THE OREGON COMMUNITY FOUNDATION

Here for Oregon. Here for Good.

Grants Portal & Online Application

Step-by-Step Instructions

V 5.0

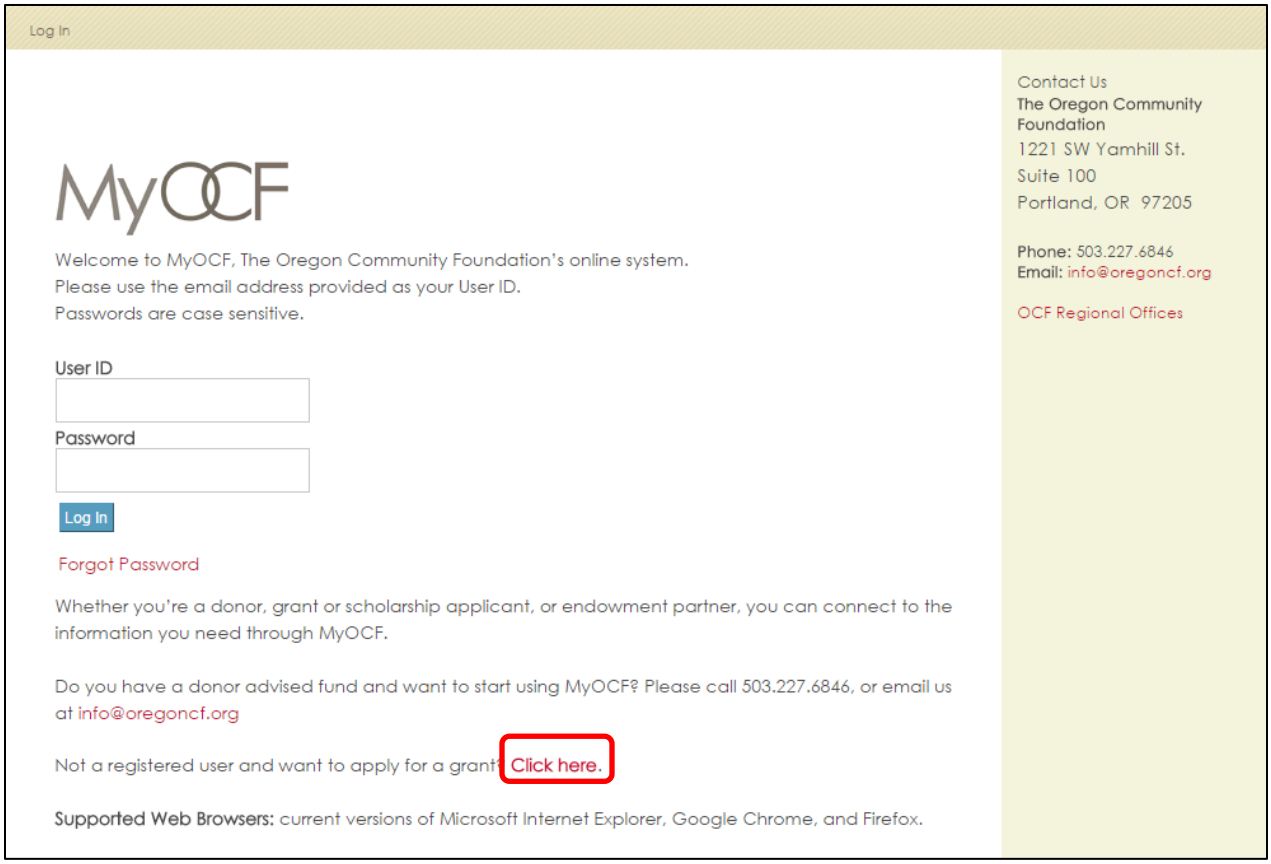
For Frequently Asked Questions (FAQ's) please visit the grant program's web page at oregoncf.org or the sidebar within the Grants Portal.

PART 1: MyOCF Login

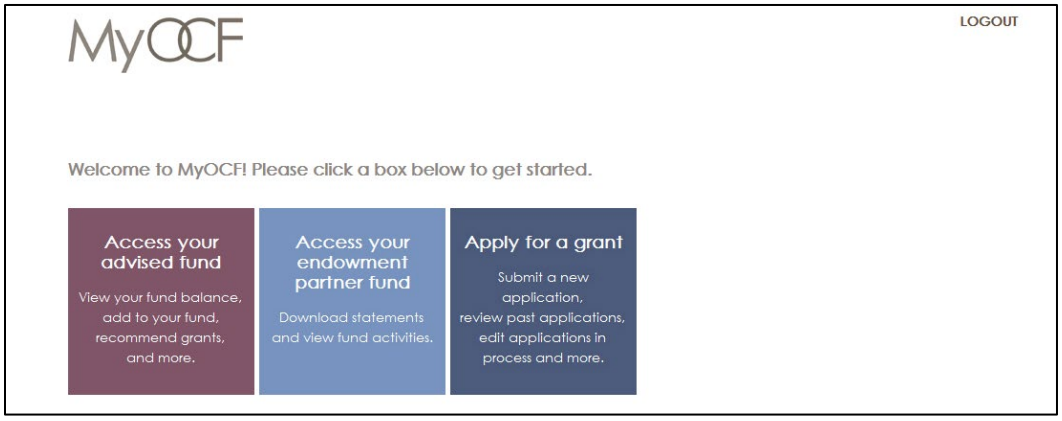
If you are on OCF's homepage (www.oregoncf.org) you can access the Grants Portal by clicking MyOCF at the top of the screen.

You can also access the Grants Portal by visiting the individual grant program pages on OCF's website, if the program is open for application.

To begin, enter your **User ID** and **Password** (your **User ID** is your email address). If you can't remember your password, click **Forgot Password** and follow the steps to retrieve your login information. If you're not a registered user and want to apply for a grant, visit the link at the bottom of the screen.



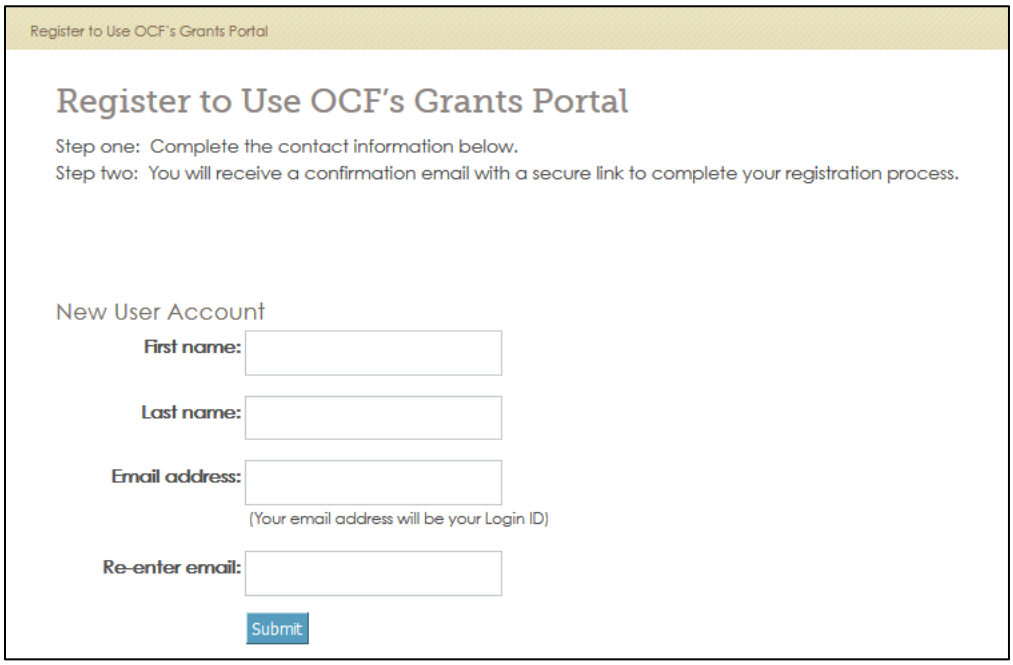
After logging in, you will be directed to the following landing screen. Depending on your level(s) of access, you may see more or less of the following options. Click on **Apply for a Grant** to get started.



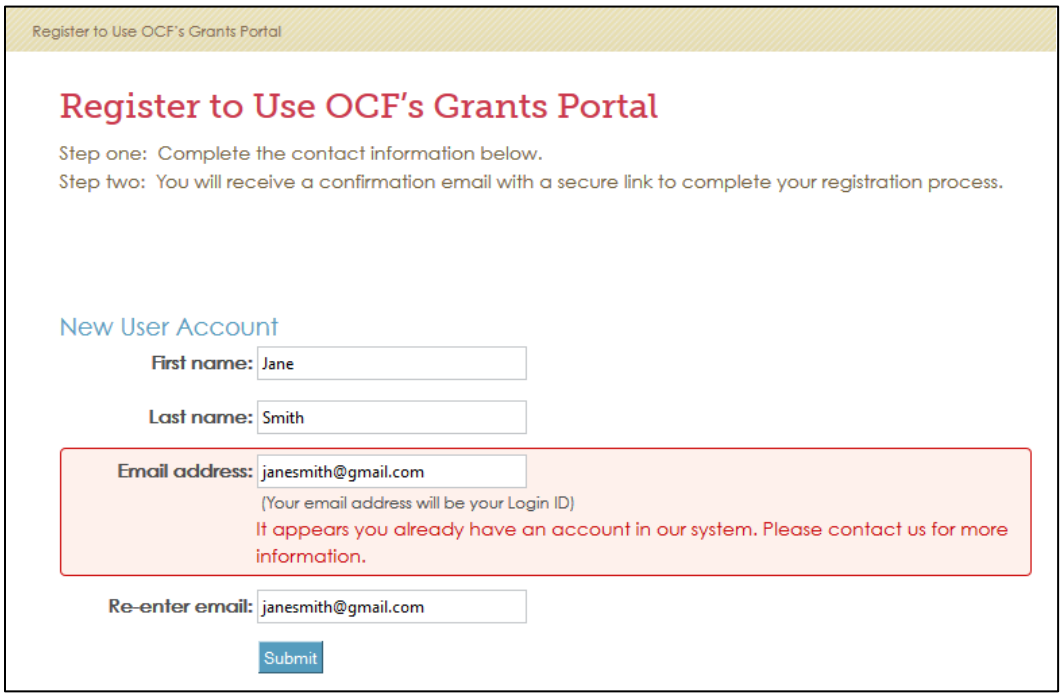
PART 2: Registering to Use OCF's Grants Portal

Existing users: if you don't need to register or connect yourself to an organization, skip ahead to **Part 4** to begin the application process. However, if you still need to connect yourself to an organization, please review **Part 3**.

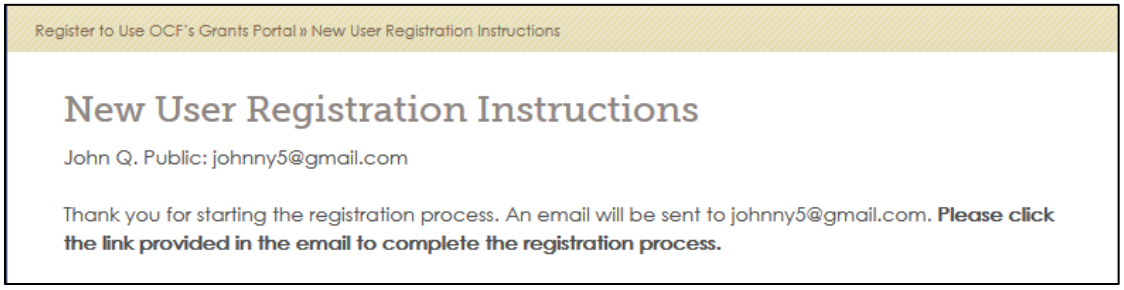
If you are new to the Grants Portal and wish to register as a user, enter your name, email address and click **Submit**. You will receive a confirmation email with a link to complete the registration process. *Please allow 15+ minutes for the email to arrive. If it doesn't arrive, please check your junk mail.*



If the system detects that you already have an account (see example below), please go back to the login screen and try logging in with your email and password. If you continue to have any issues, please contact OCF at grants@oregoncf.org for assistance.

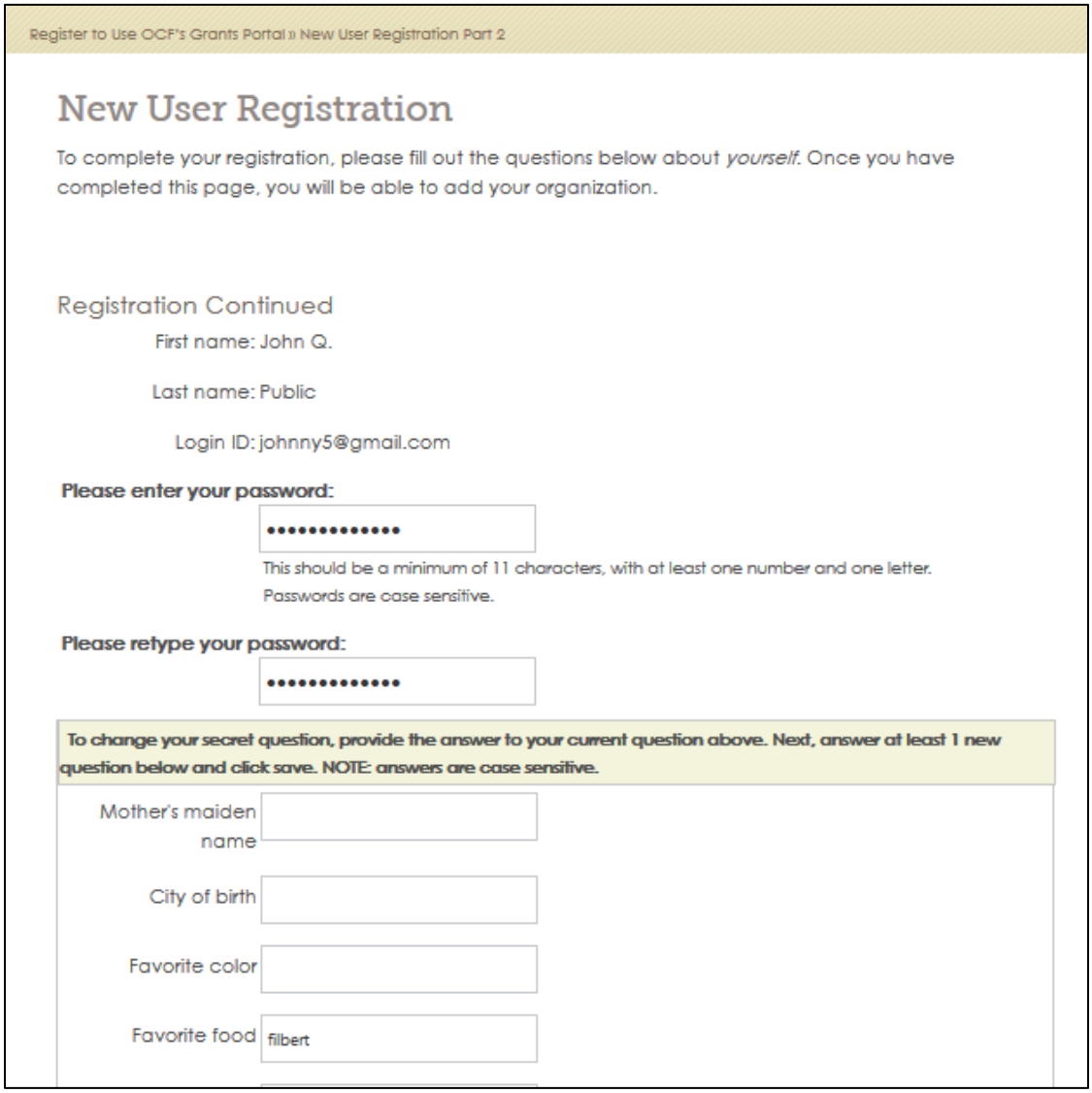


If you've successfully completed step one of the registration process, you will see this screen:



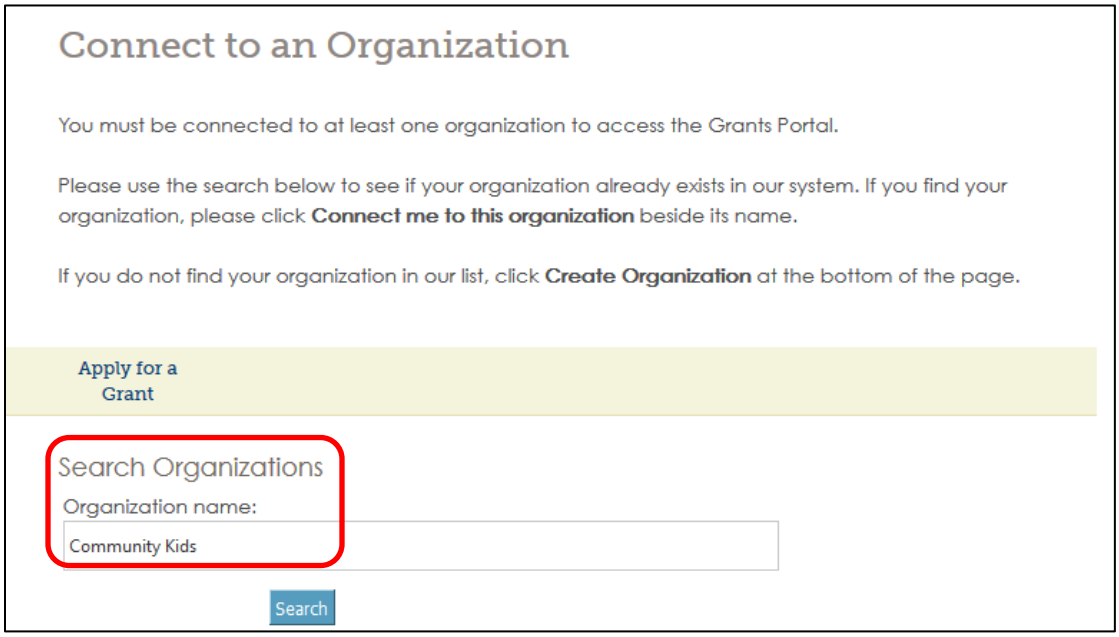
Completing the Registration Process

Step two of the registration process asks for additional user details. When you're finished, click **Submit**. You will then be prompted to connect yourself to an organization (see **Part 3**).

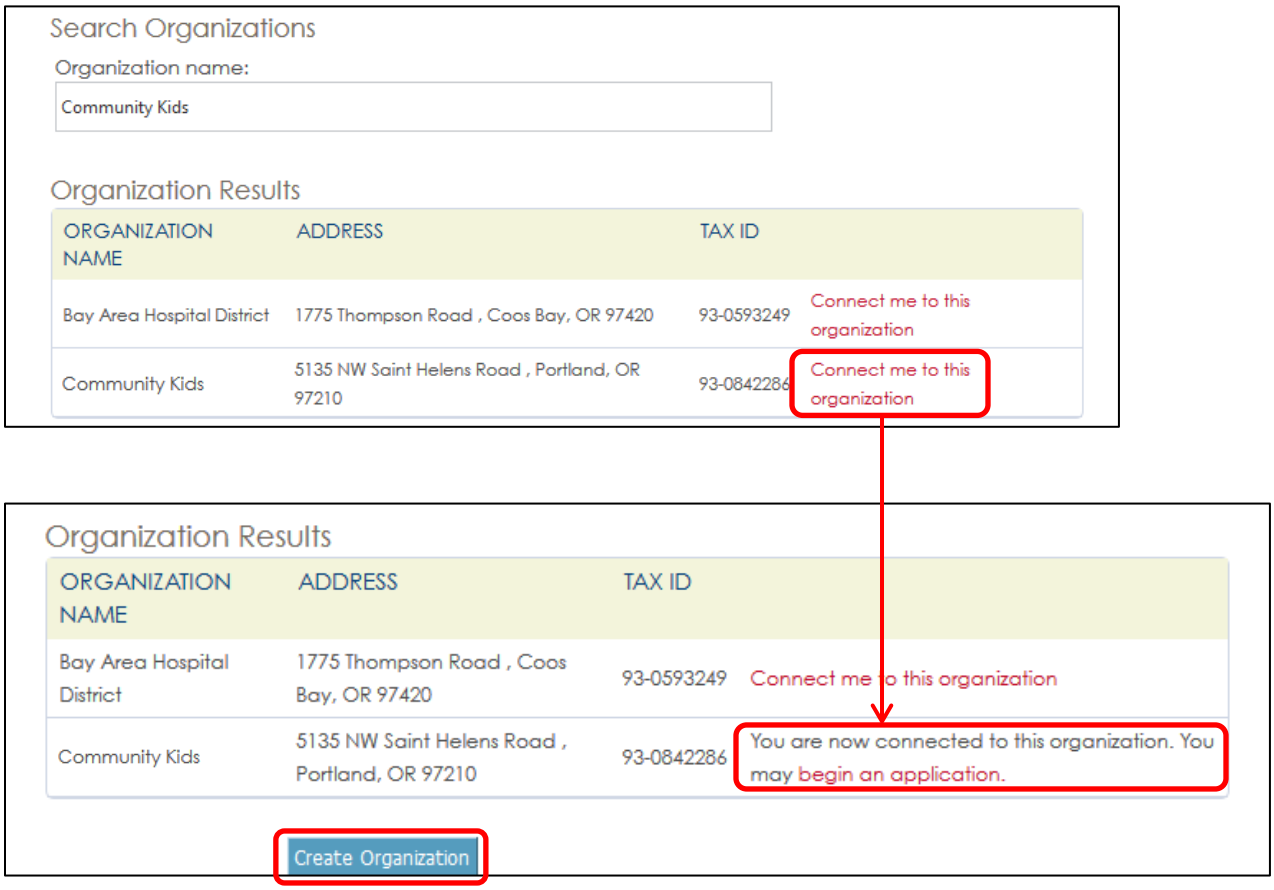


PART 3: Connecting to an Organization

You must be connected to at least one organization to access the Grants Portal. First, **Search** to see if your organization exists in our system.

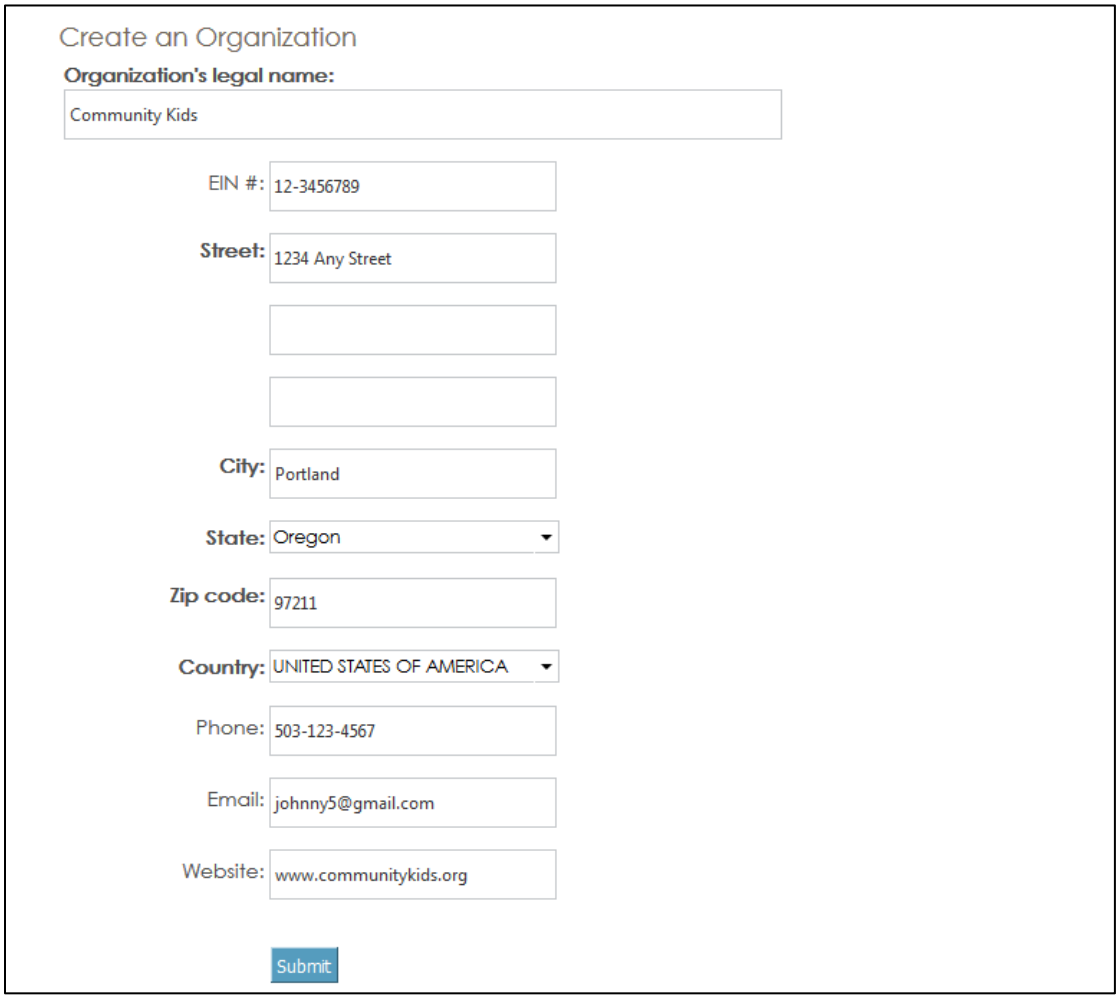


If your organization shows up in the results, click **Connect me to this organization**, then **begin an application** to continue. If the organization doesn't appear in the search results, click **Create Organization** (see next page for more information).

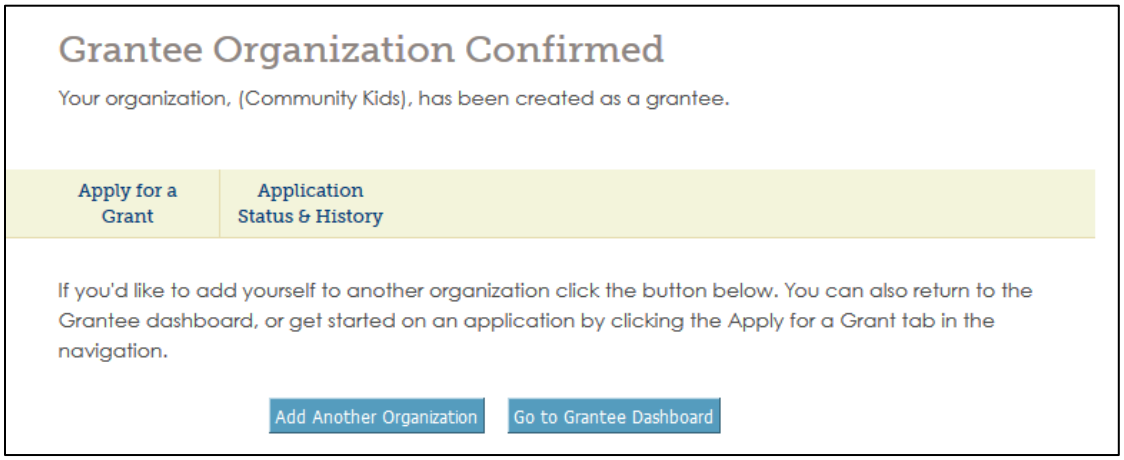


Creating an Organization

If your organization is not listed in the search results, click **Create Organization** and you will be directed to this screen. When you've completed entering the information, click **Submit**.



When you click **Submit**, the following confirmation screen will appear. From here, you can add yourself to another organization by clicking **Add Another Organization**, or click **Go to Grantee Dashboard** to apply for a grant.



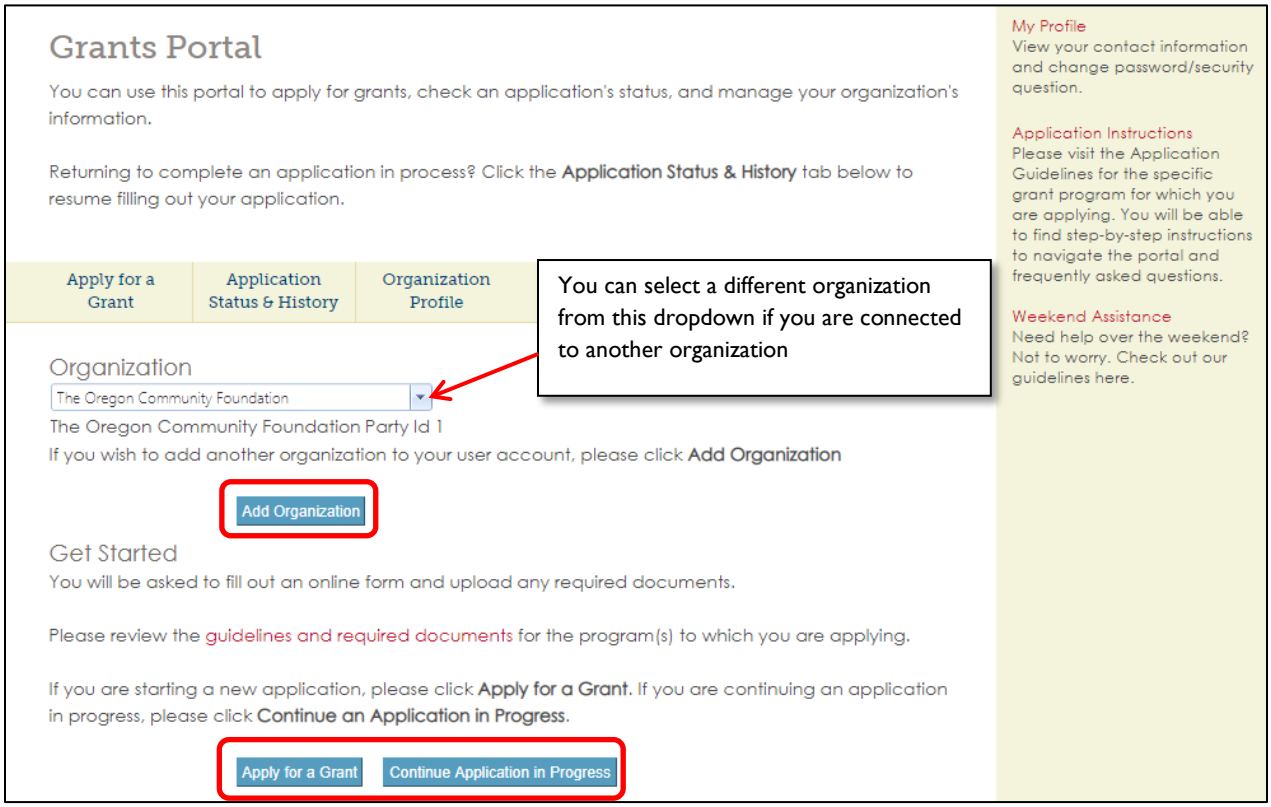
PART 4: Grants Portal Homepage

The Grants Portal homepage is where you can get started on a grant application, manage your user profile (My Profile), continue applications in progress, and view applications that have been submitted.

To add another organization to your user account, click **Add Organization** (see **Part 3** for more information).

If you're already connected to an organization and you're ready to get started, click **Apply for a Grant**.

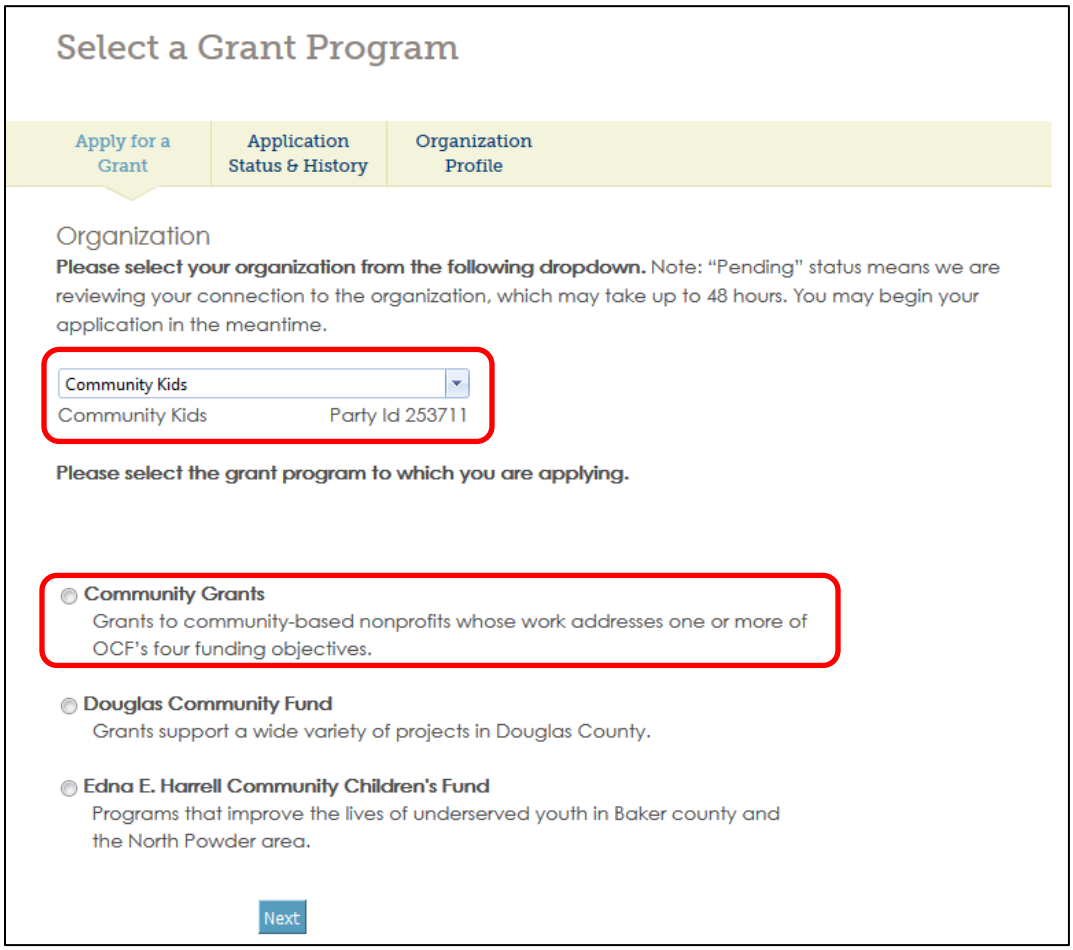
If you've started an application and you're returning to continue your work, click **Continue Application in Progress**.



PART 5: Selecting a Grant Program & Determining Eligibility

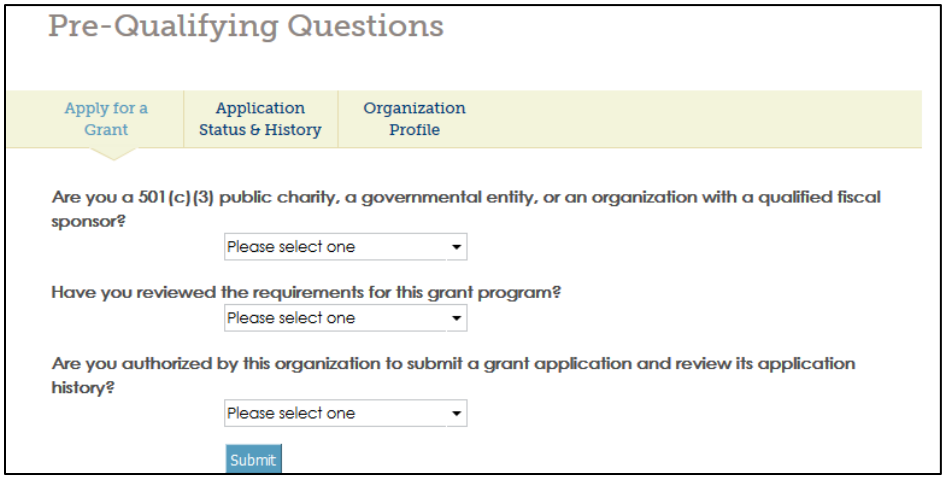
Select a Grant Program

From this screen you can select the grant program to which you are applying. You can also make sure that you're connected to the correct organization for this application. When you're ready to move on, click **Next** at the bottom of the screen. You will be taken to the Pre-Qualifying Questions screen.



Pre-Qualifying Questions

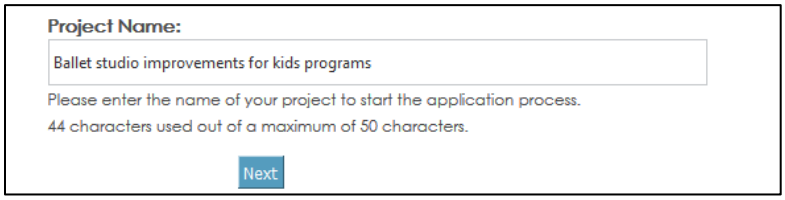
The Pre-Qualifying Questions screen determines your eligibility to apply for a grant. Answer the three questions, then click **Submit** to continue.



PART 6: Filling out an Application

Project Name

Provide a name for your project that you can reference later. Click **Next** to continue.

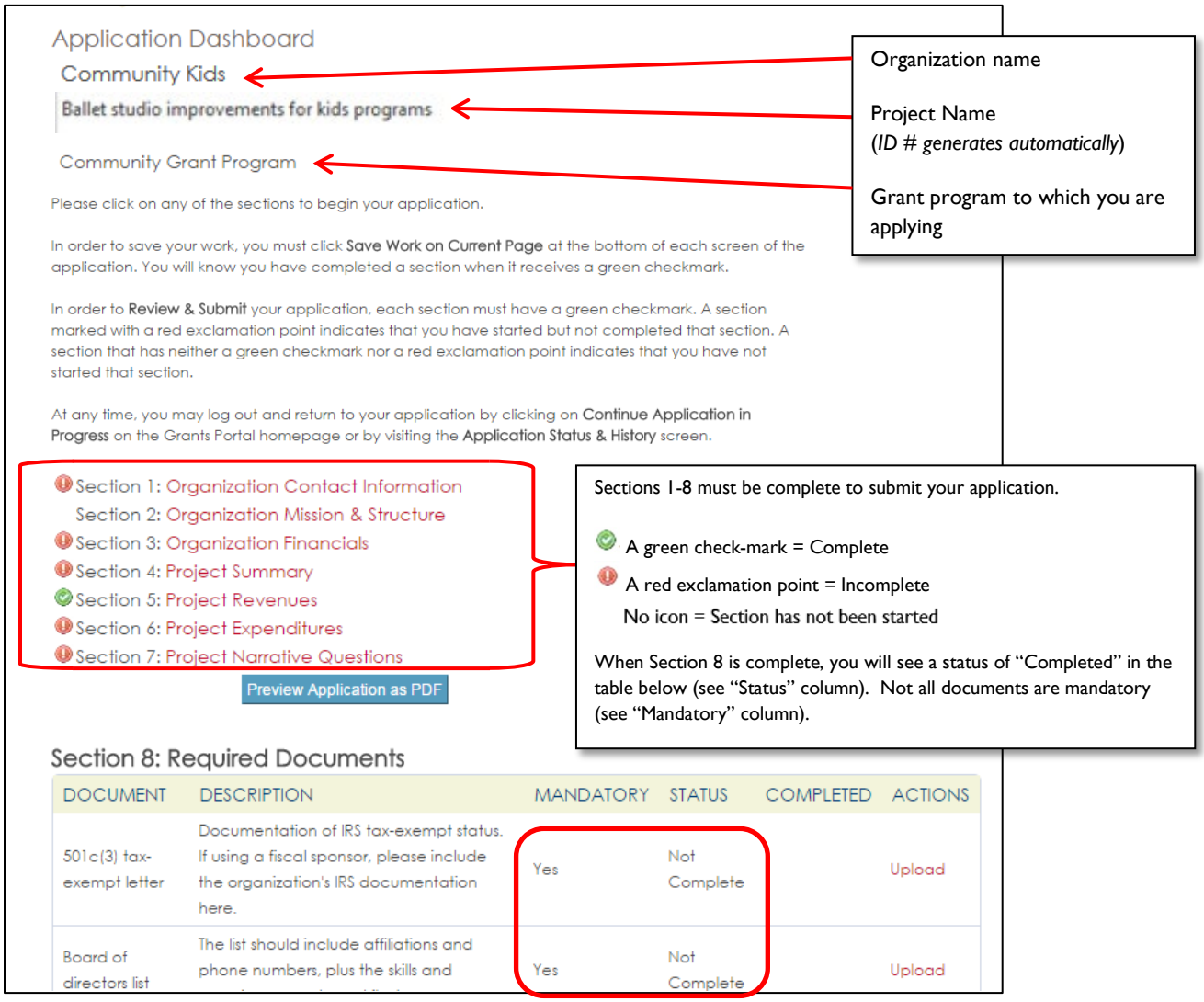


Application Dashboard

Time to begin the application! From the Application Dashboard screen you can access any section of the application and upload required documents. You may click on any of the sections to get started.

In order to submit your application, you must complete all sections and attach all required documents. You will know this is the case when: 1.) sections 1-7 have received a green check mark, 2.) all required documents (Section 8) have a status of "Completed," 3.) the Review and Submit button is visible on the Application Dashboard.

Section 8 (Required Documents) will not show a green check mark. Instead, refer to the "Status" column in the table. Please note: Not all documents are mandatory (see "Mandatory" column).



Section 1 of 8: Organization Contact Information

This is a basic overview of your organization. If you have a fiscal sponsor, please note it here. Any fields in **bold** are required fields, as is the case throughout the application. In order to save your work, you must click **Save Work on Current Page**.

Section 1 of 8: Organization Contact Information

Any fields in **bold** are required fields.

Organization name: Dance is Pure

Alternate name/Acronym: DIP

Employer ID number (EIN): 21-0074910

Fiscal sponsor name: (if applicable)

Fiscal sponsor EIN: (if applicable)

Mailing Address: PO Box 35

City: Portland

County: Multnomah

State: Oregon

Zip code: 97205-2108

Website: www.danceispure.org

Phone: 503.555.1234

Executive Director or Board Chair's Information:

Prefix: Mr. (Mr., Ms., etc.)

First name: Jazzy

Last name: Shoes

Title: Director

In order to save your work, you must click **Save Work on Current Page** at the bottom of each screen of the application. Click **Previous** to return to the previous page or click **Next** to move to the next page.

Previous | Save Work on Current Page | Return to Dashboard | Check my Work | Next

Section 2 of 8: Organization Mission & Structure

Section 2 of 8: Organization Mission & Structure

Any fields in **bold** are required fields.

Organization mission and primary activities:

Our mission is to heal the world, make it a better place, for you and for me, and the entire human race.

104 characters used out of a maximum of 500 characters.

Year organization was established:

1975

Number of paid employees:

10

Number of FTE (full time equivalent):

8.50

Full-time equivalent (FTE) measures a worker's involvement in a project. An FTE of 1.0 means that the person is equivalent to a full-time worker, while an FTE of 0.5 signals that the worker is only half-time.

Number of volunteers:

12

Number of board members:

12

Number of board members who contribute to annual budget:

6

Number of board meetings per year:

Is the mission of your organization intended to benefit the general public or is it intended to reach a specific population group?

Please select one

"General population" means no specific demographic group is targeted and services are open to everyone.

"Specific Population" means one or more specific demographic groups are targeted for services.

See next page if "Specific Population" is chosen here.

How many unduplicated persons did your organization serve directly last year? (This can be a rough estimation.)

4,000

How many persons do you expect to serve this year?

5,000

Counties where services are provided:

Statewide
Out of State
Baker
Benton
Clackamas
Clark
Clatsop
Columbia
Coos

(To select more than one, hold down your ctrl key and click on your selections.)

Section 2 (Continued)

If "Specific Population" is chosen, a new text box appears asking you to provide more information about who you're serving.

Is the mission of your organization intended to benefit the general public or is it intended to reach a specific population group?

Specific Population

"General population" means no specific demographic group is targeted and services are open to everyone.

"Specific Population" means one or more specific demographic groups are targeted for services.

If your organization does intend to reach a specific population group, please indicate which group or groups it intends to reach.

School-aged kids, ages 5-12 years-old, focusing on low-income kids from remote parts of Baker County.

Section 3 of 8: Organization Financials

Section 3 asks for financial information about your organization. We will request project-specific information in later sections.

Section 3 of 8: Organization Financials

Any fields in **bold** are required fields.

Financials for the current fiscal year and the last completed fiscal year.

A fiscal year is a 12-month period used by an organization for budgeting and accounting purposes. Often it begins in January or July.

	BUDGET FOR CURRENT FISCAL YEAR	ACTUALS TO-DATE FOR CURRENT FISCAL YEAR	ACTUALS FOR LAST COMPLETED FISCAL YEAR	
Organization Revenues	$200,000.00	$50,000.00	$180,000.00	Edit
Organization Expenditures	$200,000.00	$75,000.00	$170,000.00	Edit
Operating Surplus/Deficit	$0.00	($25,000.00)	$10,000.00	Edit

What is the time period for your current fiscal year? Example: 7/1/2015-6/30/2016.

1/1/2019-12/31/2019

And for your last completed fiscal year? Example: 7/1/2014-6/30/2015.

1/1/2018-12/31/2018

If your organization finances require additional explanation, or if either the current fiscal year or last completed fiscal year represents an operating shortfall, please explain.

Breakdown of organization revenue for the last completed fiscal year: Please enter your revenue sources for last year in the table below by clicking **Edit** to the right of each row. Then click **Save**. If you reach a row with a revenue source that is not applicable to your organization (i.e., zero dollars come from that source), please leave it blank. If the "Other" category includes more than one revenue source, go ahead and combine them all in that one row.

REVENUE SOURCE	AMOUNT	
Memberships:		Edit
Individual contributions:	$60,000.00	Edit
Earned income (ticket sales, fees for service, etc.):		Edit
Fundraising benefits:	$40,000.00	Edit
Corporate/business contributions:		Edit
Government support:		Edit
Foundation support:	$80,000.00	Edit
Endowment earnings:		Edit
Other:		Edit
	$180,000.00	

If you listed a figure in "Other", please provide a description of this revenue.

Organization's unrestricted cash reserves at beginning of current fiscal year:

$20,000.00

Organizations operate on either a calendar year (January 1 – December 31) or fiscal year (July 1 – June 30). Please show us what "current" and "previous" year means to your organization by entering date ranges (month/day/year) into these two fields.

Click **Edit** to enter amounts, then click **Save**.

Section 3 (Continued)

List of five single largest contributors from last year's revenue sources: Please enter specific individuals, agencies, businesses, foundations, or other groups. Individuals may be listed as Anonymous #1, #2, etc., if necessary.

SOURCE (CLICK EDIT TO ADD INFORMATION)	AMOUNT	
Foundation # 1	$5,000.00	Edit
Foundation # 2	$5,000.00	Edit
		Edit
		Edit
		Edit
	$10,000.00	

Click **Edit** and a text field will appear to enter revenue source and amount. Click **Save**.

Please list grant applications to OCF, approved or declined, during the past three years. If grants were approved, please include amounts awarded.

2014 - OCF Community Grant Program (approved, $5,000)

We prefer the list format seen here.

Section 4 of 8: Project Summary

Section 4 of 8: Project Summary

Any fields in **bold** are required fields.

Project contact person's information:

First name: John

Last name: Public

Title: Reading Specialist

Phone: 503.555.1234

(xxx-xxx-xxxx)

Email: achterman@gmail.com

If the project contact is different than the executive director or board chair provided in Section 1, please enter it here.

Project Name:

Expansion of reading programs in Baker County

Please use a name that will help you reference this application at a later date

Project description (one sentence):

to support kids living in remote Baker County, ages 5-12, through afters-literacy programming located a the Baker Community Center

130 characters used out of a maximum of 500 characters.

Key project components:

1. After-school literacy classes for 1 hour taught by certified reading specialists
2. Provide snacks and other homework help
3. Provide additional reading resources for parents
4. Etc.
5. Etc.

(A brief snapshot of your project, including measurable outcomes.)

193 characters used out of a maximum of 1000 characters.

How many persons will benefit directly from the project?

150

Does the project focus on a rural community? If so, how?

0 characters used out of a maximum of 250 characters.

If your project focuses on a rural community, please explain how you define that community and your specific expertise to serve that community.

Section 4 (Continued)

In what counties will services be provided?

Baker

Is the project for which you are requesting funds intended to benefit the general public or a specific demographic? (e.g. age range, ethnicity, etc.)

Specific Demographic

"General Population" means no specific demographic group is targeted and services are open to everyone.
"Specific Demographic" means one or more specific demographic groups are targeted for services.

Please note: this population question is specific to the project for which you are requesting funds, not your overall organization. The answer may look different from what you shared in Section 2: Organization Mission & Structure.

Please describe the population you serve.

0 characters used out of a maximum of 500 characters.

If your project focuses on a population that experiences disparities in education, health, income or other areas due to geography, ethnicity, gender, sexual orientation or other factor, please tell us about it. And tell us if there are systemic barriers.

0 characters used out of a maximum of 1000 characters.

Which OCF funding priority best reflects the primary goal of your project? Projects may address multiple priorities but we want to know which you see as the best fit.

Expand academic support, mentoring and recreational programs for children (

Total project budget:

$60,000.00

Total amount requested:

$15,000.00

In order to save your work, you must click **Save Work on Current Page** at the bottom of each screen of the application. Click **Previous** to return to the previous page or click **Next** to move to the next page.

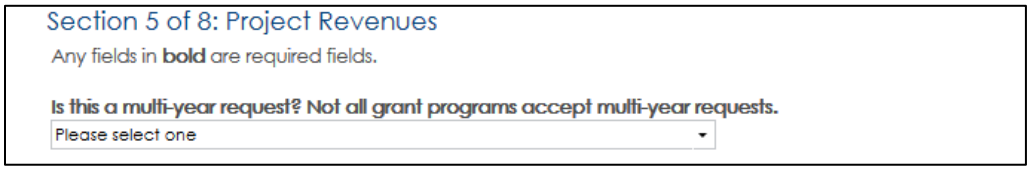
Previous | Save Work on Current Page | Return to Dashboard | Check my Work | Next

Section 5 of 8: Project Revenues

PLEASE NOTE: You must complete this section (Section 5) before you begin Section 7: Project Narrative Questions.

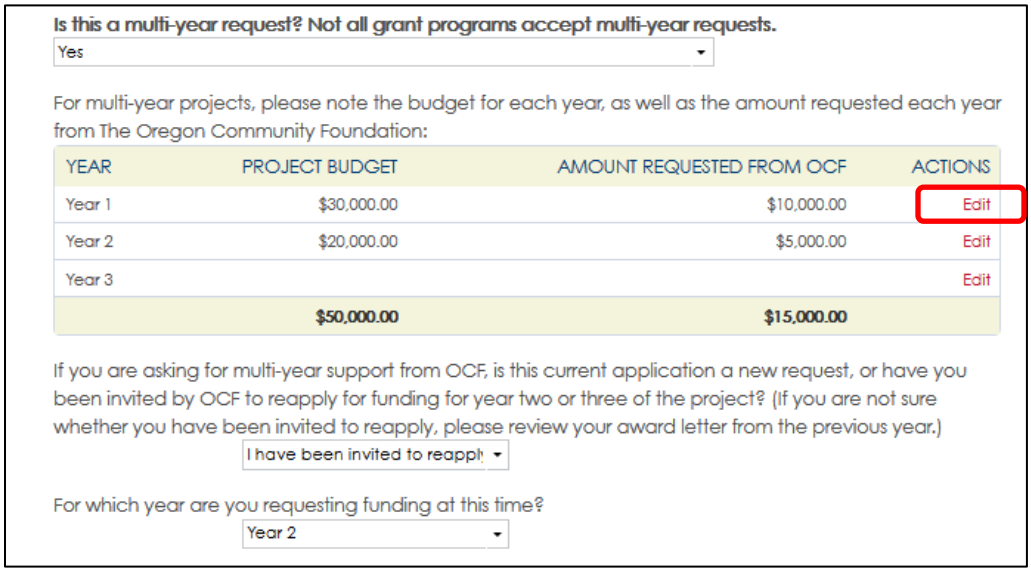
To begin Section 5, please indicate whether this is a multi-year request to OCF. If this a new multi-year request, please select "Yes." If you have been invited to reapply for year two or three of your project, please select "Yes."

If you're not sure whether the program to which you are applying accepts multi-year requests, please visit oregoncf.org to review the program's application guidelines.



If you select "No" from the dropdown, please complete the proposed sources of funding table and the remaining questions on the screen. See page 16 for details.

If you select "Yes" an additional table and set of questions will appear as follows:



Click **Edit** to share an annual budget breakdown of your project (cost per year) along with the amount you're requesting from OCF in each year.

If you've been invited to reapply for year two or three of your project, please include project budgets from prior years and amounts awarded by OCF.

Section 5 (Continued)

In the proposed sources table below Click **Edit** to add a revenue source and amount. Next, please indicate whether it's secured, pending, or planned. *Please Note: a pledge from an individual is not considered secured until it is received.*

Please list all proposed sources of funding. You may include the value of in-kind support (e.g., volunteers, donated equipment, etc.). "Submitted" means you have made a request already. "Planned" means you plan to make a request.

REVENUE SOURCE	SECURED	PENDING	PLANNED	ACTIONS
Main Street Grant	$2,000.00			Edit | Remove
Local Bank		$10,000.00		Edit | Remove
Major Donor #1	$5,000.00			Edit | Remove
Major Donor #2	$3,000.00			Edit | Remove
Foundation			$20,000.00	Edit | Remove
Individuals		$20,000.00		Edit | Remove
	$10,000.00	**$30,000.00**	**$20,000.00**	Add

(Click the "add" link to create new rows in the table.)

If your project revenues require additional explanation, please offer it here.

Individual contributions are pending. Most will come in toward the end of the year at our annual gala event.

108 characters used out of a maximum of 750 characters.

In order to save your work, you must click **Save Work on Current Page** at the bottom of each scre application. Click **Previous** to return to the previous page or click **Next** to move to the next page.

Previous | Save Work on Current Page | Return to Dashboard | Check my Work

You may use this text field to provide details about your revenue sources. This might include:

- pledges
- anticipated fundraising timelines
- proposals actively being reviewed by other funders

Section 6 of 8: Project Expenditures

Below is a sample of a complete project budget expense table.

Section 6 of 8: Project Expenditures

Any fields in **bold** are required fields.

Please list all budgeted expenditures. Project expenses listed here should correlate to project activities. Please click **Add** if you need to include more line items.

EXPENSE (*CLICK **EDIT** TO ADD INFORMATION*)	AMOUNT	ACTIONS
Cubicles, mirrors, barres	$6,000.00	Edit | Remove
Bathroom upgrades	$10,000.00	Edit | Remove
HVAC system, hot water heater	$5,500.00	Edit | Remove
Floors, walls, windows, ADA donors	$21,000.00	Edit | Remove
Appliances, furniture, signage	$10,000.00	Edit | Remove
Security system	$1,000.00	Edit | Remove
Professional fees	$5,000.00	Edit | Remove
Permit fees	$10,000.00	Edit | Remove
Miscellaneous	$1,000.00	Edit | Remove
Increased rent/utilities - one year	$28,000.00	Edit | Remove
	$97,500.00	**Add**

Click **Edit** to add an expense item and amount. Click **Save**.

Please describe how OCF funds would be allocated for the project.

OCF's funds will be used for bathroom upgrades to make them ADA accessible.

75 characters used out of a maximum of 750 characters.

Please identify which of the line items in the table above you are asking OCF to fund specifically.

If your project expenses require additional explanation, please offer it here.

Miscellaneous expenses include the following: toilet paper, towels, cleaning supplies, etc.

91 characters used out of a maximum of 750 characters.

If there are any line items that fall under a broad category (e.g., Miscellaneous) please provide additional detail here.

Section 7 of 8: Project Narrative Questions

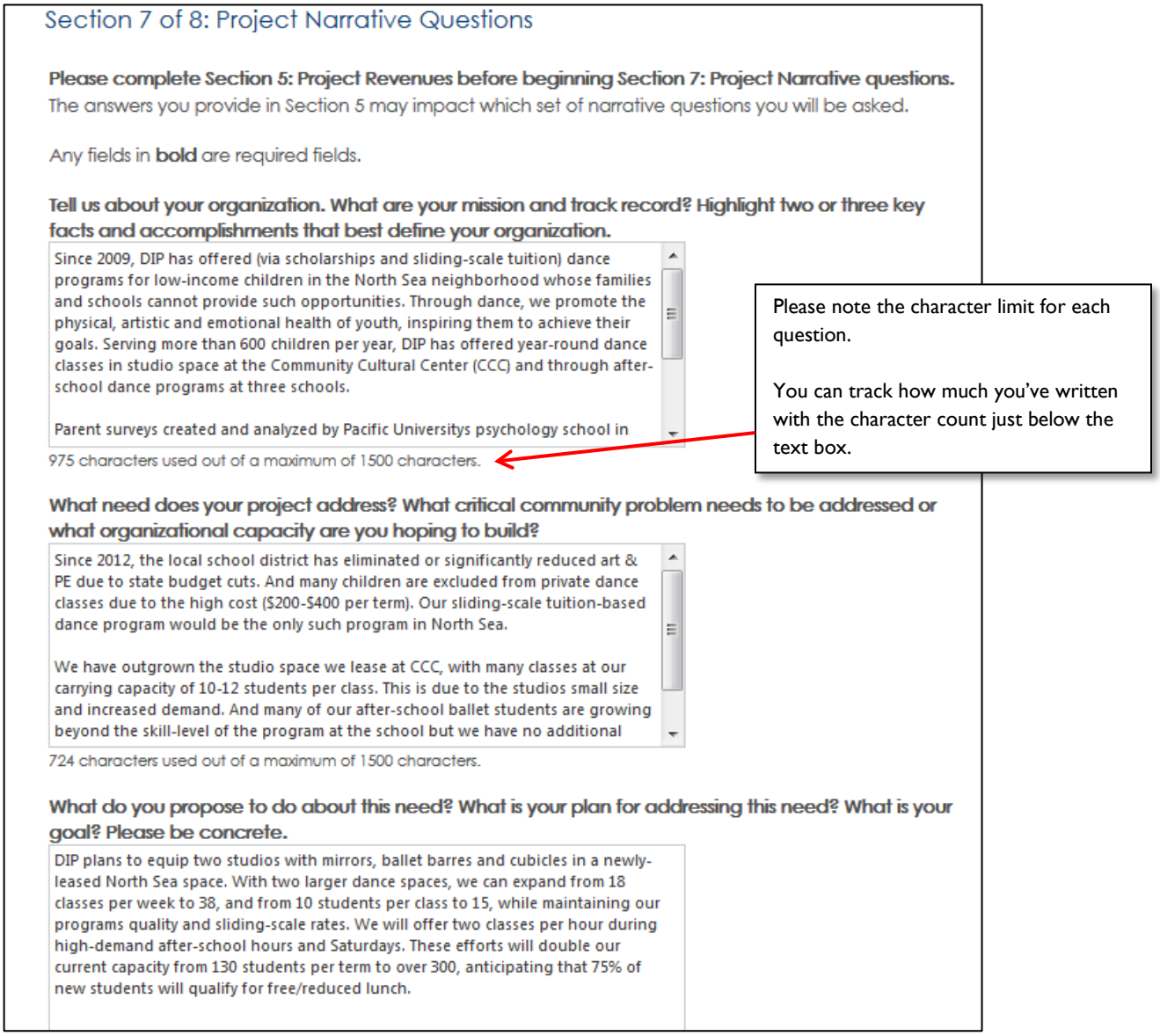
PLEASE NOTE: You must complete Section 5 before you begin Section 7: Project Narrative Questions.

Below are sample project narrative questions. Each grant program has its own unique set of questions.

If you've been invited to reapply for funding in year two or three of your project, you will be asked a set of questions about your progress to-date and upcoming plans. *Please be sure to complete Section 5 first to get the right set of questions.*

The system will warn you before it times out; however, we recommend preparing and saving your answers in another program (i.e. Microsoft Word).

Please note: Most formatting from other systems (i.e. Microsoft Word) doesn't translate well when you copy & paste (e.g. bullets, bold text, quotation marks, apostrophes, etc). **Please review your work carefully if you copy & paste to make sure that the system has saved your answers the way you want them to be presented.** The "Preview Application as PDF" on the Application Dashboard will help you with this task.



Section 8: Required Documents

At the bottom of the Application Dashboard is the Required Documents table. All mandatory documents must be uploaded in order to submit your application (see "Mandatory" column). If a document is not mandatory, you have the option of adding it, as applicable.

Section 8: Required Documents

DOCUMENT	DESCRIPTION	MANDATORY	STATUS	COMPLETED	ACTIONS
501c(3) Tax-Exempt Letter	Documentation of IRS tax-exempt status.	Yes	Completed	11/19/2015	Upload
Board of Directors List	The list should include affiliations and phone numbers, plus the skills and experience each contributes.	Yes	Completed	11/19/2015	Upload
Organization Budgtet for Current Year	Please submit your organization's current year budget on one page and detail both the revenues and expenditures to-date.	Yes	Completed	11/19/2015	Upload
Organization Actuals for Past Year	Please submit your organization's past year actuals on one page with detailed revenues and expenditures.	Yes	Completed	11/19/2015	Upload
Financial Statements (if available)	Most recent audited financial statement if available, or end-of-year financial statements for last year.	No	Completed	11/19/2015	Upload
Multi-Year Project Budget (if applicable	Please include if you're requesting support for multiple years of funding (includes renewal applicants).	No	Not Complete		Upload
Additional Project Info (optional)	Could include a one-page project graphic, schematic or timeline.	No	Not Complete		Upload

When a document has been successfully uploaded, "Not Complete" will change to "Completed"

To upload a document, click **Upload** in the far right column.

This is the screen that you will see:

Upload Required Documents

Please find your document by clicking **Select**. When you've added your document, click **Upload**. To upload other required documents, click on **Back to Requirements** at the bottom of your screen.

File types accepted: PDF, Word (DOC, DOCX), and Image (JPEG).

Apply for a Grant | Application Status & History | Organization Profile

ADDITIONAL PROJECT INFO (OPTIONAL)

Description

Could include a one-page project graphic, schematic or timeline.

Select × Remove

Upload

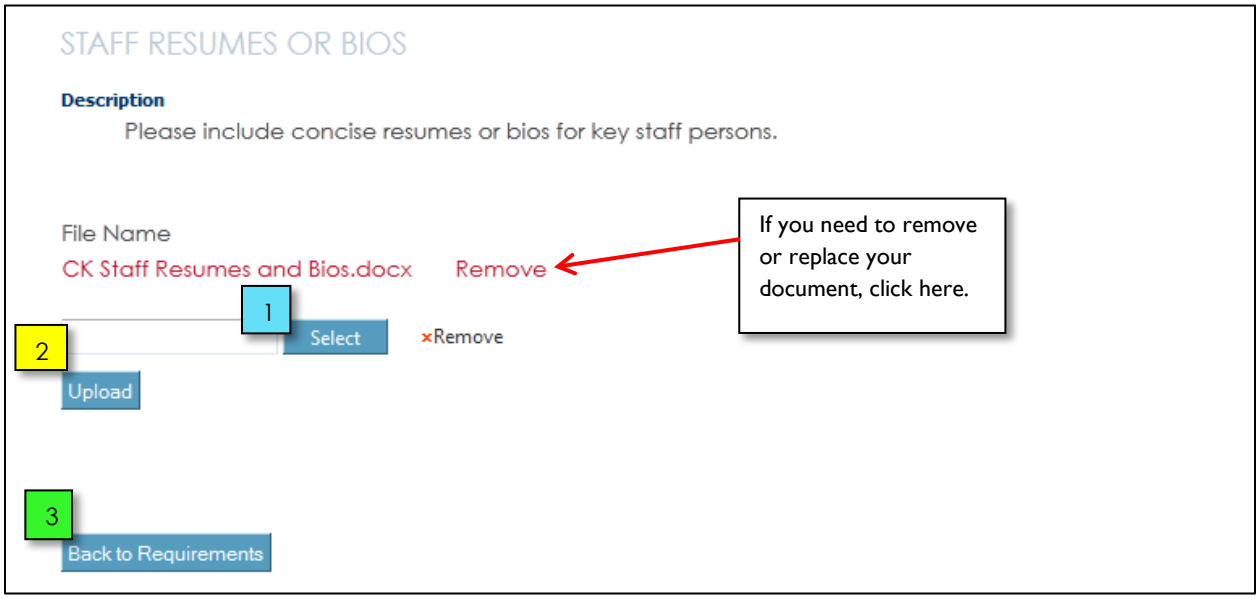
Back to Requirements

PART 7: Process for Uploading Documents

Step 1: Click **Select** to find your document.

Step 2: Click **Upload** to add your document. If you need to replace your document, click **Remove** and start at step 1 again.

Step 3: Click **Back to Requirements** to return to the Application Dashboard and Required Documents table to continue uploading all of your documents.

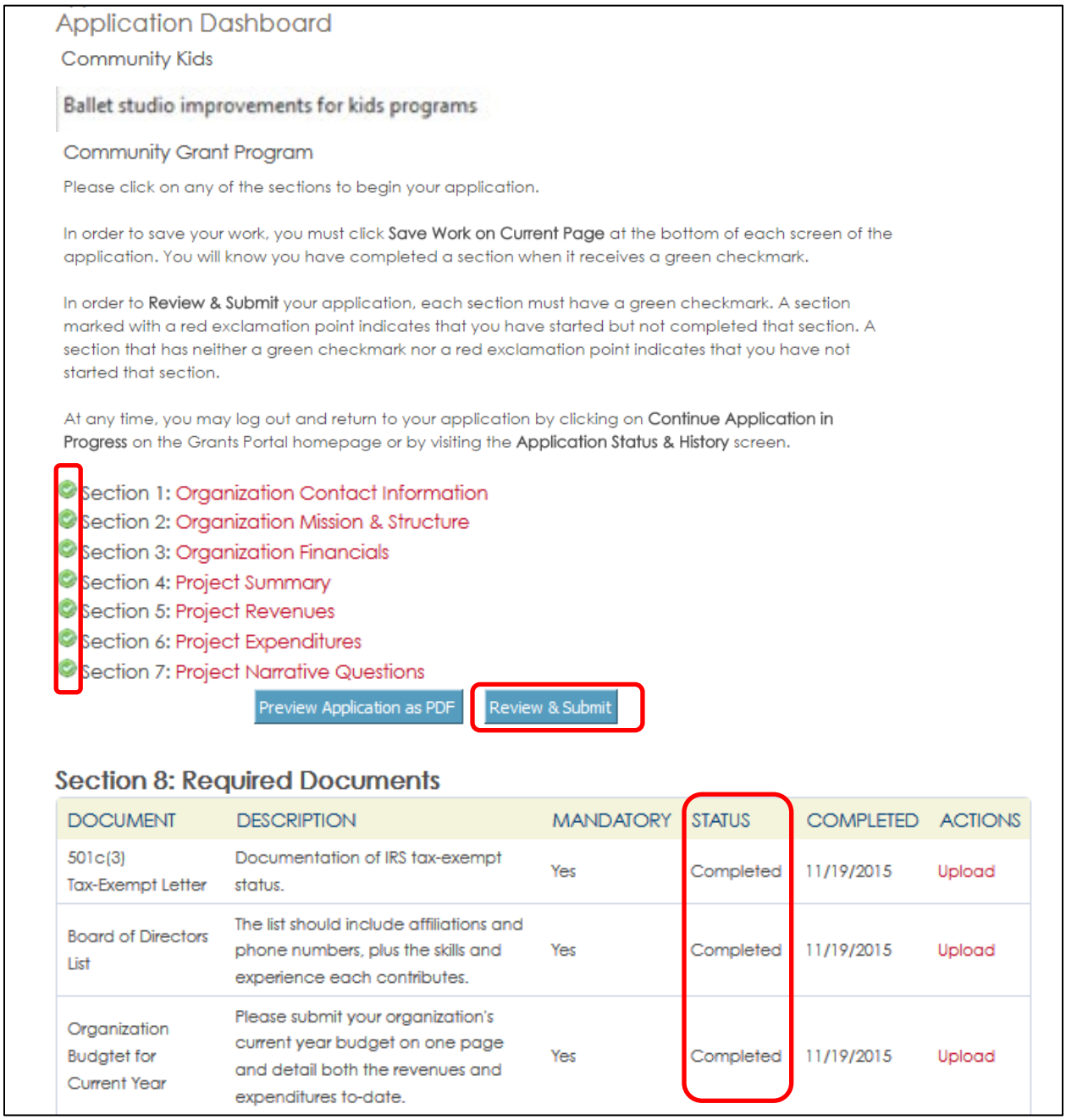


PART 8: Completing an Application

When you've completed all sections of the application and uploaded all required documents, the screen will look like the one below. Each section will have a green check mark, all mandatory documents will be listed as "Completed," and a new **Review and Submit** button will appear in the middle of the screen.

If you have any sections marked with a red exclamation point, it means you have not completed that section. Please note that all questions in bold are required questions; please check your work thoroughly on each screen.

Click **Review and Submit** to proceed to the signature page and submit your application.



Application Dashboard

Community Kids

Ballet studio improvements for kids programs

Community Grant Program

Please click on any of the sections to begin your application.

In order to save your work, you must click **Save Work on Current Page** at the bottom of each screen of the application. You will know you have completed a section when it receives a green checkmark.

In order to **Review & Submit** your application, each section must have a green checkmark. A section marked with a red exclamation point indicates that you have started but not completed that section. A section that has neither a green checkmark nor a red exclamation point indicates that you have not started that section.

At any time, you may log out and return to your application by clicking on **Continue Application in Progress** on the Grants Portal homepage or by visiting the **Application Status & History** screen.

Section 1: Organization Contact Information
Section 2: Organization Mission & Structure
Section 3: Organization Financials
Section 4: Project Summary
Section 5: Project Revenues
Section 6: Project Expenditures
Section 7: Project Narrative Questions

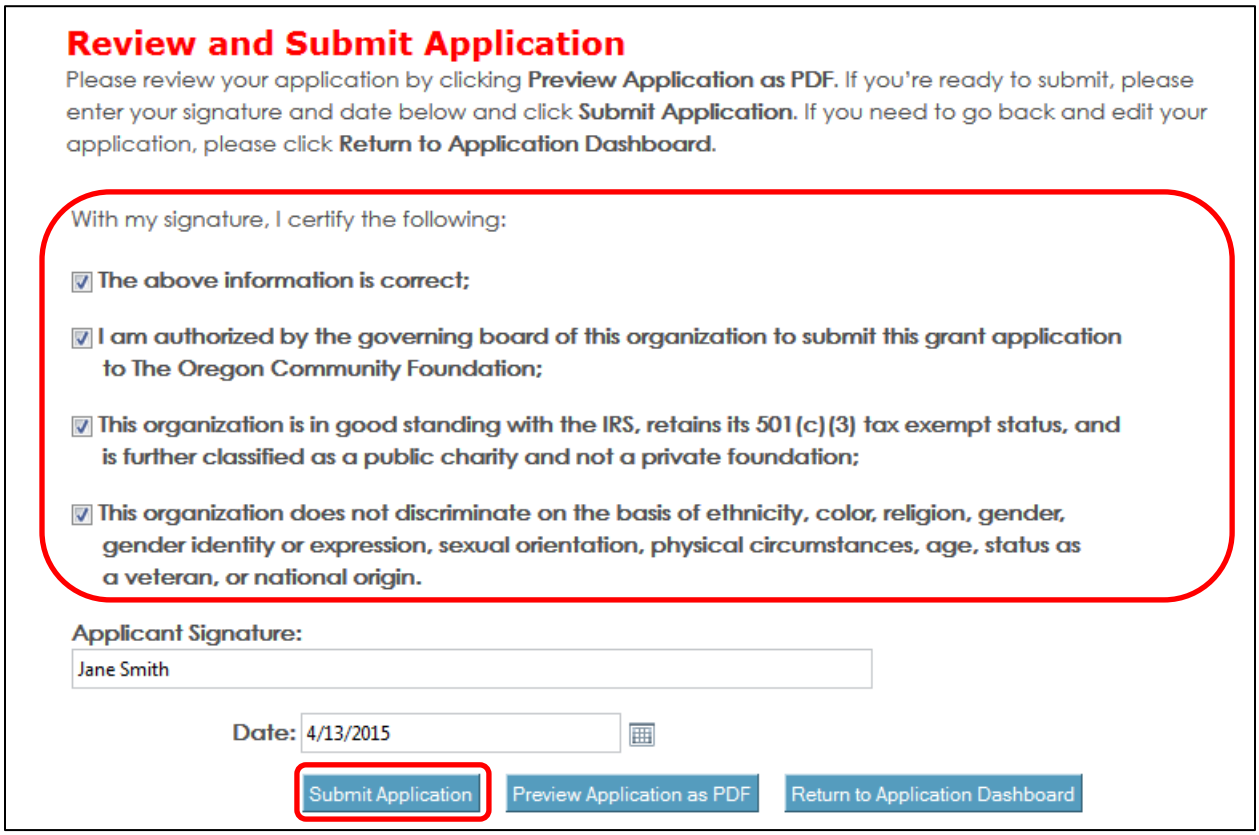
Preview Application as PDF | Review & Submit

Section 8: Required Documents

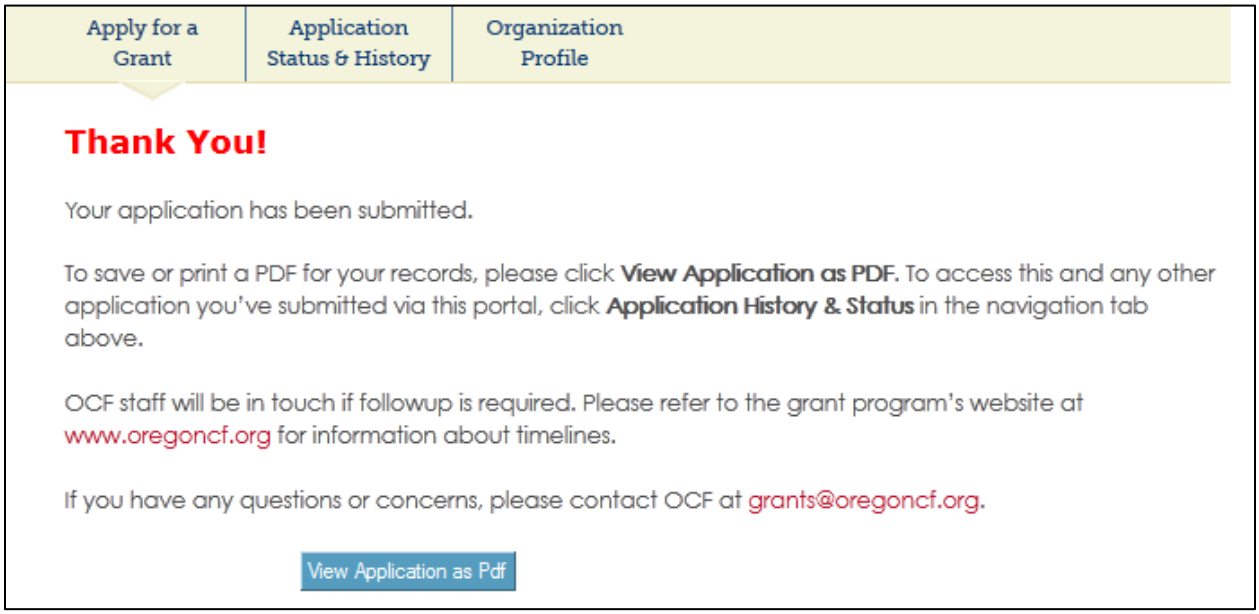
DOCUMENT	DESCRIPTION	MANDATORY	STATUS	COMPLETED	ACTIONS
501c(3) Tax-Exempt Letter	Documentation of IRS tax-exempt status.	Yes	Completed	11/19/2015	Upload
Board of Directors List	The list should include affiliations and phone numbers, plus the skills and experience each contributes.	Yes	Completed	11/19/2015	Upload
Organization Budgtet for Current Year	Please submit your organization's current year budget on one page and detail both the revenues and expenditures to-date.	Yes	Completed	11/19/2015	Upload

PART 9: Reviewing and Submitting an Application

In order to submit an application, you must first certify that you meet each of the requirements below by checking the boxes to the left. You still have the opportunity to edit your application by clicking **Return to Application Dashboard**. When you're ready to submit, enter your name, today's date, then click **Submit Application**.



When you have successfully submitted your application, this is the screen you will see. You will be sent an automatically-generated confirmation email.



PART 10: Accessing applications (submitted or in process)

At any point you may access your applications, both those that you're still working on ("In Process") and those that you've submitted ("Received" or "Under Review"). Applications listed as "In Process" can be edited by clicking **Details**. This will take you back to the Application Dashboard (see page 9). Applications listed as "Received" or "Under Review" are locked from further editing. You have the option of reviewing and printing a copy of your submitted application by clicking **View PDF**.

Ways to search for an application

If you are working on applications for multiple organizations, select the applicable organization from the dropdown. You can also search for an application by selecting a date range (Duration) and by keyword (e.g. project name, grant program) by clicking **Advanced Search**.