

MPF Philanthropy Community User Guide

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MPF Community Login Pages

How to Register to MPF Community

(All organizations must register for the new community)

1. Go to <http://www.montereypeninsulafoundation.org/grantmaking/how-to-apply/> and click on Online Portal Log In under Applicant Links
2. Click Not a member?
3. Enter required fields (First Name, Last Name, Email, Password, Create Password, Confirm Password) and click Sign Up.

How to Login to MPF Community

1. Go to <http://www.montereypeninsulafoundation.org/grantmaking/how-to-apply/> and click on Online Portal Log In under Applicant Links
2. Enter your email address as your username and then your password.
3. Click Log In

How to Reset Password on MPF Community

1. Go to <http://www.montereypeninsulafoundation.org/grantmaking/how-to-apply/> and click on Online Portal Log In under Applicant Links
2. Click Forgot your password?
3. Enter your username (email) and click Send Password Reset Email
4. Check your email (remember to look in your spam folder as well)
5. Click on the link that you receive in the email and enter a new password that must have at least 8 characters, 1 letter and 1 number.
6. Confirm the new password and click the Change Password button.

How to ensure you receive e-mails from noreply@salesforce.com

1. Add noreply@salesforce.com to your contacts or accepted e-mail list.
2. If you have applied and are awaiting correspondence, please check your spam/junk file to ensure the noreply@salesforce.com correspondence has not been sent there by security features.

Home page

On the home page, you will see your Applications, Grants in review, and previous Grants that you have submitted in the past.

Access to submissions is specific to your log-in.

Grant Record


1. By clicking on Grant Name (I.e. G-24641) you will open grant record information.
2. From here you can see all information related to Grant (General, Organization, Request and System Information).
3. At the bottom of the page, you will see all Related items. This includes Notes & Attachments, Files, and Requirements (Reports). You can upload Files to Notes & Attachments and Files by clicking on Upload Files.

MPF Website

MPF Website tab will open MPF website (<http://www.montereypeninsulafoundation.org/>) in the new tab.

New Grant Application

New Grant Application tab is used for creation or continuing a grant application. You can complete the application by following the simple flow process. (NOTE: If during the flow, you get disconnected or close your browser, return to the 'New Grant Application' tab and start the flow, it should autofill your previous input)

1. You can go to next and previous screens using Next and Previous buttons.
2. You can pause flow at any point by clicking on Pause button which saves your work. (You can resume the flow by going back to the 'New Grant Application' . Once opened, scroll down to your last entry and continue your work.
3. Click on  to see help text for field.

Before You Begin

Please be aware that there are character limits in most of the text fields, and number fields require number entries. We've added character limit descriptions for the fields and recommend you use word to calculate before you paste into the application. You will receive an error if you exceed these limits.

We will refine the application in the future to provide feedback as you enter text.

Before you begin, read flow instruction and click Next button.

Organization

Organization data are divided in 5 screens: Organization, Executive Director, Contact for Grant Request, Staff and Board of Directors.

1. On the Organization screen, you need to enter following information:

- Organization Name
- Legal Organization Name
- Tax ID Number
- Address
- City, State, Zip Code,
- Phone Number
- Website
- Mission Statement
- Year Established
- Describe the organization's history and major accomplishments
- Organization Budget (File upload)*
*Please label as Organization Budget (Insert Year)
- How many constituents does the organization serve annually
- Ten Largest Financial Gifts
- Fiscal Year Ending Date

All fields are required except the Legal Organization Name. Please enter the legal name if it is different than the name your organization uses for its day to day operations.

2. On the Executive Director screen, you need to enter following information:

First Name, Last Name, Title, Office Phone, Extension and Email.

All fields are required except the Extension.

3. On the Contact for Grant Request Screen you are asked who is contact for the request. You can choose one of the following options:

- Executive Director (Contact that is entered on previous screen)
- Current User (Me)
- Different Contact.

If user chose A Different Contact option he will be asked to enter First Name, Last Name, Title, Office Phone, Extension and Email for a new Contact for Grant Request.

All fields are required except the Extension.

4. On the Staff screen, you need to enter following information:

Number of Full Time Staff, Number of Part Time Staff, Number of Volunteers.

All fields are required.

5. On the Board of Directors screen, you need to enter following information:

- List current Board of Directors (include name, occupation, and city of residence)
- How much money did the Board of Directors contribute to the organization in the most recent fiscal year?
- What percentage of the Board of Directors contributed funds to the organization in the most recent fiscal year?

All fields are required.

Grant Request

Grant Request data are divided in three screens: Program Information, Current Key Staff and Program Classification

1. On the Program Information screen, you need to enter following information:
 - Requested Amount
 - Program Title
 - Program Start Date (Select a date after the grant review is expected; We cannot fund in arrears)
 - Program End Date
 - Describe the community need that this program will address
 - Summarize the program for which your organization is requesting grant funds
 - Describe the constituency this program serves
 - List up to three main goals of the program, including expected outcomes and activities for each goal
 - How many constituents does the program intend to serve
 - Program Budget (File upload) *Please label as Project Budget (Insert Year)
 - List all grant requests for this program including: funding source, the amount requested, and whether it is pending or approved.

All fields are required.

2. On the Current Key Staff screen, you are asked if you want to add more key staff. Executive Director is added by default. Check the “Add another one?” checkbox if you want to add more key staff.

3. On the Program Area screen, you need to select Program Area and Type of Support.

Type of Support is multiselect data type and multiple values can be selected. In order to select multiple values, press and hold CTRL (Windows) or CMD (Mac) and select values.



FIGURE 1: MULTI-SELECT PICKLIST IN FLOW

Financials

Financials data have only one screen

1. You need to upload following Financial Documents files:
 - Most recently submitted 990
 - Statement of Financial Position for the most recently completed fiscal year (Balance Sheet)
**
 - Statement of Activities for the most recently completed fiscal year (Profit & Loss) *

Organizations requesting more than \$25,000 are required to submit a financial review completed by a third party for the most recently completed fiscal year. However, a full audit is encouraged. Compilations do not meet this requirement.

Organizations requesting more than \$75,000 are required to submit a full financial audit.

****Please name your documents to reflect the type of financial document you are uploading.**

Example "Statement of Financial Position for the most recently completed fiscal year (Balance Sheet)"; "Balance Sheet for most recently completed fiscal year"; or "990 submitted 7-2018".

Financial Narrative

When there are significant deficits (greater than 10%) or large increases in net-assets, you may add a page or note in the financial's that explain the occurrence and board policies to manage the change.

Authorization

Authorization data have only one screen and this is the **final** screen. After pressing **Next**, you will no longer be able to edit anything.

1. You need to enter following information:
 - Signature of Authorized Board Member
 - Signature of Additional Authorized Representative
 - Today's Date

Submitting Your Application

Select **Next** or **Final** on the last screen to submit your application. Once you've submitted your application, Monterey Peninsula Foundation staff may contact you about the application and ask for additional information when necessary.

***NOTE: You cannot edit the file or replace files once you submit your application.

Helpful Hints - Shaping A Strong Grant Application

1. **Save copies.** It is best practice to keep a copy of your grant application, submitted financials, and all correspondence for your files.
2. **Do your homework! Research, research, research...** If the grantmaker has a website, review it and download the applicable materials. Review the grantmaking procedures and guidelines before contacting the grantmaker with questions.
3. **Make sure you understand the expectations and procedures of the grantmaker.** If in doubt, ask for clarification.
4. Follow the directions outlined in the application/guidelines. Use a grant application checklist if provided and include only the materials specified. Proofread carefully - make sure numbers add up and typos are removed.

5. **Tell the same story in the budget and the proposal narrative.** The project budget is another opportunity to tell your story and demonstrate your credibility. Everything in your budget should be reflected in the narrative. The last thing you want is a budget that raises more questions than it answers.
6. **Be clear and concise.** Grantmakers frequently need to read many letters and applications in a short period of time; an application that is easy to read and with clear content is more likely to be given serious consideration.
7. **Ask yourself the hard questions** like “What is our organization’s greatest current need, and how does it fit into this grantmakers guidelines?”. Don’t ask, “What would you fund?” or “What amount should I ask for?” Grantmakers can give guidance, but they cannot “guarantee” a grant for a certain project or for a certain amount.
8. Do not miss reporting or application deadlines. Do reach out to funders if there are issues they should be aware of.

Reporting

1. If a report is due, your grant record will have text in the ‘**Action Required**’ section.
2. To fill out the report, click on the Grant. From here, a button should appear at the top of the page saying ‘**Submit Report**’ or ‘**Fill Report**’
3. Once you complete the ‘**Fill Report**’ flow, the ‘**Action Required**’ text will remain on the Grant until it is reviewed by our staff.
4. Please attach the requested financial documents when prompted.
5. To review your Report, navigate into the Grant object, and scroll down to the ‘**Requirements**’ related list. Click into the Requirement to locate your Report.

Click [HERE](#) for additional information and best practices on reporting.

DO NOT HIT “PAUSE”. If you hit pause, your work will be not be saved and will not show again for editing purposes.

My Profile Page

The My Profile page includes components that show details about a user. Those are: Profile and Settings & Preferences.

1. The My Profile page can be accessed by clicking your username in the upper right corner and selecting My Profile.
2. On the Profile section there are following information: Name, Title, Manager, Company Name, About Me, Email, Phone, Cell, Fax and Address
3. By clicking on Edit button all fields can be edited.
4. On the Settings & Preferences section you can change you Email Address, Password, Locale and Time Zone. There is also Language option but that is currently not supported in the community.

Contact Us

By clicking on grants@mpfca.org, user default e-mail program will be opened. You may call the philanthropy department for technical assistance at 831-649-1533.