES

- Program services must be selected from the Boone Impact Group's Taxonomy of Services. A link to the Taxonomy of Services is provided in the application or can be found on one of the BIG partners' websites.
- Include all program services, not just those being proposed to be contracted/funded.
- For each service, indicate if the service is proposed to be contracted/funded by the funding source you are applying to.
- Detailed information is required only for the services being proposed to be contracted/funded. For all other services, only the service name is required.
- Services should be unbundled (ex. If the program is to provide both Individual Therapy – Child and Case Management, each service needs to be listed separately as Program Service 1 and Program Service 2.)
- The Taxonomy of Services does indicate several services considered to be "super services". "Super Services" were developed for services where multiple services may typically take place. The service definition will indicate if additional services should be listed (ex. Out of School Programming).
- The Taxonomy of Services will indicate if there is a required unit measure. This must be used when calculating the unit rate and outputs for the proposed service.

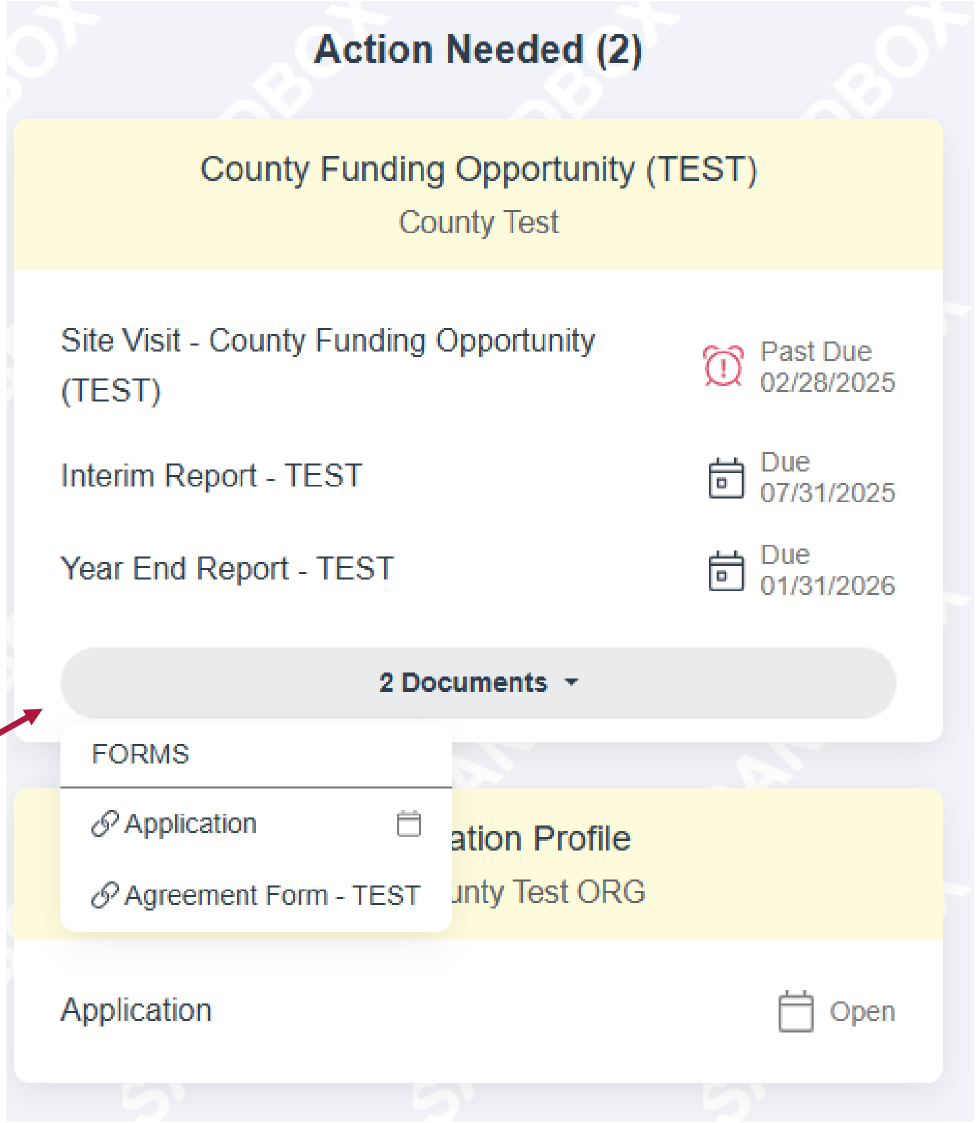
SUBMITTING AN APPLICATION

- Once all required fields are completed, the application can be submitted.
- Click ‘Submit Application’ at the bottom of the application page.
- A confirmation page will appear if the application was submitted.
- The process you applied under will appear on the dashboard under ‘No Action’ and show the submission date.
- You can view your submitted application by clicking on ‘Application’ on the applicable card on the dashboard.
  - You can download your submitted application by clicking on ‘Application Packet’.
- Once submitted, the application form is locked and can no longer be edited. If you inadvertently submitted an application prior to the submission deadline, contact the applicable funder to re-open your application.

FOLLOW-UP FORMS: AGREEMENT AND REPORTING FORMS

ACCESSING FOLLOW UP FORMS

- If awarded funding, additional documents known as 'Follow Up Forms' will be required throughout the contract. These forms may include (depending on funder):
  - Agreement Form (County, City, HMUW)
  - Interim Report (County & City only)
  - Year End Report (County, City, HMUW)
  - Site Visit Form (County only)
- Follow Up Forms can be accessed on the home dashboard. The form that is due next will be listed on the funding opportunity card. A drop down for completed documents will appear on the card. You can click on the document name to access it.



FOLLOW UP FORM: AGREEMENT FORM

- The Agreement Form can be accessed on the applicable funding opportunity card on the home dashboard. It will appear directly on the card if the form needs to be completed. If the form has been submitted and finalized, it will appear as an option in the drop-down on the funding opportunity card.
- Information on the Agreement Form is considered part of the contract.
- Any changes to what is described on the Agreement Form must be approved by the applicable funder. This includes changes to service delivery and performance measurement details.
- The funder will provide further instructions on how and when to complete an Agreement Form.
- Information on the Agreement Form includes:
  - Program Budget
  - Demographics
  - Performance Measures
  - Program Services
- Once the required information is reviewed and updated, hit 'Submit Follow Up" at the bottom of the page. The applicable funder will review the information and ask for further revisions or approve the form.
- Comments will be added to the form asking for additional information or corrections.

FOLLOW UP FORM: INTERIM AND YEAR END REPORTS

- The Interim and/or Year End Reports can be accessed on the applicable funding opportunity card on the home dashboard. It will appear directly on the card if the form needs to be completed. If the form has been submitted and finalized, it will appear as an option in the drop-down on the funding opportunity card.
- The Interim Report is only required by the Boone County Children's Services Fund and City of Columbia.
- Make sure you update the Organization Profile form throughout the year and before submitting the Interim or Year End Reports.
- Once the required information is reviewed and updated, hit 'Submit Follow Up" at the bottom of the page. The applicable funder will review the information and ask for further revisions or approve the form.
- Comments will be added to the form asking for additional information or corrections.

FOLLOW UP FORM: INTERIM AND YEAR END REPORTS REQUIRED INFORMATION

Interim Report

- Reporting Period: January 1 – June 30
- Narratives describing overall organization and programmatic information
- Actual consumer demographics
- Narratives describing efforts to collect performance measure data and if there are any issues
- Actual outputs for program services

Year End Report

- Reporting Period: January 1 – December 31
- Narratives describing overall organization and programmatic information
- Actual program budget
  - If the revenues and expenses do not align, an explanation can be provided in the 'Program Budget Narrative' field.
- Actual consumer demographics
- Actual indicator data (numerators, denominators, and percentages) and narratives describing data
  - The numerator column is the number of unduplicated individuals that achieved the stated indicator.
  - The denominator column is the number of unduplicated individuals that were measured for the indicator.
- Actual outputs for program services

ADDITIONAL ORGANIZATION AND USER INFORMATION

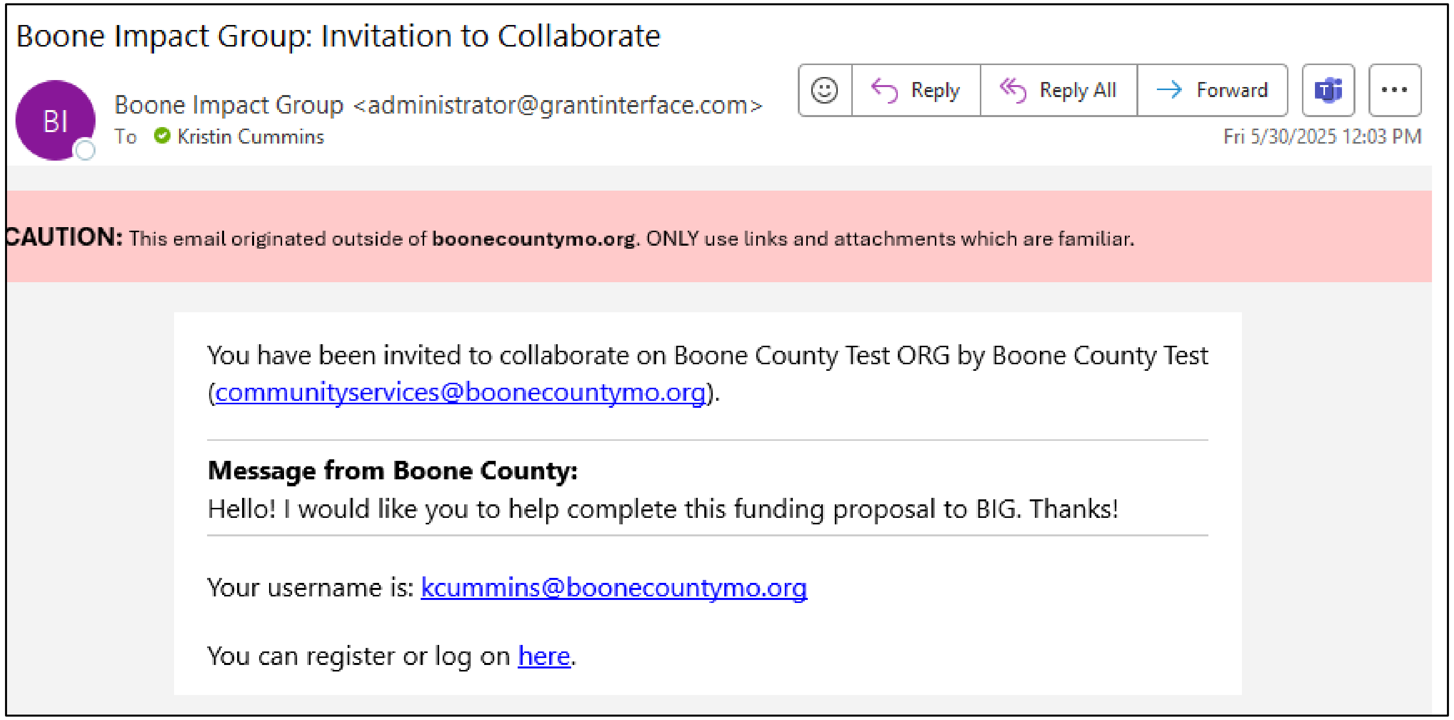
ORGANIZATION SUMMARY

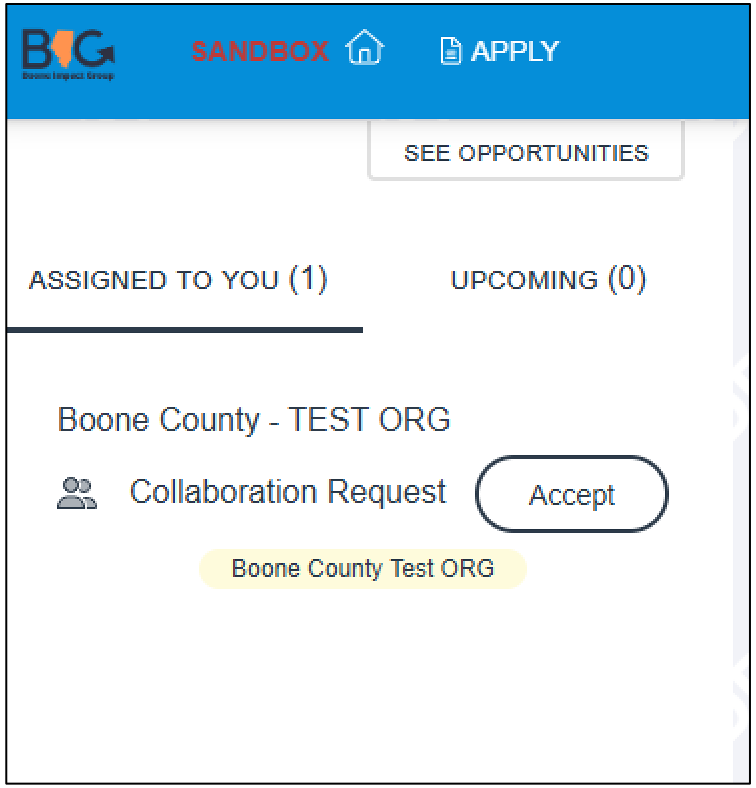
- Access Organization Summary page by clicking on 'Organization History' button on the top navigation bar next to the Home and Apply buttons.
- Organization Summary page includes:
  - Organization Information – edit button allows you to update the contact information and address of the organization
  - Request History – links to proposals started or submitted to any of the BIG partners. Also includes the status and award amount for each proposal.
  - Contacts – list of users assigned to the organization.
    - You can invite a new user by clicking on the 'Invite User' button. A pop-up window will appear where you add the email address of the new user and can include a message. Inviting a user will not automatically allow them to view proposals and forms. You must also add each applicable user as a 'Collaborator'. See the 'Adding Collaborators' slide for further instructions.
    - Contact one of the BIG partners to request a user to be deactivated.
  - Documents – documents can only be updated by one of the BIG partner administrators. This is NOT where follow-up forms (i.e. Agreement Form, Interim Report, Year End Report, etc.) will appear. See other slides for information on how to access follow-up forms.

ADDING COLLABORATORS

- Foundant's GLM system allows for organizations to have multiple users viewing and editing processes and forms. Please refer to the following Foundant articles for adding collaborators:
  - Applicant Tutorial – Collaboration
    - https://support.foundant.com/hc/en-us/articles/4523887747223-Applicant-Tutorial-Collaboration
  - Applicant Tutorial – Collaborator Tutorial (review 'Collaborator Experience (New Dashboard)' section)
    - https://support.foundant.com/hc/en-us/articles/28664505675927-Collaborator-Tutorial

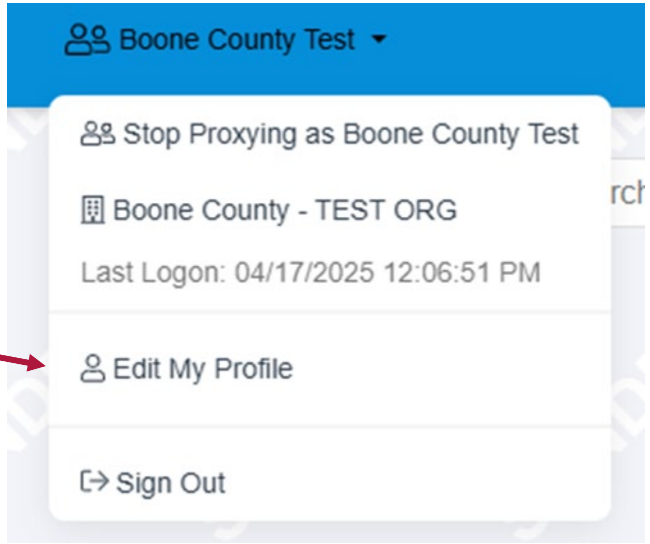
COLLABORATION INVITATION EXAMPLE





UPDATE USER

- Your user information can be updated by clicking on the drop down at the top right side of your screen next to your name and clicking ‘Edit My Profile’.
- User Information page allows updates to:
  - First and Last Name
  - Position Title
  - Email/Username
  - Preferred Contact Number
- You can also view the user email history by clicking on ‘View User Email History’ link on the right corner of the page.
- To reset your password, go to the logon page for the BIG partners Foundant site. Click ‘Forgot your password?’, enter your email address in the dialogue box, and select ‘Send Reset Link’. Check your email you entered in the box for the reset link. The link will be sent by administrator@grantinterface.com. If the email is not there, first check your junk or spam folder then contact one of the BIG partners.



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