

# Grant Portal Instructions

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SOUTHWEST FLORIDA  
**COMMUNITY  
FOUNDATION**

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About the  
Online  
Application

How to register

Steps to apply

# About the Online Application

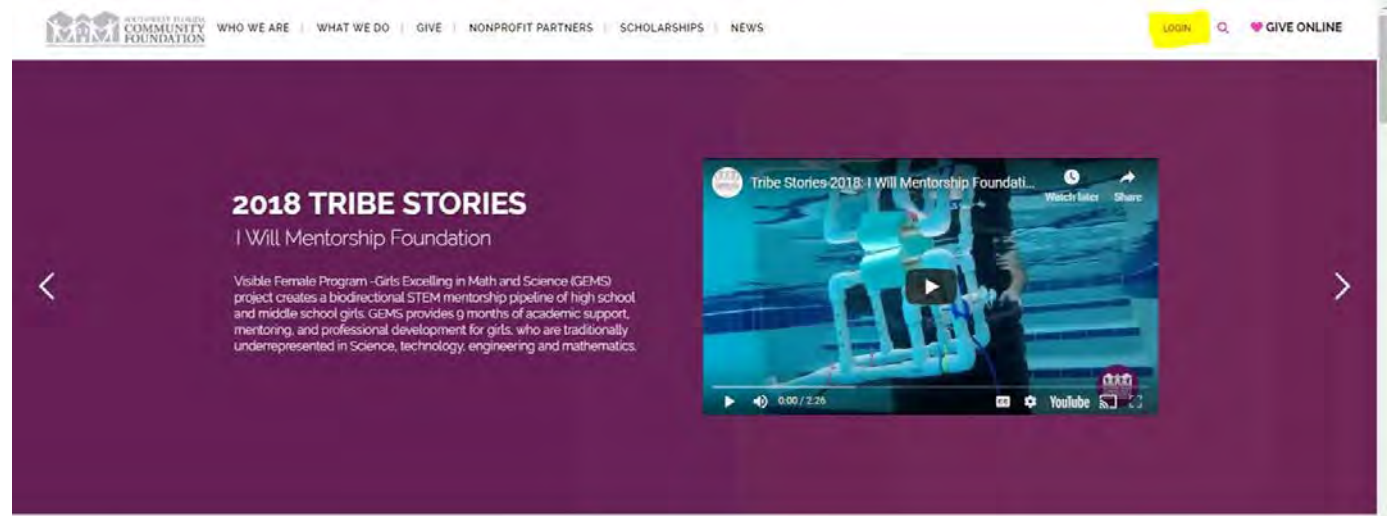
Did you apply last year?

Have you applied for a grant through the Community Foundation in the past year (Community Impact Grant, Women's Legacy Fund, LGBT Fund, or City of Fort Myers Arts and Culture)?

If so, you may already have an account!!

# Visit our Website

- Go to [www.floridacommunity.com](http://www.floridacommunity.com)
- Click on *Login*



# Login

- Put your cursor on the *Grantees* tab and click on *Begin Registration*
- *Forgot Password*

The screenshot displays the website's navigation menu with tabs for HOME, DONORS, GRANTEES (highlighted), SCHOLARSHIPS, and ANNUAL GIVING & EVENTS. Below the menu is a 'WELCOME' section with a heading and a paragraph: 'WELCOME TO THE SOUTHWEST FLORIDA COMMUNITY FOUNDATION DONOR, GRANTS, AND SCHOLARSHIP GATEWAY. By filling in the information below, you will be directed to one of 3 different personalized gateways. If you are not already registered, please click the appropriate department below to begin your registration. For login or registration assistance, please call 239-274-5900.'

The bottom section contains four colored boxes: a white 'LOGIN' box with input fields for 'User' and 'Password', a 'LOGIN' button, and a 'Forgot Password' link; a purple 'DONORS' box with contact info for Carolyn C. Rogers; a pink 'GRANTS' box with contact info for Trisha Botty; and a teal 'SCHOLARSHIPS' box with contact info for Malaina Mote.

LOGIN	DONORS	GRANTS	SCHOLARSHIPS
<p>User</p> <input type="text"/> <p>Password</p> <input type="password"/> <p><b>LOGIN</b></p> <p><a href="#">Forgot Password</a></p>	<p>give@floridacommunity.com</p> <p>Vice President, Development &amp; Communications Carolyn C. Rogers tel. 239-274-5900</p>	<p>grants@floridacommunity.com</p> <p>Grants Manager Trisha Botty tel. 239-274-5900</p>	<p>scholarships@floridacommunity.com</p> <p>Scholarship Coordinator Malaina Mote tel. 239-274-5900</p>

# Forgot Password

- Fill out your information
- Click *Send Password Email*
- Follow the email instructions

HOME ADMIN DONORS GRANTEES SCHOLARSHIPS REVIEWERS ANNUAL GIVING & EVENTS CLIENT ADMIN

## FORGOT PASSWORD

Login

Email

Your email on file. What you enter here is validated against our records.

Security Code



Generate New Image

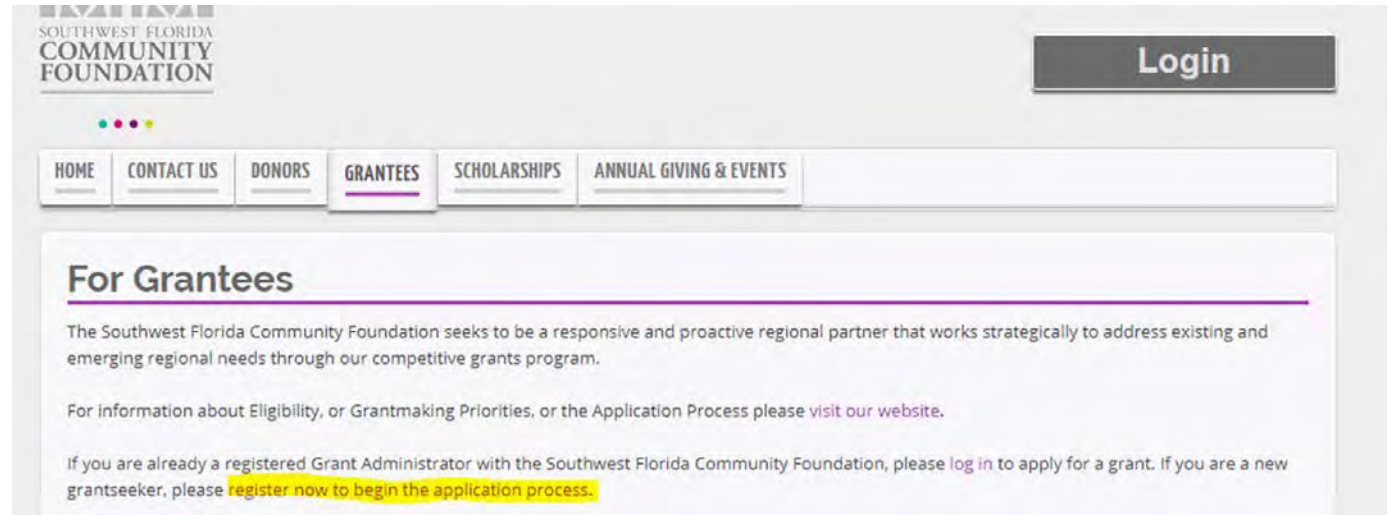
Audio

[SEND PASSWORD EMAIL](#)

[Back to Login](#)

# Starting the Application Process – New Applicant

- Click the *Grantees* tab
- Click on *Register now to begin the application process*
- For new applicants put your cursor over *Grantee*, and select *Begin Registration*



The screenshot shows the website for the Southwest Florida Community Foundation. The logo is in the top left, and a 'Login' button is in the top right. A navigation menu contains tabs for HOME, CONTACT US, DONORS, GRANTEES (which is highlighted with a purple underline), SCHOLARSHIPS, and ANNUAL GIVING & EVENTS. Below the navigation, the 'For Grantees' section is displayed, featuring a purple horizontal line. The text in this section includes: 'The Southwest Florida Community Foundation seeks to be a responsive and proactive regional partner that works strategically to address existing and emerging regional needs through our competitive grants program.'; 'For information about Eligibility, or Grantmaking Priorities, or the Application Process please [visit our website](#).'; and 'If you are already a registered Grant Administrator with the Southwest Florida Community Foundation, please [log in](#) to apply for a grant. If you are a new grantseeker, please [register now to begin the application process](#).'

# Application Account Registration

- Fill in your information
- Click on *Submit*

## Applicant Registration

To begin, you must first create an account for yourself as a grant administrator. Once you have registered, you will be taken to a screen to register your organization.

First Name:

Last Name:

Email:

Your email address will be your Login ID.

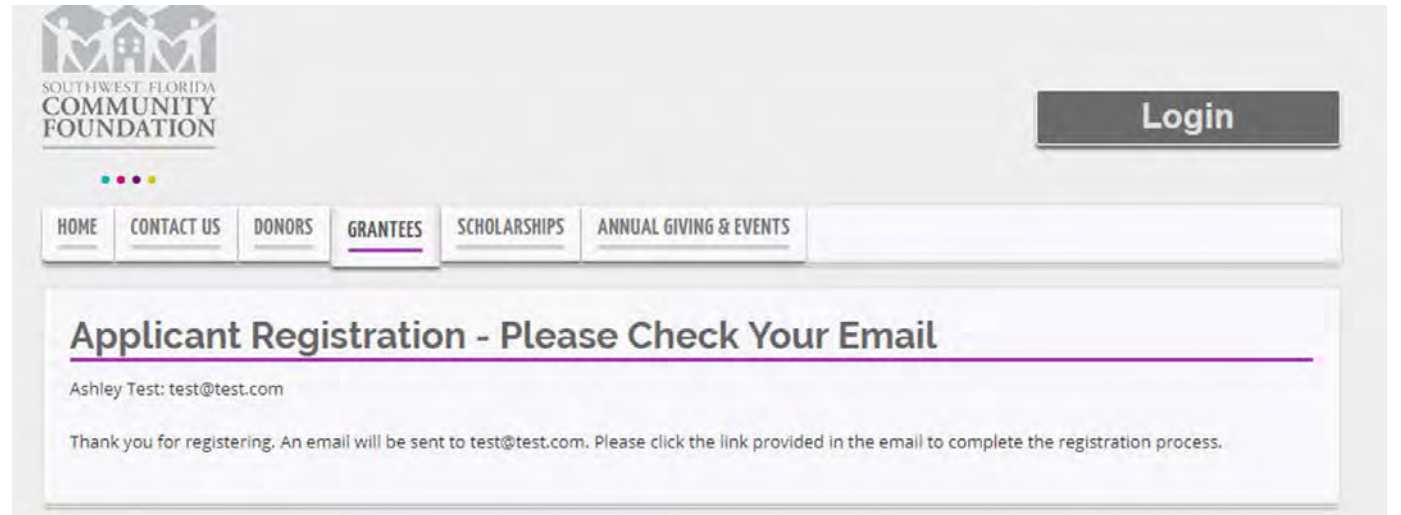
Re-Enter Email:

**SUBMIT**



# Complete Applicant Registration

- Follow instructions in your email



The screenshot displays the website for the Southwest Florida Community Foundation. At the top left is the organization's logo, which features stylized figures holding hands above a house icon, with the text "SOUTHWEST FLORIDA COMMUNITY FOUNDATION" below it. To the right of the logo is a "Login" button. Below the logo is a horizontal navigation menu with the following items: HOME, CONTACT US, DONORS, GRANTEES (which is highlighted with a purple underline), SCHOLARSHIPS, and ANNUAL GIVING & EVENTS. Below the navigation menu is a main content area with the heading "Applicant Registration - Please Check Your Email" underlined in purple. Below the heading, the text reads "Ashley Test: test@test.com" and "Thank you for registering. An email will be sent to test@test.com. Please click the link provided in the email to complete the registration process."

# Applicant Registration Continued

- Fill in your information
- Click *Submit*

## Applicant Registration Continued

Please enter the rest of your **personal** information below to finish creating your account as a Grant Administrator. You will be able to enter your organization's information on the next page.

First Name: Test

Last Name: Test

Email/Login ID: test21@test.com

Please enter a password:

This should be a minimum of 6 characters with at least 2 numbers and 2 letters.

Retype Password:

**Challenge Questions (answer at least 1)**

Question: Favorite color

Please select your security question and provide the answer below.

Answer:

Date of Birth:

Address Type: Business

Address:

# Application Registration Complete

- Click *Search* to find your organization
- If your organization is in the search, click *Add Grant Admin* (you can check the tax id)
- Then click on *Grantee Dashboard* to start application
- If not, click *Add Grantee Organization*

SEARCH ORGANIZATIONS:

Charity Name:  [SEARCH](#) [CANCEL](#)

Pre-approved Charities Only

ORGANIZATION RESULTS:

ORGANIZATION NAME	ADDRESS	TAX ID	ACTION
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>
[REDACTED]			<a href="#">Add Grant Admin</a>

Page: 1 of 5 [Go](#) Item 1 to 10 of 47

[ADD GRANTEE ORGANIZATION](#) [GRANTEE DASHBOARD](#)

# Add Grantee Organization

- Fill out information
- Click *Submit*

## Add Grantee Organization

Please enter the following information about **your organization**.

Organization's  
Legal Name:

EIN #:

Address Type:

Address:

City:

State:

Zip Code:

Phone Number:

xxx-xxx-xxxx

Website:

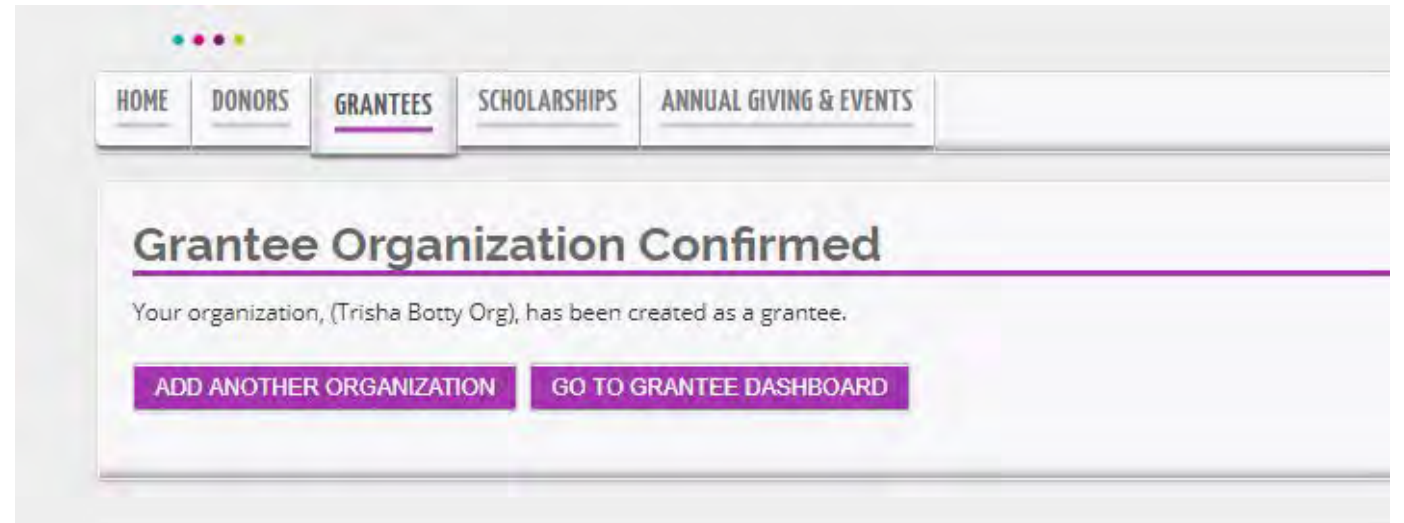
www.mywebsite.org

**SUBMIT**

# Grantee Organization Confirmed

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- Click *Go To Grantee Dashboard*
- Start Application



# Find Open Grant Cycles

- When you complete registration, you can apply for a grant
- Put your cursor over *Grantees* and select *Apply for a Grant*
- You will need to answer pre-qualifying questions to determine your eligibility
- Click *Submit*

The screenshot shows a web application interface for finding open grant cycles. At the top, there is a navigation menu with the following items: HOME, ADMIN, DONORS, GRANTEES (highlighted), SCHOLARSHIPS, REVIEWERS, ANNUAL GIVING & EVENTS, and CLIENT ADMIN. Below the navigation is a section titled "Find Open Grant Cycles" with a downward arrow. Underneath this title is a paragraph: "To begin, please answer the following questions to determine whether or not your organization qualifies for a grant through the Southwest Florida Community Foundation." Below this is a section labeled "PreQualifyingQuestions" with a downward arrow. The form contains several questions, each followed by a dropdown menu with the text "Please select one":

- My organization is a:
- My organization and/or proposed project can be included in one of the following program areas:
- Is your organization governed by a volunteer board of directors with at least 5 individuals unrelated through familial or business connections?
- Does your organization conduct business with discrimination to anyone based on any of the following: race, gender or gender identity, sexual orientation, age, disability, national origin, or religious affiliation?
- Which county does your organization and/or proposed program/project serve?  
no values selected  
Hold CTL key to select more than one option.
- Is your project or program primarily serving the LGBT Community in Southwest Florida?
- Is your project or program primarily serving Women and/or Girls in Southwest Florida?
- Does your program or project proposal provide immigration legal services in Southwest Florida?
- Does your organization offer children's mental and behavioral health services in Southwest Florida?

At the bottom of the form is a section labeled "CustomFormSubmitButton" with a downward arrow, containing a purple button with the text "SUBMIT".

# Applying for a Grant

- After you answer the Pre-qualifying questions, you will see the grant cycle you are eligible for, click the *COMMUNITY IMPACT GRANTS* checkbox
- Click *Continue*

## Grant Cycles ▾

Based on your answers to the Pre-Qualifying Questions, these are the Grant Programs that are available to your organization. To learn more about each program listed below, click on the "+" to expand the description.

**Please, select ONE program to which you would like to apply and click Continue. You must complete one grant application at a time. If you would like to apply for multiple open grant cycles, you must answer the prequalifying questions each time.**

+  COMMUNITY IMPACT GRANTS

CustomFormSubmitButton ▾

CONTINUE

GRANTEE DASHBOARD

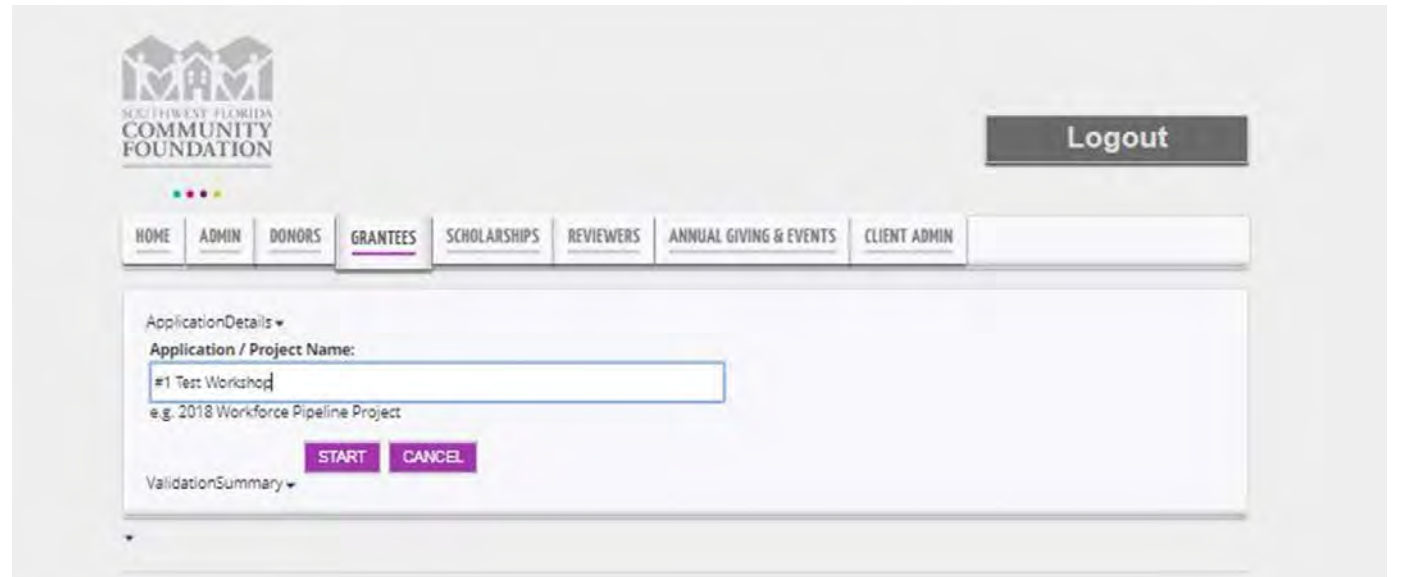
ValidationSummary ▾

CustomFormAdvancedSettings ▾



# Application Project Name

- Enter Application/Project Name
- Click *Start*



The screenshot shows the Southwest Florida Community Foundation website interface. At the top left is the logo with the text "SOUTHWEST FLORIDA COMMUNITY FOUNDATION". To the right is a "Logout" button. Below the logo is a navigation menu with tabs for HOME, ADMIN, DONORS, GRANTEES (which is highlighted), SCHOLARSHIPS, REVIEWERS, ANNUAL GIVING & EVENTS, and CLIENT ADMIN. The main content area is titled "ApplicationDetails" and contains a form for "Application / Project Name". The text input field contains "#1 Test Workshop". Below the input field is a hint: "e.g. 2018 Workforce Pipeline Project". At the bottom of the form are two buttons: "START" and "CANCEL". Below the form is a "ValidationSummary" section.



# The Application Dashboard

- Read the instructions carefully
- Click on *Section 1* to begin the application
- You can upload your document attachments by clicking *Details* at anytime

## Grant Program:

Community Impact Grants

### Special notes and instructions

- Clicking Save and Go Next at the bottom of each screen will validate your work. When each section is complete, it will show a green checkmark. When every section is complete and saved, and all required documents are uploaded (see table below), you will be able to Review and Submit your application.
- It is best practice to type your answers in a word document and then copy/paste your answers into the application once ready to save/submit.
- Please save your work every few seconds. The session will automatically time out on you after a certain amount of inactivity, and lost work cannot be recovered.
- All questions on the page must be answered to Save.
- Once saved, you may log out and return to your application at any time by clicking on the Application History tab.
- Supplemental materials beyond the Letter of Intent (LOI) requirements will not be reviewed unless specifically requested by Foundation Staff.
- All Required Documents must be in PDF file type.
- Required Documents will only generate in your PDF packet after you submit your application. To change the order of your Required Documents, please use Sort function
- **Awards will not be announced until January 2020. Please keep this in mind as you plan your application that you will need to plan for implementation 6 months after the grant is submitted.**
- If you have any questions, please contact [grants@floridacommunity.com](mailto:grants@floridacommunity.com) or (239) 274-5900

Please select any section below to begin your application.

[Section 1: Organization Information](#)

[Section 2: Tell Us More About Your Organization](#)

[Section 3: Application Narrative](#)

### Required Documents

NAME	CURRENT STATUS	MANDATORY?	DATE COMPLETED	ACTIONS
Program Budget	Incomplete	Yes		<a href="#">Details</a>
Organization 990	Incomplete	Yes		<a href="#">Details</a>

[PREVIEW PDF](#)

# Organization Information

- Confirm Contact Information
- Fill out information
- *SAVE AND GO NEXT*

ApplicationDetails ▾

## ORGANIZATION INFORMATION

Legal Name of Organization: Southwest Florida Community Fo

Office Phone:

Address: 2031 Jackson Street

Suite 100

City: Fort Myers

State: Florida ▾

Zip: 33901

Grant Administrator: Botty, Trisha

Grant Admin Email: tbotty@floridacomunity.com

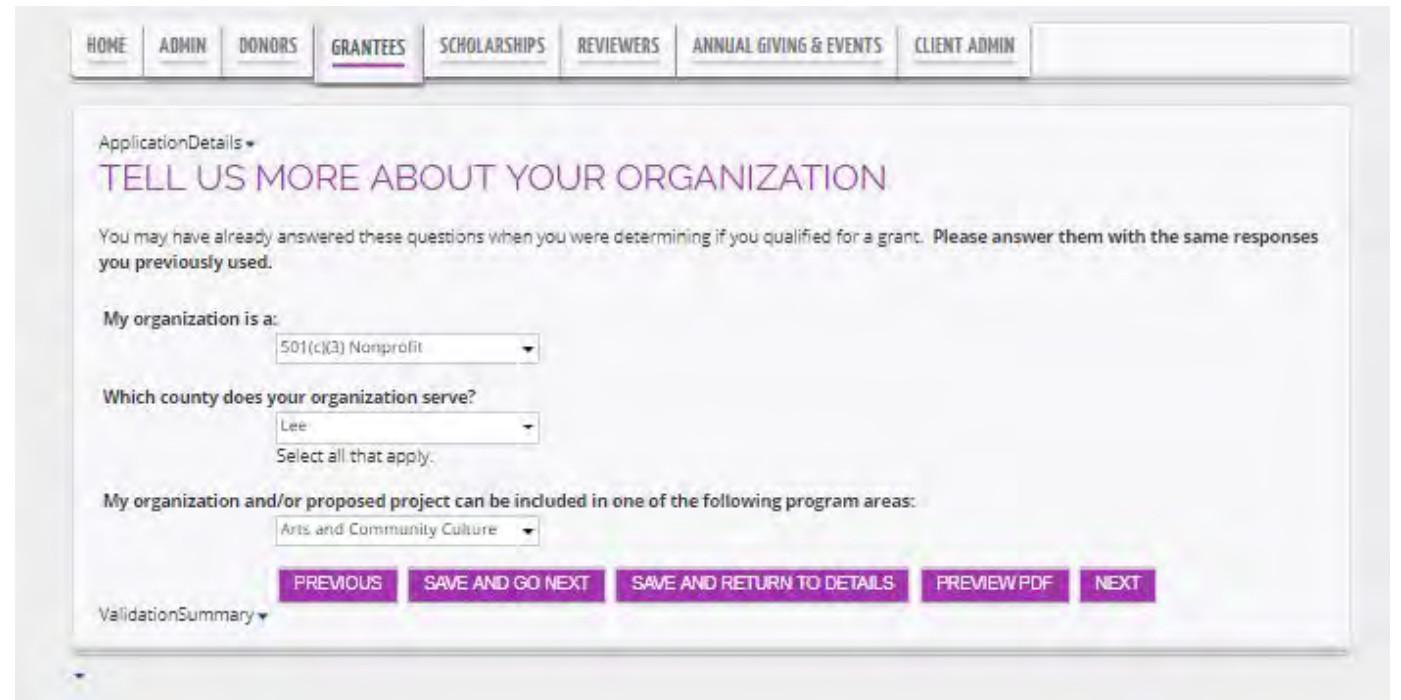
Grant Admin Phone:

Executive Director Name:

Executive Director Email:

# Tell Us More About Your Organization

- Answer the six questions
- *SAVE AND GO NEXT*



The screenshot shows a web application interface with a navigation bar at the top containing links for HOME, ADMIN, DONORS, GRANTEES (highlighted), SCHOLARSHIPS, REVIEWERS, ANNUAL GIVING & EVENTS, and CLIENT ADMIN. Below the navigation bar is a section titled 'ApplicationDetails' with a sub-header 'TELL US MORE ABOUT YOUR ORGANIZATION'. A message states: 'You may have already answered these questions when you were determining if you qualified for a grant. Please answer them with the same responses you previously used.' The form contains three questions with dropdown menus: 'My organization is a:' (selected: 501(c)(3) Nonprofit), 'Which county does your organization serve?' (selected: Lee, with a note 'Select all that apply.'), and 'My organization and/or proposed project can be included in one of the following program areas:' (selected: Arts and Community Culture). At the bottom of the form are five buttons: PREVIOUS, SAVE AND GO NEXT, SAVE AND RETURN TO DETAILS, PREVIEW PDF, and NEXT. A 'ValidationSummary' link is visible at the bottom left of the form area.

# Application Narrative

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- Read questions and description
- Answer all six questions
- *SAVE AND GO TO NEXT*

ApplicationDetails ▾

## APPLICATION NARRATIVE

It is best practice to type your answers in a word document and then copy/paste your answers into the application once ready to save/submit. Please save each of the six questions individually.

**PROGRAM ACTIVITIES:** What is your program/project idea and what are the key strategic activities you plan to implement? We want to know exactly what you to plan to do with requested funds.

0 characters used out of a maximum of 2000 characters.

SAVE

**CHALLENGE:** Briefly describe how your program or project will address a challenge or opportunity in the area, and use data specific to Southwest Florida where possible.

0 characters used out of a maximum of 2000 characters.

# Upload and Complete Application

- Green check marks will show if the sections are complete
- Make sure you upload your required documents
- Incomplete to Completed

Please select any section below to begin your application.

- ✔ Section 1: Organization Information
- ✔ Section 2: Tell Us More About Your Organization
- ✔ Section 3: Application Narrative

**Required Documents**

NAME	CURRENT STATUS	MANDATORY?	DATE COMPLETED	ACTIONS
Program Budget	Incomplete	Yes		<a href="#">Details</a>
Organization 990	Incomplete	Yes		<a href="#">Details</a>

[PREVIEW PDF](#)

ValidationSummary ▾

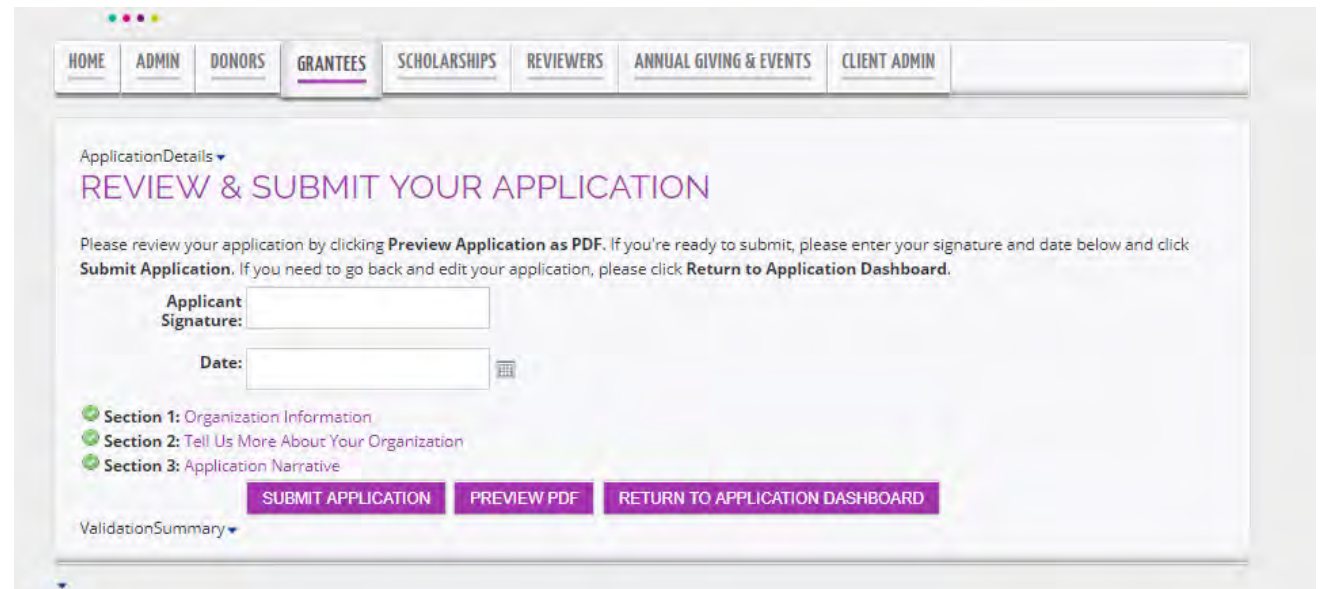
# Upload Required Documents

- Click *Select* and find your file
- PDF File Format Only
- Click *Upload*
- Click *Back*

The screenshot shows a web application interface with a navigation menu at the top containing links for HOME, ADMIN, DONORS, GRANTEES (which is highlighted with a purple underline), SCHOLARSHIPS, REVIEWERS, ANNUAL GIVING & EVENTS, and CLIENT ADMIN. Below the navigation menu is a section titled "Upload Required Documents for Application" with a purple underline. A note below the title reads: "Note: Please only upload the document(s) referenced below. To upload other items from the requirements list, you will need to go back to the requirements table and click 'Upload' beside its name." Underneath the note is a section titled "Program Budget" with a sub-section "DESCRIPTION" that says "Please upload a detailed program budget that clearly shows how requested funds will be used." Below the description is a purple button labeled "BACK". Further down is a section titled "UPLOAD DOCUMENTS" with a dropdown arrow. Below this is a file selection area consisting of a text input field, a "Select" button, and a purple button labeled "UPLOAD".

# Review and Submit

- Type your name
- Enter the date
- Click *Submit Application*



The screenshot shows a web application interface with a navigation menu at the top containing links for HOME, ADMIN, DONORS, GRANTEES (highlighted), SCHOLARSHIPS, REVIEWERS, ANNUAL GIVING & EVENTS, and CLIENT ADMIN. Below the menu, the page title is "ApplicationDetails" with a dropdown arrow, followed by the main heading "REVIEW & SUBMIT YOUR APPLICATION".

The main content area contains the following text: "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**."

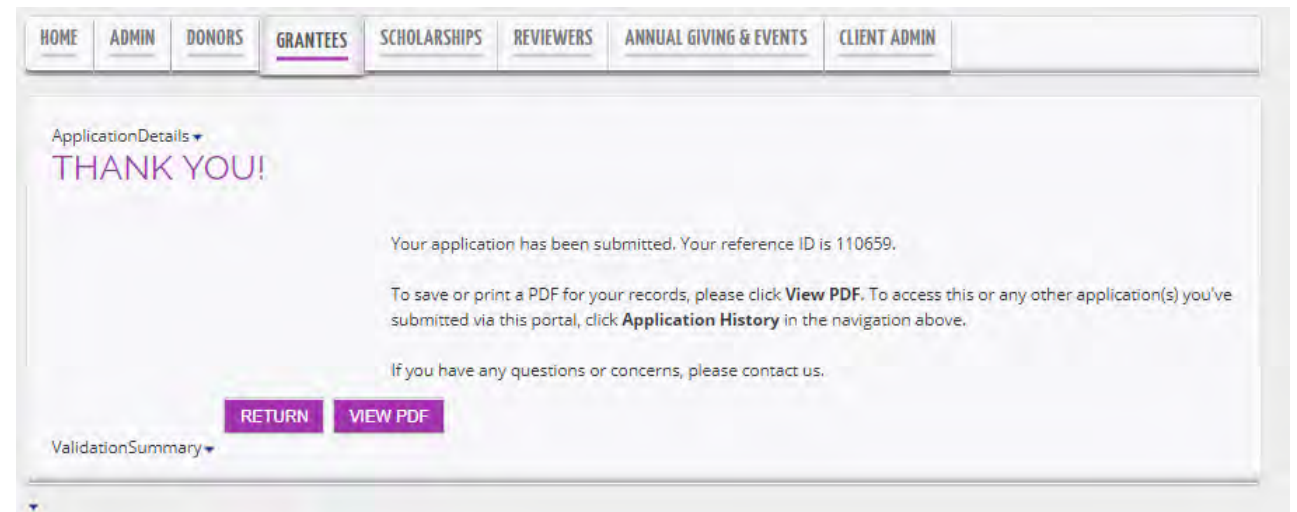
Below the text are three input fields: "Applicant Signature:" with a text input box, "Date:" with a date picker, and a small calendar icon to the right of the date field.

At the bottom of the form, there are three buttons: "SUBMIT APPLICATION", "PREVIEW PDF", and "RETURN TO APPLICATION DASHBOARD".

At the very bottom of the page, there is a "ValidationSummary" dropdown arrow.

# Thank You You Did It!

- You will receive an email confirmation
- The ID number is your Application Number





# Information

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- For questions, contact the Grants Manager at the Southwest Florida Community Foundation
  - [grants@floridacommunity.com](mailto:grants@floridacommunity.com)
  - (239) 274-5900