# United Way Halton & Hamilton

Seed Grant Application Guide

May 2024

United Way
Halton & Hamilton

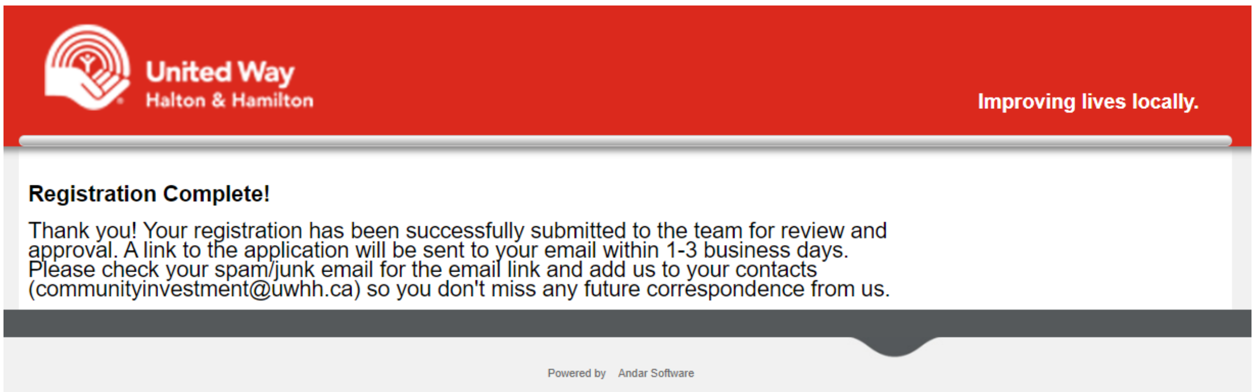
**Contents**

United Way Halton & Hamilton is providing this reference guide to agencies interested in applying for the Seed Funding grant. This document is meant to assist agencies through the reporting process and clarify the requirements of each section expected to be filled out and submitted.

## Registration

Please submit your registration via the link provided on our website here: [https://www.uwhh.ca/investments/seedgrant/](https://www.uwhh.ca/investments/seedgrant/)

Once complete, you will receive the following message.




Upon registering, UWHH will review your submission and provide a response within 3 business days.

- If accepted, your email will contain a link to apply via our web portal. (you may proceed using the information below)
- If there is more information required, we will try to be clear about the required information and you can re-register if you are able to provide the requirements.
- If you do not meet the criteria outlined in the eligibility guide, you may be declined.

## User Tips

**Tip #1**

**The Grant application can be accessed with a computer, laptop, tablet, or smartphone. Google Chrome is the most application-friendly web browser**. Working on the application on Google Chrome allows the user to benefit from a built-in spell check feature.

**Tip #2**

While completing the grant application package, please use the **"Next"** button on the bottom to proceed to the next form and **"Return"** button to go back to the previous page. Please DO NOT use your browser's back button! Using the browser back button can cause the system to disrupt the grant application or to reload data to your screen. Please remember to **"Save"** the entries on each page while filling the grant application. If you have unsaved entries, it may cause those entries to be lost.

All navigation instructions and buttons can be found at the bottom of each page of the application or report.

**Tip #3**

Please read the instructions at the top of each page. This should help clarify expectations and what specific information is required. If something is unclear or raises questions please contact communityinvestment@uwhh.ca

**Tip #4**

To complete the grant application, each section of the package (Organizational Information, Project Information, Project Budget etc.) must be submitted. This is done by clicking the "**Submit**" button at the bottom of each page.

It is strongly recommended to review all information prior to submission of any page or section. Once a user clicks "**Submit**" the information cannot be edited. Once all sections are submitted, the grant application status should read "**Complete**."

**Online Portal & Application Guide**

## Getting Started

Agencies in the Halton area have been using the online portal since 2014 and Hamilton-based agencies first started using it in 2017. The purpose of allowing all agencies to access an online application or report is for enhanced efficiency and equality.

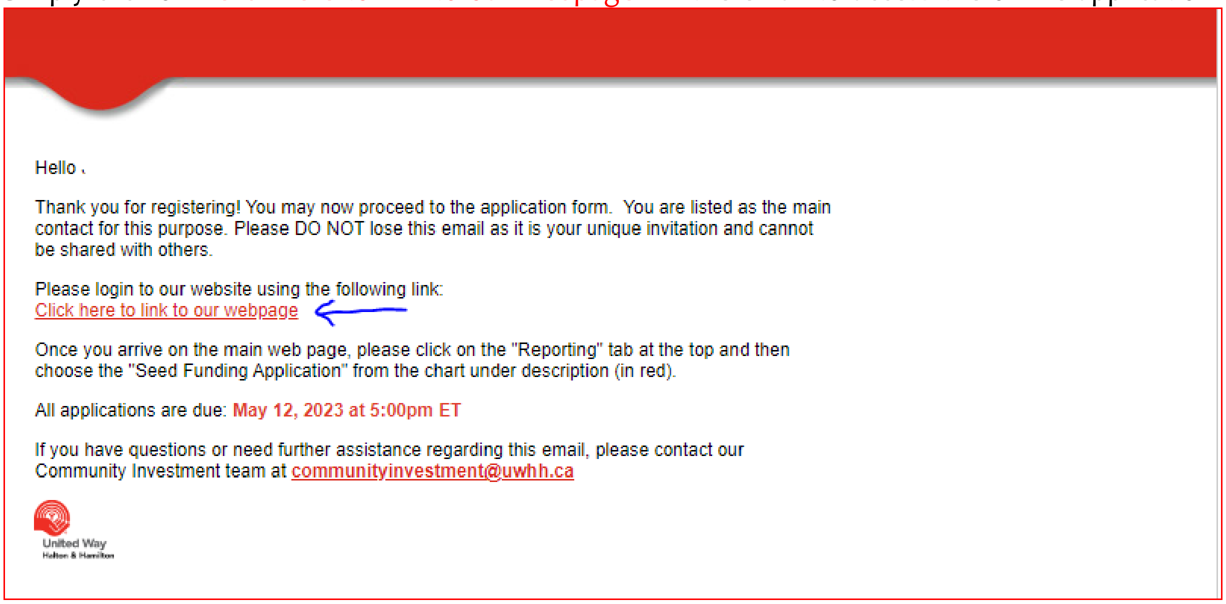
The following are tips for getting started:

- All grant applicant Community Service Organizations (CSOs) can submit their basic information (agency name, contact details, email etc.) on the first registration form.
- Upon submission of the registration form, UWHH will review the eligibility and accept or reject the CSOs based on eligibility.
- All CSOs will be sent an **email invitation** stating the approval or rejection of the CSOs within three business days. In case of rejection, the rationale for rejection/ineligibility will be stated in the email.
- Approved emails will include a hyperlink to the online portal and will have a built-in log in. There is no need to remember a user name and password, however, do not lose the email invitation. Agencies should not share the email/link with other staff as it is tied to their unique account in the database.
- Multiple users can be logged in to the portal at the same time. However, it is **not advised to work on the same form, budget, or page at the same time**. To prevent system failure and possible loss of data, please ensure staff working on the portal are coordinating their efforts.
- **A star (*) indicates a field is mandatory** – meaning you must input data into the field to be able to submit the form.
- Some sections have **word or character limits** (usually indicated on the question itself) so please be aware of this.
- The detailed application page has an option to print to PDF or export to Excel.
- These two options let you **download the information you've input into the application for your records**. We recommend saving a copy of the completed application or report using the PDF version as the formatting is easier to comprehend. All applications that have been downloaded using these buttons will show in the **"My Outputs"** section and can be accessed or downloaded locally there. CSO's can apply for only one program / grant. The application cannot include multiple supports. For example, if you are applying for funding for one program, you will not be eligible to apply for a second program as a separate application or in the same application.

## Portal Access

The email invitation with access to the online portal will be provided to the relevant contacts of the respective agencies as indicated upon registration. These contacts will receive an email similar to the one shown below here and it will contain each contact's unique log in:

Simply click on "Click here to link to our webpage" in the email to access the online application.



Hello ,

Thank you for registering! You may now proceed to the application form. You are listed as the main contact for this purpose. Please DO NOT lose this email as it is your unique invitation and cannot be shared with others.

Please login to our website using the following link:
Click here to link to our webpage

Once you arrive on the main web page, please click on the "Reporting" tab at the top and then choose the "Seed Funding Application" from the chart under description (in red).

All applications are due: **May 12, 2023 at 5:00pm ET**

If you have questions or need further assistance regarding this email, please contact our Community Investment team at communityinvestment@uwhh.ca

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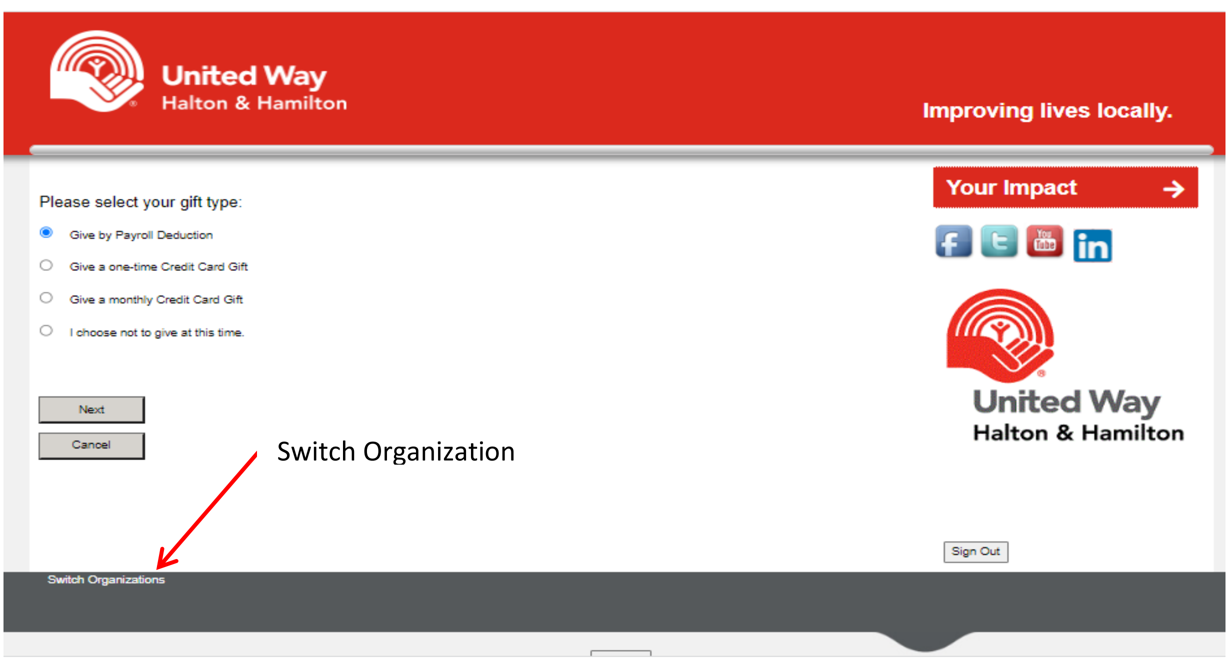
This will take you to the Home page of the grant application. If you are already in the UWHH database, you may have multiple roles. If you cannot see the screen for your CSO, click on the **"Switch Organization"** on the bottom left corner which will take you to the next page.



Please select the appropriate organization from the list. If you are the admin for multiple organizations which in some cases can be the scenario, please ensure to select the right agency from the list and click on **"Change Organization"**.


***Note – If your agency is newly added to the database of United Way Halton and Hamilton, you will land directly on the above page by clicking the link provided in the invitation email sent to you after submitting the registration information of your agency.**

This main page contains the due dates of the SEED grant stream as well as some navigation instructions.

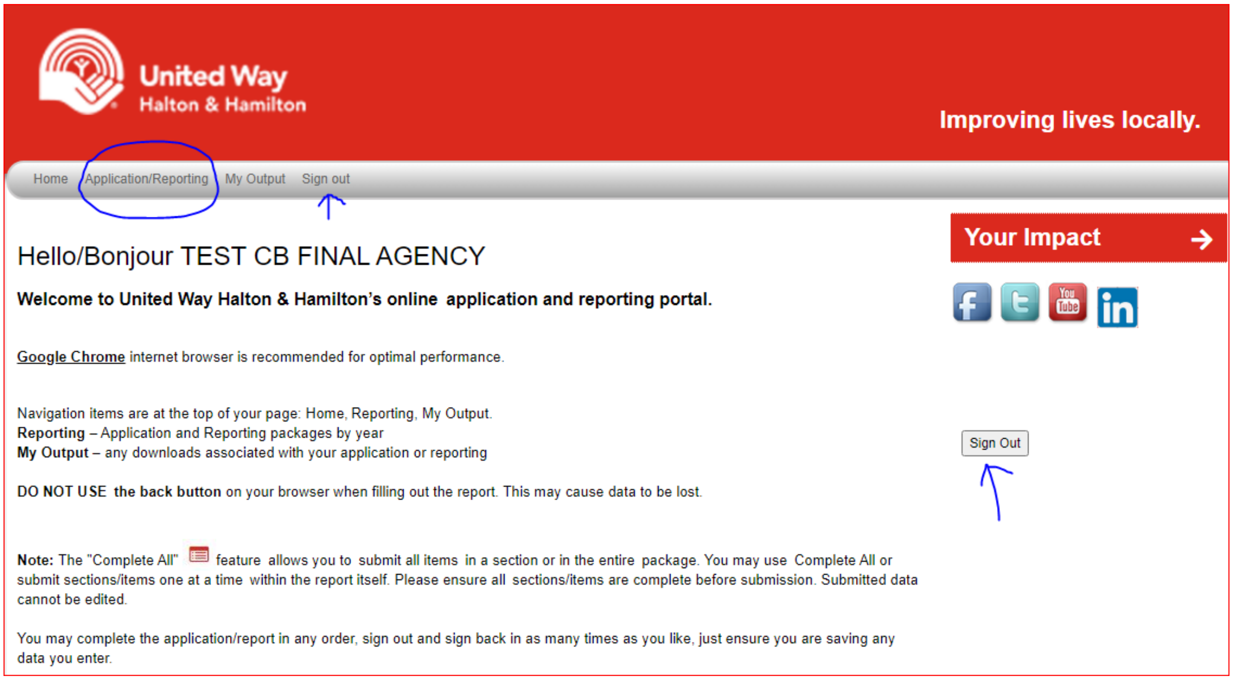
The menu along the top allows you to navigate from one page to the next.

Clicking the "Your Impact" banner or icons will take you to United Way Halton & Hamilton's website and other social media.

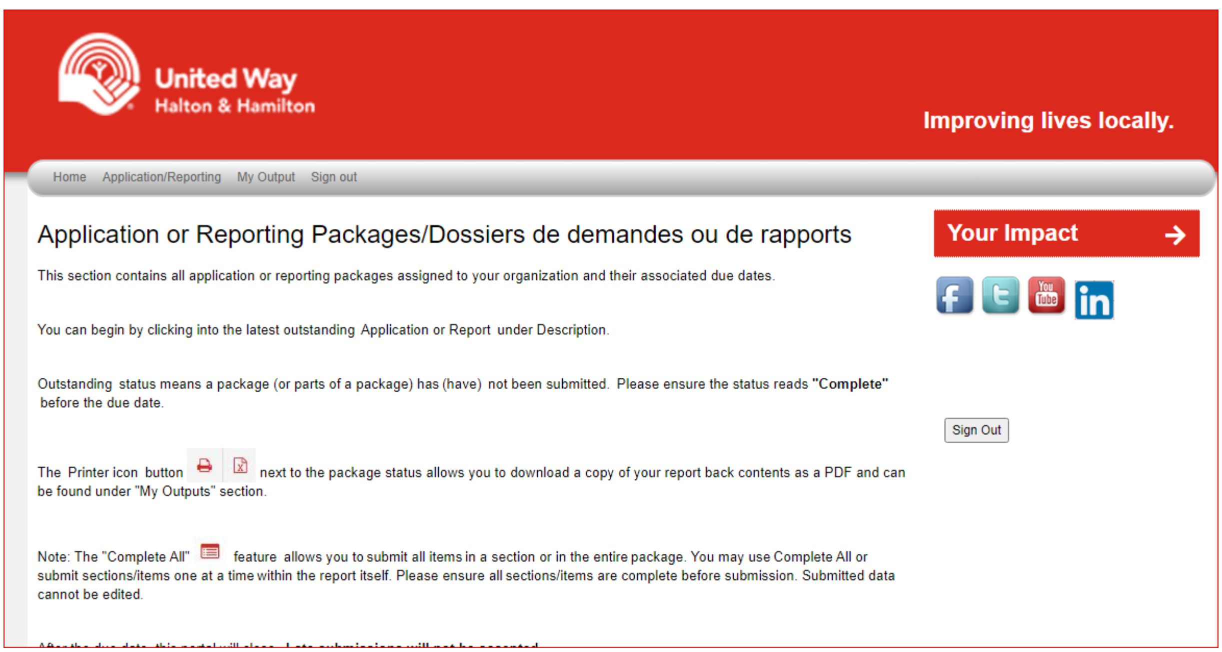
If you click the "Sign Out" button, you can log back in using the email invitation link.

## Navigating the access to application

The main application section of the portal can be accessed by clicking on the **"Reporting"** tab from the menu item.




Upon clicking the reporting tab, you will be redirected to a page with a link to the Seed Funding application. Note: already existing agencies will see a list of all previous grant applications and report backs.




In both cases, the Seed application should be the first item as shown in the image below.

| Due Date | Description | Status | |
|---|---|---|---|
| Jul 08, 2024 | Seed Application - 2024 | Outstanding | |
| Mar 22, 2024 | Feed - Final Report Back | Outstanding | |

## Application Package Components

Once in the **grant application** section, the table shows the due date for the grant application and its **status**. A status of **Outstanding** means a section or sections have not been submitted yet.

Reminder: The two icons to the right of the application allow you to download copies of the report for your internal records. The PDF version is recommended for easier comprehension. <u>The button to the far right is the **Complete All** function. At this level, clicking this will submit every form in the entire application. Please use this button with caution</u>.

Please click on the Seed Application items (as shown below) to proceed with the grant application.

## Application Overview

| | | Section | Status |
|---|---|---|---|
| | | Seed Application - 1. Agency Overview | Outstanding |
| | | Seed Application - 2. Agency Diversity, Equity and Inclusion | Outstanding |
| | | Seed Application - 3. Governance and Financial Accountability | Outstanding |
| | | Seed Application - 4. Financial Statements | Outstanding |
| | | Seed Application - 5. Project Overview | Outstanding |
| | | Seed Application - 6. Project Objectives and Evaluation | Outstanding |
| | | Seed Application - 7. Budget | Outstanding |
| | | Seed Application - 7a. Project Budget | Outstanding |

Return

You do not have to complete each section in the order that it appears. The **complete all** button appears at all the **consent, organizational information and project information levels**. This allows you to submit all forms within one section. For example, clicking the "Complete All" button beside the organizational information section.

Once you complete a section, it is recommended to **Save**. Saving still allows for the option of changing any information in the future before you submit.

Also, remember to click **Return** to navigate back to the main reporting menu, and not to click the browser back button.

Save

Submit

Return

The response to the questions in the application may be either multiple selection, text box, number, radio button or drop down. In some cases, the agency needs to insert a URL for relevant link as well.

### Agency Overview

*Note: If applicant is a non-qualified donee applying with a charitable fiscal sponsor, this section is to be completed with the **information of the non-qualified donee.***

This section has 5 questions regarding the Agency

### Agency Diversity, Equity and Inclusion

*Note: If applicant is a non-qualified donee applying with a charitable fiscal sponsor, this section is to be completed with the **information of the non-qualified donee.***

This section has 5 questions seeking information regarding DEI.

### Governance and Financial Accountability

*Note: If applicant is a non-qualified donee applying with a charitable fiscal sponsor, this section is to be completed with the **information of the charitable fiscal sponsor***

This section has 9 questions seeking information regarding the fiscal sponsor's governance and financial information.

### Financial Statements

*Note: If applicant is a non-qualified donee applying with a charitable fiscal sponsor, this section is to be completed with the **information of the charitable fiscal sponsor***

This section has 4 questions regarding the financial status and uploading of financial documents of the charitable fiscal sponsor.

### Project Overview

*Note: If applicant is a non-qualified donee applying with a charitable fiscal sponsor, this section is to be completed with the **information of the non-qualified donee.***

This section contains 9 questions describing the project/initiative. In some questions you are given the opportunity to answer in text OR provide approximately a 3 minute video (Maximum upload is 100MB)

## Project Objectives and Evaluation

*Note: For agencies applying with a charitable fiscal sponsor, this section requests information about the agency implementing the project.*

This section has 7 questions regarding the project plan, timeline, expected deliverables, approaches etc.

## Project Budget

*Note: If applicant is a non-qualified donee applying with a charitable fiscal sponsor, this section is to be completed with the **information of the non-qualified donee.***

Budget Form – Fill out the form with the expenses for your project in each section. The total expense = Total Funding being requested

| Item | Description | Amount | Side |
|---|---|---|---|
| 1 | Personnel- Wages & Employment Related Costs | $0.00 | Expense |
| 2 | Contractors - Fees for Professional Services | $0.00 | Expense |
| 3 | Materials & Supplies | $0.00 | Expense |
| 4 | Project Equipment | $0.00 | Expense |
| 5 | Travel Expenses | $0.00 | Expense |
| 6 | Training & Events | $0.00 | Expense |
| 7 | Administration | $0.00 | Expense |
| | Total Income | $0.00 | |
| | Total Expense | $0.00 | |
| | Total Surplus/Deficit | $0.00 | |

**Comments**

If "Other Revenue" was entered above, please expand on the exact sources of funding and amounts associated to each here.

Also input any other information you wish regarding the budget.

This section requires only expenses to be entered against each budget heading for the project period. There are **Income and Expense field types in the totaling column. However, the income column shall remain empty.** Surplus/deficit will also be the total expense of the project.

Enter amounts into the "**Amount**" field.

****Note: you don't need to enter any information on comments below the budget table regarding "Other Revenue" as it is a default technical glitch.***

| |
|---|
| 1. Personnel = Staff Costs (e.g., new or maintained staff positions specifically focused on project) |
| 2. Contractors = Consultants and/or service providers |
| 3. Material & Supplies = Supplies, materials and/or equipment required for the project |
| 4. Project Equipment = Rental Costs (e.g., for workshops meetings or convening space) |

| |
|---|
| 5. Travel Expenses = Participant accessibility supports and honorariums (e.g., travel, childcare, honorariums to participants of research or co-design activities; gift cards may not exceed $500) |
| 6. Training & Events = Other: Include other project expenses that may not be covered by the above categories |
| 7. Administration = Administration (Maximum 15% of budget; overhead related to administration, staffing and rent) |
| Total Amount (should equal total amount requested) |

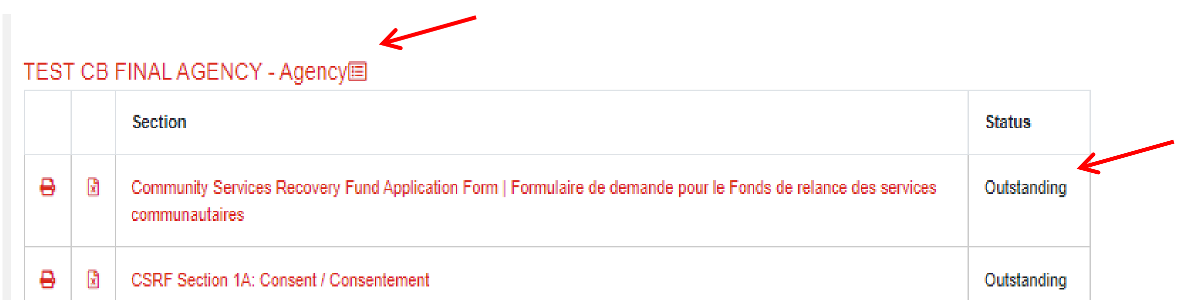
Section 7b of the budget has 3 questions looking for additional details regarding the budget spending along with any additional funding you may be seeking or secured.

### Acknowledgement & Approval

This section must be completed by someone who is legally authorized to bind the agency.

## General Instructions and Guidance

Only **Submit** a section or sections once the information has been reviewed and checked for accuracy. Remember, you can click the **Complete All** button if every page of an application and/or report section is complete. This feature will submit all pages within one section.




Once your application is complete, and all sections have been submitted, its status should read "**Complete**."

Once the application has been submitted successfully, a confirmation email will be sent to the original email ID mentioned on the registration page.

**Please ensure all sections are submitted before the application due date.**

Thank you for your compliance and cooperation with the application process. Each piece of data collected is valuable information to: assess and evaluate program impact; gauge alignment with the Community Services Recovery Fund, better understand and communicate out our network's impact, understand challenges agencies are facing; understand how equitable our investments are; and inform the role United Way plays as a convener, capacity builder, funder, and partner.

**For any questions please contact: communityinvestment@uwhh.ca**