FY2016-17 *take pART* Grant
Application Instructions and WebGrants User Guide

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* Keep this document and the *take pART* Guidelines with you as you complete the application. *

OVERALL REMINDERS

<u>Save your work often</u>! Similar to word processing software, WebGrants only saves your work when you click the Save button so save your work frequently. You will lose the work that you did if you go to a different section before hitting the save button.

If you click the save button and get the message: "Please complete all required fields," this means that there is at least one required field (i.e., question) that you have not yet completed; you can recognize the required fields because they are preceded by a red asterisk. When you click the OK button, the system will place a cursor in the required field that needs to be completed before you can save.   If you cannot answer all the required questions on the page in one sitting, you can place a random character in each required field and then the system will allow you to save.

> <u>Example</u>: In the Event Narrative Form, all questions are required and have a red asterisk, so if you are working on the first question and need to leave the screen, you must put a placeholder character(s) – such as "LATER" or "X" -- into each red asterisked field before the system will allow you to save your work. **Be sure to go back to each section prior to submitting your entire application to verify that you have replaced all "placeholders" with appropriate responses.**

WebGrants does NOT have a running character count function for applicants. Most narrative questions in the application have a maximum character limit, and this limit includes spaces. Some applicants choose to compose their answers using word processing software such as Microsoft Word and then cut and paste their responses into WebGrants. If you do this, confirm that all your words have transferred over as most word processing softwares' character count methods do not exactly match WebGrants' character count because WebGrants counts formatting characters (tabs, paragraph returns, etc.) as separate characters.

Your session will time out after 30 minutes of inactivity. For your security, WebGrants automatically ends a session after 30 minutes of inactivity. There is no prior warning so please remember to save your work by scrolling up to the Save button frequently. If you are timed out, just log in again.

For additional questions, email <u>arlene.biala@sanjoseca.gov</u> (faster) or call 793-4332.
Response times will generally be quicker via email; please allow at least 2 business days.

QUICK REFERENCE CONTENTS

1. **Starting Point**

Enter your user id and password into the City of San Jose's **login page**:
http://grants.sanjoseca.gov

Login

User ID:* [   ]
Password:* [   ]
        [Login]

If you don't have a user id, you can request one by going to the same login page and clicking on the "Register Here" link below the City's icon. It will take about 2 business days to process.
If you forgot your password, click on the "Forgot Password?" link below the login button, and enter your user id and the email that you originally registered with. Your password will be sent to the email account in a few minutes.
If you forgot your user id, contact your program staff.

2. Click on **Funding Opportunity** link

   Funding Opportunities

3. Click on **take pART Grants FY2016-17** title

   Opportunity Title

   take pART Grants FY2016-17

4. Click on Start An Application

Start a New Application

If you will have several people working on one application, <u>make sure that people do not create a new application every time they enter the system</u>; *have everyone work on the one application that is initially created in this step.*

For future reference, <u>in order to return to an application that you already created,</u> log on to the system; do steps #1-3. At the top of the screen you will see your Project Title (the one that you will create in Step #5). Click on your Project Title, and, then you can click on the application section that you want to return to.

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5.   **General Information**

NOTE: After you complete this Form, you will be able to preview and print the entire application by clicking on the **Application Details** *link in the Application Forms section.*

Enter your Project Title (*Example: short succinct titles such as "2016-17 Adobo Kids Project" work best*) and select the proper drop down values for Primary Contact, Authorized Official and Organization then click on [💾 **Save**] icon.

General Information

This page must be completed and saved before proceeding with the rest of the application process.

Primary Contact: *	Test1 Test1 ▾
Project Title: (limited to 250 characters) *	2015-16 Adobo Kids Project
Authorized Official: *	Test1 Test1 ▾
Organization: *	BaseLine Organization ▾

If satisfied with answers Click on Go to Application Forms link. If answers are unsatisfactory click on Edit link.

Go to Application Forms   or   📝 **Edit**

6. **Sources of Funds Statement** After completing Step #5, click on **Sources of Funds Statement Application Form** link:

(a) Scroll up and click on the ![Edit] icon to begin filling out this form.

(b) Enter response(s) for **Project Description** (Example: **"2016-17 Adobo Kids Project on November 28, 2016 at Montgomery Theater.")** and **Grant Amount Requested** in the form.

    After you are done, click the ![Save] icon;

    Later, if you want to change your response(s) for parts (a) and (b) above, click on ![Edit] icon.

(c) In order to enter response(s) for *Total Amount of Other City Funds for Project* and *Total Amount of External Funds for this Project*, you **must click on the highlighted blue Add** link on the far right of the table. (Later, if you want to **change** your response(s) in the tables click on the **highlighted blue text** in the Program/Agency column.)

    i.) Additional directions for *Total Amount of Other City Funds for the Project* box:

Total Amount of Other San Jose City Funds for Project			Add
Program/Agency	Fund Status	Use of Funds	Amount

    If you have no Other City Funds for this project, you must click on the blue Add icon to the far right and then type in "n/a" in all the fields (Program/agency, Fund Status, Use of Funds); leave the Amount at "$0."

    If you do anticipate other City funds (cash grants), click on the Add link and complete the required information. Repeat this step for each different City funding source that you are budgeting.

    ii.) Special instructions for *Total Amount of External Funds for this Project* for take pART applicants:

    After you hit the Add icon, write in "Various Sources" under PROGRAM/AGENCY and select "Anticipated Revenue" from the drop down menu for FUND STATUS and write in "Production" for USE OF FUNDS.   For the AMOUNT, enter the **total revenues for the project minus the take pART grant request and minus any other City funds for the project.** (Example, if your project had a total budget of $30,500 and you were requesting a $5,000 take pART Grant and you got a $500 grant from another City grant, then you would put $25,000 ($30,500 - $5,000 - $500) on the AMOUNT line.) When you are done, it should look something like this (Of course, your figure in the "amount" line will be different, however!):

Total Amount of External Funds for Project			Add
Program/Agency	Fund Status	Use of Funds	Amount
Various	Anticipated Revenue	Production	$25,000

Later, if you want to **change** your response(s) in the tables click on the **highlighted blue text** in the Program/Agency column.

If you have only entered placeholder values in these fields it is suggested that you click the save button and then click on the Go to Application forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses, click on the Mark as Complete link.

Go to Application Forms   or   **Mark as Complete**

7. **Organization Information Form** After clicking on the Mark as Complete or Go to Application Forms link in Step #6, click on the **Organization Information Form**.

Form Name

Organization Information

After entering your values click on the **Save** icon.

> If you are unable to click into the fields, or if you are returning to the document to edit previous info, then scroll up and click on the **Edit** icon, and the fields should be opened so you can enter or revise information.

If you have only entered placeholder values in these fields it is suggested that you click on the Save link and then click on the Go to Application forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses click on the Mark as Complete link.

Go to Application Forms   or   **Mark as Complete**

8. **Narrative** After clicking on the Mark as Complete or Go to Application forms in Step #7, click on the **Narrative** form. Complete this form by clicking directly into the field boxes to enter text.

Form Name

Narrative

After entering text, click on the **Save** icon.

Please use at least 12 point font for the benefit of your application readers!

*Note #1: **WebGrants does not have a character count function**. If you feel you are nearing the limit, you can hit the save button, and it will tell you whether you have exceeded the character limit. (Alternately, you can compose the answer in a Word document and determine the character count in Word. If you do this, note that Word will generally undercount the characters because it may not count paragraph returns and formatting and WebGrants does.)*

*Note #2: If you are cutting and pasting from a word document, it's recommended that you **cut and paste the answers <u>one question at a time</u>**, and HIT THE SAVE BUTTON AFTER EACH QUESTION. For example, after you've cut and pasted the answer to one question, hit the save button, then cut and paste the answer to the second question.*

> If you are unable to click into the fields, or if you are returning to the document to edit previous info, then scroll up and click on the ![Edit] icon, and the fields should be opened so you can enter or revise information.

If you have only entered placeholder values in these fields, it is suggested that you click on the Save link and then click the Go to Application forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses click on the Mark as Complete link.

Go to Application Forms   Or   **Mark as Complete**

9. **Work Sample Description** After clicking on the Mark as Complete or Go to Application Forms in Step #8, click on **Work Sample Description** form. Complete this form by clicking directly into the field boxes and clicking on the yes or no check box. After entering character values click on the ![Save] icon.

Form Name
Work Sample Description

> If you are unable to click into the fields, or if you are returning to the document to edit previous info, then scroll up and click on the ![Edit] icon, and the fields should be opened so you can enter or revise information.

If you have only entered placeholder values in these fields it is suggested that you click on the Go to Application forms, which will allow you to exit the form without Marking it as complete. If you are satisfied with responses click on the Mark as Complete link.

Go to Application Forms   Or   **Mark as Complete**

10. <u>**Application Signature Form**</u> After clicking on Go to Applications or Mark as complete in Step #9, click on the **Application Signature** Form. This step should be done once you have completed answering all of the questions and filling in placeholders.

> Form Name
> **Application Signature**

Read the statement in the field and click on the Application Signature check box if you agree with the statement.   Enter the date in the calendar field box. When done, click on the **Save** icon.

If you are satisfied with your answers, click on the Mark as Complete link.

Mark as Complete

11. <u>**Attachments**</u> After clicking on the Mark as Complete or Go to Application Forms in Step # 10, click on the **Attachments** form. ***Except for work samples, attach only PDF, JPEG or Word versions of documents.***   Complete this form by executing the following:

> Form Name
> **Attachments**

a.   Click on the highlighted text for each requested attachment;
b.   Click on the Browse button to select the requested file to attach;
c.   Enter text in the description field box;
d.   Click on the Save link; and
e.   Repeat these steps for each requested document.

If you need to remove an attached document, click on the delete link. Then OK on the drop down message box.

Delete?

Microsoft Internet Explorer

Are you sure you want to delete this attachment?

OK   Cancel

If you have only entered placeholder values in these fields it is suggested that you click on the Save button and click on the Go to Application forms, which will allow you to exit the form and return later to enter correct values. If you are satisfied with responses click on the Mark as Complete link.

Go to Application Forms   or   **Mark as Complete**

Project Budget   *As a reminder, the project budget form is an attachment.* If you have not already done so, please download the Project Budget form in the "Important Attachments" section **or from the OCA webpage**: http://www.sanjoseculture.org/DocumentCenter/View/30761
After you complete the form, save it as a PDF and submit as an attachment.

12. **Preview the application** To Preview the application, click on the **Application Details** link. This will provide you with a black and white copy of the application, which is printable.

   Note: You may click this link anytime during the application process (after completing the General Information Form) to generate a hard copy showing the responses entered to date.

13. **Submit the Application** To submit the application, the Mark as Complete column must have a check mark by each application component. Click on the **Submit** icon and then on the OK button to complete the application. This will lock the application and no further editing will be allowed.
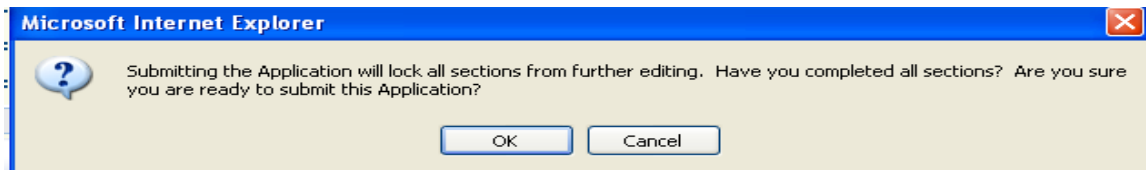
   IMPORTANT NOTE: Prior to submitting, please be sure to preview the entire application (see above step) to make sure that you have responded to each question to your satisfaction, and that you double checked that all "place holder" responses (i.e., misc. characters that you placed in required fields so that you could save the application and return for future editing later) have been replaced with actual responses. After you submit the application, you will not be able to make any revisions or changes.

   Once the Submit button has been successfully clicked, you should immediately see a confirmation message screen from WebGrants that the system has accepted your application.

   Applicants bear the burden of proof that their application was submitted successfully. Applicants are strongly advised to print this confirmation screen as proof of their submission.

Sample Confirmation Screen to print out for your records:

REMINDER: The application deadline **is 5:00 pm on Monday, February 8, 2016**. WebGrants will not accept applications submitted even a minute after the deadline so please plan to submit the application *at least 7 days prior* to the deadline so that you have time to resolve any unanticipated issues. **Also, note Supporting Materials (See Section 4.5 in take pART Guidelines) must be submitted either online as an attachment in your application OR by mail or delivered to the OCA on or before the same deadline.**

<div style="border:1px solid black; text-align:center; color:#9b1b1b;">Planning Tips for a Successful Application Submittal Experience</div>

- GET STARTED EARLY. Set your personal deadline to submit the application at least one week prior to the posted deadline (i.e., February 1). You take on a significant risk by waiting until the deadline to submit the application! WebGrants does not accept late applications.

- DROP OFF SUPPORTING MATERIALS IN DECEMBER (if you are submitting hard copy materials). To avoid last minute scrambling, drop off or mail required supporting materials and an optional work sample to the OCA in December or early January. Be sure to refer to Section 4.5 of the Grant Guidelines for details on the preparation of these materials.

- READ GRANT GUIDELINES THOROUGHLY BEFORE STARTING THE APPLICATION. The Guidelines contain important information you will need about rules governing grant request amounts (Section 2.3), the preparation of required attachments, work sample and supporting materials (Sections 4.4 – 4.7). In addition, it is helpful to refer to evaluation criteria when writing the application narratives.

- LOCATE AND CONVERT REQUIRED ATTACHMENTS TO PDF and/or JPEG FORMAT AS EARLY AS POSSIBLE. If you do not have in-house capacity, many large copy centers have services that will convert paper or electronic documents to PDF. Call in advance to locate a center and do this as soon as possible.