



Agency Training 2026

**Introduction to
Impact San Antonio**

Impact San Antonio

- Women's collective giving circle
- 100% of each \$1,000 membership goes to grants
- Individual contributions combine to fund significant grants
- Member-led, rigorous Grant Review process
- Membership decides agency grant awards
- Annual Goal: One High Impact Grant per Focus Area

ARTS &
CULTURE

EDUCATION

ENVIRONMENT/
RECREATION/
PRESERVATION

FAMILY

HEALTH &
WELLNESS

- Over \$6.9 million in grants awarded 2005 - 2025

Impact San Antonio Focus Areas

Arts & Culture

Programs and projects that cultivate, develop, educate and improve the cultural and artistic climate

Education

Programs and projects that advance learning opportunities, increase educational access and improve education

Environment, Recreation & Preservation

Programs and projects that conserve, revitalize or enhance the natural environment, recreational facilities or preserve historic sites

Family

Programs and projects that strengthen and enhance the lives of children and families

Health & Wellness

Programs and projects that positively impact the mental or physical health and wellness of people

Grant Award Process

- Applicant submits organizational questionnaire with financial information for readiness review
- Eligible agencies are invited to submit a Project Application (PA) focusing on **project details** and **impact**
- **Applicant chooses** Focus Area in which to apply
- Complete and compliant PAs proceed to Grant Review
- The Grant Review process narrows PAs in each focus area to two finalists
- Impact San Antonio membership votes to determine which finalists are awarded a High Impact Grant

High Impact Grants

- \$100,000 High Impact Grants
- We fund projects in these categories:
 - *New Program*
 - *Expansion of an Existing Program*
 - *Capital Investment or Construction Project*
- 10% of grant will be automatically allocated to Indirect Costs
- Grant fund distribution will begin in November with 24 months to complete project

High Impact Grants

High Impact Markers

- Address a **critical need** in one or more of our 5 focus areas
- Improve the **quality of life** for people in our Service Area*
- Benefit either a **large population**, or a **smaller population in a major way**
- Result in an **innovative approach** to address a critical problem or **expand** on an already **existing** successful approach
- Result in **compelling** and **measurable** outcomes

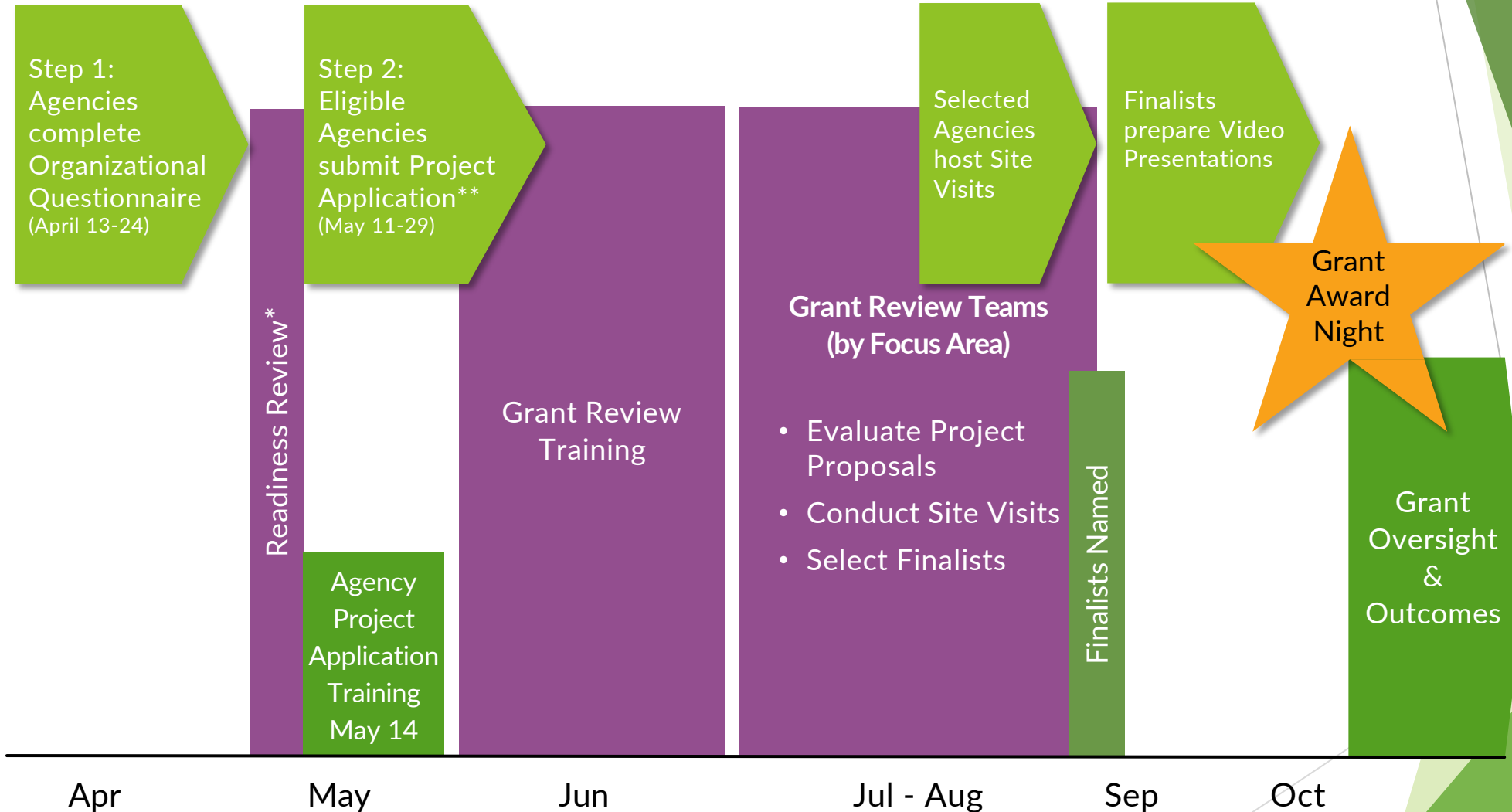
**Our Service Area is Bexar, Atascosa, Bandera, Comal, Guadalupe, Kendall, Medina and Wilson Counties*

High Impact Grant

Execution and Oversight

- Grantee has **two years** to complete its Project (Oct 31, 2028)
- Grantee is eligible to apply again after **three grant cycles** (2030)
- Funds are awarded for the **specific project** detailed in the grant application and are not unrestricted grants
- Funds are paid out over the course of the project
 - Indirect Expense 10% (\$10,000) is paid after the Agency signs the grant agreement
 - Remainder (\$90,000) paid on a reimbursement basis with required documentation

2026 Grant Timeline



*Readiness Review includes screening for compliance with Applicant Grant Criteria

**Project Applications will be screened for compliance with Project Grant Criteria prior to releasing to Grant Review

Key Dates

Date	Action
Thursday, March 27	Step 1 Agency Training Materials posted on website
Friday, April 13 8AM	Organizational Questionnaire (Step 1) submission window opens
Friday, April 24 2PM	Deadline to submit Organizational Questionnaire
Monday, May 11 8AM	Notification of Readiness Review Results Project Application (Step 2) available*
Thursday, May 14 10AM	Live Project Application Training Webinar
Friday, May 29 2PM	Deadline to submit Project Application
July – August	Grant Review Process – including Site Visits
Late August/Early September	Finalists announced
Early September	Finalists Training Session
October TBD	GRANT AWARD NIGHT

*To agencies demonstrating readiness



Agency Training 2026

Two Step Application Process

Step 1:
Organizational Questionnaire

Step 2:
Project Application

Applicant Eligibility Criteria

***New for 2026**

Applicants must:

- Be recognized by the IRS as a tax exempt 501 (c)(3) public charity
- ***File either a 990 or 990 EZ with the IRS for the most recent fiscal year**
- Have either its primary, or significant operations within Impact San Antonio's service area which includes Bexar, Atascosa, Bandera, Comal, Guadalupe, Kendall, Medina and Wilson counties

Applicant Disqualifications

- Engaging in politically partisan activities or lobbying
- Supporting or opposing any candidate for public office
- Labor or fraternal organizations, athletic or social clubs or associations
- Redistribution of funds to other organizations or individuals, however, subject to additional limitations and requirements, we will consider applications from:
 - a “Supporting Organization” applying on behalf of its supported organization
 - a “Fiscal Sponsor” applying on behalf of a sponsored program or organization

Organizational Questionnaire

The Basics

- **Pre-requisite** to submitting a Project Application
 - Basic Agency Information
 - Eligibility Criteria – Agency Qualifications
 - Board of Directors and Governance
 - Risk Management
 - Compliance Matters
 - Financial Management & Governance
 - Recent Agency Events
 - Balance Sheet
 - Revenue and Expenses
- Will be used to assess overall readiness from both an organizational and financial perspective
- Results of Readiness Review provided prior to opening of Project Application window

Organizational Questionnaire

Financial Worksheets

- Impact San Antonio uses balance sheet, revenue and expense data provided by agencies as the basis for the financial review portion of our readiness review process. Having standardized, accurate data is critical to our review.
- Using our Excel-based Financial Information worksheets is required. Please do not attempt to override or modify these forms or convert them to another format.
- All agencies will submit the Financial Information Worksheet found in the Agency Financial Information section of the OQ.
- Agencies that are a branch or chapter of a larger organization and have their **financials consolidated** with the larger organization will also complete a simplified Local Agency Financial Information Worksheet found in the Local Agency Financial Information section of the OQ.

Organizational Questionnaire

Financial Data

WORKSHEET & ENTRY INTO OQ:

- We strongly encourage you to have your agency financial expert provide this information.
- **DOWNLOAD** the worksheet from the OQ and **PREPARE** it first. It covers assets, liabilities and net assets (aka “balance sheet” items), revenue & expenses **for the last three years***
 - If you’re not sure about an entry, we have included definitions for all entries on the second page of the Financial Information Worksheet.
 - The categories in the worksheet mirror those on your 990s.
 - A 990/990EZ and Financial Information Worksheet Cross Reference is also available in the OQ to help locate our required information from your tax filings.*
 - You may not have data for every type of asset or liability. Enter zeros for those.
 - Depending on your fiscal year, your 2025 tax return may not be ready. In this case, you may need to use your agency financial statements for your 2025 data

*New for 2026

Organizational Questionnaire

Financial Data

WORKSHEET & ENTRY INTO OQ:

- Make sure each year balances. The cells at the bottom of the Financial Information Worksheet must all be OK and green. A red ERROR cell indicates the year is unbalanced. Do not submit unbalanced financial data.
- Copy the information from the worksheet into the OQ form. Use the tab button to move from cell to cell.
- Double check your entries to make sure you copy over and enter the information correctly. Our system doesn't have the ability at this time to cross-check or validate the information you enter.
- Agencies have the most trouble with the financial sections of the OQ. If you need more in-depth assistance, please check out our financial videos covering the financial information worksheet and how to use your 990 or 990 EZ to complete it.

Organizational Questionnaire

Financial Indicators

- Review of the financial information you provide is a critical component of how we assess an agency's overall readiness to implement a grant.
- We look at several indicators of stability, such as cash reserves, income, assets, liabilities and debt, as well as:
 - **Liquidity** – to determine if you have *cash/current assets available to cover current liabilities and other short-term obligations*
 - **Profitability** – to evaluate *sustainability and consistency of revenue streams*
 - **Balance Sheet Composition** - looking at *sufficiency of reserves and standard financial ratios*
 - **Diversity of Funding Sources** – reviewing *revenue sources such as grants, individual contributions and program income*

Organizational Readiness Review

Result	Project Application Assigned
Agency does not meet Grant Applicant Criteria	No
Readiness concern identified	No
Readiness demonstrated and meets Grant Applicant Criteria	Yes

Readiness Status will be communicated to Agencies no later than May 11, and Project Applications will be available to those demonstrating readiness beginning May 11

Prepare to Apply

- Visit the Impact San Antonio website (www.impactsanantonio.org) to:
 - Review our **Applicant and Project Criteria**
 - Preview the **Organizational Questionnaire, Project Application, and Financial Worksheet**
- Gather necessary information
- Begin to consider your Project
- Ensure Agency information in **Candid/Charity Check** is updated
- Review training materials and “Lessons Learned” from previous grant recipients and other resources on the Nonprofits page

Submission Timeline

Step 1 – Organizational Questionnaire

- ▶ Opens **April 13 at 8am** - Closes **April 24 at 2pm**

Step 2 – Project Application

- ▶ Opens **May 11 at 8am** - Closes **May 29 at 2pm**
- ▶ **Training webinar** on May 14th from 10am-12pm

DO NOT WAIT until the Final Day to Submit

We will not extend deadlines.

If you have technical or other issues, you may not have time to resolve them before the deadline.

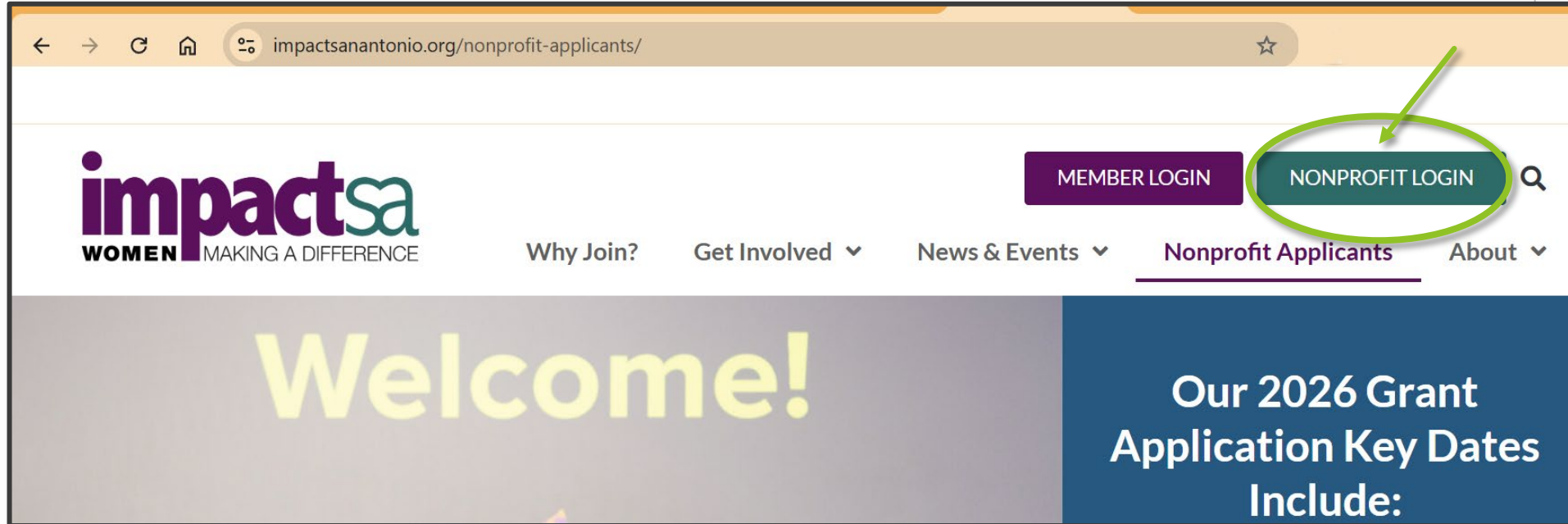


Agency Training 2026

**Using Foundant to
Complete and Submit
an Organizational
Questionnaire**

Accessing Foundant

- You can always access our grant management system – Foundant – from the “NONPROFIT LOGIN” button at the top of our website



- There will also be a link in the cycle opening email (if you have a user account in Foundant)

Your Foundant Account

- Verify or create your agency's account in Foundant, and your user credentials – these will be tied to your agency's account
- You can reset your password if you don't remember it

grantinterface.com/Home/Logon?urlkey=impactsan

impactsa

WOMEN MAKING A DIFFERENCE

Logon

Email Address*

Password*

Log On Create New Account

[Forgot your Password?](#)

Welcome to our grant management system!
To use our grant management system and receive our communications, your agency will need an account and you as a user will also need individual user credentials tied to the agency's account. Agencies can have multiple users under their account.

Not sure if your agency has an account?
If you believe your agency has an account but you are unsure of the login information or wish to be added as a user under your agency's account, **PLEASE DO NOT create a new account.** This could result in loss of historical

Creating a New Account

- If you are sure your agency doesn't have an account, create a new account
- You will provide agency information, including your chief executive, as well as creating your user credentials



The screenshot shows a web browser window with the URL `grantinterface.com/Home/Logon?urlkey=impactsan`. The page features the 'impactsa' logo in purple and teal, with the tagline 'WOMEN MAKING A DIFFERENCE' below it. The main content area is titled 'Logon' and contains two input fields: 'Email Address*' and 'Password*'. Below these fields are two buttons: 'Log On' and 'Create New Account'. A green arrow originates from the first bullet point of the text on the left and points directly to the 'Create New Account' button, which is also circled in green. To the right of the login form, there is a grey box with the following text:

Welcome to our grant management system!
To use our grant management system and receive our communications, your agency will need an account and you as a user will also need individual user credentials tied to the agency's account. Agencies can have multiple users under their account.

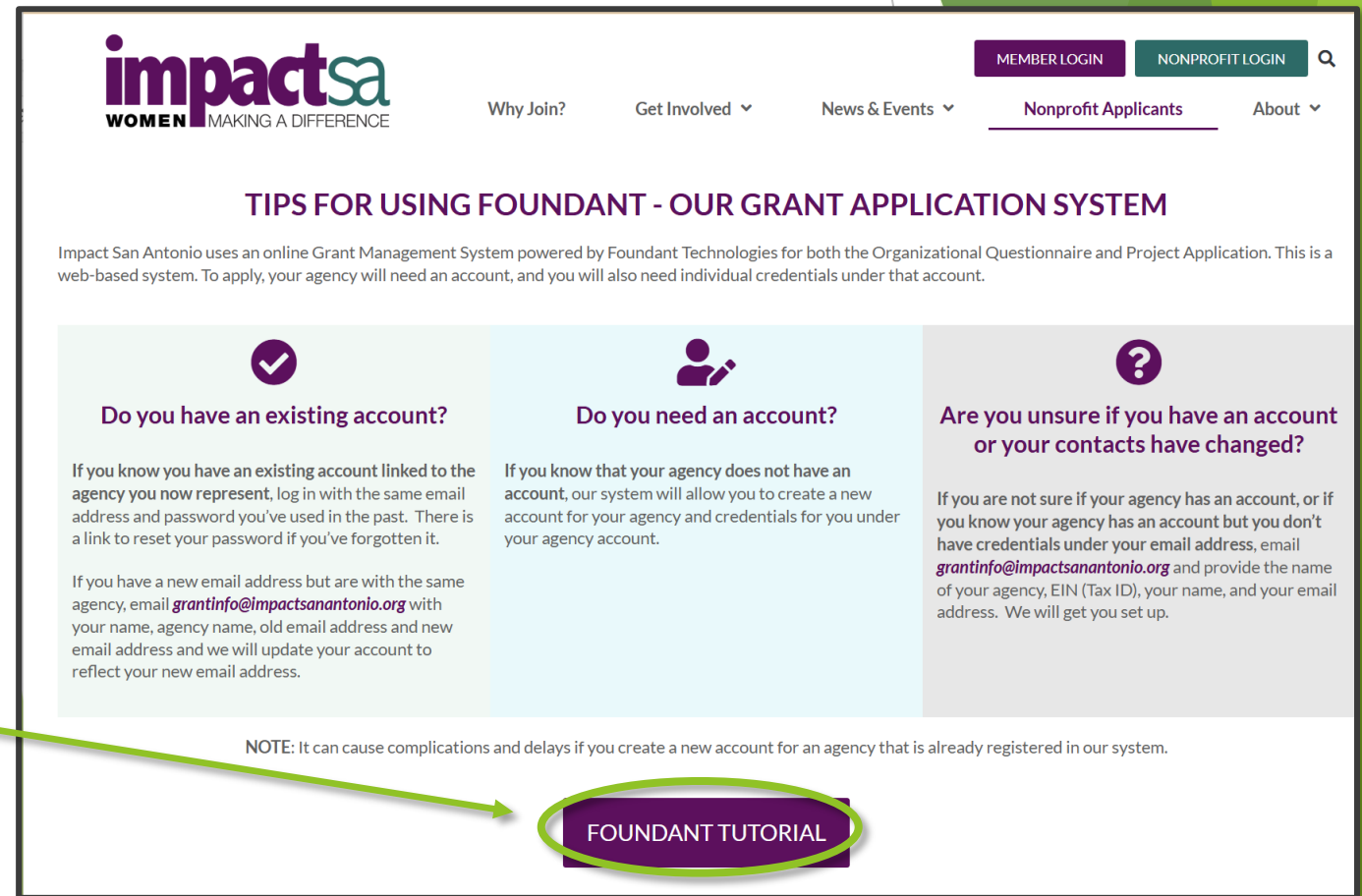
Not sure if your agency has an account?
If you believe your agency has an account but you are unsure of the login information or wish to be added as a user under your agency's account, **PLEASE DO NOT create a new account.** This could result in loss of historical

Updating Account Users

- If you think your agency has an account but you don't have credentials, ***don't create a new account***—if you need credentials, email us
- We will get you set up with credentials and also validate your existing users
- We encourage you to do this before the submission window opens for the Organizational Questionnaire so you will not be waiting for access

Foundant Technical Resources

- If you have never used Foundant before, we have a link on our website to their tutorial videos
- If after consulting the Foundant resources, you are still having technical issues or concerns, email us



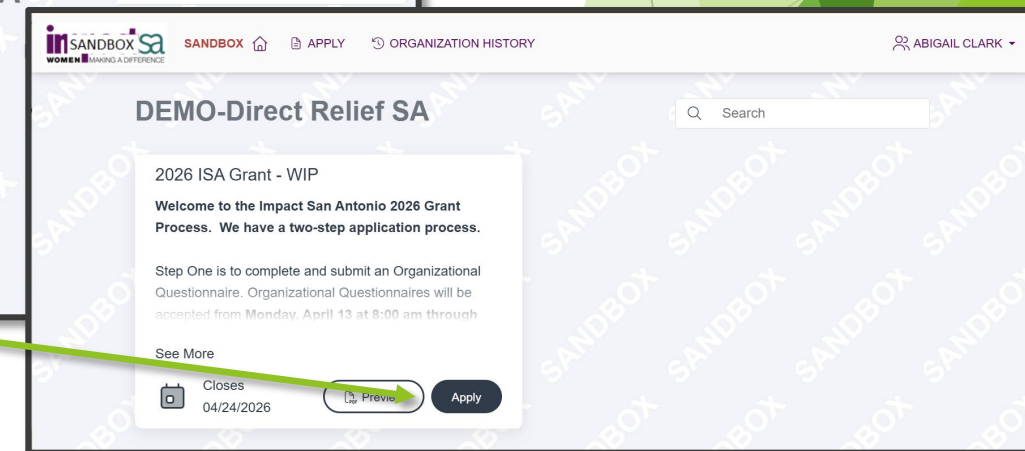
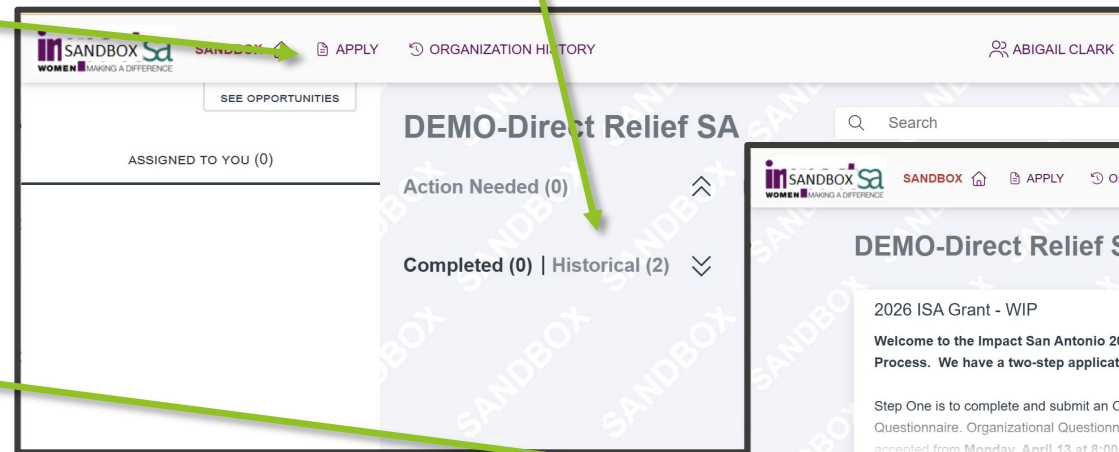
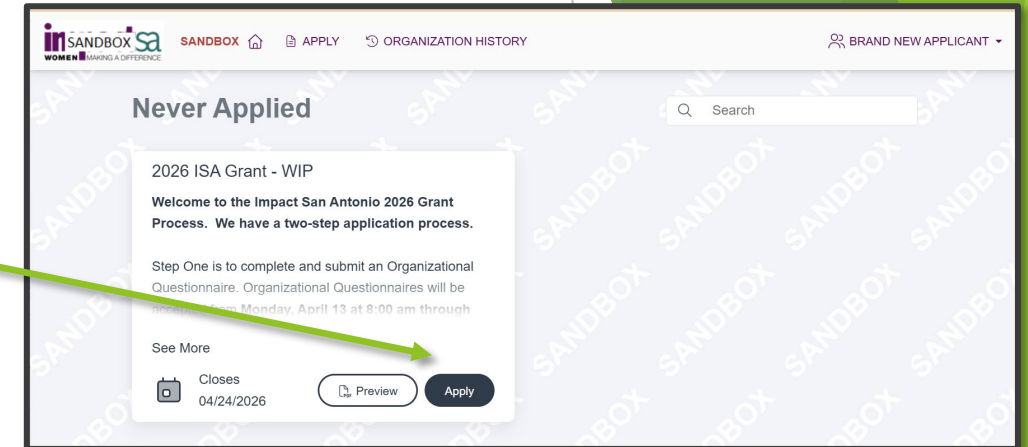
The screenshot shows the Impact San Antonio website with the following elements:

- Header:** Impact San Antonio logo (impactsa WOMEN MAKING A DIFFERENCE), navigation links (Why Join?, Get Involved, News & Events, Nonprofit Applicants, About), and login buttons (MEMBER LOGIN, NONPROFIT LOGIN).
- Section Title:** TIPS FOR USING FOUNDANT - OUR GRANT APPLICATION SYSTEM
- Introductory Text:** Impact San Antonio uses an online Grant Management System powered by Foundant Technologies for both the Organizational Questionnaire and Project Application. This is a web-based system. To apply, your agency will need an account, and you will also need individual credentials under that account.
- Three Columns of Guidance:**
 - Column 1 (Green):** Do you have an existing account? If you know you have an existing account linked to the agency you now represent, log in with the same email address and password you've used in the past. There is a link to reset your password if you've forgotten it. If you have a new email address but are with the same agency, email grantinfo@impactsanantonio.org with your name, agency name, old email address and new email address and we will update your account to reflect your new email address.
 - Column 2 (Blue):** Do you need an account? If you know that your agency does not have an account, our system will allow you to create a new account for your agency and credentials for you under your agency account.
 - Column 3 (Grey):** Are you unsure if you have an account or your contacts have changed? If you are not sure if your agency has an account, or if you know your agency has an account but you don't have credentials under your email address, email grantinfo@impactsanantonio.org and provide the name of your agency, EIN (Tax ID), your name, and your email address. We will get you set up.
- NOTE:** It can cause complications and delays if you create a new account for an agency that is already registered in our system.
- Call to Action:** A purple button labeled "FOUNDANT TUTORIAL" is circled in green, with a green arrow pointing to it from the text "you are still having technical issues or concerns, email us".

Accessing the OQ Form

Once you are logged in:

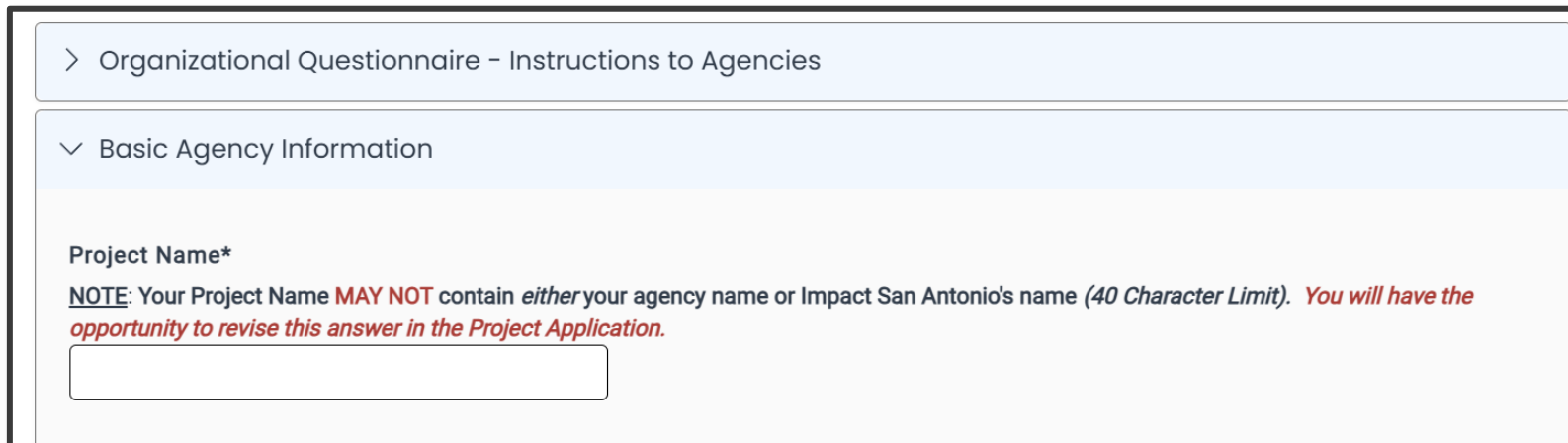
- If your agency ***has not applied before***, you will see the application screen – click “Apply” to access the Organizational Questionnaire
- If your agency ***has applied before***, you will see your dashboard, with your agency’s history
- Click the “APPLY” button and it will take you to the application screen – click “Apply” to access the Organizational Questionnaire



Organizational Questionnaire

Project Name

- Our system requires that the “Project Name” field be completed before you can submit any form, including the Organizational Questionnaire
- Your Project Name will be very important in the Project Application stage, but is not at this stage
- You ***will be able to change this*** in the Project Application form



The screenshot shows a web form titled "Organizational Questionnaire - Instructions to Agencies". Under the "Basic Agency Information" section, there is a "Project Name*" field. A note below the field states: "NOTE: Your Project Name MAY NOT contain either your agency name or Impact San Antonio's name (40 Character Limit). You will have the opportunity to revise this answer in the Project Application." The field is currently empty.

> Organizational Questionnaire - Instructions to Agencies

▼ Basic Agency Information

Project Name*

NOTE: Your Project Name **MAY NOT** contain *either* your agency name or Impact San Antonio's name (40 Character Limit). *You will have the opportunity to revise this answer in the Project Application.*

Organizational Questionnaire

Eligibility Questions – Gating (NEW)

- You *will not be able to access the questions* on the Organizational Questionnaire until you provide answers to all Eligibility Questions
- **We strongly recommend that you answer the Eligibility Questions immediately upon accessing the Organizational Questionnaire in our system.**
- If you answer all Eligibility Questions with answers that reflect that your Agency does meet our Agency grant criteria, you will then be able to access the rest of the form

Organizational Questionnaire

Eligibility Questions – Gating (NEW)

- If one or more of your answers reflect that your Agency does not meet our Agency grant criteria, you will see this message, and you will not have access to the substantive questions in the form

✓ Your Agency does not meet our Grant Criteria

Acknowledgment*

Unfortunately, your agency does meet our grant eligibility criteria for this application cycle. Although our system will allow submission of this questionnaire, your agency will not be deemed eligible or “ready” to move forward to Step 2.

We understand this is disappointing and encourage you to check back with us next year as our eligibility criteria do change.

☐ I acknowledge that my agency is not eligible to apply for a grant during this cycle

- The system **will** allow you to submit the form, but you **will not be eligible** to move forward to Step 2

Organizational Questionnaire

Uploading your most recent 990 (NEW)

- We now require that to be eligible to apply for an Impact San Antonio grant your Agency must have filed (or is preparing to file) either a 990 or a 990-EZ for your most recently ended fiscal year.
- In connection with this requirement, and to assist our Readiness Review Team, as part of this year's Organizational Questionnaire, we require you to upload a copy of your **most recently filed** 990 (or 990-EZ, as applicable) – this must be for your fiscal year ending 2024 or 2025.
- Your 990 must be uploaded in PDF format and must be smaller than 9MB – if you scan it, scan in black/white with at least 300dpi resolution

Most Recent IRS 990 Filing*

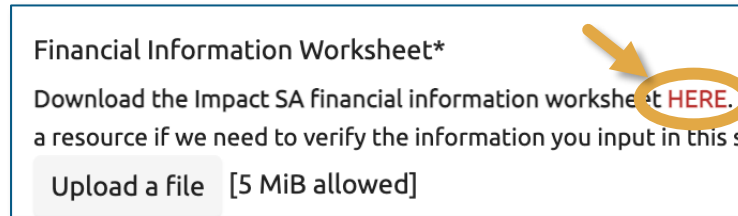
Upload a PDF copy of the agency's most recent 990 (or 990-EZ, if applicable) filed with the IRS (must be for the agency's fiscal year ending in 2024 or the fiscal year ending in 2025).

Upload a file [9 MiB allowed]

Organizational Questionnaire

Financial Information Worksheet

- You must download, complete and upload the Financial Information Worksheet provided by Impact SA in the Organizational Questionnaire.



- If you are part of a larger organization, you may ***also*** be required to complete a Local Agency Worksheet – addressing revenue & expenses of your local operations only.
- All worksheets **MUST** be uploaded in MS Excel format.
- ***Do not use Google Sheets or other programs to complete any worksheet.***

Organizational Questionnaire

Financial Information Worksheet

- Enter data for your fiscal years ending 2023, 2024, 2025
- *Provide 2025 data even if you haven't filed your 2025 990 yet and/or finalized your 2025 audit*
- Round entries to the nearest dollar

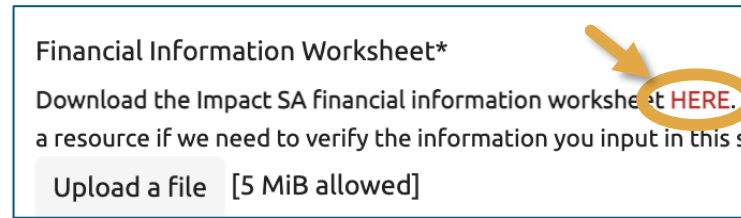
Check boxes should all be **Green**
Do not submit if you have a **Red ERROR** message

	A	B	C	D
1	INSTRUCTIONS: First, please enter your organization's name in the yellow cell. Next, fill in financial information for your last 3 fiscal years <u>ENDING</u> in 2023-2025. Three years of financial information is required. Note that some entries may not apply to your agency. Definitions are included on the next sheet in this spreadsheet.			
2	[[ENTER AGENCY NAME HERE]]			
3	FISCAL YEAR ENDING	2023	2024	2025
4	BALANCE SHEET			
5	ASSETS			
6	Cash	\$121,350	\$652,231	\$627,286
7	Investments			\$5,000
8	Receivables	\$5,076	\$600	\$475
9	Other Current Assets			\$378
10	Total Fixed Assets Net of Accum. Dep.	\$290,981	\$244,946	\$244,946
11	Other Assets			
12	Total Assets	\$417,407	\$897,777	\$878,085
13	LIABILITIES			
14	Accounts Payable	\$200	\$329	\$359
15	Grants Payable			
16	Current Portion of Notes Payable	\$29	-\$462	-\$334
17	Deferred Revenue			
18	Loans and Notes			
19	Tax-exempt Bond Liabilities			
20	Other Liabilities			
21	Total Liabilities	\$229	-\$133	\$25
22	NET ASSETS			
23	Unrestricted Net Assets	\$417,177	\$897,910	\$873,060
24	Restricted Net Assets			
25	Total Net Assets	\$417,177	\$897,910	\$873,060
26	Total Liabilities and Net Assets	\$417,407	\$897,777	\$873,085
27				
28	REVENUE and EXPENSES			
29	REVENUE			
30	Program Services Revenue	\$207,063	\$395,609	\$662,887
31	Membership Dues	\$24,280	\$38,010	\$33,125
32	Investment Income			
33	Government Grants	\$202,850	\$628,803	\$243,342
34	All Other Grants and Contributions	\$88,541	\$255,573	\$170,499
35	Other Revenue	\$2,515	\$7,827	\$5,415
36	Total Revenue	\$525,250	\$1,325,821	\$1,115,268
37	EXPENSES			
38	Program Service Expenses	\$72,175	\$202,089	\$348,598
39	Fundraising Expenses	-\$235	\$13,180	\$25,377
40	Management and General Expenses	\$453,007	\$530,792	\$766,144
41	Total Expenses Before Depreciation	\$524,947	\$746,061	\$1,140,118
42				
43				
44				
45		OK	OK	ERROR
46				
47				

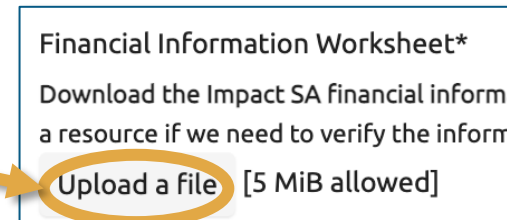
Organizational Questionnaire

Downloading & Uploading Financial Worksheets

- Click the link to download the required worksheet
- Save worksheet to your computer
 - *Excel may open internet downloads in “Protected View” - you may need to “Enable Editing” to complete the worksheet*



- Complete the worksheet and save it
 - Upload the worksheet into your Organizational Questionnaire
- NOTE: Upload must be in Excel format*



Organizational Questionnaire

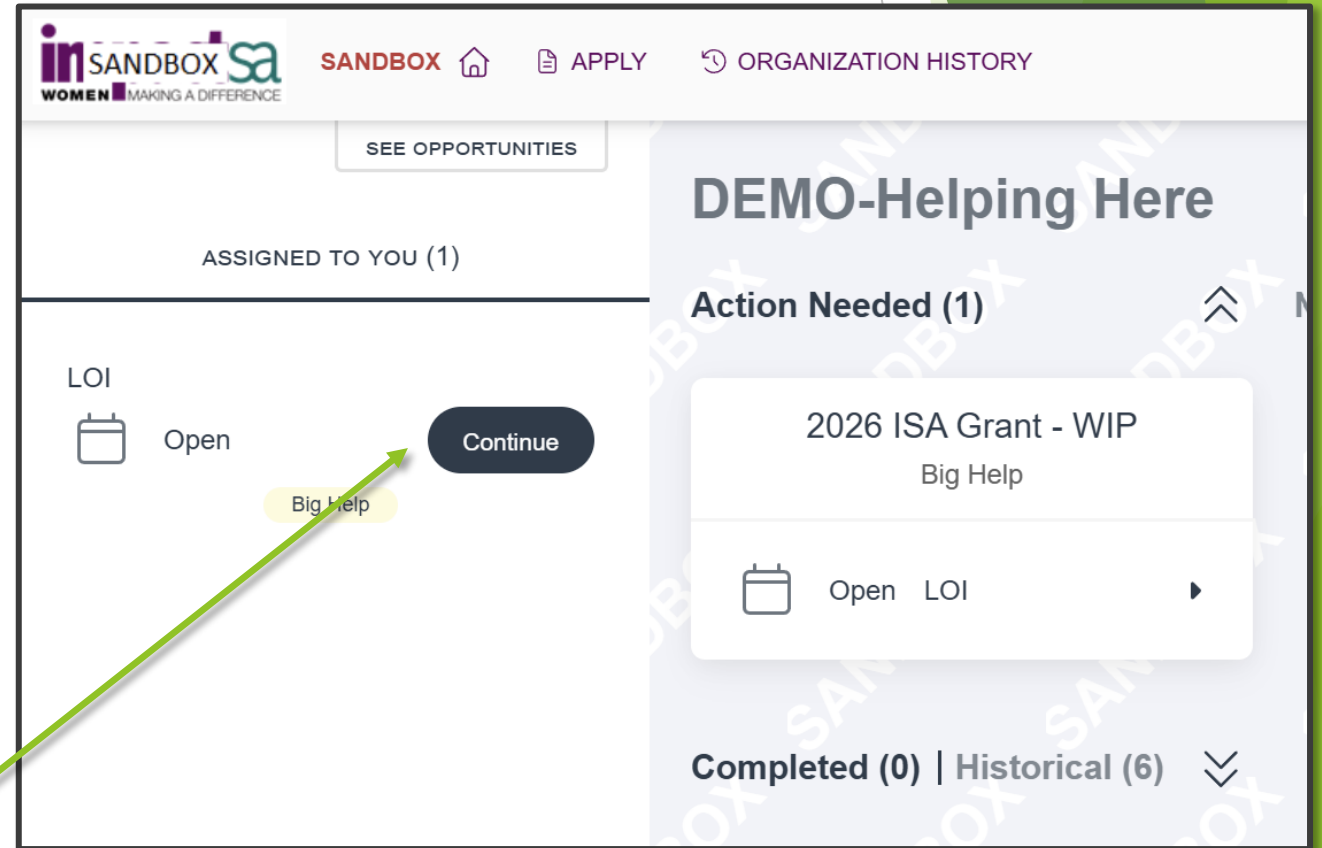
Entering Financial Information in the OQ Form

- You must input a value in every field in each financial table, even if it is “0”
- Advance from field to field within the tables using the “tab” button
- The form will auto-total each column in each table
 - double check the totals against your worksheet
 - If the worksheet and form differ by \$1, that is ok – there can be rounding discrepancies that are not a problem

Organizational Questionnaire

Saving and Returning

- You can save your questionnaire as you work on it - you don't need to complete it all at once
- After saving, when you log in again, you will see the Organizational Questionnaire (labeled as "LOI") on your dashboard
- Click "Continue" to reopen



Organizational Questionnaire

Submitting

- If any required question is unanswered (including attaching the required uploads), the system will not allow you to submit the questionnaire
- If you experience technical issues, please refer to the Foundant Tutorial – there is a link on the Nonprofit page of our website

*Once your Organizational Questionnaire is submitted, you will not be able to access it to make any changes, so make sure your submission is complete and correct before you hit “**Submit**”*

Submission Timeline

Step 1 – Organizational Questionnaire

- ▶ Opens **April 13 at 8am** - Closes **April 24 at 2pm**

Step 2 – Project Application

- ▶ Opens **May 11 at 8am** - Closes **May 29 at 2pm**
- ▶ **SAVE THE DATE:** Training webinar on **May 14th** from 10am-12pm

DO NOT WAIT until the Final Day to Submit

We will not extend deadlines

If you have technical or other issues you may not have time to resolve them before the deadline

Contact Information

If you have questions, email:
grantinfo@impactsanantonio.org

We have no paid staff and are all volunteers.

**We will attempt to respond to inquiries within
3-4 business days outside the submission windows,
and 1-2 business days during the windows.**

*Do not email the general email address on our website
or leave a phone message.*

This will delay your message reaching the Agencies & Applications team.