

City of Richmond

Arts & Culture Project Assistance

City Grants Web-based System

Grant Applicant User Guide

REVISION CONTROL

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1	Sept 23, 2013	Evelyn Dawson		Initial document creation
2	Sept 9, 2014	Evelyn Dawson		Changes for 2015 Grant Year

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City of Richmond

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1. Introduction

The City of Richmond supports the enhancement of a positive quality of life for all its residents. City Council recognizes that one means of helping to achieve this goal is through annual Grant Programs to support the work of non-profit community service organizations.

A City Grants Web-based System was created, at stakeholders' request, to provide an integrated, user-friendly, efficient and effective on-line system for applicants. Some of the tangible benefits to having an online grant application system include:

- Reducing paperwork and eliminating unnecessary duplication from year to year;
- Enabling applicants to copy and revise their previous application rather than start each application anew;
- Providing the ability to access, save and review applications at any time from commencement to submission;
- Ensuring the completion of all mandatory fields before submission; and
- Establishing a database of application information for both the applicant and the City.

This City Grants Web-based System User Guide is designed for applicants to the Arts & Culture Project Assistance Grant Program. Prior to application, please read the Program Guidelines found at www.richmond.ca/citygrants.

The City also has Health, Social & Safety; Parks, Recreation & Community Events; and Child Care Grant Programs. For further information, please see the City website at www.richmond.ca/citygrants.

2. Account

a. Account Registration

City Grants are awarded to non-profit societies. To apply for a City Grant, a representative of the society must register by entering the society number (assigned by the BC provincial government), the society name, attaching two documents and choosing a password for the system. The two documents required are the Society's Certificate of Incorporation and its Constitution and bylaws.

An email address must be supplied to receive correspondence from the City.

Society Number:		
Society Name:		
Email:		
Certification of Incorporation:		
Certification of Incorporation:	Browse	Add File
Certification of Incorporation: Constitution / Bylaws:		Add File
		Add File Add File
	Browse	
Constitution / Bylaws:	Browse	
Constitution / Bylaws:	Browse	
Constitution / Bylaws: Password:	Browse	
Constitution / Bylaws: Password: (minimum 8 characters)	Browse	
Constitution / Bylaws: Password: (minimum 8 characters)	Browse Browse	

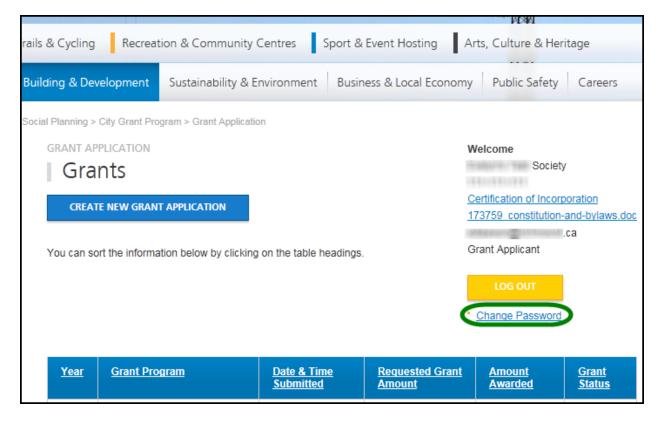
b. Log In

Please log into the system by entering your society number and password. Then click the "Log In" button. As a Grant Applicant, you will have used the Account Registration function first, to create your account.

Trails & Cycling Recreat	ion & Community Centres	Sport & Event Hosting
ıg, Building & Development	Sustainability & Environment	Business & Local Ecc
Social Planning > City Grant Progra GRANT APPLICATION		
to streamline the applicatio the quality of life for Richmo to select a grant program: I Community Events; Arts ar application, please review t	hmond's Web-based Grant Applicat n process for non-profit organization ond residents. Once you have regis Health, Social and Safety; Parks, Re nd Culture; or Child Care. Before be the relevant <u>Program Guidelines</u> and derstanding of program criteria and t	ns seeking to improve tered, you will be asked ecreation and ginning your d Web-based System
Already have an ac Log In	count?	
Society Number/User Nam Password:	e:	
	t password? <u>Reset Password.</u> changed? <u>Email the Administrator</u> or c	all 604-247-4692.

c. Change Password

Once your account is set up, you can change your password anytime by clicking the "Change Password" link on the right of the screen, under the yellow "LOG OUT" button.



Once in the "Change Password" tool, enter a new password and repeat the password in the "Confirm Password" field. Then click the "Change Password" button at the bottom to save the new password.

GRANT APPLICATION
Please change your password by using the form below.
New Password
(minimum 8 characters)
Confirm Password
CHANGE PASSWORD CANCEL

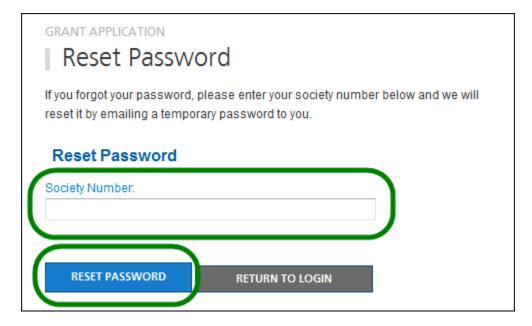
d. Reset Password

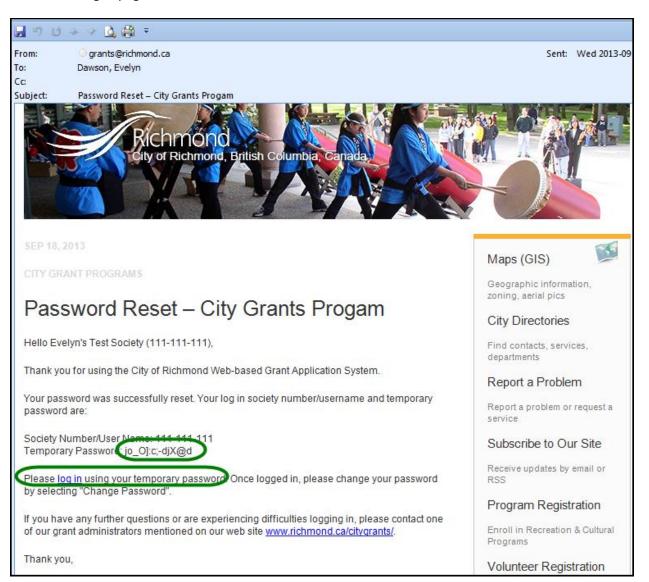
If you forgot your password, or if your account gets locked out¹, you may generate a new temporary password. Go to the Log In page and click on the Reset Password link. This will take you to the "Reset Password" page.

Trails & Cycling	Recreation & Co	mmunity Centre	s Spo	ort & Event Hosting
ng, Building & Develop	ment Sustair	ability & Environ	ment E	Business & Local Econ
Social Planning > City Gra	nt Program > Grant	Application		
GRANT APPLICATI	ON			
Log In c	or Registe	er		
Welcome to the Cit to streamline the ap the quality of life fo to select a grant pro Community Events application, please <u>User Guides</u> to gain	pplication process r Richmond reside ogram: Health, So ; Arts and Culture; review the relevar n an understandin	for non-profit orga nts. Once you hav cial and Safety; Pa or Child Care. Bei nt <u>Program Guideli</u> g of program criteri	nizations se e registered rks, Recrea fore beginni <u>nes</u> and We	eking to improve I, you will be asked ation and ng your eb-based System
Already have	an account?			
Log In				
Society Number/Us	ser Name:			
Password:				
LOG IN		Reset Password Email the Administra	ator_or call 60)4-247-4692.

¹ If someone tries to access your account and enters the wrong password more than four times, the account is locked out for your protection.

Enter the Society Number that is registered with the system and click the "RESET PASSWORD" button.

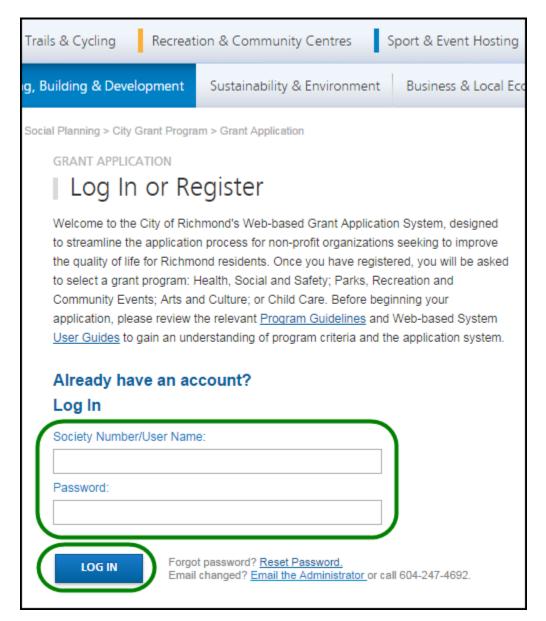




The system will email you a temporary password. Click on the link in the email to go to the Log In page.

Enter your society number and the temporary password to log in.

You will then want to use the Change Password function to create a password that you can remember.



3. Grants List Options

a. Grant List

Once logged in, all of your Grants are listed on the page, and show the following information:

- Year
- Grant Program
- Date & Time Submitted
- Requested Grant Amount
- Amount Awarded
- Grant Status

grant ai	PPLICATION Ints	Welcome Test Society 2 222-222-222			
CREA	TE NEW GRANT APPLICATION	Certification of Incorporation 171850 constitution-and-bylaws.doc			<u>c</u>
You can sort the information below by clicking on the headings.			Grant Applicant LOG OUT Change Password		
<u>Year</u>	<u>Grant Program</u>	<u>Date &</u> <u>Time</u> <u>Submitted</u>	<u>Requested</u> <u>Grant</u> <u>Amount</u>	<u>Amount</u> <u>Awarded</u>	<u>Grant</u> <u>Status</u>
2014	AC: Arts & Culture Project Assistance		\$5,000.00	\$0.00	DRAFT

b. Navigate to a Grant Application

On the Grant list, click on the Grant Program for the application you wish to review. This will take you to the Grant Application Details page.

<u>Year</u>	<u>Grant Program</u>	<u>Date &</u> <u>Time</u> <u>Submitted</u>	<u>Requested</u> <u>Grant</u> <u>Amount</u>	<u>Amount</u> <u>Awarded</u>	<u>Grant</u> <u>Status</u>
2014	AC: Arts & Culture Project Assistance		\$5,000.00	\$0.00	DRAFT

Grant Application Details page:

GRANT APPLICATION: ARTS & C	CULTURE PROJECT ASSISTANCE	Welcome	
Grant Applicat	tion Details	Test Society 2	
- 11		222-222-222 Certification of Incorporation	
Application for Arts & (171850 constitution-and-		
Test Society 2		bylaws.doc	
Society #: 222-222-222		COMPANY OF THE OWNER OWNER OF THE OWNER OWNE OWNER OWNE	
Status: DRAFT Date of Incorporation: Mar 27, 19	442	Grant Applicant	
Certification of Incorporation	43		
171850 constitution-and-bylaws.	doc	LOG OUT	
List of all current directors of t	he Socitey:	Change Password	
Joe Small, President Frank Smith	n, Treasurer Rosemary Appleton, Secretary		
Caroline Scottsdale	6911 No. 3 Rd.	√ Step 1 - Society Information	
President	Richmond, British Columbia	√ Step 2 - Project Summary	
604-276-5555 test@test.com	Canada, V6Y 2C1	√ Step 3 - Project Details	
testigitest.com		✓ Step 4 - Project Audience	
		✓ Step 5 - Proposed Operating Budget	
Requested Grant Amount: \$5,0	000.00	√ Step 6 - Financial Summary	
Society Mission/Mandate		✓ Step 7 - Declarations	
We have a lovely mission and a l	ovely mandate.	Review Application	
-		Submit Application	
Brief History of the Society and	l its Role in Richmond		
We have been in Richmond for a	We have been in Richmond for a very long time.		
		Return to Grants	
Art Participation Days			
July 1 - 4, 2014			
Minoru Park			

c. Enter Your Final (Grant Use) Report

Before you can apply for a grant, you must have completed the Final (Grant Use) Report for any previous grant you received.

Navigate to your Approved grant from a preceding year and press the link to <u>Final</u> <u>Report</u>.

<u>Year</u>	<u>Grant Program</u>	<u>Date &</u> <u>Time</u> <u>Submitted</u>	<u>Requested</u> <u>Grant</u> <u>Amount</u>	<u>Amount</u> <u>Awarded</u>	<u>Grant Status</u>
2014	AC: Arts & Culture Project Assistance	Nov 18, 2013 10:19 AM	\$5,000.00	\$4,680.00	APPROVED DUPLICATE



GRANT APPLICATION - ARTS & CULTURE PROGRAM
Final Report
Final Report for Arts & Culture Project Assistance
Society #: Project Name: Meet the Artist Videos Grant Amount Approved: \$4,680.00 <u>Application Review</u>
Treasurer Signature: (download form)
Choose File No file chosen Add File
Brief summary of the project: (max. 2000 characters)
Indicate any significant changes between your actual activities and your original plans
as outlined in your grant application. (max. 1600 characters)
Indicate the key goals achieved and partnerships involved. (max. 1200 characters)

d. Duplicate a Grant Application

To create a new Grant Application from a previous application, you will find the "Duplicate" button in the Grant Status column for Grants that have been Approved, Reporting Complete on the Grants Listing page. Click on the "Duplicate" button to create a copy of your Grant in DRAFT mode.

<u>Year</u>	<u>Grant Program</u>	<u>Date &</u> <u>Time</u> <u>Submitted</u>	<u>Requested</u> <u>Grant</u> <u>Amount</u>	<u>Amount</u> <u>Awarded</u>	<u>Grant Status</u>
2014	AC: Arts & Culture Project Assistance	Nov 18, 2013 10:19 AM	\$5,000.00	\$4,680.00	DUPLICATE

GRANT APPLICATION Grants	
Application Duplicated Your previous year's application was successful DRAFT application now listed below to proceed Note: Not all information is duplicated. Where r are not duplicated, it is your responsibility to en- updated and accurate before submitting the new that is duplicated, please review it and make su upcoming application.	l. numbers (for example, budget) sure that that all information is w application. For information

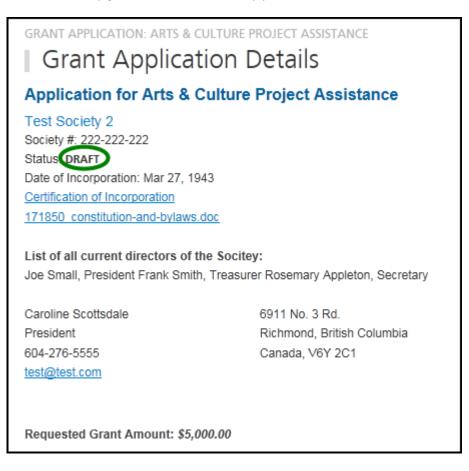
The duplicated Grant application will appear on the Grants List in Status DRAFT.

<u>Year</u>	<u>Grant Program</u>	<u>Date &</u> <u>Time</u> <u>Submitted</u>	<u>Requested</u> <u>Grant</u> <u>Amount</u>	<u>Amount</u> Awarded	<u>Grant Status</u>
2014	AC: Arts & Culture Project Assistance	Nov 18, 2013 10:19 AM	\$5,000.00	\$4,680.00	APPROVED DUPLICATE
2015	AC: Arts & Culture Project Assistance		\$0.00	\$0.00	DRAFT

3. Grant Status

a. Grant Status

The Grant Status is located at the top of the Grant Application. When you submit your application, and when your interim/final report is accepted, the system will send you an automatically generated email to notify you.



Below are the different Grant statuses:

- DRAFT
- SUBMITTED
- UNDER REVIEW
- APPROVED
- REPORTING COMPLETED
- DECLINED
- b. Draft

The Grant Applicant is entering and adding to the application. The Grant Administrator may view the information.

c. Submitted

When the application is in the Submitted status, no further edits can be done to the application by the Applicant. The Grant Administrator may ask for additional information from the Applicant and attach it to the application under the title of 'Additional Information'.

d. Under Review

When the application is in the Under Review status, it is being reviewed by the Grant Administrator and Grant Reviewers. They will assess the application and make recommendations to Council. Then Council will review the application and make the final decision.

e. Approved

A grant is awarded by Richmond City Council. The applicant may enter their (results of use of the grant) interim or final report, when ready.

f. Reporting Completed

For grant recipients, an interim or final grant use report must be provided by the next year's grant application deadline if the society wishes to apply for a grant the following year. If not re-applying, a final report must be submitted by the end of the society's fiscal year. Your society will be notified by e-mail once the report has been accepted.

g. Declined

This status is set if Council declines the grant application.

4. Create a Grant Application

a. General Tips

You can create a new Grant Application either from scratch, or from having the system duplicate one of your previous Grants (See "Duplicate a Grant Application" for instructions).

Below are some tips to assist you when creating a Grant Application from scratch:

- 1) There is a navigation menu on the right hand side that allows you to go directly to the different parts of the application.
- 2) All fields are required unless marked "(optional)".
- 3) To attach a document to the application, first click 'Browse' and locate the document on your computer, then click 'ADD' to add the document to your application.
- 4) Missing information or errors are highlighted with pink:

Contact:
First Name:
Last Name:
Society Role:

A summary of these issues will also be displayed in an error message at the top of the page:

Please correct the following:
 First Name is required
 Last Name is required
 Society Role is required
 Address is required
 City is required

- 5) Steps completed with all required information receive a green checkmark \checkmark in the navigation menu on the right of the screen.
- 6) The system allows you to upload up to 3 documents for each question and accepts any combination of the following file formats:
 - PDF
 - DOC
 - DOCX
 - JPEG
 - JPG
 - GIF
 - TIFF
 - PNG
 - XLS
 - XLSX
 - BMP
- 7) If you have uploaded a wrong file or wish to update an existing file, please remove the unwanted file by clicking the **Remove** link to the right of the file.

8) At any given point during the application process, you can click the "Save Draft" button at the bottom of the page and log out of the system. If you use the "Save Draft" button, be assured that all information you have entered has been saved in the database.

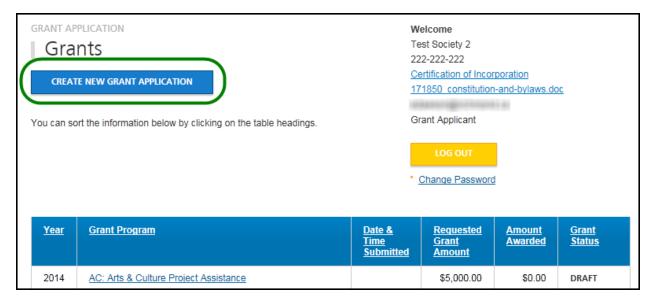


9) To proceed through the steps in order, click the "Save & Proceed to Next Step" button at the bottom of the page for each step. All edits will be re-checked when the Grant Application is Submitted.

SAVE & PROCEED TO NEXT STEP

b. Creating your Grant Application

To create a new Grant Application from scratch, you will find the "Create New Grant Application" button at the top of the Grants Listing page. Click on the button to go to **Select a Grant Program.**



c. Select a Grant Program

This step asks you to choose a grant program. This selection must be made before you continue onto the next step. Complete this information and press Save and Proceed to Next Step.

GRANT APPLICATION
The City of Richmond provides a range of grant programs. To make an online application, please select one of the grant programs below.
Select a Grant Program
Health, Social & Safety
Parks, Recreation & Community Events
Arts & Culture Project Assistance
Arts & Culture Operating Assistance
Child Care Capital Grant
Child Care Professional & Program Development Grant
As you fill in your application, please be sure to use one of the following options before exiting each page.
Save Draft - This will save any changes made to the current application and will remain on this page.
Save & Proceed to Next Step - This will save any changes made to the current application and take you to the next page.
START APPLICATION

d. Step 1: Society Information

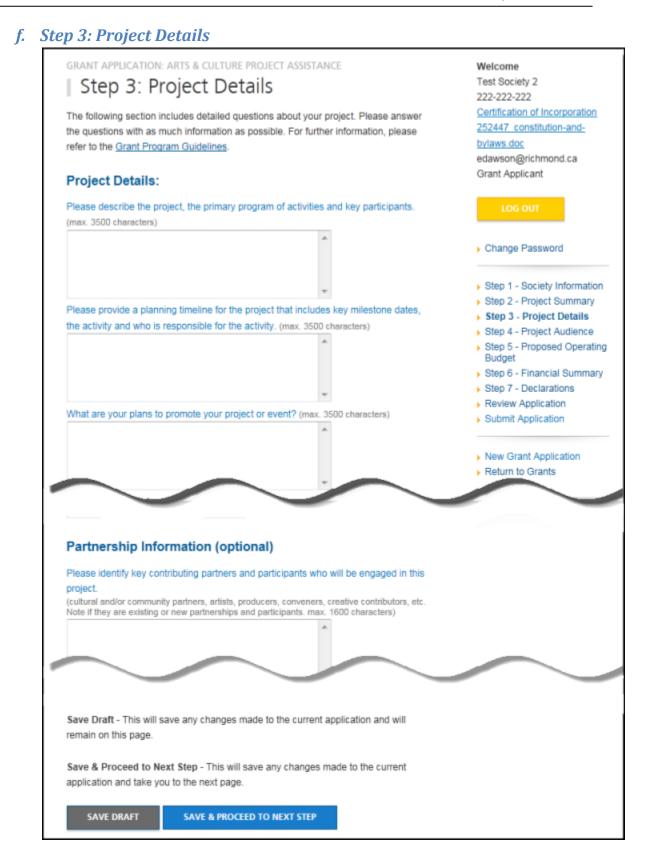
This step allows you to enter general information on the organization and contact information. Complete this information and press **Save and Proceed to Next Step**. Remember, you may press **Save Draft** at any time and your application will be saved so that you may return to it later.

GRANT APPLICATION: ARTS & CULTURE PROJECT ASSISTANCE	Welcome
Step 1: Society Information	Test Society 2
	222-222-222
The following section includes questions about the Society. For assistance in filling	Certification of Incorporation
out this section of the form, please refer to the Grant Program Guidelines.	171850 constitution-and-
	bylaws.doc
Society Name:	and the second sec
Test Society 2	Grant Applicant
Society Number:	
222-222-222	LOG OUT
Date of Incorporation:	
	ohaan Daamaad
Society Website:	Change Password
http://	
	Step 1 - Society Information
Contact:	Step 2 - Project Summary
	Step 3 - Project Details
First Name:	Step 4 - Project Audience
Last Name:	 Step 5 - Proposed Operating Budget
	Step 6 - Financial Summary
	Step 7 - Declarations
Society Role:	Review Application
	Submit Application
Address:	
	New Grant Application
City:	Return to Grants
Province/State:	
British Columbia	
\sim	
Society Details	
Society Mission/Mandate: (max. 1200 characters)	
A	
Ψ.	
Brief history of the Society and its role in Richmond: (max. 2000 characters)	

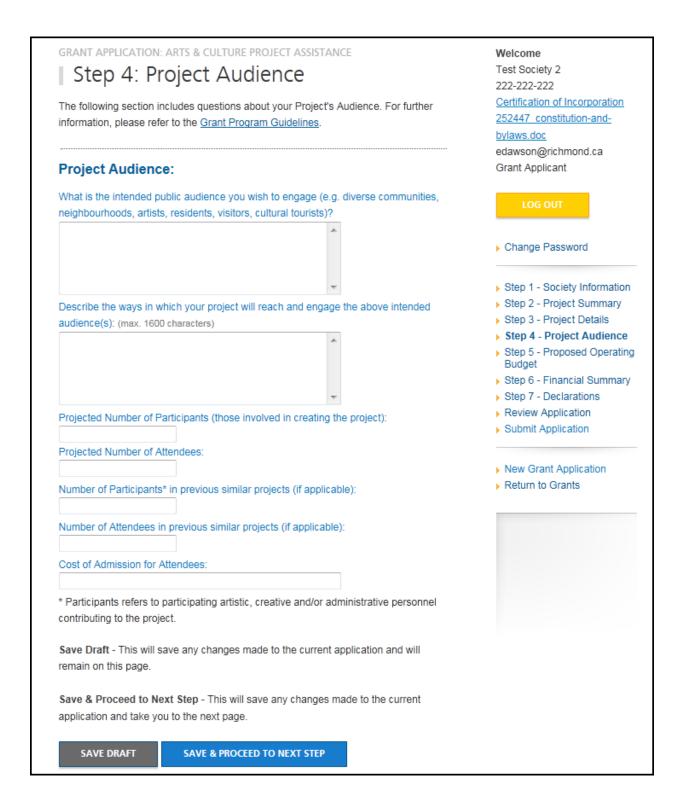
e. Step 2: Project Summary

This step requests information about your proposed project. Complete this information and press **Save and Proceed to Next Step**.

GRANT APPLICATION: ARTS & CULTURE PROJECT ASSISTANCE	Welcome Test Society 2
The following section includes general questions about your grant. Please answer the questions with as much information as possible. For further information, please refer to the <u>Grant Program Guidelines</u> .	222-222-222 Certification of Incorporation 171850 constitution-and- bylaws.doc
Project Summary:	Grant Applicant
Project Name:	LOG OUT
Project Date(s):	Change Password
Project Location(s):	Step 1 - Society Information Step 2 - Project Summary
Project Website:	 Step 3 - Project Details Step 4 - Project Audience
Project Category:	 Step 5 - Proposed Operating Budget
(Check as many as apply)	Step 6 - Financial Summary
Community Engagement	Step 7 - Declarations
Dance / Performing Arts	Review Application
E Festival	 Submit Application
Music	New Grant Application
Visual Arts	Return to Grants
Design / New Media	
elinary	
Brief Project Summary:	
(You will be asked to provide more detail later in this application. max. 600 characters)	
*	
How do your project goals relate to your mission / mandate?	
Save Draft - This will save any changes made to the current application and will remain on this page.	
Save & Proceed to Next Step - This will save any changes made to the current application and take you to the next page.	
SAVE DRAFT SAVE & PROCEED TO NEXT STEP	



g. Step 4: Project Audience

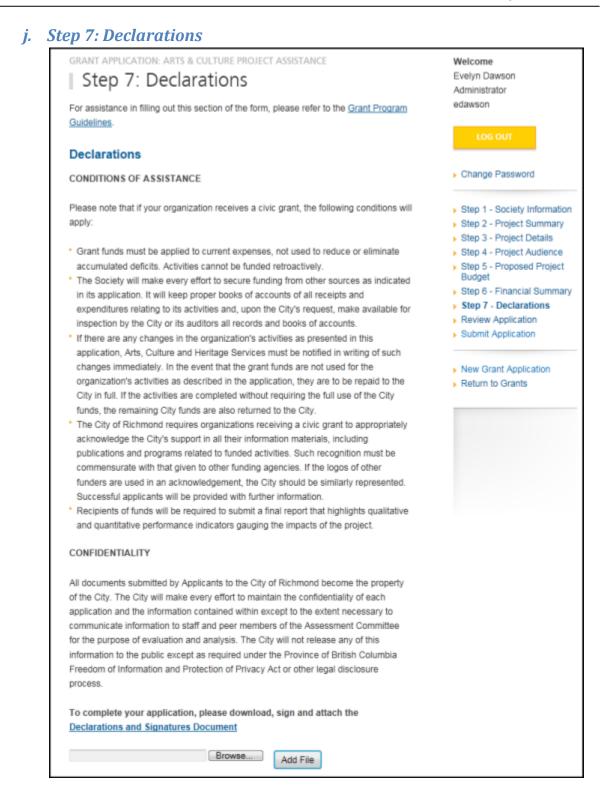


h. Step 5: Proposed Project Budget

CRAME ADDITION ADDE & CULTURE DROJECT ACCUTANCE	
GRANT APPLICATION: ARTS & CULTURE PROJECT ASSISTANCE	Welcome Evelyn Dawson
Step 5: Proposed Project Budget	Administrator
The following section is your proposed balanced Project Budget. For fur information, please refer to the Grant Program Guidelines.	rther edawson
Not all categories will be relevant to your specific project and some line	LOG OUT
blank.	Change Password
Proposed Budget: (Fill in all categories relevant to your budget:)	
Revenues	 Step 1 - Society Informatio Step 2 - Project Summary Step 3 - Project Details
Earned	Step 4 - Project Audience
Admissions / Box Office / Sales	Step 5 - Proposed Project S0.00 Budget
On-site Cash Donations	S0.00 Step 6 - Financial Summar
Concessions / Merchandising	Step 7 - Declarations
Memberships	\$0.00 Review Application \$0.00 Submit Application
Other, provide details	
	 S0.00 New Grant Application Return to Grants
Total Earned Revenue:	\$0.00
Fundraising	
Individual Donations	\$0.00
TUIDE .	
Government	
City of Richmond Project Grant (the amount you are requesting)	\$1.00
Province of BC including Gaming or BC Arts Council, specify:	\$0.00
Expenses	
Programming	
Commissioning Fees	\$0.00
Creative Fees or Honoraria (ie artists, speakers or community	\$0.00
contributors)	50.00
and a state of the	\$0.00

i. Step 6: Financial Summary

Step 6: Financial Summary For further information, please refer to the <u>Grant Program Guidelines</u> .		
<u>Suidelines</u> .	edawson	
	LOG OUT	
\$0.00		
\$1.00	Change Password	
	Oten 4. Consists Information	
	 Step 1 - Society Information Step 2 - Project Summary 	
\$0.00	Step 3 - Project Details	
\$0.00	Step 4 - Project Audience	
\$0.00	 Step 5 - Proposed Project Budget 	
\$0.00	Step 6 - Financial	
\$0.00	Summary Step 7 - Declarations	
\$0.00	Review Application	
*	Submit Application	
_	New Grant Application	
T	Return to Grants	
\$0.00		
\$0.00		
\$0.00		
\$0.00		
\$0.00		
\$0.00		
*		
	\$1.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	

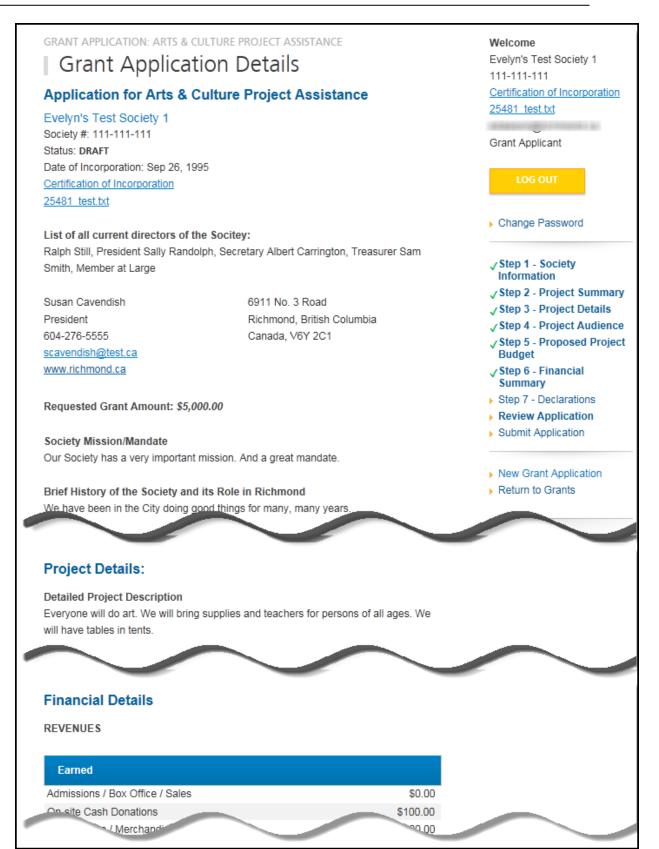


5. Review Application

a. General

Once you have completed the application, the system will take you to the "Review Application" page where you can review all your information and view any uploaded documents. If you need to make any changes, you may click on the link from the right column menu or click the "Make Changes" button at the bottom of the page.

The right column menu will also indicate if you have provided all required information. If any of the steps doesn't have the \checkmark next to it, you will need to go back to that step and review the information.



b. Print Application

You can print your application at any time by using the print button at the bottom of the page.



c. Submit Application

If you are satisfied with your answers and are ready to submit the application, there are two ways to do this.

On the right menu, you may click Submit Application:

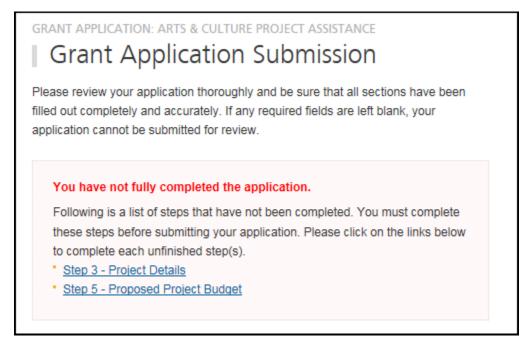


Or, at the bottom of the Review Application page, click the button that says Submit Application:



If you have not fully completed the application, the system will list the unfinished step(s) on the page.

See following. You may click on the link provided on the list to return to that specific section, review your answer and complete the application.



d. Terms & Conditions

If all answers are in order, the system will take you to the final step: "Terms & Conditions".

Please read through the document carefully.

You must answer "Yes" at the bottom of the page before you can submit the application successfully.

Once it is submitted, the system will send you an email confirming your application.

Since this is a competitive process, please note that once the application is submitted, you will no longer be able to make changes. Please review your application thoroughly before pressing Submit.