

Grants Portal 101
A Grantseeker's Guide

CICF
CENTRAL INDIANA COMMUNITY FOUNDATION

HAMILTON COUNTY COMMUNITY FOUNDATION

IMPACT CENTRAL INDIANA

the Indianapolis Foundation

WOMEN'S FOUNDATION OF INDIANA

ABOUT OUR COLLABORATIVE

Central Indiana Community Foundation (CICF), The Indianapolis Foundation, Hamilton County Community Foundation and Women's Fund of Central Indiana are a $1.2 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. We use an online grants management platform for most competitive grantmaking processes. The grants portal 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 our Grants Portal, contact **GrantSupport@cicf.org**.

We can help you troubleshoot and answer common questions about using the Grants Portal.

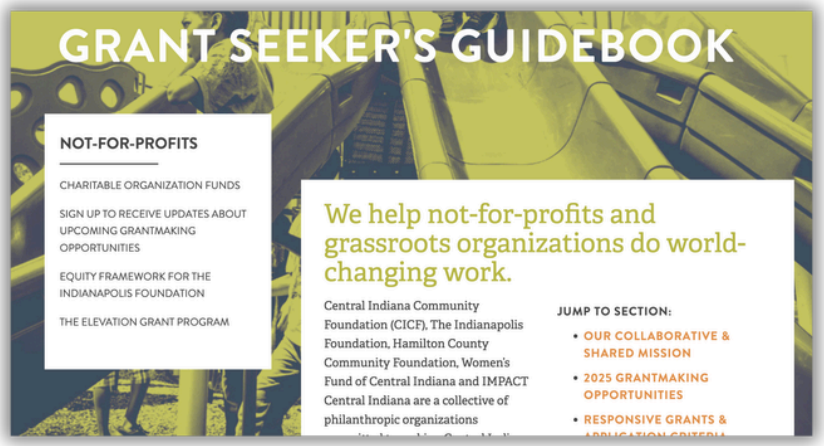
CICF Central Indiana Community Foundation · Hamilton County Community Foundation · IMPACT Central Indiana · the Indianapolis Foundation · Women's Foundation of Indiana

HELPFUL DEFINITIONS



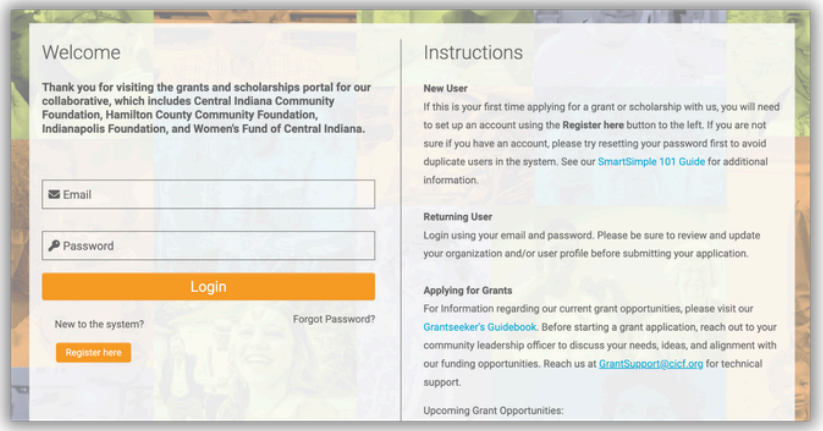
DEFINITIONS

Grant Seeker Guidebook: Each year, we update our Grant Seeker Guidebook with information about available grants, processes, deadlines, staff portfolio areas, etc. **View the Grant Seeker Guidebook at cicf.org/not-for-profits/**



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.

Grants Portal: The Grants Portal is our online grants management platform powered by SmartSimple. Grantseekers 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 the Grants Portal, 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 the Grants Portal 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.

Call or Open Call: Each funding opportunity is listed as a separate "Open Call" in the Grants Portal. 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.



GETTING STARTED

Collect the following information and documents to set up your Nonprofit Organization Account in the Grants Portal. A completed Organization Profile is required for access to grant applications. 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.

Need technical help? Grant support staff receive many inquiries prior to a grant deadline causing response times to vary. Please plan ahead and contact us early to avoid delays for last-minute technical assistance.

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

CREATING AN ORGANIZATION ACCOUNT



CREATING AN ORGANIZATION 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 the Grants Portal before. Setting up an account will give you a username and password, which you'll use to access the Grants Portal 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 to jump to instructions on how to update your personal profile.

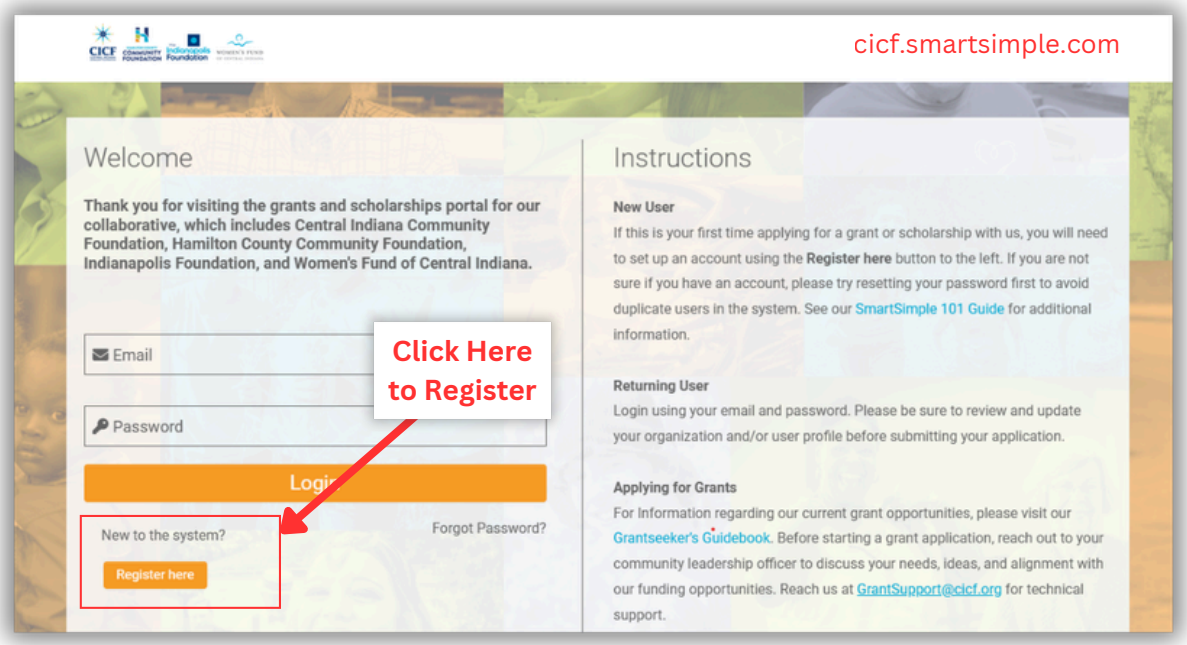
To register as a new organization in the Grants Portal, you must have your organization's EIN. We use your EIN to confirm your not-for-profit and tax-exempt status with the IRS Tax Exempt Organization Search. (https://apps.irs.gov/app/eos/)

1. Visit the Grants Portal at **cicf.smartsimple.com**.

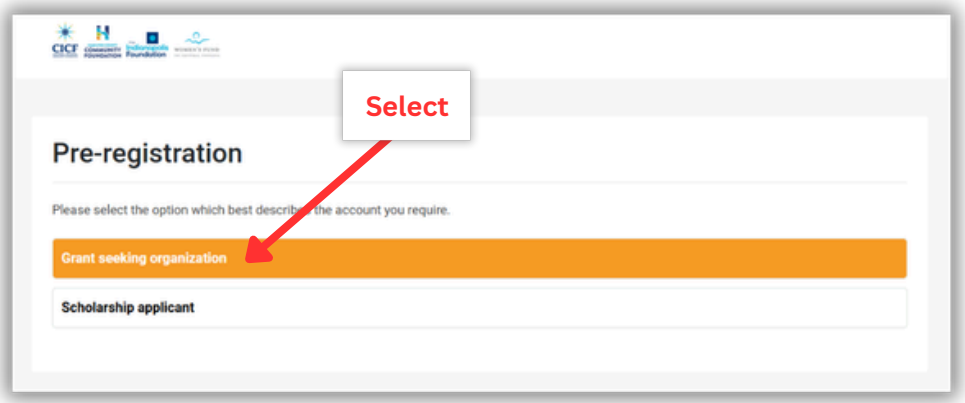
   On the welcome page, you will see a place to log in if you already have a Grants Portal account.

   If you don't have an account, follow the steps below to create one.

2. Click "**Register Here**"



3 Select "**Grant Seeking Organization**"

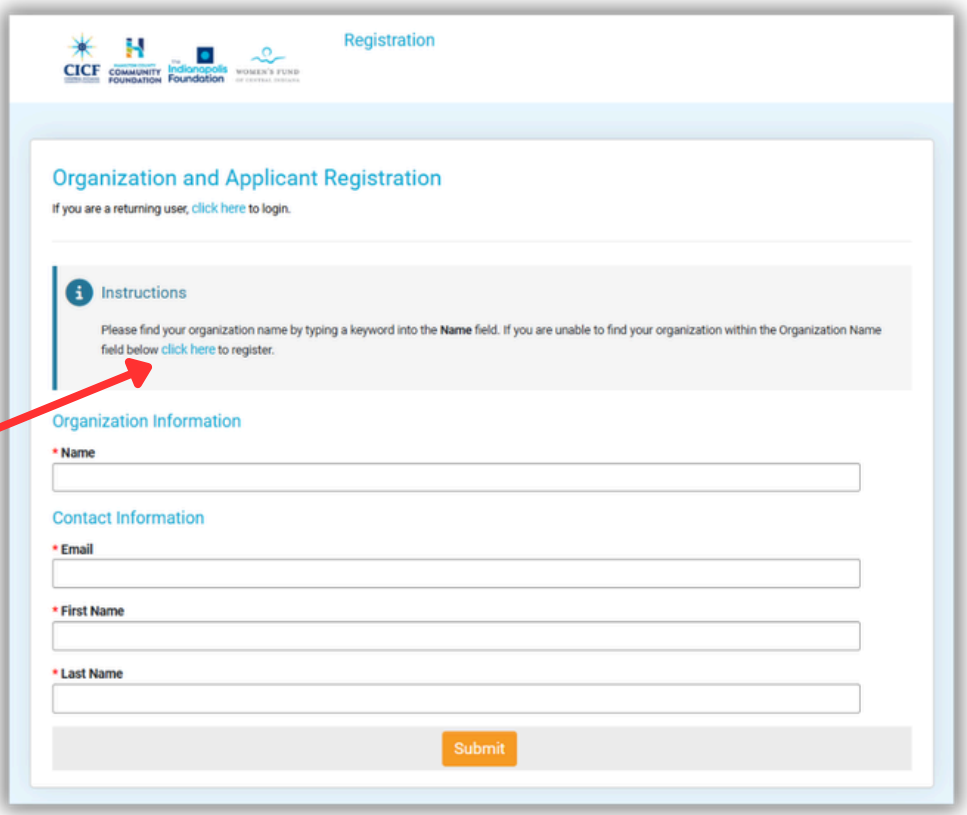


4 Begin filling in the fields under "**Organization and Applicant Information.**"

Online instructions prompt you through the steps, including confirming your organization's tax-exempt status (see next step).

Complete all fields and click "Submit" to complete your registration.

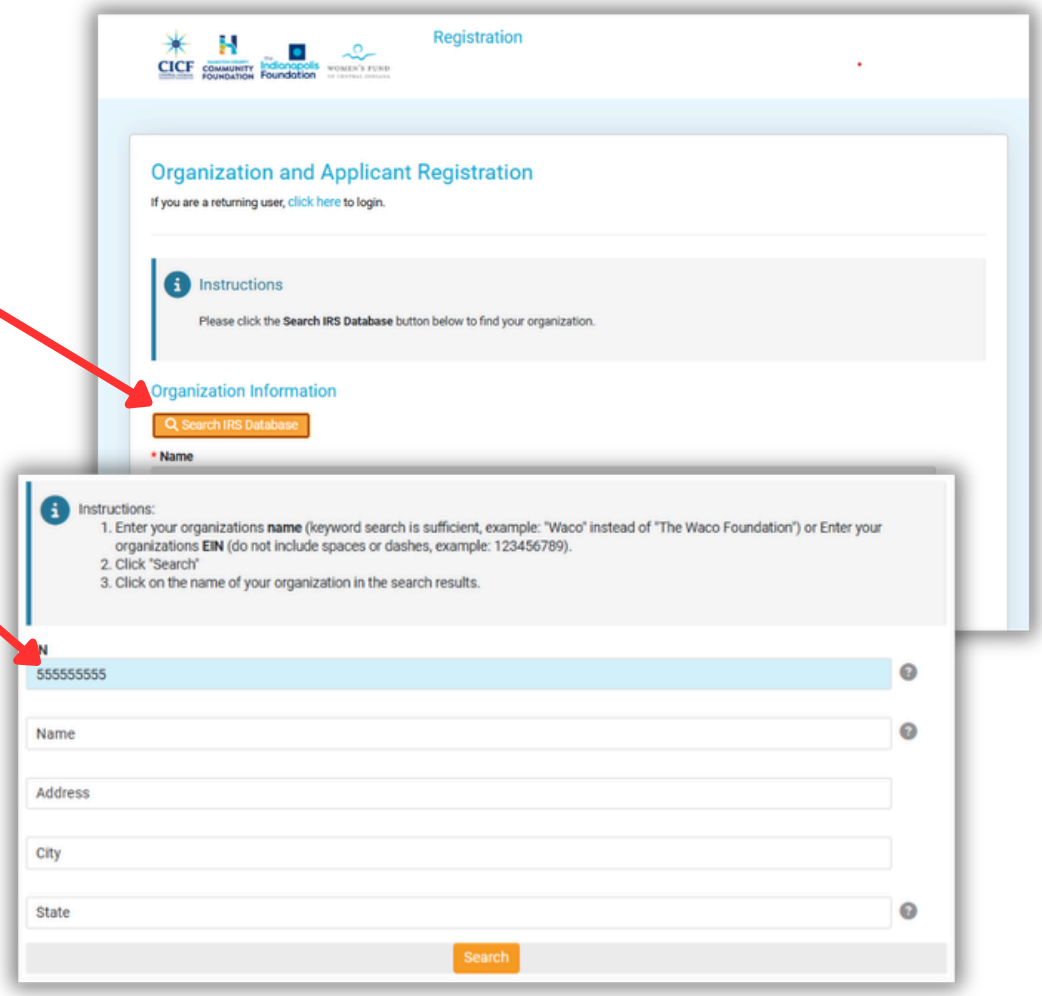
If you do not see your organization's name pop up when typing it into the Name field, click the link provided to register your organization.



5 Confirm your tax-exempt status by matching your organization's EIN to the IRS database.

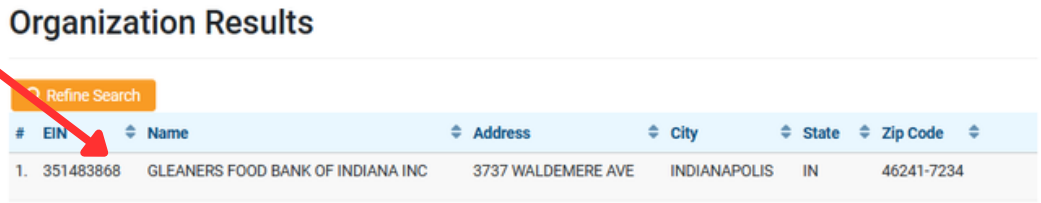
Click the orange button that says "**Search IRS Database**," and you will be prompted to enter your EIN.

Enter your EIN without a hyphen.

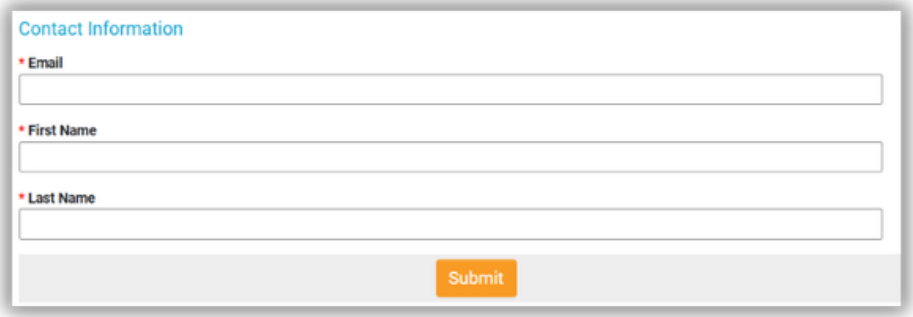


When you've located your organization in the database, click anywhere in the row. Your organization's info will then autofill to your Organizational Profile within the Grants Portal.

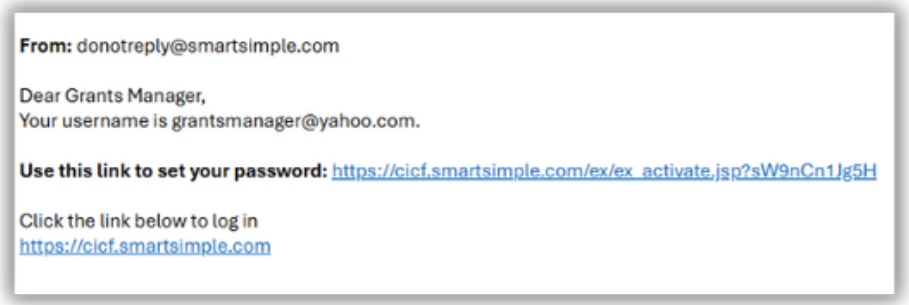
If you cannot find your organization in GuideStar, contact **GrantSupport@cicf.org** and include a copy of your organization's 501c3 determination letter. We will work with you to manually create an account.



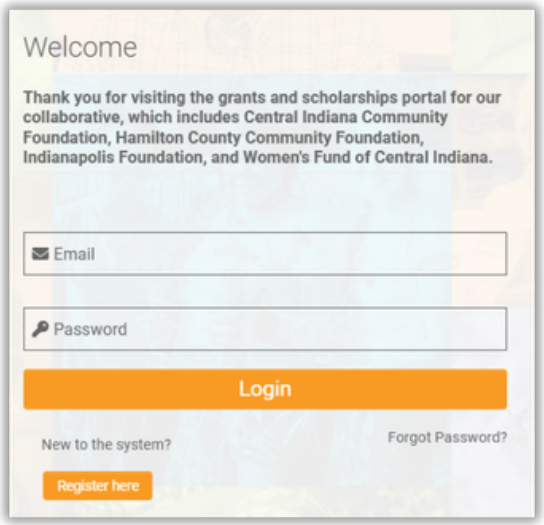
6 Complete your Organization Registration by entering your **First Name**, **Last Name**, and **Email**, then click "Submit." IMPORTANT: This email address will be used for all Grants Portal communication.



7 Check your inbox for an email from **DoNotReply@smartsimple.com** that contains your username and a link to set your 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 the login page at **cicf.smartsimple.com**.



9 **Enter your email and new password to login.**

COMPLETING YOUR PERSONAL PROFILE



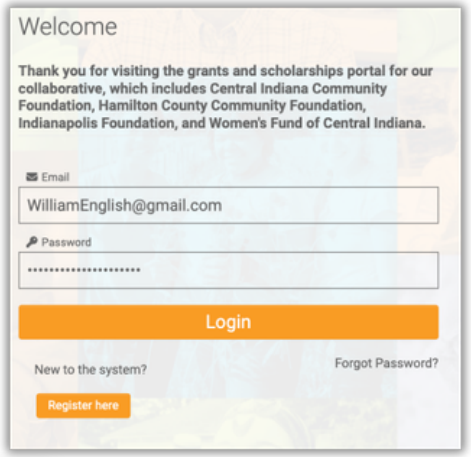
COMPLETING YOUR PERSONAL PROFILE

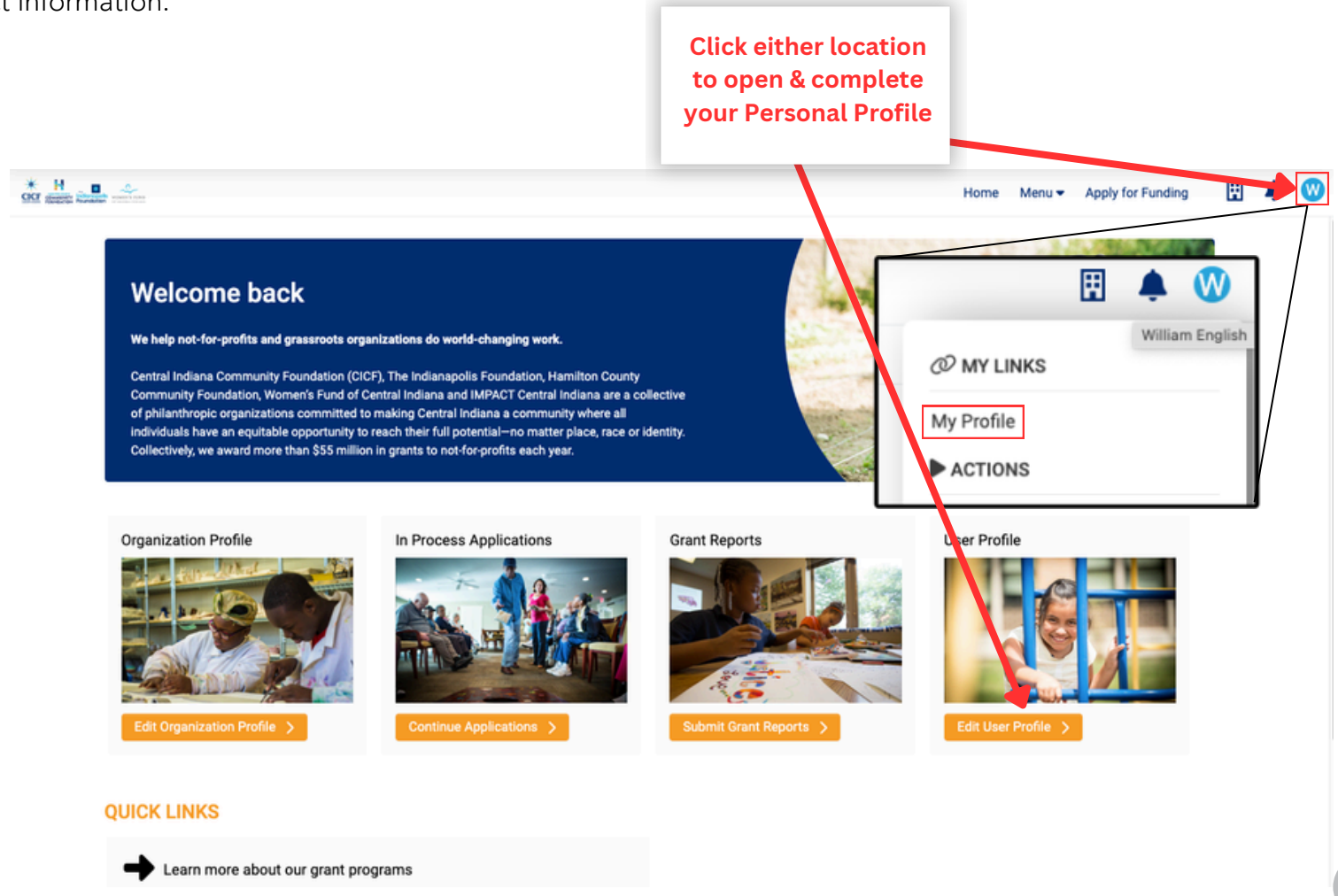
TIP: We encourage **only one account and one personal profile** be created for the organization if possible.

Use your email and password to login to the Grants Portal.

Please keep this information on record to reference when you need to access the Grants Portal again.

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





COMPLETING YOUR ORGANIZATION PROFILE

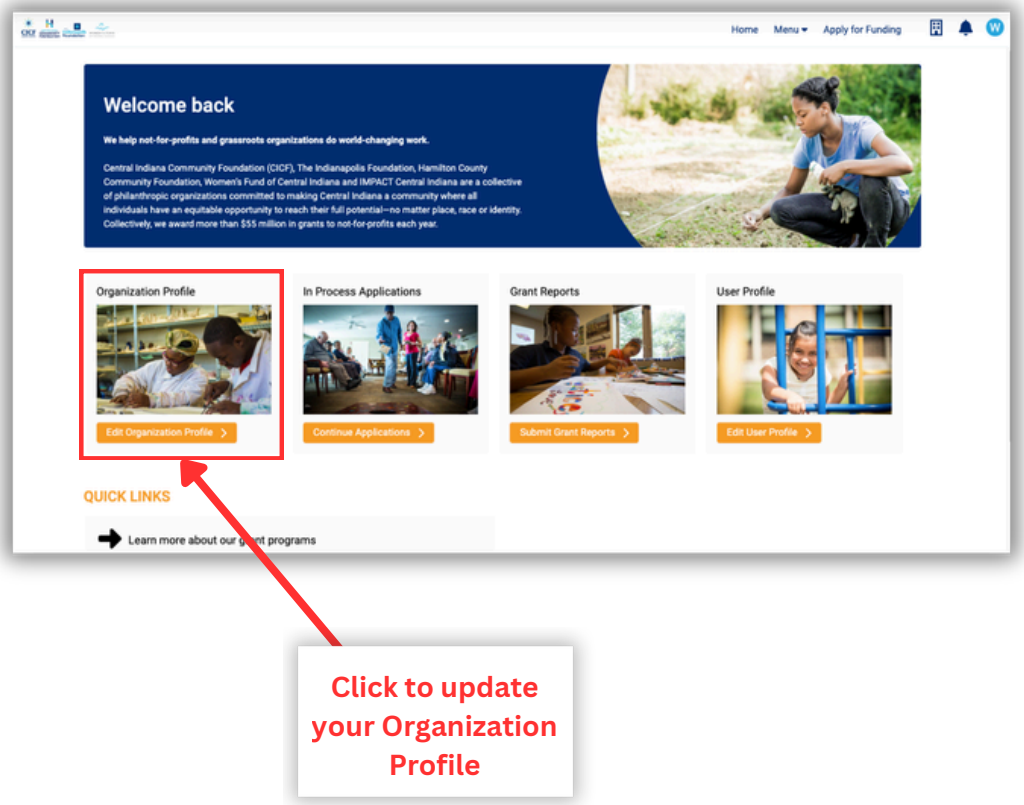


COMPLETING YOUR ORGANIZATION PROFILE

After your organization has an account in the Grants Portal and you've filled in the details of your personal profile, you'll need to complete an Organization Profile. Your Organization 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 Organization 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 Organization 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.



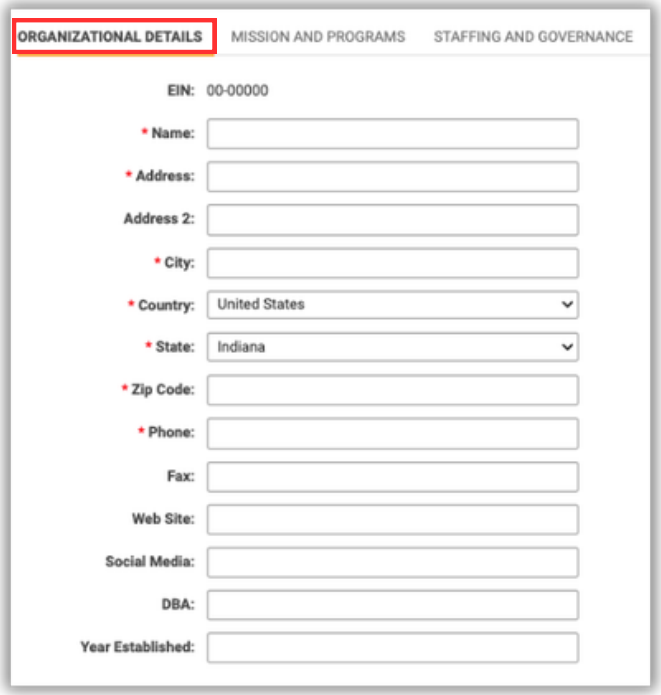
To access your Organization Profile, click on the Edit Organization Profile button on your home page. Once you are in your Organization Profile, you will see six sections and a field to enter your organization's preferred email account for receiving notifications about grant applications or reports. 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."

TIP: 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.



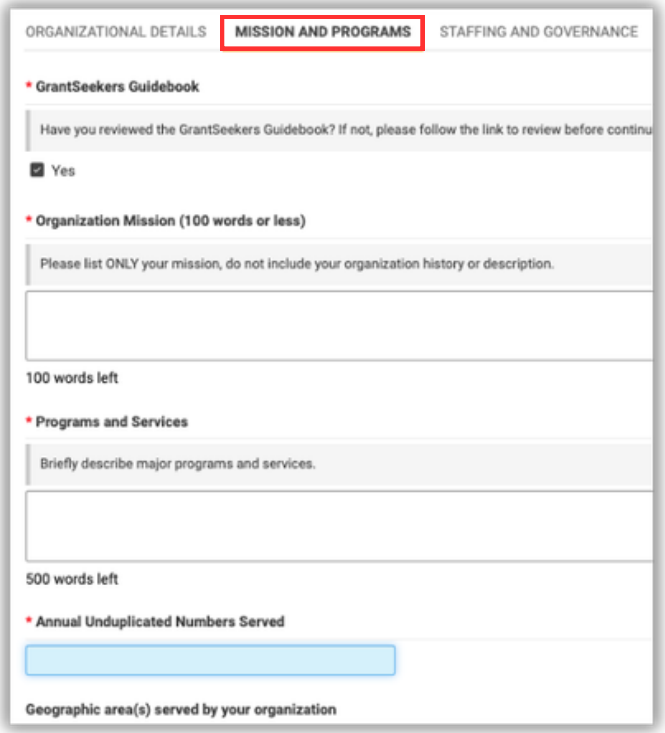
SECTION 2

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.

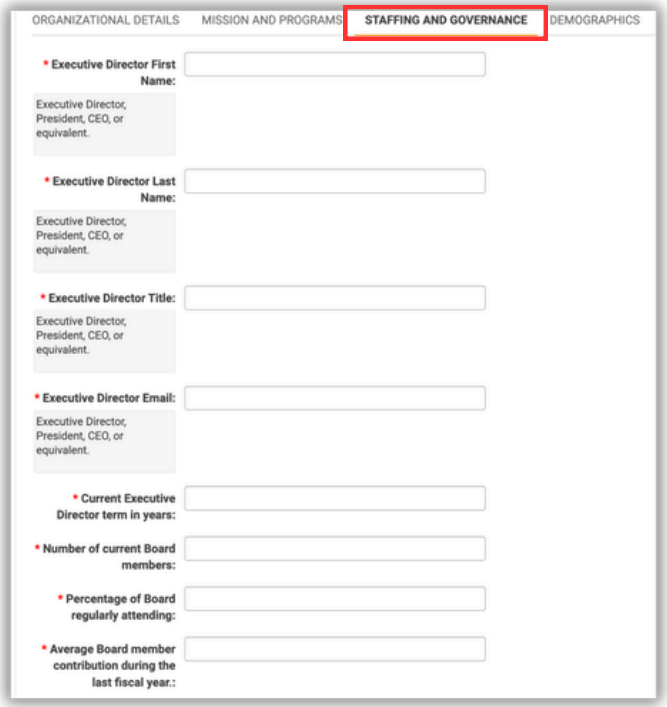


SECTION 3

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.

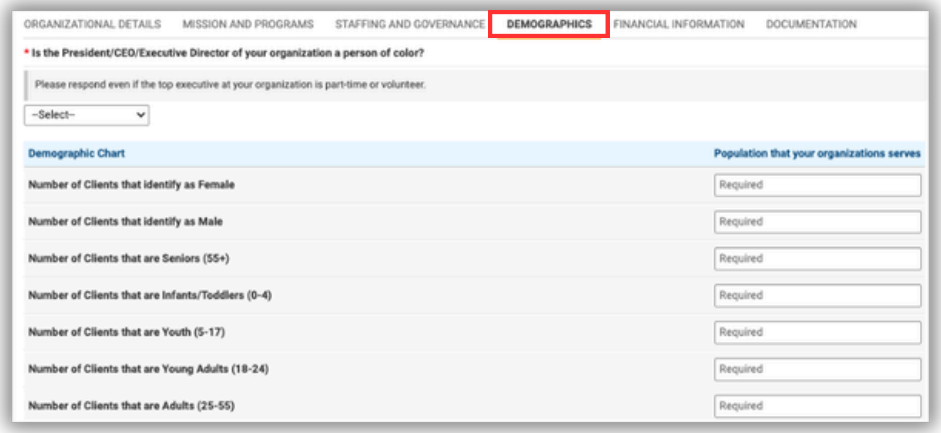
There are also some questions that ask about how well your organization's staff and leadership reflect the diversity of the people you serve, and an opportunity to share how you are working towards equitable representation if that's applicable.



SECTION 4

Demographics Enter the demographics of the clients/ population served by your organization.

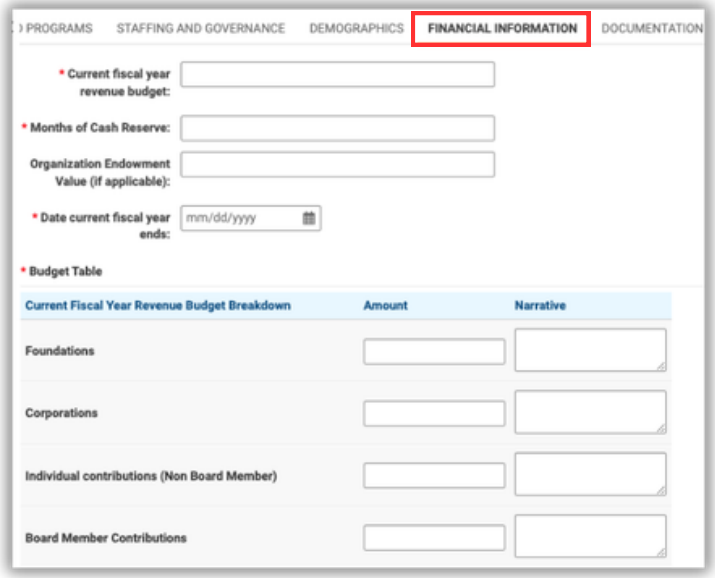
Please enter numbers, not percentages. If you do not know the demographics in a particular category, please enter "unknown."
This section also includes a table that breaks down the demographics of your board, full-time and part-time staff.



SECTION 5

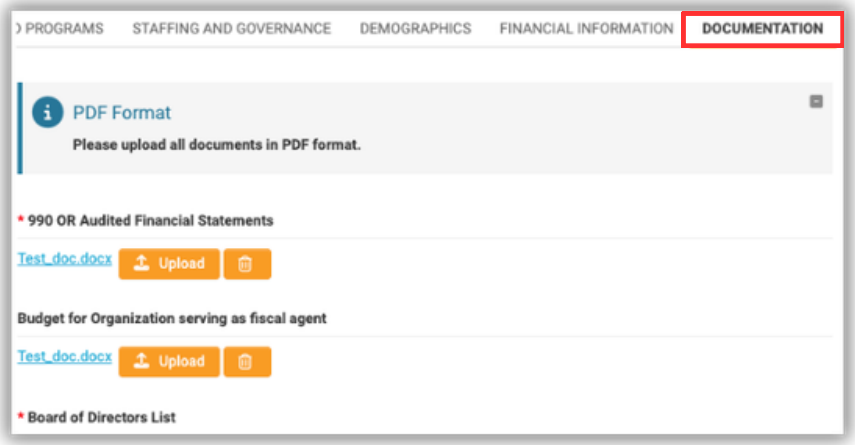
Financial Information Fill in information about your organization's budget, including how many months' cash reserve you have on hand and endowment (if applicable).

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



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.



NOTE If you have applied for a grant from CICF before, you 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.** Don't risk having out of date organization information impact funding decisions and our ability to contact you regarding your application.

APPLYING FOR A GRANT



PREPARE YOUR INFORMATION

Download the **Grant Overview pdf** for your selected Grant Application to guide you in completing questions and preparing documents needed for successful grant completion.

Gather the following:

- 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 database SAM.gov.



APPLICATION TIPS

Calls For Application

Each call includes program details, eligibility requirements, and contact information. ***Please review Call information carefully.***

Collect Documents and Compose Offline

Use the **Grant Overview pdf** to prepare your grant responses and documents before submitting them online.

Grant Deadlines

Deadlines are set for 4 p.m. on the due date. Late applications are not accepted.

Save a Draft

Save and return to your application as many times as you need before the deadline. ***Click the "Save Draft" button frequently to save your work.***
IMPORTANT: Only click "Submit" when you are done editing and ready to submit.

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

If you require technical assistance, please plan ahead and contact us early to avoid delays for last-minute technical assistance.

HOW TO APPLY FOR A GRANT

1. Log in to the Grants Portal at cicf.smartsimple.com. Only a single contact will have access to edit an Application. Please start your application using the contact account that will be used for grant submission, reporting, and communications.

2. Review Grant Requirements & Eligibility. Locate the "Open Calls" section on your home screen to review program descriptions, confirm eligibility, and deadline dates. Download the **Grant Overview pdf** to guide you in completing questions and preparing documents needed for grant completion.

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. Most calls have multiple sections to complete, such as 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.

5. Submit the application. After you are finished editing all of the sections, click the orange "Submit" button at the bottom of the screen. You will be prompted to complete any required fields before being permitted to submit. Once you click Submit, you will receive email confirmation of your submission and the application will be locked to further editing.

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

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