

TUTORIAL FOR APPLICANTS USING ETF'S ONLINE GRANT APPLICATION SYSTEM

For: Letters of Intent (LOI) and Applications

This document is designed to provide applicants with step-by-step instructions about using East Tennessee Foundation's (ETF) online application system.

Logon Page

Welcome to ETF's Online Grant portal

New Users: Please "Create New Account" to complete the registration process and create your logon credentials.

Existing Users: Please enter your email address and password. If you forgot your password, please use the "Forgot your Password" link to reset your password.

Not Sure? If you think that you or someone at your organization has already registered in the system, do not create a new account. Please contact Jan Elston, VP for Competitive Grant Programs at ETF: jelston@etf.org for help.

The screenshot shows the ETF Logon Page. At the top, there is a banner with the East Tennessee Foundation logo and the tagline "Thoughtful Giving for Stronger Communities, Better Lives". Below the banner, the page is titled "Logon Page". There are two input fields: "Email Address*" and "Password*". Below the password field is a link that says "Forgot your Password?". At the bottom of the form are two buttons: "Log On" and "Create New Account".

Returning users logon by entering your email address and password.

If you have forgotten your password, *click here*.

New applicants must register themselves and their organizations.

Create New Account – **for first-time users only**

Creating a new account is a multi-step process

- The first section collects **Organization Information**
- The second collects **User Information**
- Sections three and four collect **Executive Officer Information**

After **Organization Information** has been entered click on the “next” button.

Organization Information

Organization Name* EIN / Tax ID (##-#####)*

DUNS Number (#####) Web Site*

Telephone Number (###-###-#### x###)* Organization Email

Address 1 Address 2

City State

Postal Code Country

Next >

User Information

Executive Officer Question

Additional Executive Officer Information

Password

- The next section is the “**User Information**” section, or *YOUR* information.
 - If your address is the same as your organization’s, you may use the “**Copy Address from Organization**” button to automatically pull the address information from the organization address fields into the address fields in this section.
 - Please note: The email address entered in the **email/username** field becomes the Applicant’s (*your*) **email address on the Logon Page**.
- Once the fields on the “**User Information**” section are completed, click on the “**Next**” button.
 - Please note: If you need to return to the previous section in the registration process, you must use the “**Previous**” button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate to the previous section by using their browser’s “back” button you will lose all registration information entered.
- In the final section, you will indicate whether you are the **Organization Executive Officer**.
 - If you *are* the executive officer, select “**Yes**.” You are taken to a section of optional fields that includes only the fields that were not required in the “User Information” section.
 - If you *are not* the executive officer, select “**No**,” and complete the Executive Officer’s fields.

Once the executive officer’s information is entered, click on the “**Next**” button.

Create New Account

To complete your registration, you will be taken to the **Create New Account** page.

1. Enter a password with at least 6 characters.
2. Enter password again to confirm.

The screenshot shows the 'Create New Account' page. At the top right is a 'Cancel Account Creation' button. Below the title, there is a note: 'If you already have an Account, click the 'Cancel Account Creation' button to go to the Logon page'. A yellow warning box states: 'Using the browser's back button will delete your registration information.' An information box says: 'This registration process has multiple steps you must complete before you can apply. Fields with an asterisk (*) are required.' The form has two sections: 'User Information' and 'Password'. The 'Password' section has two fields: 'Password*' and 'Confirm Password*'. A callout bubble points to the 'Password*' field with the text: 'Create and enter password of at least 6 characters.' At the bottom left is a '< Previous' button and at the bottom right is a 'Create Account' button. A larger callout bubble points to the 'Create Account' button with the text: 'Once you have confirmed your password, click on "Create Account." You will be taken to the Email Confirmation screen.'

The screenshot shows the 'Email Confirmation' page. At the top is the title 'Email Confirmation'. Below it is an information box: 'You will be receiving emails from this system about your request.' A larger text box explains: 'To ensure you receive emails from this system we have sent you an email to confirm your account was created successfully. If you do not see an email from, 'East Tennessee Foundation (administrator@grantinterface.com)', look in your junk or spam folder. To remove 'East Tennessee Foundation (administrator@grantinterface.com)' from your spam filter, use the link below. Click Here for a tutorial about removing email addresses from spam filters.' Below this are three radio button options: 'I have received the email', 'Continue without checking', and 'I have not received the email'. A 'Send Email Again' button is to the left of the radio buttons. A 'Continue' button is on the right. A callout bubble points to the 'Continue without checking' radio button with the text: 'Select "Continue without checking" and then click on "Continue" on the right side of the screen'. Another callout bubble points to the 'Continue' button with the text: 'Click "Continue." This will take you to the Apply page'.

Apply Page

- The Apply page allows you to review the list of grants programs as well as any relevant deadlines and other information related to them.
- You can preview the LOI or application without having to save any work by clicking on the “Preview” button.
- To begin working on completing the LOI or application, click on the blue “Apply” button beneath the grants program for which you would like to apply.
- Please note: Several of ETF’s grants programs begin their application process with a LOI (Youth Endowment, Arts Fund, for example.) “Apply” will take you directly to the LOI in those circumstances. When a LOI is not used, you will be taken directly to the Application.

The screenshot shows the 'Apply' page on the ETF website. It features two grant listings. The first listing is for the '2017 Youth Endowment', which is accepting submissions from 03/20/2017 to 04/21/2017. The description mentions that the Youth Endowment supports creative solutions to problems that place our region's youth at risk. It lists priorities such as equal opportunities, life, career, and financial skills, and STEM educational opportunities. A callout box points to the title '2017 Youth Endowment' as the 'Name of grants program'. Another callout points to the submission dates as 'Relevant deadline information'. A third callout points to a link for more details as 'Link to Youth Endowment page on ETF's website'. Below the description are buttons for 'Preview' and 'Send to GrantHub'. A fourth callout points to the 'Preview' button as 'Click here to preview the LOI or application'. The second listing is for the 'Butterfly Fund', accepting submissions from 02/01/2017 to 02/28/2017. Its description mentions the fund's mission and fundraising efforts. A callout points to the 'Apply' button at the bottom right as 'Click here to apply'.

The screenshot shows the 'Receive' page on the ETF website. The page has a dark blue header with the word 'Receive' in white. Below the header is a navigation breadcrumb: 'Home > Receive > Grants > Mount Rest Fund'. On the left side, there is a list of grants under the heading 'Grants'. The 'Mount Rest Fund' is highlighted in blue. To the right of the list is a detailed description of the 'Mount Rest Fund'. The description starts with 'In 1894, Mount Rest Home was started by a group of forward-thinking women...' and continues to describe the fund's history and mission. Below the description are sections for 'Application Process' and 'Grant Terms and Amounts'. A callout box points to the 'Mount Rest Fund' description as 'Sample grant program description page on ETF's website'.

Application/LOI Form:

Once in the LOI or application, note that your contact and organization information automatically populate the top of the form. You may return to your LOI/application as many times as you wish prior to submitting it.

As you work your way through the form answering each question, please note that:

- Any questions with an asterisk (*) must be completed before you submit your LOI/application.
- Some questions have character limits. A character is any space, punctuation mark or letter. As you type, the “character count” will decrease in accordance with that limit.
 - An error message will appear, informing you if the limit has been exceeded.
- As you complete the form, the system will auto-save after every 100 characters are typed or every time you move to another question.

East Tennessee Foundation Jan Elston

Search Tools Communications Reporting Applicant Menu

Application

Butterfly Fund 2017

Public Profile Question List Create Documents

Project Name:
Process: Butterfly Fund 2017 [Request Email History](#)

Applicant: Jan Elston, jelston@etf.org [Contact Email History](#)
Organization: East Tennessee Foundation, 62-0000000 [Organization Email History](#)

If your organization information does not appear correct, please click the edit (pencil) icon.

Part II: Project Information

Explanation of Funding Priorities

- **Equal opportunities.** Disparity may result from: 1) biased treatment of ethnic and racial minority youth; 2) socioeconomic inequality; or 3) real or perceived obstacles to accessing opportunities.
- **Life, career, and financial skills.** Skills essential to help youth become independent and employed.
- **STEM educational opportunities.** The Department of Labor's Occupational Outlook Handbook predicts that over 50% of jobs created in the future will require a background in math, science, and technology.

Funding Priority*

Having read the explanation of funding priorities above, please select the priority for your organization's proposed project/program.

Equal opportunities

Life, career, and financial skills

STEM educational opportunities

Project Description*

Describe the project, program, or activities for which your organization is requesting Youth Endowment grant support and what you plan to accomplish during the two-year grant period.

3,000 characters left of 3,000

Project Partners*

If the proposed project or program is a collaboration between your organization and another/others, identify the organization(s) and their roles. *If this is not a collaboration, type "None."*

Uploading Documents

- Some applications require uploaded documents, such as project budgets, financial statements, and lists of board members and staff. Upload files have size limits (in Mega Bytes – MB.)
- If the document exists in an electronic format (Word, Excel, PDF, jpeg, etc.), you may search for it on your computer using the “Upload a file” button inside the application. Simply find the relevant document on your computer and select it to be uploaded.
- An uploaded file can be deleted by clicking on the red **X** next to the file name. Once deleted, a new file can be uploaded.

✓ 1,000 characters left of 1,000

REQUIRED ORGANIZATIONAL DOCUMENTS

Required Organizational Documents must be uploaded to this application by clicking on the "Upload a file" button beneath each question and selecting that document from your computer files.

Organization's 501(c)(3) *
Confirmation that your organization is a 501(c)(3) nonprofit organization or educational institution.
Upload a file [1 MIB allowed] **Upload file button**

Current Organization Operating Budget*
Include all revenues and expenses.
Upload a file [2 MIB allowed]

Most Recent Audit or Financial Statement*
Provide a copy of your organization's most recent audited financial statements. If audited statements are not available, provide the financial statements compiled by the organization's CPA for the most recent fiscal year. If compiled statements are not available, provide internally prepared financial statements for the most recent fiscal year.
Upload a file [5 MIB allowed] **MB limit on size of uploaded file**

Board Members*
Include name and city/state of residence of each member.
Upload a file [1 MIB allowed]

Key Staff Members*
Include names, titles, and phone numbers and/or email addresses.
Upload a file [1 MIB allowed]

▼ Certifications and Electronic Signature **Final section to complete, verifying that all information is correct**

Enter your full name and business title.

Full Name*

Business Title*

Confirmation*
By entering your signature information above and clicking "I Agree" below, you certify to the best of your knowledge that:
• I am (or am authorized to sign on behalf of) the Primary Contact Person listed on this LOI
• All information entered on this LOI is correct
• The tax-exempt status of this organization is still in effect
 I Agree I Do Not Agree

Click here to Save LOI/application work. You can continue working now or at a later date

Click here to submit!

Save LOI Submit LOI

When your LOI/application is completed, click the blue “Submit” button. **Once submitted, no changes can be made!**

You will be taken to the **Confirmation Page**, verifying that your application/LOI has been saved or submitted.

Confirmation Page

✓ The Application has been submitted.

Continue

Click the blue “**Continue**” button to get to your home page - the **Application Dashboard**.

Applicant Dashboard (“Home” icon)

You can get to your Applicant Dashboard at any time, by clicking on the Home icon at the top of the screen, next to the ETF logo. Once you have registered the first time, whenever you logon, you will automatically be directed to your Applicant Dashboard.

The screenshot shows the Applicant Dashboard for Jan Elston at the East Tennessee Foundation. The top navigation bar includes a Home icon (pointed to by a callout), Search, Tools, Communications, Reporting, and Applicant Menu. The dashboard displays the user's profile, organization information, and a list of applications. A callout points to the Home icon, stating "Home icon". Another callout points to the "Edit Application" link for a draft application, stating "This saved application can be edited before it is submitted". A third callout points to the "View Application" link for a submitted application, stating "This submitted application can only be viewed".

East Tennessee Foundation Jan Elston

Search Tools Communications Reporting Applicant Menu

Applicant Dashboard

Public Profile

Applicant: Jan Elston
jelston@etf.org

Organization: East Tennessee Foundation
62-0000000

Contact Email History Organization Email History

If your organization information does not appear correct, please click the edit (pencil) icon.

Process	Status	Date	Action
YOUTH DEVELOPMENT PROGRAMS			
Process: Wachs Youth Leadership Fund			
Application Draft	Draft	02/19/2017	Edit Application
xxx			
Process: Butterfly Fund 2017			
Application Submitted	Submitted	02/19/2017	View Application
Process: 2016 CNS Y-12 Community Investment Fund			
Application Draft	Draft	09/19/2016	View Application

Your request is no longer under consideration. Click 'Apply' in the menu for a list of available opportunities.

Important Information about ETF’s Grants Programs

1. Each grants program has its own set of guidelines and application.
2. Each grants program has its own application deadline and grants cycle.
3. Dates and information about grants programs are subject to change, so visit our website on a regular basis for updated information.

Questions?

If you have questions about the online application, please contact the appropriate staff person:

Field-of-Interest Funds: Jan Elston, Vice President for Competitive Grants at jelston@etf.org

Affiliate Funds: Samantha Amick, Advancement Associate, samick@etf.org

Affordable Housing Trust Fund: Anna Wiggins, Financial & Administrative Officer, at awiggins@etf.org

All staff can also be reached by telephone at (865)524-1223 or *toll-free* at (877)524-1223

[CLICK HERE to APPLY](#)

ETF grants are administered in compliance with ETF’s Diversity and Non-Discrimination Policy.