



*Here for Oregon. Here for Good.*

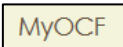
## **Grants Portal & Online Application Step-by-Step Instructions**

**V 5.0**

- Part 1: MyOCF Login
- Part 2: Registering to Use OCF's Grants Portal
- Part 3: Connecting to an Organization
- Part 4: Grants Portal Homepage
- Part 5: Selecting a Grant Program & Determining Eligibility
- Part 6: Filling out an Application
- Part 7: Process for Uploading Documents
- Part 8: Completing an Application
- Part 9: Reviewing and Submitting an Application
- Part 10: Accessing Applications (submitted or in process)

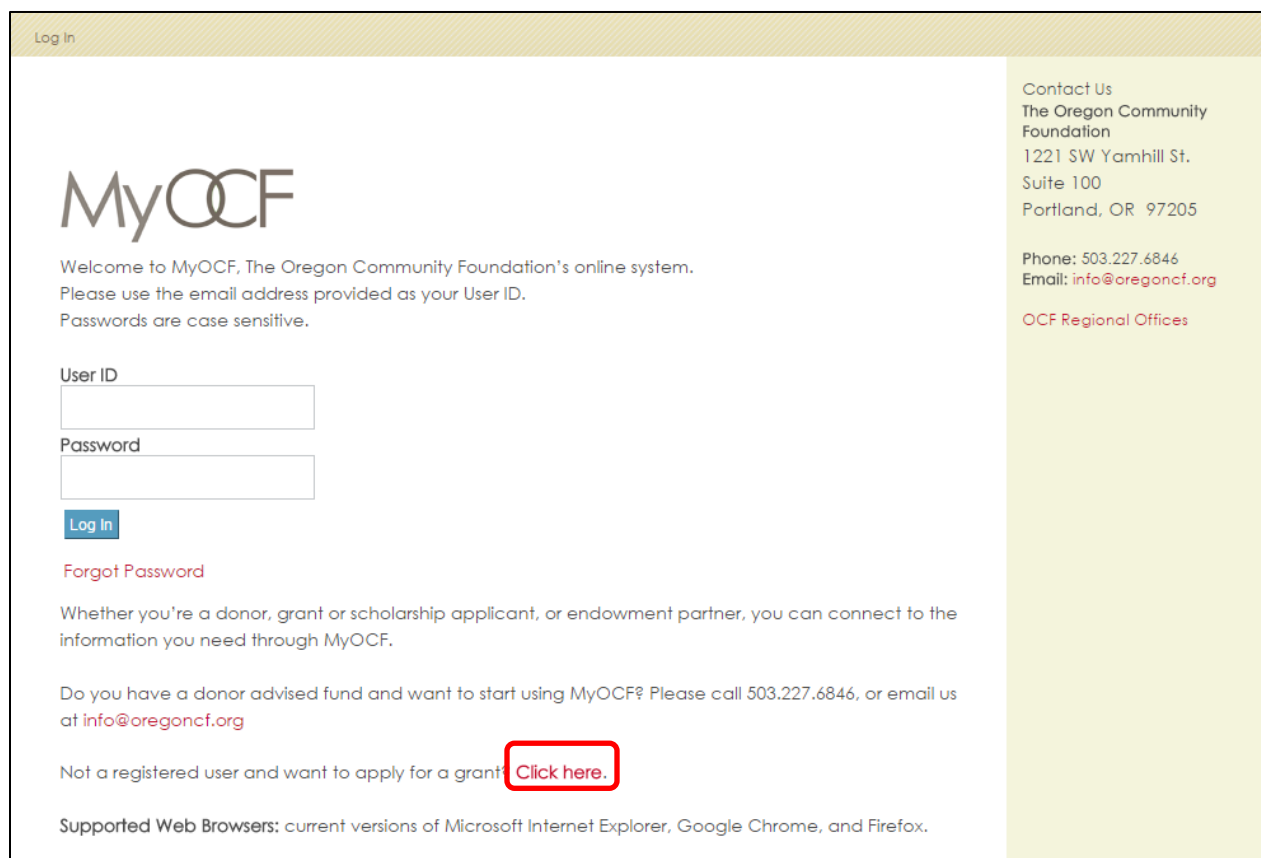
**For Frequently Asked Questions (FAQ's) please visit the grant program's web page at [oregoncf.org](http://oregoncf.org) or the sidebar within the Grants Portal.**

## PART I: MyOCF Login

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

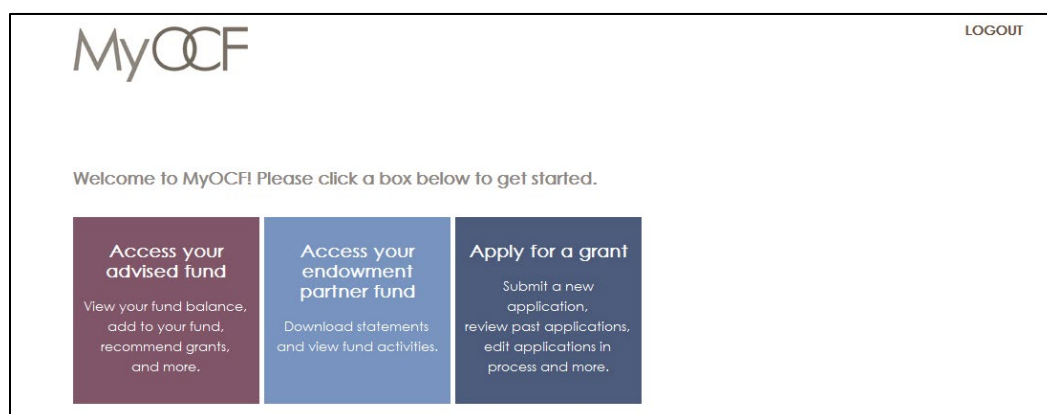
You can also access the Grants Portal by visiting the individual grant program pages on OCF's website, if the program is open for application.

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.



The image shows the MyOCF login page. At the top left is a "Log In" link. The main heading is "MyOCF". Below it, a welcome message states: "Welcome to MyOCF, The Oregon Community Foundation's online system. Please use the email address provided as your User ID. Passwords are case sensitive." There are two input fields: "User ID" and "Password". Below these is a blue "Log In" button. To the right of the login fields is a red link "Forgot Password". Below that, a paragraph explains that users can connect to the information they need through MyOCF. Another paragraph asks if the user has a donor advised fund and provides contact information: "Please call 503.227.6846, or email us at [info@oregoncf.org](mailto:info@oregoncf.org)". At the bottom, there is a red link "Click here." for non-registered users who want to apply for a grant. On the right side of the page, there is a "Contact Us" section with the address: "The Oregon Community Foundation, 1221 SW Yamhill St., Suite 100, Portland, OR 97205". It also lists the phone number "503.227.6846" and email "[info@oregoncf.org](mailto:info@oregoncf.org)". At the bottom right, it says "OCF Regional Offices".

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.

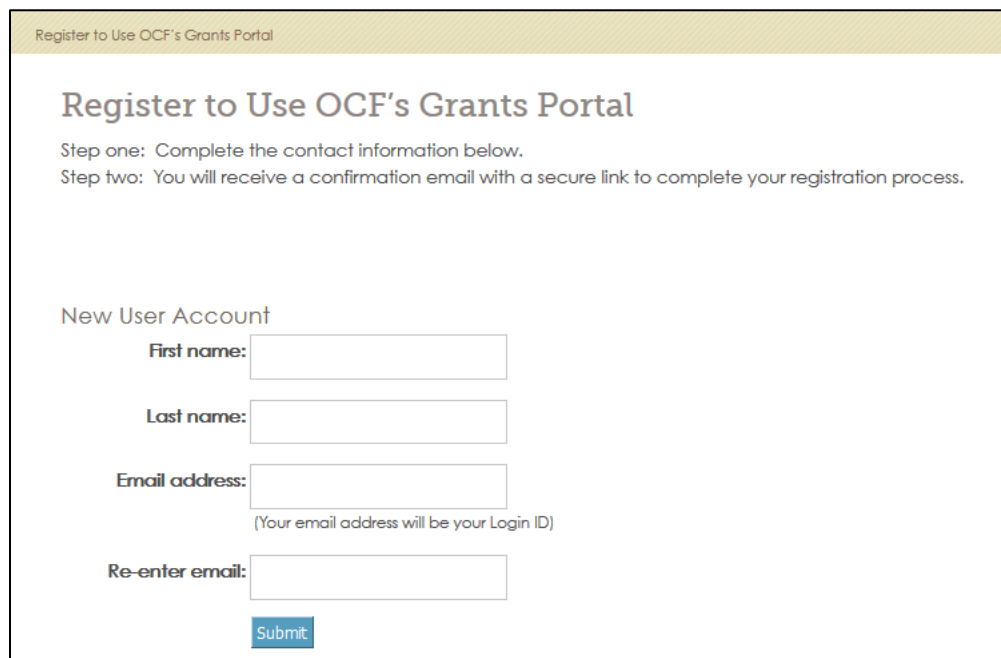


The image shows the MyOCF landing screen after login. At the top left is the "MyOCF" logo, and at the top right is a "LOGOUT" link. Below the logo, a welcome message says: "Welcome to MyOCF! Please click a box below to get started." There are three colored boxes with white text: a purple box for "Access your advised fund" (with subtext: "View your fund balance, add to your fund, recommend grants, and more."), a blue box for "Access your endowment partner fund" (with subtext: "Download statements and view fund activities."), and a dark blue box for "Apply for a grant" (with subtext: "Submit a new application, review past applications, edit applications in process and more.").

## 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.*



Register to Use OCF's Grants Portal

### Register to Use OCF's Grants Portal

Step one: Complete the contact information below.  
Step two: You will receive a confirmation email with a secure link to complete your registration process.

New User Account

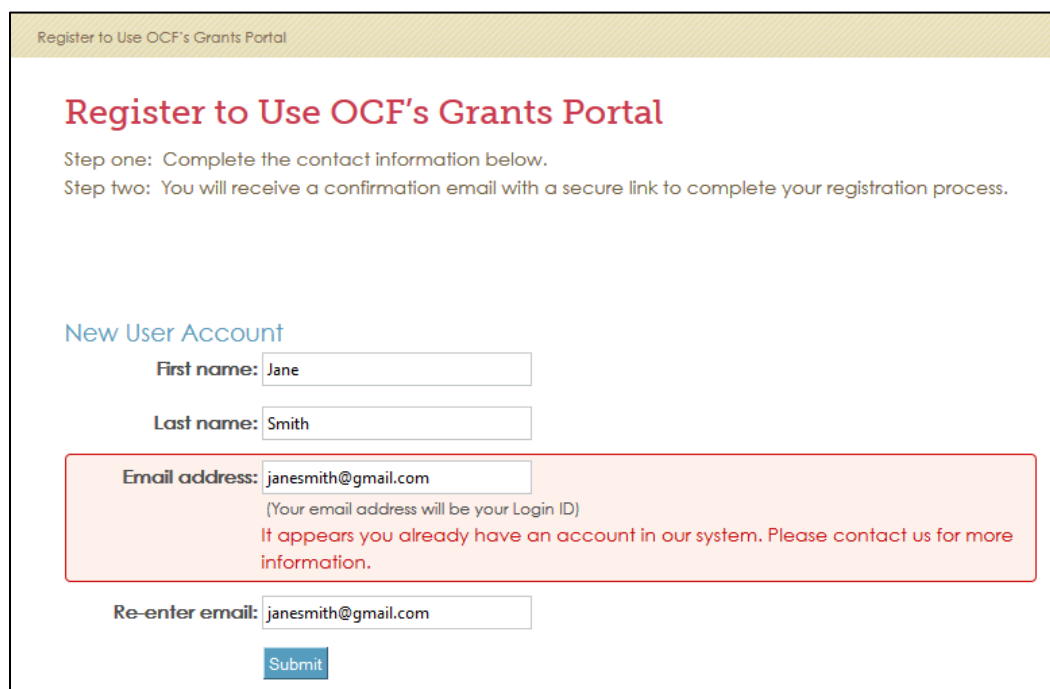
First name:

Last name:

Email address:   
(Your email address will be your Login ID)

Re-enter email:

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](mailto:grants@oregoncf.org) for assistance.



Register to Use OCF's Grants Portal

### Register to Use OCF's Grants Portal

Step one: Complete the contact information below.  
Step two: You will receive a confirmation email with a secure link to complete your registration process.

New User Account

First name:

Last name:

Email address:   
(Your email address will be your Login ID)

**It appears you already have an account in our system. Please contact us for more information.**

Re-enter email:

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

Register to Use OCF's Grants Portal » New User Registration Instructions

## New User Registration Instructions

John Q. Public: johnny5@gmail.com

Thank you for starting the registration process. An email will be sent to johnny5@gmail.com. **Please click the link provided in the email to complete the registration process.**

## 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**).

Register to Use OCF's Grants Portal » New User Registration Part 2

## New User Registration

To complete your registration, please fill out the questions below about *yourself*. Once you have completed this page, you will be able to add your organization.

Registration Continued

First name: John Q.

Last name: Public

Login ID: johnny5@gmail.com

**Please enter your password:**

.....

This should be a minimum of 11 characters, with at least one number and one letter.  
Passwords are case sensitive.

**Please retype your password:**

.....

To change your secret question, provide the answer to your current question above. Next, answer at least 1 new question below and click save. NOTE: answers are case sensitive.

Mother's maiden name

City of birth

Favorite color

Favorite food

### 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.

## Connect to an Organization

You must be connected to at least one organization to access the Grants Portal.

Please use the search below to see if your organization already exists in our system. If you find your organization, please click **Connect me to this organization** beside its name.

If you do not find your organization in our list, click **Create Organization** at the bottom of the page.

Apply for a Grant

Search Organizations

Organization name:  
Community Kids

Search

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).

### Search Organizations

Organization name:  
Community Kids

### Organization Results

ORGANIZATION NAME	ADDRESS	TAX ID	
Bay Area Hospital District	1775 Thompson Road , Coos Bay, OR 97420	93-0593249	Connect me to this organization
Community Kids	5135 NW Saint Helens Road , Portland, OR 97210	93-0842286	Connect me to this organization

### Organization Results

ORGANIZATION NAME	ADDRESS	TAX ID	
Bay Area Hospital District	1775 Thompson Road , Coos Bay, OR 97420	93-0593249	Connect me to this organization
Community Kids	5135 NW Saint Helens Road , Portland, OR 97210	93-0842286	You are now connected to this organization. You may begin an application.

Create Organization

## 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**.

### Create an Organization

**Organization's legal name:**

**EIN #:**

**Street:**

**City:**

**State:**

**Zip code:**

**Country:**

**Phone:**

**Email:**

**Website:**

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.

## Grantee Organization Confirmed

Your organization, (Community Kids), has been created as a grantee.

<a href="#">Apply for a Grant</a>	<a href="#">Application Status &amp; History</a>
-----------------------------------	--

If you'd like to add yourself to another organization click the button below. You can also return to the Grantee dashboard, or get started on an application by clicking the Apply for a Grant tab in the navigation.

## 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**.

The screenshot shows the Grants Portal homepage. At the top, there's a header with the title "Grants Portal" and a brief description: "You can use this portal to apply for grants, check an application's status, and manage your organization's information." Below this, a message says: "Returning to complete an application in process? Click the **Application Status & History** tab below to resume filling out your application." There are three tabs: "Apply for a Grant", "Application Status & History", and "Organization Profile". The "Organization Profile" tab is active. Under this tab, there's a section titled "Organization" with a dropdown menu showing "The Oregon Community Foundation". A red arrow points to the dropdown arrow with a text box that says: "You can select a different organization from this dropdown if you are connected to another organization". Below the dropdown, it says "The Oregon Community Foundation Party Id 1" and "If you wish to add another organization to your user account, please click **Add Organization**". The "Add Organization" button is highlighted with a red box. Below this is a "Get Started" section with the text: "You will be asked to fill out an online form and upload any required documents." and "Please review the **guidelines and required documents** for the program(s) to which you are applying." It then says: "If you are starting a new application, please click **Apply for a Grant**. If you are continuing an application in progress, please click **Continue an Application in Progress**." Both "Apply for a Grant" and "Continue Application in Progress" buttons are highlighted with a red box. On the right side, there's a sidebar with three sections: "My Profile" (View your contact information and change password/security question), "Application Instructions" (Please visit the Application Guidelines for the specific grant program for which you are applying. You will be able to find step-by-step instructions to navigate the portal and frequently asked questions.), and "Weekend Assistance" (Need help over the weekend? Not to worry. Check out our guidelines here.).

**Grants Portal**

You can use this portal to apply for grants, check an application's status, and manage your organization's information.

Returning to complete an application in process? Click the **Application Status & History** tab below to resume filling out your application.

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

**Organization**

The Oregon Community Foundation

The Oregon Community Foundation Party Id 1

If you wish to add another organization to your user account, please click **Add Organization**

**Add Organization**

**Get Started**

You will be asked to fill out an online form and upload any required documents.

Please review the **guidelines and required documents** for the program(s) to which you are applying.

If you are starting a new application, please click **Apply for a Grant**. If you are continuing an application in progress, please click **Continue an Application in Progress**.

**Apply for a Grant**   **Continue Application in Progress**

**My Profile**  
View your contact information and change password/security question.

**Application Instructions**  
Please visit the Application Guidelines for the specific grant program for which you are applying. You will be able to find step-by-step instructions to navigate the portal and frequently asked questions.

**Weekend Assistance**  
Need help over the weekend? Not to worry. Check out our guidelines here.

## 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.

### Select a Grant Program

[Apply for a Grant](#)[Application Status & History](#)[Organization Profile](#)

Organization

Please select your organization from the following dropdown. Note: "Pending" status means we are reviewing your connection to the organization, which may take up to 48 hours. You may begin your application in the meantime.

Community Kids

Community Kids

Party Id 253711

Please select the grant program to which you are applying.

☒ Community Grants

Grants to community-based nonprofits whose work addresses one or more of OCF's four funding objectives.

☐ Douglas Community Fund

Grants support a wide variety of projects in Douglas County.

☐ Edna E. Harrell Community Children's Fund

Programs that improve the lives of underserved youth in Baker county and the North Powder area.

Next

### 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.

### Pre-Qualifying Questions

[Apply for a Grant](#)[Application Status & History](#)[Organization Profile](#)

Are you a 501(c)(3) public charity, a governmental entity, or an organization with a qualified fiscal sponsor?

Please select one

Have you reviewed the requirements for this grant program?

Please select one

Are you authorized by this organization to submit a grant application and review its application history?

Please select one

Submit



## PART 6: Filling out an Application

### Project Name

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

**Project Name:**

Ballet studio improvements for kids programs

Please enter the name of your project to start the application process.  
44 characters used out of a maximum of 50 characters.

[Next](#)

### 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).

**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.

Organization name

Project Name  
(ID # generates automatically)

Grant program to which you are applying

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

Sections 1-8 must be complete to submit your application.

A green check-mark = Complete

A red exclamation point = Incomplete

No icon = Section has not been started

When Section 8 is complete, you will see a status of "Completed" in the table below (see "Status" column). Not all documents are mandatory (see "Mandatory" column).

**Section 8: Required Documents**

DOCUMENT	DESCRIPTION	MANDATORY	STATUS	COMPLETED	ACTIONS
501c(3) tax-exempt letter	Documentation of IRS tax-exempt status. If using a fiscal sponsor, please include the organization's IRS documentation here.	Yes	Not Complete		Upload
Board of directors list	The list should include affiliations and phone numbers, plus the skills and	Yes	Not Complete		Upload

## 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:**

**Alternate name/Acronym:**

**Employer ID number (EIN):**

**Fiscal sponsor name:**   
(if applicable)

**Fiscal sponsor EIN:**   
(if applicable)

**Mailing Address:**

**City:**

**County:**

**State:**

**Zip code:**

**Website:**

**Phone:**

**Executive Director or Board Chair's Information:**

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

**First name:**

**Last name:**

**Title:**

\_\_\_\_\_

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

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.

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.)

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.

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

## 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 <a href="#">Edit</a>
Organization Expenditures	\$200,000.00	\$75,000.00	\$170,000.00 <a href="#">Edit</a>
Operating Surplus/Deficit	\$0.00	(\$25,000.00)	\$10,000.00 <a href="#">Edit</a>

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:	<a href="#">Edit</a>
Individual contributions:	\$60,000.00 <a href="#">Edit</a>
Earned income (ticket sales, fees for service, etc.):	<a href="#">Edit</a>
Fundraising benefits:	\$40,000.00 <a href="#">Edit</a>
Corporate/business contributions:	<a href="#">Edit</a>
Government support:	<a href="#">Edit</a>
Foundation support:	\$80,000.00 <a href="#">Edit</a>
Endowment earnings:	<a href="#">Edit</a>
Other:	<a href="#">Edit</a>
	\$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	

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

2014 - <del>OCF</del> Community Grant Program (approved, \$5,000)	
---	--

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

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 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](#)

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.



## 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](http://oregoncf.org) to review the program's application guidelines.*

### Section 5 of 8: Project Revenues

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

Is this a multi-year request? Not all grant programs accept multi-year requests.

Please select one

**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:

Is this a multi-year request? Not all grant programs accept multi-year requests.

Yes

For multi-year projects, please note the budget for each year, as well as the amount requested each year from The Oregon Community Foundation:

YEAR	PROJECT BUDGET	AMOUNT REQUESTED FROM OCF	ACTIONS
Year 1	\$30,000.00	\$10,000.00	Edit
Year 2	\$20,000.00	\$5,000.00	Edit
Year 3			Edit
	<b>\$50,000.00</b>	<b>\$15,000.00</b>	

If you are asking for multi-year support from OCF, is this current application a new request, or have you been invited by OCF to reapply for funding for year two or three of the project? (If you are not sure whether you have been invited to reapply, please review your award letter from the previous year.)

I have been invited to reapply

For which year are you requesting funding at this time?

Year 2

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			<a href="#">Edit</a>   <a href="#">Remove</a>
Local Bank		\$10,000.00		<a href="#">Edit</a>   <a href="#">Remove</a>
Major Donor #1	\$5,000.00			<a href="#">Edit</a>   <a href="#">Remove</a>
Major Donor #2	\$3,000.00			<a href="#">Edit</a>   <a href="#">Remove</a>
Foundation			\$20,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Individuals		\$20,000.00		<a href="#">Edit</a>   <a href="#">Remove</a>
	\$10,000.00	\$30,000.00	\$20,000.00	<a href="#">Add</a>

(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 screen 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 <b>EDIT</b> TO ADD INFORMATION)	AMOUNT	ACTIONS
Cubicles, mirrors, barres	\$6,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Bathroom upgrades	\$10,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
HVAC system, hot water heater	\$5,500.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Floors, walls, windows, ADA donors	\$21,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Appliances, furniture, signage	\$10,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Security system	\$1,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Professional fees	\$5,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Permit fees	\$10,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Miscellaneous	\$1,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
Increased rent/utilities - one year	\$28,000.00	<a href="#">Edit</a>   <a href="#">Remove</a>
	<b>\$97,500.00</b>	<a href="#">Add</a>

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.

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.

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

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

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 7 of 8: Project Narrative Questions

Please complete Section 5: Project Revenues before beginning Section 7: Project Narrative questions. The answers you provide in Section 5 may impact which set of narrative questions you will be asked.

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

**Tell us about your organization. What are your mission and track record? Highlight two or three key facts and accomplishments that best define your organization.**

Since 2009, DIP has offered (via scholarships and sliding-scale tuition) dance programs for low-income children in the North Sea neighborhood whose families and schools cannot provide such opportunities. Through dance, we promote the physical, artistic and emotional health of youth, inspiring them to achieve their goals. Serving more than 600 children per year, DIP has offered year-round dance classes in studio space at the Community Cultural Center (CCC) and through after-school dance programs at three schools.

Parent surveys created and analyzed by Pacific University's psychology school in

975 characters used out of a maximum of 1500 characters.

**What need does your project address? What critical community problem needs to be addressed or what organizational capacity are you hoping to build?**

Since 2012, the local school district has eliminated or significantly reduced art & PE due to state budget cuts. And many children are excluded from private dance classes due to the high cost (\$200-\$400 per term). Our sliding-scale tuition-based dance program would be the only such program in North Sea.

We have outgrown the studio space we lease at CCC, with many classes at our carrying capacity of 10-12 students per class. This is due to the studio's small size and increased demand. And many of our after-school ballet students are growing beyond the skill-level of the program at the school but we have no additional

724 characters used out of a maximum of 1500 characters.

**What do you propose to do about this need? What is your plan for addressing this need? What is your goal? Please be concrete.**

DIP plans to equip two studios with mirrors, ballet barres and cubicles in a newly-leased North Sea space. With two larger dance spaces, we can expand from 18 classes per week to 38, and from 10 students per class to 15, while maintaining our programs quality and sliding-scale rates. We will offer two classes per hour during high-demand after-school hours and Saturdays. These efforts will double our current capacity from 130 students per term to over 300, anticipating that 75% of new students will qualify for free/reduced lunch.

Please note the character limit for each question.

You can track how much you've written with the character count just below the text box.

## 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 Budget 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.

The screenshot shows a web interface for uploading documents. At the top, the title "STAFF RESUMES OR BIOS" is displayed. Below it, a "Description" section states: "Please include concise resumes or bios for key staff persons." The main area contains a file upload section. A text input field labeled "File Name" contains the text "CK Staff Resumes and Bios.docx". To the right of the input field is a red "Remove" link. Below the input field is a blue "Select" button, which is highlighted with a blue box and the number "1". To the left of the "Select" button is a yellow box with the number "2". Below the "Select" button is a blue "Upload" button. To the right of the "Upload" button is a red "x Remove" link. Below the "Upload" button is a green box with the number "3". Below the "x Remove" link is a blue "Back to Requirements" button. A red arrow points from a text box to the "Remove" link. The text box contains the text: "If you need to remove or replace your document, click here."

STAFF RESUMES OR BIOS

**Description**  
Please include concise resumes or bios for key staff persons.

File Name  
CK Staff Resumes and Bios.docx Remove

1 Select x Remove

2 Upload

3 Back to Requirements

If you need to remove or replace your document, click here.

## 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	<a href="#">Upload</a>
Board of Directors List	The list should include affiliations and phone numbers, plus the skills and experience each contributes.	Yes	Completed	11/19/2015	<a href="#">Upload</a>
Organization Budget 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	<a href="#">Upload</a>

## 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**.

### Review and Submit Application

Please review your application by clicking [Preview Application as PDF](#). If you're ready to submit, please enter your signature and date below and click **Submit Application**. If you need to go back and edit your application, please click [Return to Application Dashboard](#).

With my signature, I certify the following:

- ☒ The above information is correct;
- ☒ I am authorized by the governing board of this organization to submit this grant application to The Oregon Community Foundation;
- ☒ This organization is in good standing with the IRS, retains its 501(c)(3) tax exempt status, and is further classified as a public charity and not a private foundation;
- ☒ This organization does not discriminate on the basis of ethnicity, color, religion, gender, gender identity or expression, sexual orientation, physical circumstances, age, status as a veteran, or national origin.

Applicant Signature:

Jane Smith

Date: 

4/13/2015

Submit Application

Preview Application as PDF

Return to Application Dashboard

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

Apply for a Grant

Application Status & History

Organization Profile

## Thank You!

Your application has been submitted.

To save or print a PDF for your records, please click [View Application as PDF](#). To access this and any other application you've submitted via this portal, click [Application History & Status](#) in the navigation tab above.

OCF staff will be in touch if followup is required. Please refer to the grant program's website at [www.oregoncf.org](http://www.oregoncf.org) for information about timelines.

If you have any questions or concerns, please contact OCF at [grants@oregoncf.org](mailto:grants@oregoncf.org).

View Application as Pdf



## 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**.

The screenshot shows the 'Application Status & History' page. At the top, there are navigation links: 'Grants & Scholarships', 'Grants Portal', and 'Application Status & History'. The main heading is 'Application Status & History'. Below it, a paragraph states: 'This page shows the status of your organization's grant application(s) in real time. Please do not consider any application approved until you receive written notification from The Oregon Community Foundation. If you did not submit your application through this website, please email grants@oregoncf.org to check its status.' Another paragraph notes: 'If you are in the middle of completing a grant application, please note that it is not complete until you upload all required documents. If you have not yet uploaded the required documents for one of your applications, you can click the corresponding "Upload" link.'

On the right side, there is a 'My Profile' link with the text: 'View your contact information and change password/security question.'

Below the text, there are three tabs: 'Apply for a Grant', 'Application Status & History' (which is selected), and 'Organization Profile'.

Under the 'Application Status & History' tab, there is a search section. It includes a dropdown for 'Organization' with 'Community Kids' selected. Below that is a 'Search' section with a 'Duration' dropdown set to 'Last 6 Months' and a 'Find' text input containing 'after-school'. There is also an 'Exact Match' checkbox and a 'Simple Search' link. A red box highlights the 'Search' section, and a red arrow points from it to the 'Advanced Search' link below the search section.

Below the search section is a 'My Applications' table. The table has columns: 'PROJECT NAME', 'PROGRAM', 'APPLICATION', 'AMOUNT REQUESTED', 'APPROVED', 'STATUS', 'ACTIONS', and 'VIEW'. There are two rows of data:

PROJECT NAME	PROGRAM	APPLICATION	AMOUNT REQUESTED	APPROVED	STATUS	ACTIONS	VIEW
Community Kids after-school literacy program - 232936	Ben Serafin Fund	4/1/2015	\$15,000.00		Under Review	Details	View PDF
TEST Community Kids after-school literacy program - 232935	Small Arts & Culture Grants - Eastern OR	4/1/2015	\$15,000.00		In Process	Details	

Red boxes highlight the 'STATUS' column and the 'View PDF' and 'Details' links in the first row of the table.