

ABOUT OUR COLLABORATIVE

Central Indiana Community Foundation (CICF), The Indianapolis Foundation, Hamilton County Community Foundation and Women's Fund of Central Indiana are a \$1 billion collective of philanthropic organizations committed to making Central Indiana a community where all individuals have equitable opportunity to reach their full potential—no matter place, race or identity. The collaboration collectively awards more than \$55 million in grants to not-for-profits each year.

SmartSimple is our grants management platform for most competitive grantmaking processes. SmartSimple is a streamlined resource that aligns application and grant reporting into one platform to maximize efficiency. This guide walks you through creating an account and beginning your application.

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If at any time you need technical assistance using SmartSimple, contact GrantSupport@cicf.org. We can help you troubleshoot and answer common questions about using SmartSimple.

GETTING STARTED

You will need the following information and documents to set up your account and apply for a grant. We recommend that you gather these items before getting started:

- Organization's EIN (federal tax ID number)
- Organization's legal name (sometimes this is different than the name you do business with)
- Most recent 990 or audited financial statements
- Fiscal agent's organizational budget (if applicable)
- List of current board of directors with affiliations and officers listed (women should be marked with an asterisk)
- Most recent board-approved budget
- Additional documents to support your request (optional) such as:
 - year-to-date financials
 - strategic plan
 - evidence of resident endorsement (i.e., letters of support)
- Elevation Grant program applicants must be registered in the federal SAM.gov database.

Our staff receives many inquiries within 72 hours before a grant deadline, and our availability to respond to everyone is limited. If you require technical assistance, it is to your benefit to plan ahead and contact us early.

THANK YOU FOR ALL YOUR WORK TO MAKE OUR COMMUNITY MORE EQUITABLE!

DEFINITIONS

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SmartSimple: SmartSimple is CICF's grants management platform. This is where grant seekers fill out grant applications to be considered for support from any entity within the philanthropic collaborative. Grant recipients also submit interim and final reports through this platform. You can check the status of current and past applications in SmartSimple, including any reports that may be due.

Organizational Profile: Your Organizational Profile includes basic information about your organization, including your organization's mission statement, an overview of programs, staff and board demographics, and organizational budget. The first time you apply for a grant, you must create an Organizational Profile. Each time you apply, we encourage you to check to ensure this information is up to date.

Personal Profile: All individual users of SmartSimple must have a Personal Profile and access the system by logging in with those credentials. Individual users in the system list their name, title and contact info. More than one personal profile can be associated with an organizational profile.

Community Leadership Team: The community leadership team consists of members of the grantmaking team for The Indianapolis Foundation and Hamilton County Community Foundation. Additionally, we have consultants to help support grantmaking for some of our other funds. This team develops relationships with organizations and reviews applications. If you don't know who your contact is, please refer to our Grant Seeker's Guidebook to learn whose portfolio aligns with your organization's scope of work

Call or Open Call: Each funding opportunity is listed as a separate "Open Call" in SmartSimple. Calls have specific purposes and deadlines; for some, only certain organizations are eligible to apply, based on geography, focus area, etc. Generally, each call includes a program description and a deadline; read carefully to ensure you are eligible, get additional instructions and ensure you don't miss a deadline.

CICF Grant Seeker Guidebook: Each year, we update our Grant Seeker Guidebook with information about available grants, processes, deadlines, staff portfolio areas, etc. **You can view the Grant Seeker Guidebook here.**



CREATING AN ACCOUNT

CREATING AN ACCOUNT

If your organization has previously applied for a grant from within the collaborative, you likely already have an account. Your organization needs an account if you have not applied through SmartSimple before. Setting up an account will give you a username and password, which you'll use to access SmartSimple to work on your grant application and check its status after you've submitted it. This section focuses on registering your organization account.

[Click here for instructions on how to update your personal profile.](#)

To register as a new organization in SmartSimple, you must have your organization's EIN. We use your EIN to confirm your not-for-profit and tax-exempt status with the IRS.

- 1 Visit cicf.smartsimple.com. On the welcome page, you will see a place to log in if you already have a SmartSimple account. (If you already have an account, you can skip this section.) Below that, you'll see an orange button that says "Register Here" if you need to set up a new account.
- 2 Click "Register Here."

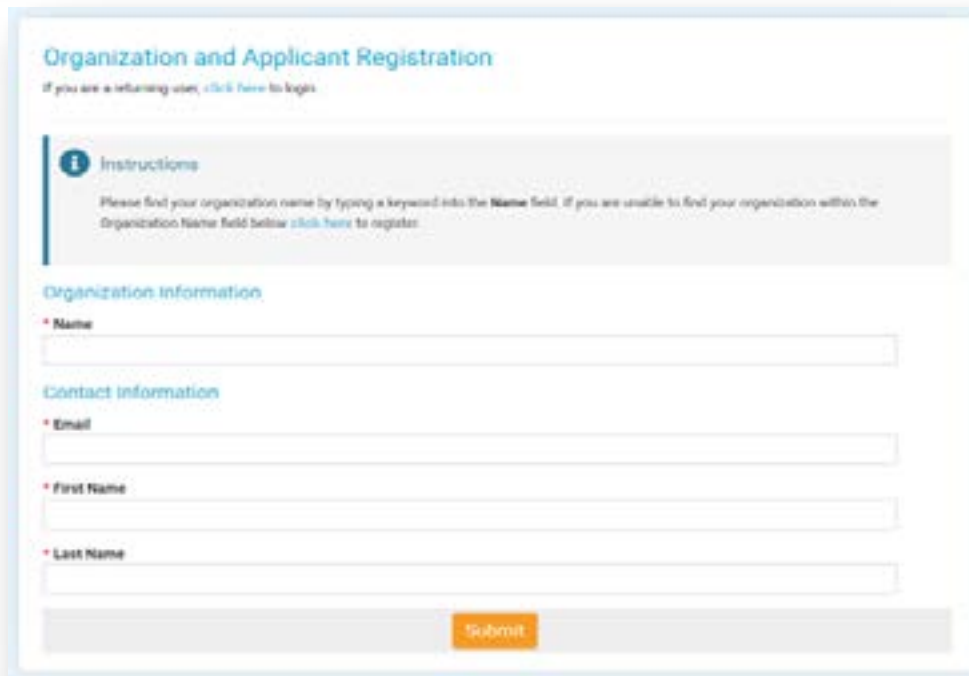


- 3 Select "Grant Seeking Organization."



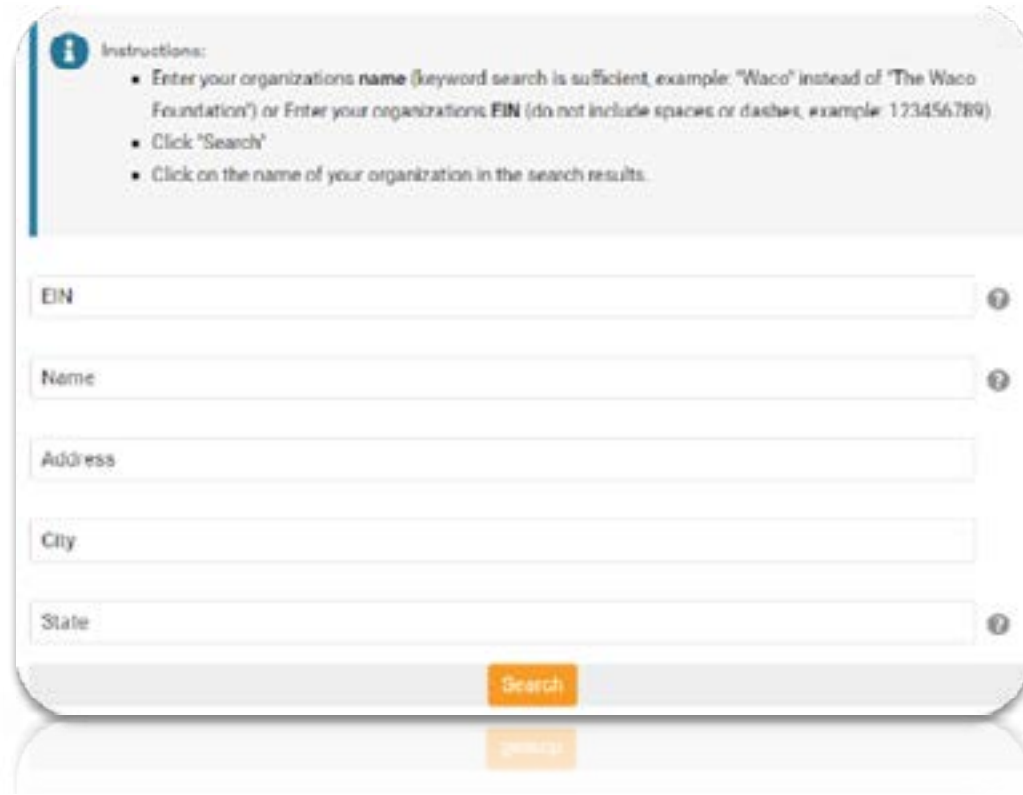
The screenshot shows the CICF logo at the top left. Below it, the heading "Pre-registration" is displayed. A sub-heading reads "Please select the option which best describes the account you require." There are two radio button options: "Grant seeking organization" (which is selected and highlighted with an orange bar) and "Scholarship applicant". A hand cursor icon is positioned over the selected option.

- 4 Begin filling in the fields under "Organization and Applicant Information." Online instructions prompt you through the steps, including confirming your organization's tax-exempt status (see next step).



The screenshot shows the "Organization and Applicant Registration" form. At the top, there is a link for returning users. Below that is an "Instructions" section with a blue information icon and text: "Please find your organization name by typing a keyword into the Name field. If you are unable to find your organization within the Organization Name field below click here to register." The form is divided into two sections: "Organization Information" with a "Name" field, and "Contact Information" with fields for "Email", "First Name", and "Last Name". A "Submit" button is located at the bottom right of the form.

- 5 Confirm your tax-exempt status by matching your organization's EIN to the IRS database. Click the orange button that says "Search the Database," and you will be prompted to enter your EIN. Enter your EIN without a hyphen.

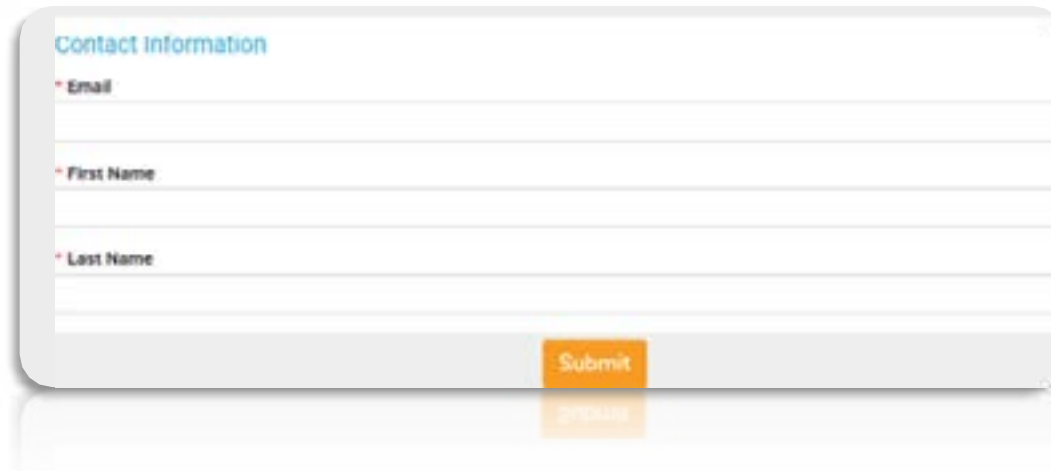


The screenshot shows a search interface with the following elements:

- Instructions:**
 - Enter your organizations **name** (keyword search is sufficient, example: "Waco" instead of "The Waco Foundation") or Enter your organizations **EIN** (do not include spaces or dashes, example: 123456789)
 - Click "Search"
 - Click on the name of your organization in the search results.
- Input fields:** EIN, Name, Address, City, and State. Each field has a question mark icon to its right.
- Search button:** An orange button labeled "Search" at the bottom center.

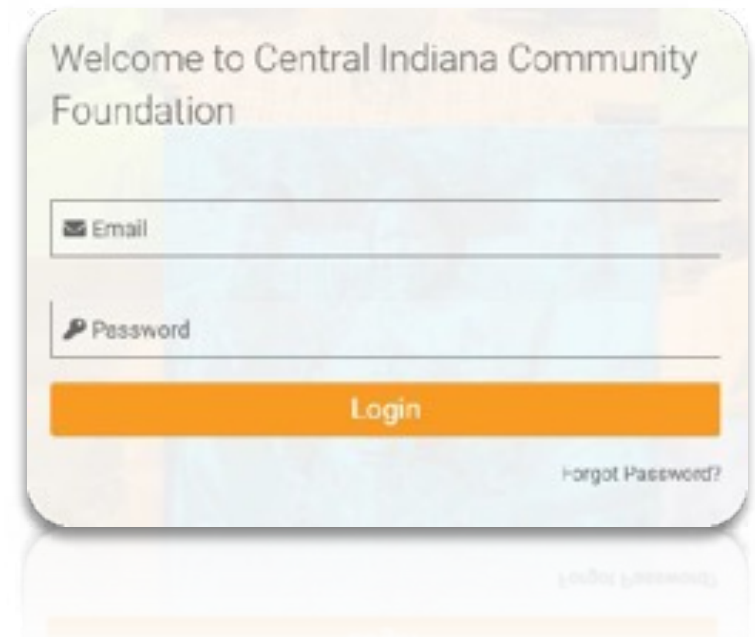
- When you've located your organization in the database, click anywhere in the row. Your organization's info will then autofill to your Organizational Profile within SmartSimple.
- If you cannot find your organization in GuideStar, contact GrantSupport@cicf.org and include a copy of your organization's 501c3 determination letter. We will work with you to manually create an account.

- 6 Enter your personal information and hit "Submit." This email address is where your username and auto-generated password will be sent.



A screenshot of a web form titled "Contact Information". The form has three input fields: "Email", "First Name", and "Last Name". Each field has a red asterisk to its left, indicating it is required. Below the fields is an orange "Submit" button. The form is set against a light gray background with rounded corners and a subtle reflection below it.

- 7 Check your email. You should have an email from **DoNotReply@smartsimple.com** that includes your new username and auto-generated password. If you don't see this message, check your spam folder. If you still don't see it, contact **GrantSupport@cicf.org** with the subject line "Re: Password Reset."
- 8 Return to **cicf.smartsimple.com** to log in with your username and password.
- 9 The system will prompt you to update your password. Where it says current password, enter the password that was emailed to you. Then enter and confirm your preferred password.



A screenshot of a login form for the Central Indiana Community Foundation. The form has a light blue and white background with rounded corners. At the top, it says "Welcome to Central Indiana Community Foundation". Below this are two input fields: "Email" with an envelope icon and "Password" with a key icon. Below the fields is an orange "Login" button. In the bottom right corner, there is a link that says "Forgot Password?". The form is set against a light gray background with rounded corners and a subtle reflection below it.

COMPLETING YOUR PERSONAL PROFILE

COMPLETING YOUR PERSONAL PROFILE

Once you've logged in with your auto-generated password, you'll be prompted to create a new password. This will now be the email and password that you will use any time you want to log in to SmartSimple.

Please keep this information on record to reference when you need to access SmartSimple again.

Once you've set up an organization account, you'll be prompted to fill in your personal details on your SmartSimple personal account. These include your title/role and contact information.

We encourage only one account and one personal profile be created for the organization if possible.



COMPLETING YOUR ORGANIZATIONAL PROFILE

COMPLETING YOUR ORGANIZATIONAL PROFILE

After your organization has an account in SmartSimple and you've filled in the details of your personal profile, you'll need to complete an Organizational Profile. Your Organizational Profile includes basic information about your organization, including your mission statement, an overview of your programs, your staff and board demographics, and your organizational budget. Reviewers use the information in your Organizational Profile to inform the decision-making process, so it's important that it is **complete and up to date**.

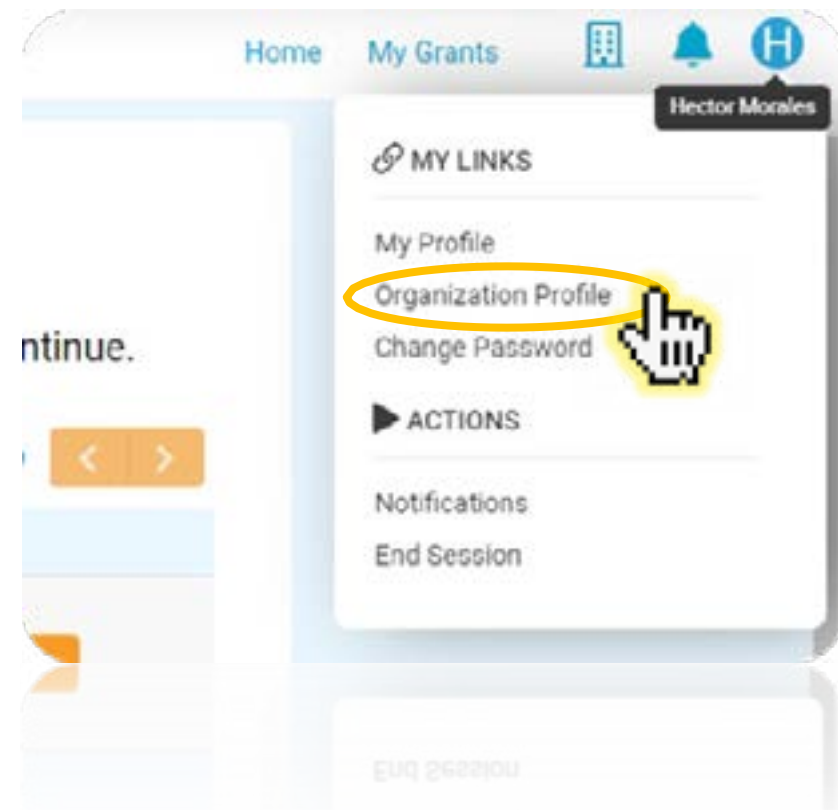
Before starting, gather these documents. You will need them to complete your Organizational Profile. All documents should be uploaded as a PDF.

- Most recent 990 or audited financial statements
- Fiscal agent's organizational budget, if applicable
- Current board of director's list with affiliations and officers listed; women members should be marked with an asterisk
- Most recent board-approved budget
- (Optional) Additional documents to support your request, such as year-to-date financials, strategic plan, evidence of resident endorsement such as letters of support

To access your Organizational Profile, go to the Main Menu button, and use the drop-down menu.

Once you are in your Organizational Profile, you will see six sections and a field to enter your organization's preferred email account for receiving notifications about grant applications or reports. Required fields are marked with a red asterisk. Each section needs to be filled in. If something doesn't apply to your organization, enter "N/A."

We recommend clicking "update" each time you complete a section to make sure your work is saved.



SECTION 1

Organizational Details EIN, name, address, phone, website, etc.

The screenshot shows a web form titled "Example Account" with a sub-header "ORGANIZATIONAL DETAILS". The form contains the following fields: EIN (00 0000), Name (Example Account), Address (multiple lines), Address 2, City, Country (United States), State (Select One), Zip Code, Phone, Fax, Web Site, Social Media, DEA, and Your Role/Title.

SECTION 2

Mission & Programs Provide a brief overview of the work your organization does in the community. You'll also fill in how many demographics of who you serve each year and some information about the counties and zip codes where your work is concentrated. Do not duplicate numbers.

The screenshot shows a web form titled "Example Account" with a sub-header "MISSION AND PROGRAMS". The form contains the following fields: a text area for "Please provide a brief overview of the work your organization does in the community.", a field for "Organization Website (URL)", a field for "Please list the counties in which your organization provides services.", a field for "CICF work site", a field for "Programs and Services", a field for "Please describe major programs and services.", a field for "CICF work site", and a field for "Annual demographic numbers served".

SECTION 3

Staffing and Governance Enter details about your executive director, staff and board, including the average board member contribution and how many times the board meets each year.

There are also some questions that ask about how well your organization’s staff and leadership reflect the diversity of the people you serve, and an opportunity to share how you are working towards equitable representation if that’s applicable.

Example Account

ORGANIZATIONAL DETAILS | MISSION AND PROGRAMS | **STAFFING AND GOVERNANCE**

* Current Executive Director term in years: 2

* Number of current Board members: 32

* Percentage of Board regularly attending: 90%

* Average Board member contribution during the last fiscal year: \$1,000.00

* Percentage of Board contributing to Organization during last fiscal year: 20%

* Number of times full Board meets annually: 4

SECTION 4

Demographics Here you enter the demographics of your clients/population served.

Please enter numbers, not percentages.

If you do not know the demographics in a particular category, please enter “unknown.”

This section also includes a table that breaks down the demographics of your board, full-time and part-time staff.

Example Account

ORGANIZATIONAL DETAILS | MISSION AND PROGRAMS | STAFFING AND GOVERNANCE | **DEMOGRAPHICS** | FINANCIAL INFORMATION | ECONOMICS

Demographic Data	Population that our organization serves
Number of Clients that identify as Female	Required
Number of Clients that identify as Male	Required
Number of Clients that are Seniors (65+)	Required
Number of Clients that are Infants/Toddlers (0-4)	Required
Number of Clients that are Youth (5-17)	Required

SECTION 5

Financial Information Fill in information about your organization’s budget, including how many months’ cash reserve you have on hand and endowment (if applicable).

Use the table to show the sources of your organization’s budget (individual and board member contributions, government contracts, grants from other funders, etc.).

Current Organization Budget	Amount	Source
Foundations		
Corporations		
Individual contributions (See Board Minutes)		

SECTION 6

Documentation Upload all of the required documents.

Do your best to include current-year financials or the most recently completed fiscal year’s financial statements.

1 2022-23 Budget Financial Statements [Upload]

Budget for Organization serving as fiscal agent [Upload]

2 Board of Directors List (with addresses and officers listed) work sheets include with: [Upload]

NOTE If you have applied for a grant from CICF before, you probably already have an Organizational Profile. **Please check to make sure that it includes the most up-to-date information, especially as it relates to staff and board numbers and demographics and financials.** We often find that these sections are not current, and this may impact funding decisions and our ability to contact you regarding your application.

STARTING AN APPLICATION

PREPARING FOR YOUR APPLICATION

If you haven't already, gather these items:

- Organization's EIN (federal tax ID number)
- Organization's legal name (sometimes this is different than the name you do business with)
- Most recent 990 or audited financial statements
- Fiscal agent's organizational budget, if applicable
- Current board of director's list with affiliations and officers listed; women should be marked with an asterisk
- Most recent board-approved budget
- **OPTIONAL** Additional documents to support your request, such as year-to-date financials, strategic plan, evidence of resident endorsement like letters of support.
- *Elevation Grant Program recipients must be also registered in the federal [SAM.gov](https://sam.gov) database.*



In SmartSimple, grant opportunities are listed as separate calls (sometimes called “open calls”). It’s important to select the correct call for the funding opportunity you want to apply to. Each call includes a program description that describes the purpose of the funding and eligibility parameters; sometimes it includes a link to more information or additional instructions, so please review this information carefully. You’ll also see information about the deadline; often, deadlines are midday (rather than 5 p.m. or midnight), so be sure to check the deadline carefully so you don’t miss it.

You can save and return to your application as many times as you need before the deadline. Each time you work on the application or make changes, be sure to hit the orange button that says “Save Draft.” Only hit “Submit” when you are sure you have completed the entire application.

Please do not wait until the last minute to begin your application.

Our staff receives many inquiries within 72 hours before a grant deadline, and our availability to respond to everyone is limited. If you require technical assistance, it is to your benefit to plan ahead and contact us early.

We do not accept late applications unless it is in the case of a technology failure on our part (i.e., the system crashes).

TO BEGIN YOUR APPLICATION FOLLOW THESE STEPS:

1. **Log in to SmartSimple at cicf.smartsimple.com.**
2. **Find the “Open Calls” section** on your home screen and find the call to which you are applying. Read the program description to make sure you are eligible, and check the deadline. Late applications will not be accepted.
3. **Click the orange “Apply” button to begin your application.** If you do not see the Apply button, contact GrantSupport@cicf.org
4. **Complete the application.** Calls have different sections depending on the nature of the grant opportunity, but in general there are multiple sections to complete. These will include an overview or summary, narrative questions, demographics about who will be served by the grant activities, and a budget section. Some grants may also require you to upload additional documents. You can save and return to your application as many times before the deadline as you need.

Submit the application. After you have completed all of the sections, hit the orange “Submit” button at the bottom of your screen. If any required fields are blank, you will receive an error message prompting you to go back and try again. (The line items in the error message are clickable and can take you directly to the missing/incomplete field.)

Be sure you hit Submit when you are done!

If you are having trouble with this final step, or are not sure if your submission has gone through, contact GrantSupport@cicf.org