Grants Portal & Online Application
Step-by-Step Instructions
V 5.0

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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**.

![Create an Organization Form](image)

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](image)
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 2 of 8: Organization Mission & Structure

#### 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:

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

- General population
- Specific Population

- 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:

- [Select options]

  - [To select more than one, hold down your alt key and click on your selections.]

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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?

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.

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.

<table>
<thead>
<tr>
<th>BUDGET FOR CURRENT FISCAL YEAR</th>
<th>ACTUALS TO-DATE FOR CURRENT FISCAL YEAR</th>
<th>ACTUALS FOR LAST COMPLETED FISCAL YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Revenues</td>
<td>$200,000.00</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>Organization Expenditures</td>
<td>$200,000.00</td>
<td>$75,000.00</td>
</tr>
<tr>
<td>Operating Surplus/Deficit</td>
<td>$0.00</td>
<td>($25,000.00)</td>
</tr>
</tbody>
</table>

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.

1/1/2014-12/31/2014

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.

<table>
<thead>
<tr>
<th>REVENUE SOURCE</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memberships</td>
<td></td>
</tr>
<tr>
<td>Individual contributions</td>
<td>$60,000.00</td>
</tr>
<tr>
<td>Earned income (ticket sales, fees for service, etc.):</td>
<td>Edit</td>
</tr>
<tr>
<td>Fundraising benefits</td>
<td>$40,000.00</td>
</tr>
<tr>
<td>Corporate/business contributions</td>
<td></td>
</tr>
<tr>
<td>Government support</td>
<td></td>
</tr>
<tr>
<td>Foundation support</td>
<td>$60,000.00</td>
</tr>
<tr>
<td>Endowment earnings</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$100,000.00</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>SOURCE (CLICK EDIT TO ADD INFORMATION)</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation #1</td>
<td>$8,000.00</td>
</tr>
<tr>
<td>Foundation #2</td>
<td>$5,000.00</td>
</tr>
<tr>
<td></td>
<td>$10,000.00</td>
</tr>
</tbody>
</table>

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)

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

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
  (area code: 503)
- **Email:** aclereman@gmail.com

**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 after-literacy programming located at 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. Free 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?**
120

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

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

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

<table>
<thead>
<tr>
<th>REVENUE SOURCE</th>
<th>SECURED</th>
<th>PENDING</th>
<th>PLANNED</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Street Grant</td>
<td>$2,000.00</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Local Bank</td>
<td>$10,000.00</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Major Donor #1</td>
<td>$5,000.00</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Major Donor #2</td>
<td>$3,000.00</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Foundation</td>
<td></td>
<td>$20,000.00</td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Individuals</td>
<td></td>
<td>$30,000.00</td>
<td>$20,000.00</td>
<td>Add</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>EXPENSE</th>
<th>AMOUNT</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cubicles, minor, bar, &amp;</td>
<td>$6,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Bathub upgrade</td>
<td>$10,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>HVAC system, hot water heater</td>
<td>$5,500.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Floors, walls, windows, ADA donors</td>
<td>$21,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Appliances, furniture, signage</td>
<td>$10,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Security system</td>
<td>$1,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Professional fees</td>
<td>$5,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Permit fees</td>
<td>$10,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>$1,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Increased rent/utilities - one year</td>
<td>$28,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$97,500.00</strong></td>
<td></td>
</tr>
</tbody>
</table>

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.

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.

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**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 is your mission and track record? Highlight two or three key facts and accomplishments that best define your organization.

Since 2009, DIP has offered (a) 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 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-$600 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 studios small size and increased demand. Many of our after-school ballet students are growing beyond the skill-level of the program at the school but we have no additional space.

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 bars and cubicles in a newly-leased North Sea space. With two larger dance spaces, we can expand from 18 classes per week to 36, 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.

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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.

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

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:
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.
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.

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 for information about timelines.

If you have any questions or concerns, please contact OCF at 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.