



Building Smarter Grant Applications with SmartSimple Cloud

Webinar hosted by eTRANSERVICES



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Webinar Overview

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What is a Grant Program?

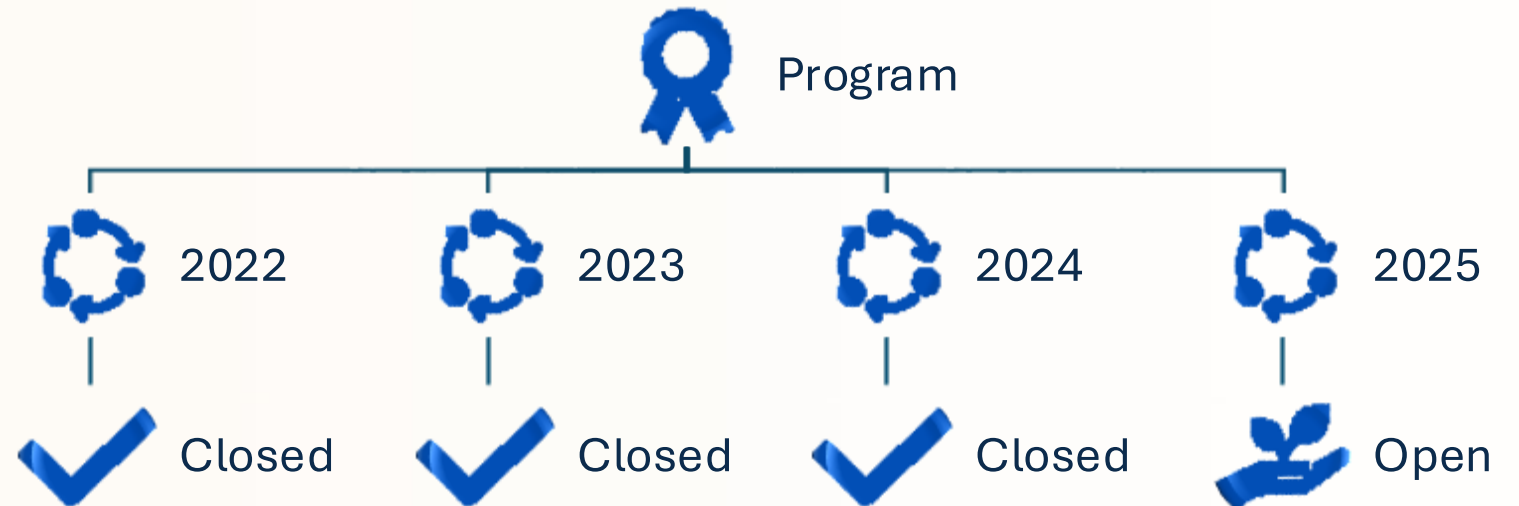
A financial assistance initiative provided by an organization, government, foundation, or corporation to support individuals, groups, businesses, or other entities in achieving specific goals or objectives. Typically, grant programs are:

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- **Purpose-Driven:** Awarded to fund activities aligned with the grantor's mission or objectives
 - **Eligibility:** Programs have specific eligibility requirements that must be met
 - **Application Process:** Applicants must typically submit a proposal or application outlining their project, goals, budget, and how the funds will be used.
 - **Competitive or Non-Competitive:** Open to all applicants, or select invitees
 - **Reporting Requirements:** Grantees are required to provide updates on progress, impacts and financials

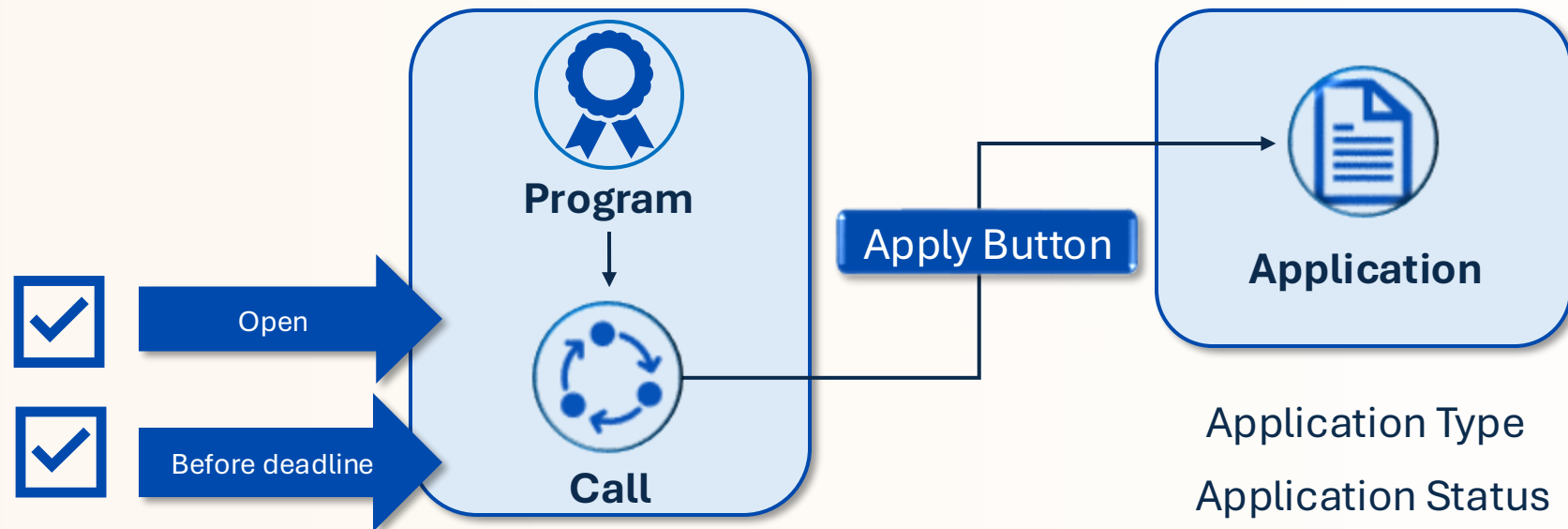
The SmartSimple Program Manager

Common Terms

- Call
- Cycle
- RFP
- Grant Round
- Funding Opportunity



Program Manager is the “Launchpad” for Your Application



Building Smarter Applications

Add fields, instructions and other content based on call settings or “rules”

Customize the number, frequency and type of activities

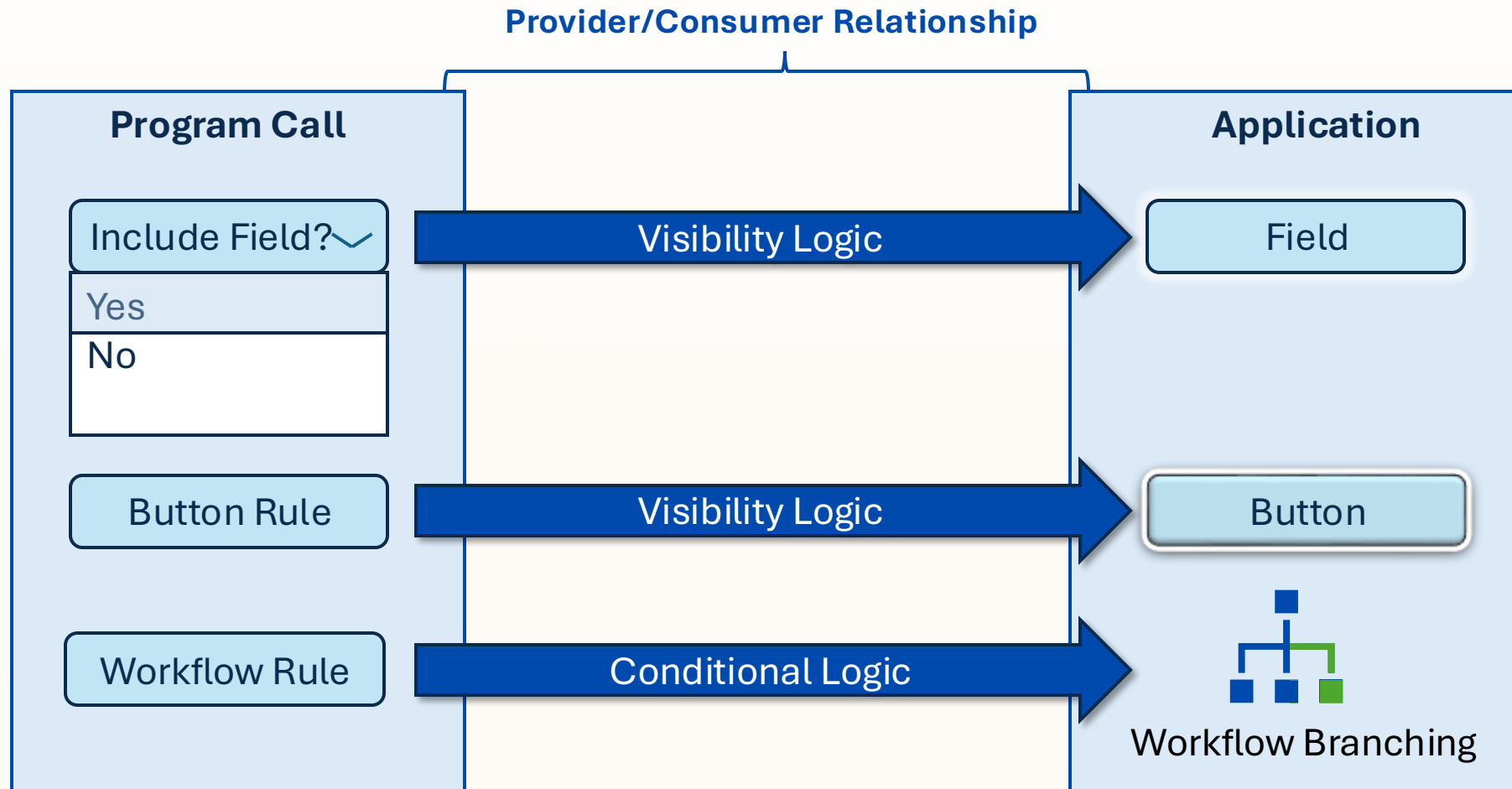


Start with the same application content for all programs

Customize the business process by including or excluding steps

Fewer required changes to application configuration

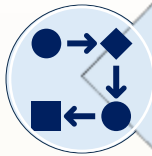
How does it work?



Demonstration

"Making the most of your SmartSimple Program Manager to build customizable application forms and processes"

Considerations



A common application can be tailored to the program needs, or changed from year to year or cycle to cycle



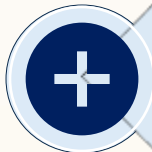
Reduces the need for configuration changes as program needs change



Puts customization of applications into the hands of program and grant staff



Saves time, effort, and cost from year to year



Makes adding new programs much easier

Q & A:

What else would you like to know?

Thank you for your time and participation today!

Scan the QR code to access our Linktree, where you'll find links to our company website, contact details, and social media platforms!



Please feel free to reach out with any additional questions: jamie.neel@etranservices.com

Accreditations



Certified Information Systems Security Professional



DAWIA Level III Program Management
DAWIA Level III Information Technology
DAWIA Level II Requirements Manager



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Helpful Information

Common Application

- Start with a common set of fields for all application types or programs (standard and custom fields)
 - ID
 - Organization
 - Applicant Name
 - Status
 - Type
 - Project Title
 - Project Description
 - Amount Requested

Customized Fields and Field Behavior



- Use the Call record business rules to add new fields specific to that call
 - Eligibility Questions
 - Review Criteria
 - Narrative Questions
 - Select Value Questions (dropdown, checkbox, radio button)
- Customize instructions for certain fields
- Change the validation rules
 - Maximum Request Amount
 - Grant Term
- Change parameters for data tables such as Budgets

Button and Status Rules

- Skip steps in the business process
 - No eligibility status
 - No external review
 - Streamline application process for rapid response
- Add steps in the business process
 - Add executive review
 - Add payment contingencies

Activity Creation Rules

- Specify the number and frequency of activities needed
 - Progress Reports
 - Site Visits
- Require or exclude final reports
- Specify the number of external reviewers required and when to create review records
- Specify the number and frequency of payments