Oregon Conservation Grant Hub

Prepared for: *Oregon Regional Conservation Partners (OrCP)*

Version	Description	Date
V1	Initial Draft	Nov 11, 2024

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Introduction

The Oregon Conservation Grant Hub is designed to identify and assess new funding opportunities for soil and water conservation districts, watershed council members, land trusts, and conservation entities. Federal funding for land protection and restoration is anticipated to change due to the Inflation Reduction Act (IRA), Infrastructure Investment and Jobs Act (IIJA), and the introduction of new programs following the natural climate solutions provisions of HB3409.

Overview

The Climate Source team conducted interviews with conservation managers across Oregon to understand current grant identification processes, grant sources, and criteria that are used to decide when to apply for a grant. An options analysis was performed to select database and automation tools that fit the desired features (e.g., read-only users, filter, sort, search). After establishing the core decision variables, a survey was administered to the OrCP Advisory Board and interviewees to refine the initial design of Grant Hub (e.g., category values). The Climate Source team will establish a communication protocol to allow for new funding sources to be added to the Hub and will continue as the Grant Hub Administrator through July 2025.

Getting Started

Access

The Grant Hub is stored in Airtable with automation capability in Zapier. The current pricing tier allows for 5 "Admin" users, 50 "Commenters", and unlimited "Read-only" users. For commenter access, reach out to the OrCP Advisory board.

For read-only access, navigate to this link: [OrCP Grant Hub Read-only](#). Users need a no-cost Airtable account to access the Grant Hub. Once logged in, the "All" tab is displayed in the List View. See [List View](#) for further guidance.

Navigation

The main functions of the Grant Hub are listed below based on their location on the interface.
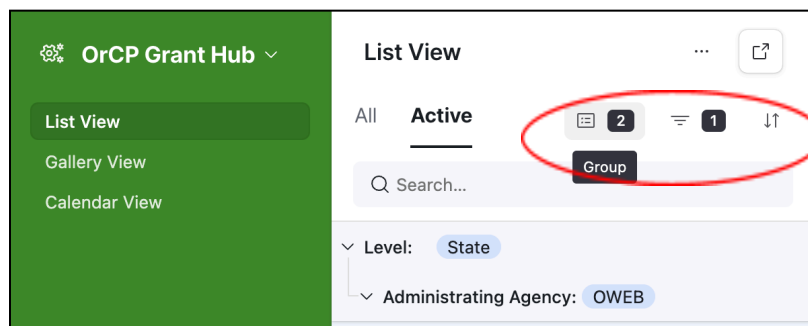
Navigation Panel
- <u>Toggle View</u>: Switch between views on the top left of the screen.
- <u>Share</u>: Invite new users by clicking the "Share" button on the bottom left of the screen.
- <u>Notifications</u>: View new comments or mentions by clicking the *alert* icon on the bottom left of the screen.
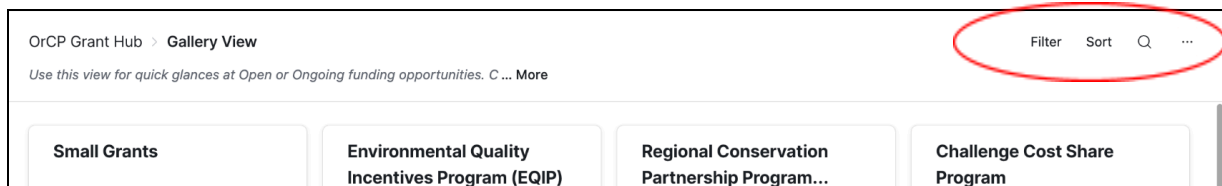
Top Right Menu*

- **Search**: Use keywords to filter funding opportunities that contain the text. This function is available on all views.
- **Group**: Combines records with identical values for ease of use (e.g., Level, Administrating Agency). This function is available on List View only.
- **Filter**: Select specific criteria to include or exclude funding opportunities from the view (e.g., Resource Concern = Fire Resiliency). This function is available on all views.
- **Sort**: Order the funding opportunities by the specified data element (e.g., furthest to closest Close Date). This function is available on all views.
- **Add New Grant Entry**: Submit new funding opportunities to the form available on the List View only.
- **Print**: Export the filtered funding opportunities in the view format as a PDF.
- **Export**: Export the filtered funding opportunities in a table format as a CSV.

Note: the top right menu is located on the inner navigation panel in List View.
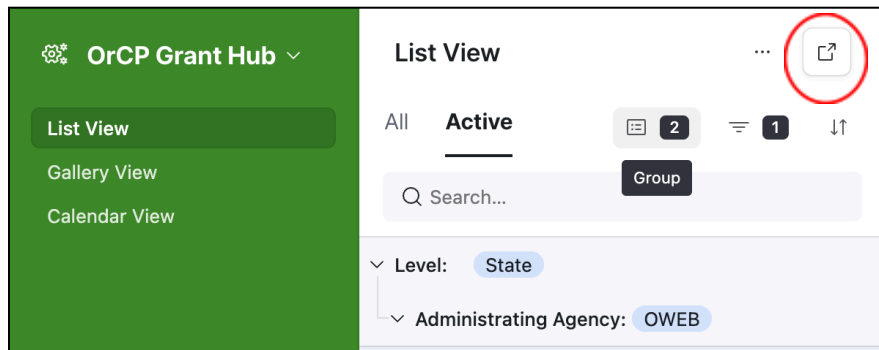
List View

Gallery View

Detail View
- **Comment** - Add public notes or tag users in the detailed view of funding opportunities. This function is available on List and Gallery views.
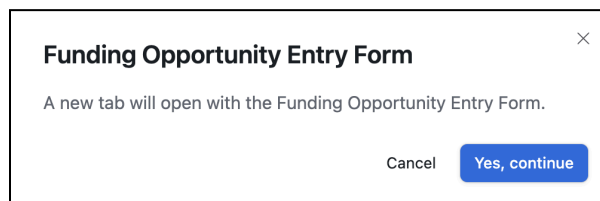
List View

The List View can be used as a preliminary scan for funding opportunities based on application decision criteria. The inner navigation panel groups entries by Level and Administrating Agency for streamlined browsing. You may also remove or add groups using the *list* icon. Changes to

groups will only be available during your current login session. More details, such as Project Type(s), Resource Concern(s), link to the application website, Staff Contact, and Close Date, will appear on the right of screen as you click on funding opportunities. You can scroll up and down using the *carrot* icons on the top left of the detail screen.

The New Entry Form is available on the List View by clicking *export* icon circled below. See New Entry Form for more information.
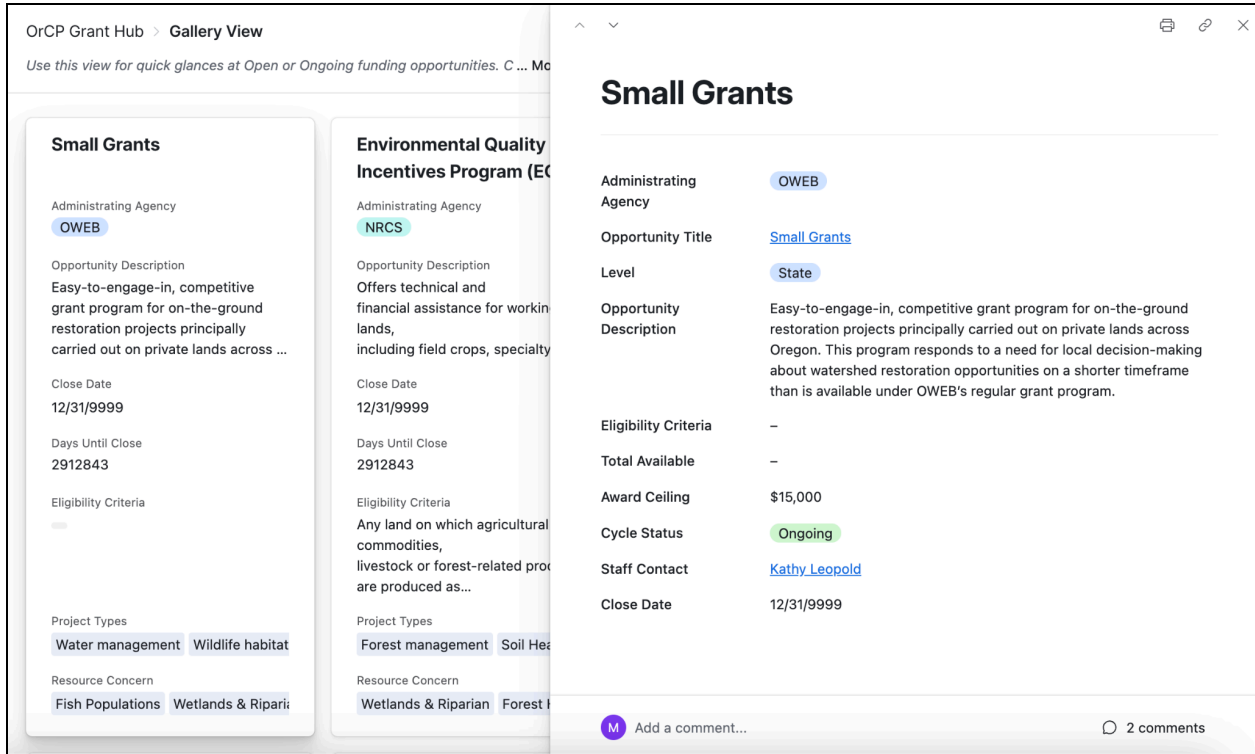

A popup will appear to confirm the request. A new tab will open when the user clicks "Yes, continue". The popup will close when you click "X" or "Cancel".
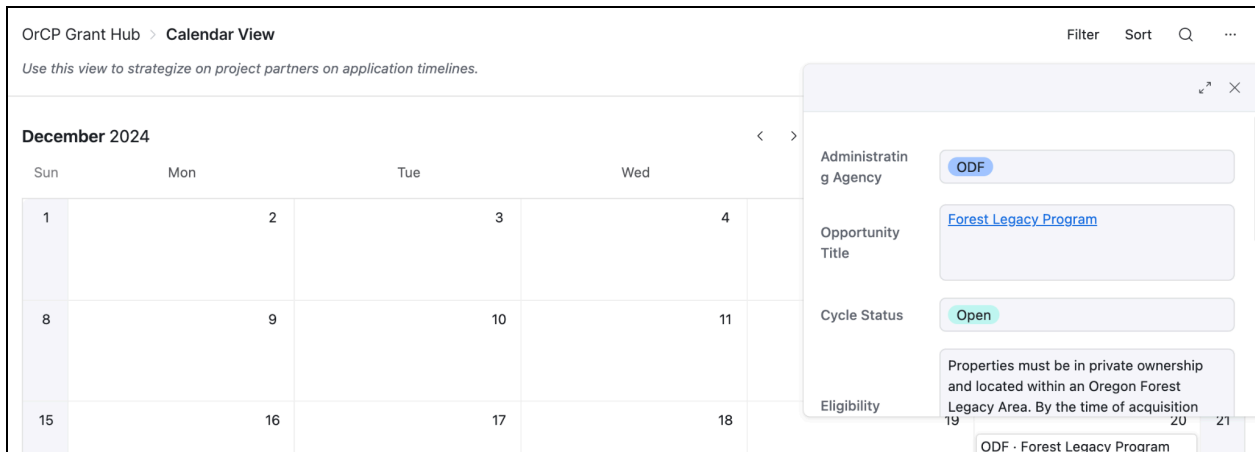

Gallery View

The Gallery View can be used for glances at funding opportunities that have an "Open" or "Ongoing" Cycle Status. The gallery view includes the following data elements: Grant Title, Administrating Agency, Opportunity Description, Close Date, Days Until Close, Eligibility Criteria, Project Types, and Resource Concerns. Click each gallery item for more information and to navigate to the application website.

Calendar View

The Calendar View may be used to strategize project partners and application timelines. Funding opportunities with an assigned Close Date will be displayed on the calendar. A list view on the right-hand side allows the user to toggle between funding opportunities without an assigned Close Date or All Grants. Note that grants with an "Ongoing" cycle are currently assigned a Close Date of 12/31/9999.

Below is a screenshot of the collapsed and expanded detail view. The *copy link* icon circled in red on the expanded detail view allows users to share a link to the selected funding opportunity. This feature is also available on the Gallery View.

New Entry Form

Funding Opportunity Entry Form is accessible using this link. The form is available to anyone with the link and does not require an Airtable account. The Grant Hub Admin will be notified upon new entry to validate information and complete missing fields. A screenshot of the form is available below.

OrCP Funding Opportunity Entry Form

Please complete the form to the best of your ability. Use the drop-downs to standardize values with existing grants. The Grant Hub Admin will be notified to validate and populate any remaining fields.

Opportunity Title *

Please add the link as hypertext to the application process.

Opportunity Description

Please add the priority focus or purpose of the funding opportunity. This may be directly from the opportunity website.

Cycle Status *

Identifies if the entity is Ongoing, Not accepting, Open, or Closed for the current cycle.

Close Date

Please enter close date for current cycle if available.

mm/dd/yyyy

Administrating Agency *

Please select the agency administrating the application process.

Staff Contact *

Please enter name and/or contact information listed for the grant opportunity.

Award Ceiling

Please enter the maximum amount awarded for each project.

Annual Available Amount

Please enter the annual allotted amount for this funding opportunity if available.

Eligibility Criteria *

Match Criteria

Description of requirement for matching funds

Restrictions

Description of restrictions (e.g., timeline of completion, excluded projects or entities)

Project Category

One or more categories that describe the scope of funding opportunity

+ Add category

Resource Concern

One or more resources that are prioritized for this funding opportunity

+ Add resource

↺ Clear form

Submit

Configuration

The Grant Hub is a structured database stored on Airtable's web-based platform. It is managed by up to 5 Admin users who have the ability to add new funding opportunities, update existing entries, update drop-down values, add or update column names, and automate recurring cycles. Please reach out to the Support team to request updates.

Enhancements & Limitations

Enhancements

We are exploring opportunities to simplify new grant entries and update existing grants, such as automated web scraping, browser extension "zaps", and forwarding newsletters to a shared email. Please reach out to the Support team with any requests on automation capabilities.

Limitations

The Grant Hub is limited by the available information and time capacity of the Administrators. We expect the data elements with predefined values (e.g., Project Types and Resource Concerns) to continuously improve as various audiences use the Grant Hub.

Troubleshooting & Support

Error Messages

This section will contain error messages discovered during user testing.

Support Team

Name	Role	Email
Andrea Kreiner	Executive Director	andrea.kreiner@oacd.org
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Appendices

Appendix A: Survey Responses

Appendix B: Data Dictionary