ONLINE GRANT APPLICATION HELP GUIDE

The Buell Foundation implemented an online system to make the grant application and reporting processes more accessible and user friendly.

This guide is intended to help applicants navigate the system. Please visit our website for the more information about what we fund, the process, and FAQs.

Table of Contents

INVESTING IN COLORADO'S FUTURE

Getting Started

Creating Your Account:

Anyone within an organization that is planning to work on a grant application for the Buell Foundation should create an account. More than one member of an organization can work collaboratively on an application from their own accounts within the system. Please only create one account per person.

1. Enter your email address to start your account setup. You'll then be emailed a link. Please check your spam folder for the email.

2. Once you receive it, click the link and enter your information.

Starting a New Application/adding an Organization:

1. Once you've reviewed all of the application information on this page and the Buell Foundation website you are ready to start your application. Login to the system, and scroll down to the bottom of the page. Click the "Start a New Application" button.
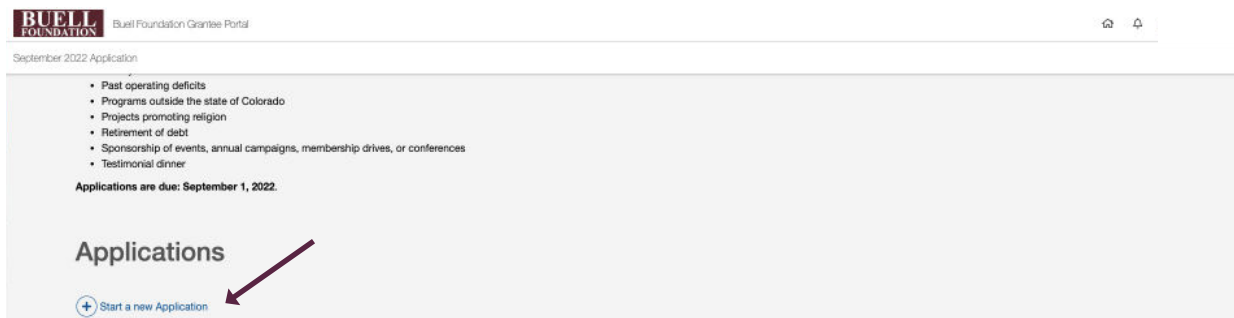
2. Select your organization from the list, or if you don't see it on the list click "Add New Organization." You can then search the IRS Database for your organization by entering the U.S. Tax ID or Organization Legal Name. If you don't see it that way, you can select "Entering an Organization Name" and enter the name of your organization. This will be necessary for School Districts, County Offices, or other governmental agencies applying for a grant. Then click "Start Application"

3. You will then be taken to the welcome screen. Read all of the instructions on this page, then click "Start Application."

Getting Started Continued

Saving Your Application:

You can save your application and return to it at any point. The application will automatically save information as you enter it..

Flagging Sections:

You can use the "Flag this Step" button at the bottom of each section to flag a section to come back to. The system will not let you submit the application until are all flags are removed.

Troubleshooting:

If you need technical help with your application, click the blue comment bubble icon (shown in the illustration to the right) to send a message to our technical help team. The icon appears under the title of most of the sections. Our team will respond to you by email within one business day.

If you need assistance with the content of your application, contact your Program Officer.

Filling Out the Application

All items with an * are required to be completed.

Application Type:

There are currently three types of applications: Capital Grant, Licensed Child Care Center, and General Operating and Program. The online application will automatically switch to the one you need based on your answer to the question "How are you planning to use the funds you are requesting?" The questions and sections are a little different depending on the type so be sure you answer that question correctly, and right when you start of your application.

If you are a licensed child care center requesting general operating or program support select "Licensed Child Care."

Text Boxes:

One of the main components of the application are text boxes. You'll notice that some have suggested word limits. Word limits are a suggestion only. Please use the necessary amount of space to answer the questions without repeating information.

Filling Out the Application Continued

<u>Uploading Documents:</u>

There are places throughout the application where you'll be asked to upload documents. Most of these documents should be in .pdf format, but can also be .docx, .xlxs, or other formats where applicable. For some of the documents a template file is available for download if you don't already have a file created with the requested information.

<u>Adding Key Contacts:</u>

On the "Key Contact" section, start at the top with your CEO or Executive Director and click "Select Contact". Any person who has made an account in the system and started or worked on an application for your organization will show up in the list and can be selected. If you don't see the person you need, click "Add New Contact" and fill in their information. Please note this does NOT create an account for them in the system. All information for each contact must be filled in before your application can be submitted.

<u>Financials:</u>

In the "Financials" section there are 2 forms for you to enter information. Both ask for your "Revenue", "Expenses", and "Data Source". The first should be used for your most recently completed fiscal year. The second is for your current fiscal year.

For example: If your current fiscal year ends December 31, 2022, first enter the relevant information for the fiscal year ending December 31, 2021. Then, on the second form enter all information for your current fiscal year 2022.

In the first form where you entered information for your most recently completed fiscal year, you will also need to enter Notable Sources of Revenue. The form will show several primary source categories (raised income, tuition/fees/earned income, other, and in-kind). Please include information for these broad categories as well as the breakdown by subcategory wherever possible. Be sure to specify:

- The top three (3) businesses supporting your organization, if applicable
- The top three (3) fundraising events, if applicable
- The top five (5) foundations supporting your organization, if applicable
- The top five (5) government agencies supporting your organization, if applicable

You do NOT need to enter notable sources of revenue for your current fiscal year (shown in the second form).

Review and Submit

On the "Review and Submit" page you can see all the steps that have been completed. Note that this screen shares a summary indicating the number of steps completed, but throughout the application you can also see what has been completed on the right side of your screen. All completed steps are noted with a green checkmark on the side bar on the right side of the screen. If the system is showing that not all steps have been completed, there is a required item (shown with an *) on the page without a checkmark that still needs to be filled out.

On this page you can also see any steps that are flagged. If any steps are flagged, it means that you or a member of your team flagged a section to return to. You must unflag all sections before you can submit. You will receive a confirmation email once your application is successfully submitted.