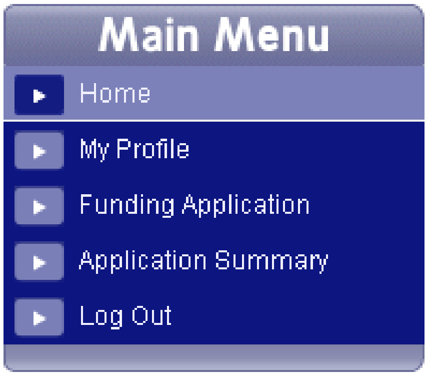
Head of the Lakes
United Way

LARGE GRANT
Online Application
User Guide

Version 1: September 2017

The Basics

Menus



When working inside the website, all menu options are on the left side of the page. When you select an item, it opens a new page for data submission. Use **ONLY** the menu on the left to navigate from page to page.

Common Buttons and Miscellaneous Information

The **Save** button lets you save a work in progress. Use this button until the form is ready to submit.

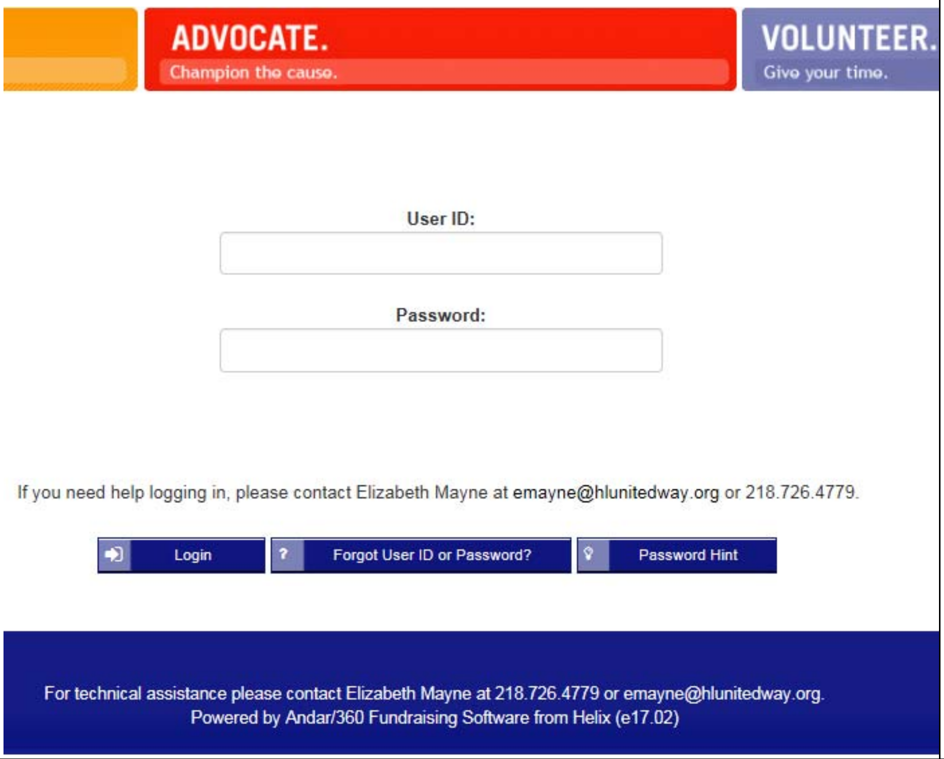
The **Submit** button saves any changes you have made in the current session and submits the form. **Once submitted, you cannot make changes.**

The **Cancel** button cancels all changes made *in this session* and returns to the previous screen. It is not an undo button.

The **Return** button will take you back to the previous page. Use this instead of the Back button on your web browser.

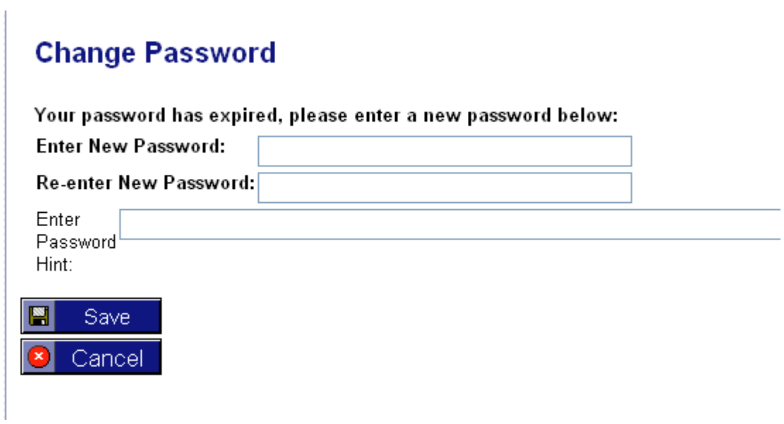
- By each form, you will see these icons: . You can print the form to a PDF document by clicking the yellow printer icon. You can import the form to an Excel file by clicking the Excel icon.
- **Do not** use your browser's Back and Forward buttons. They can lead to your data being corrupted.
- Double asterisks denote mandatory fields within a form.
- An icon of a red "X" allows you to delete the piece of information selected.
- When you are finished with a session, don't forget to **Log Out** of the system.

Getting Started

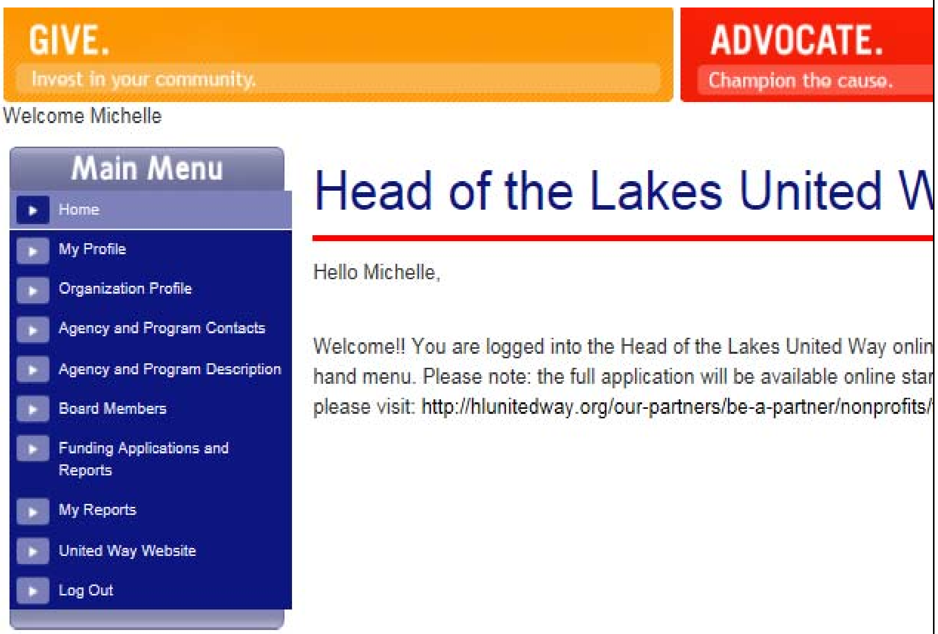


Log into the site using the link, user ID, and password provided via e-mail. The URL is https://web.hlunitedway.org

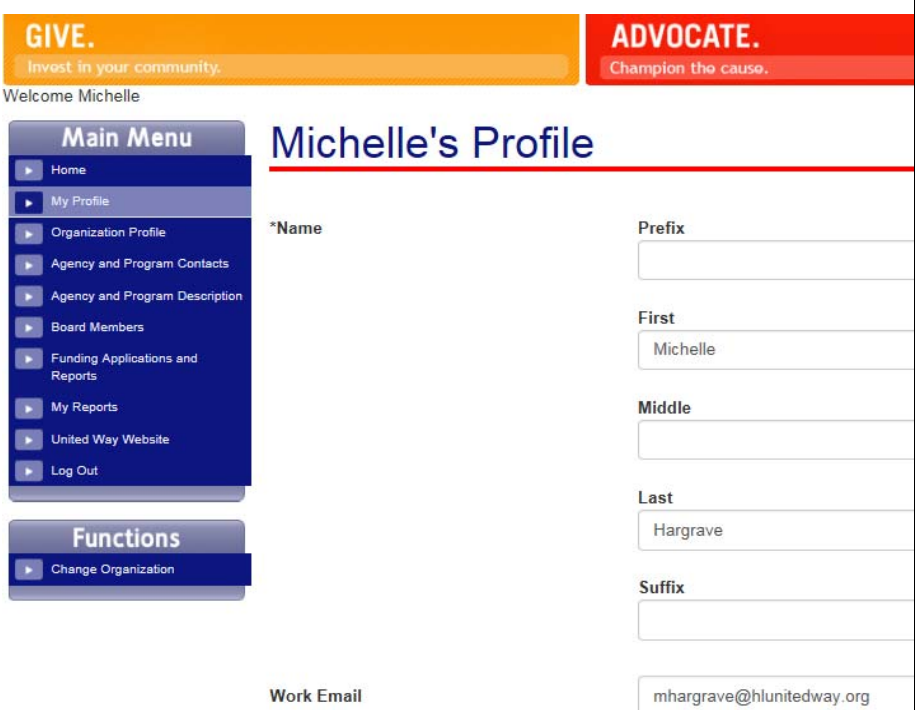
If you forget your password, click on the **Forgot Password** button and enter the email address related to your account – the password will be sent via email.



New users are prompted to change the password. Enter the password twice. Enter a **Hint**, if desired. Then click **Save**.



After a successful log-in, a **Welcome** screen with a message personalized to the organization will appear. A navigation menu is available to the left of the screen.



Click on **My Profile** in the menu to the left. This will contain information from the user's personal account. Please review and make sure the data is correct. To change your password, click on the icon to the right of the password field.

Funding Applications

Application

Due Date			Description
Nov 20, 2017			LARGE Grant Application
Nov 20, 2017			SMALL Grant Application
Jun 19, 2014			Test
Nov 25, 2013			Full Application: Basic Human Services
Nov 25, 2013			Full Application: Education
Sep 30, 2013			Pre-Application

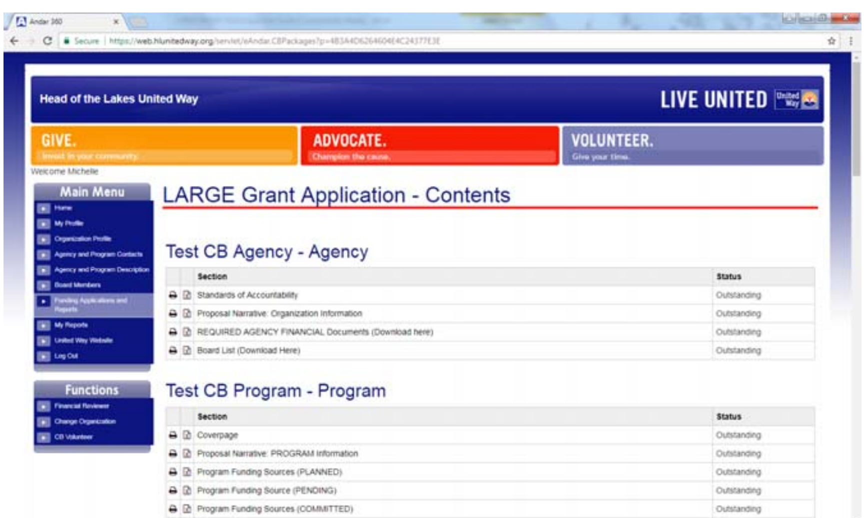
The **Funding Applications** page includes all the application packages that are open: large grant & small grant. Please select and complete the appropriate package for your request.

The due date indicates the date by which the package is due.

The status will show as **outstanding** until all elements have been completed.

Users can print the entire package of information from this screen by clicking the printer icon.

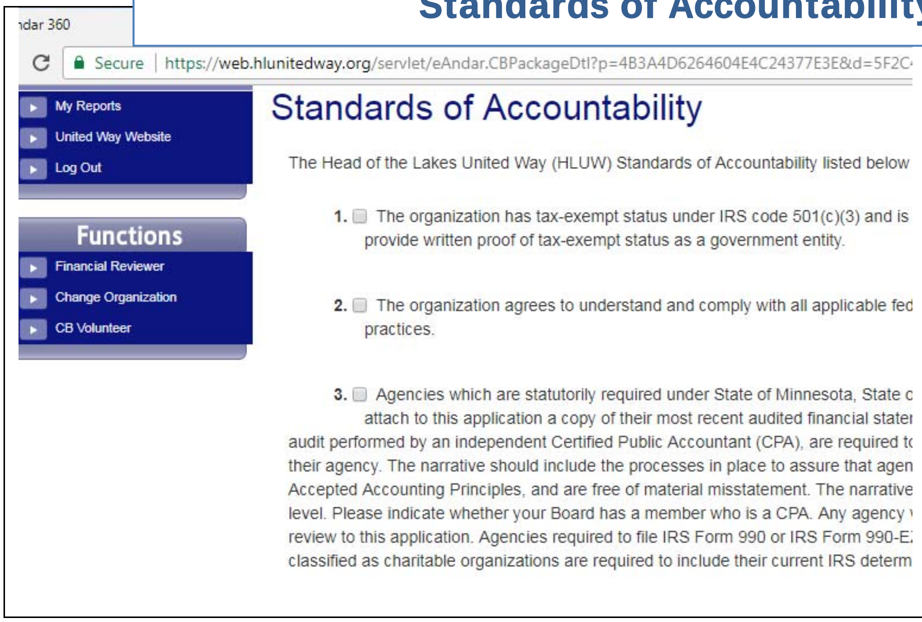
Full Application: Agency Section



In the large grant application there are sections for **agency**-related and **program**-related information.

Please note that if your agency has more than one program, you need only to submit organization information once for the agency. It will automatically be included with each program application.

Standards of Accountability

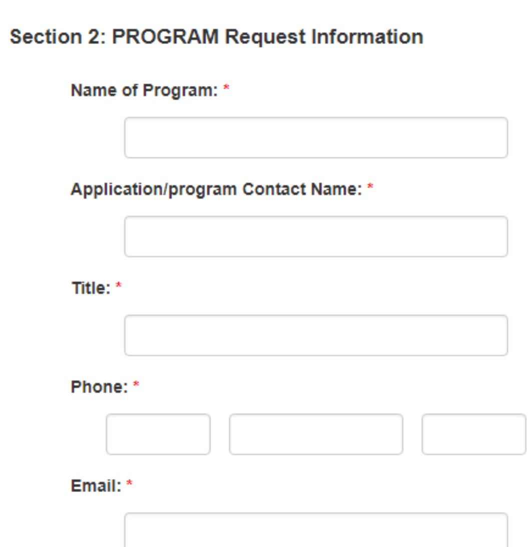


COMPLETE THIS SECTION FIRST.

Please review each statement carefully and ensure your organization is in compliance.

If you are not able to meet one of these factors, STOP and do not proceed with the full application. Contact Michelle Hargrave at HLUW to consult before continuing.

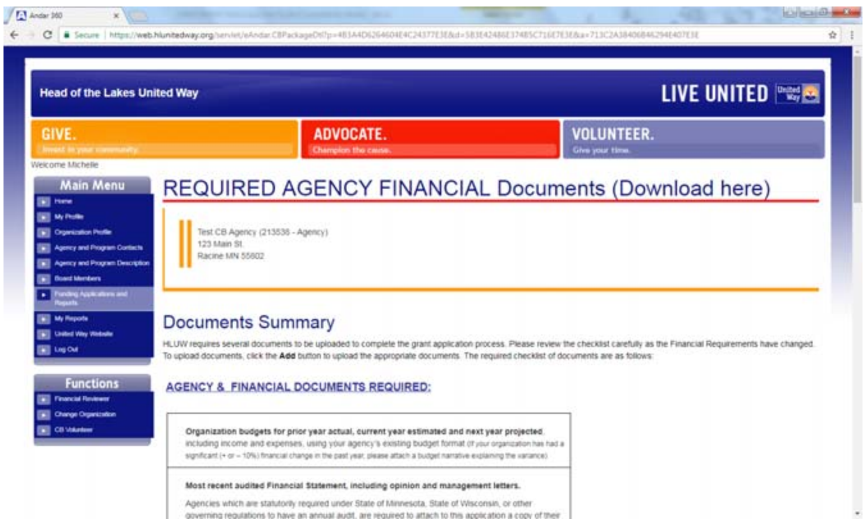
Cover Page



Please complete the cover page and ensure all contact information is correct. The program contact listed is the person we will contact with any application questions.

Uploading Documents

SUMMARY PAGE:



UPLOAD PAGE:

Directions: Please upload each document one at a time. Type the title of the document in the 'Document Description' text box. You may ignore the effective and expiry date

Year	2014
Class	Financial
Type	Document
Document Description	
File Name	Choose File No file chosen
Effective:	
Expiry:	

Add

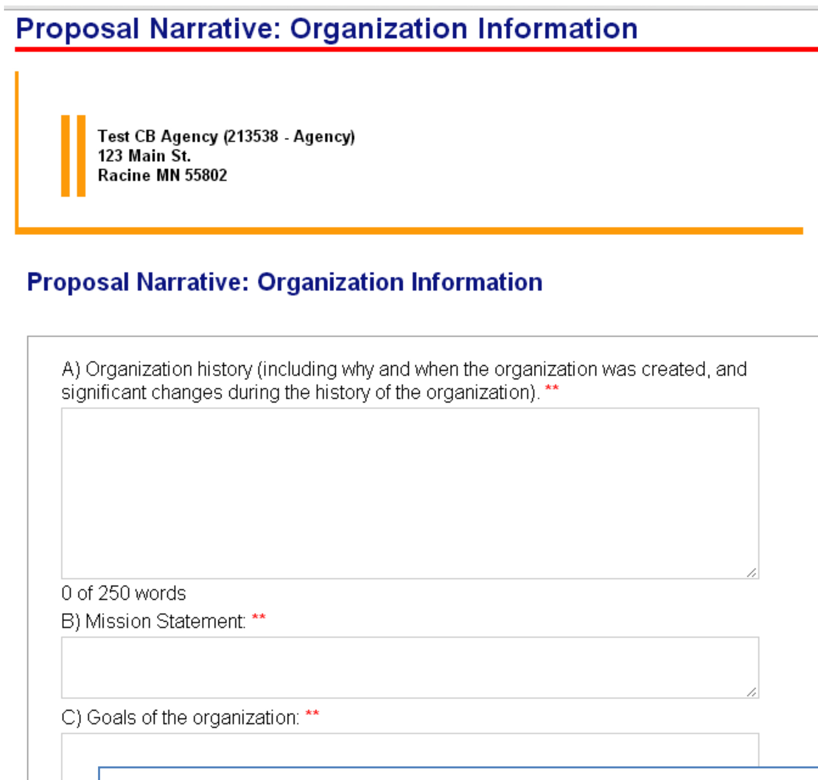
Cancel

There are two sections where you can upload documents – one for agency-related documents, and one for program-related documents. Please refer to the document submission checklist listed on the summary page and as the final element of your program section to complete to ensure you have uploaded the correct documents.

To upload a document, Press the **Add** button on the summary page, which will take you to an upload page where you can upload the document and give it a description.

Please do not click **Submit** on the main summary page until **ALL** documents in that section have been uploaded.

Proposal Narrative: Organization Information



Proposal Narrative: Organization Information

Test CB Agency (213538 - Agency)
123 Main St.
Racine MN 55802

Proposal Narrative: Organization Information

A) Organization history (including why and when the organization was created, and significant changes during the history of the organization). **

0 of 250 words

B) Mission Statement: **

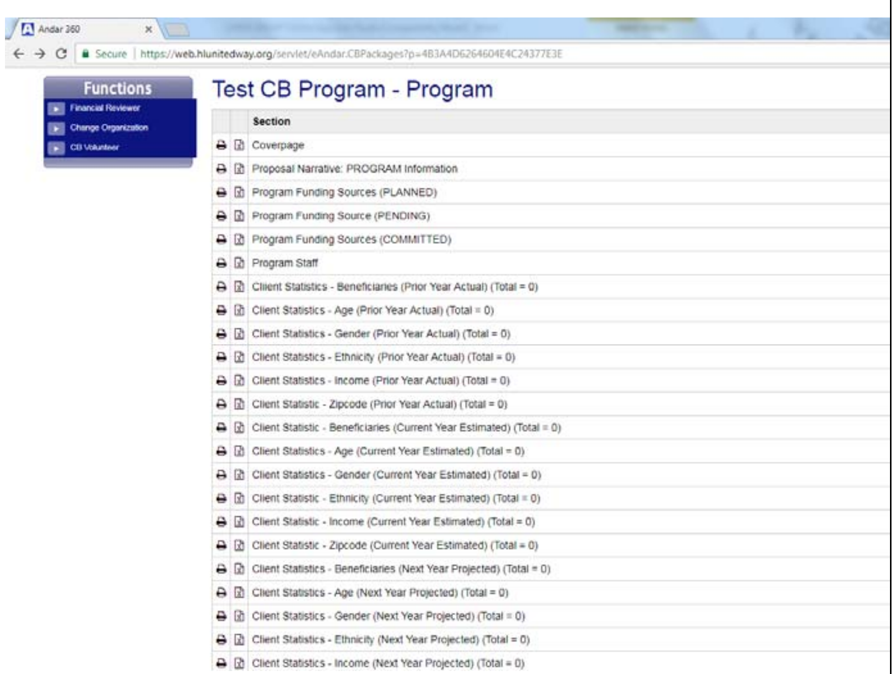
C) Goals of the organization: **

This section requests information about the applicant organization. This information is included with each program application, so ensure that this information reflects **organizational** information rather than specific program information.

Please note that there are word limits for many of the questions.

The questions about number of board members, staff, etc., allow only numerical answers.

Full Application: Program Section



Andar 360

https://web.hlunitedway.org/servlet/eAndar.CBPackages?p=4B3A4D6264604E4C24377E3E

Functions
- Financial Reviewer
- Change Organization
- CB Volunteer

Test CB Program - Program

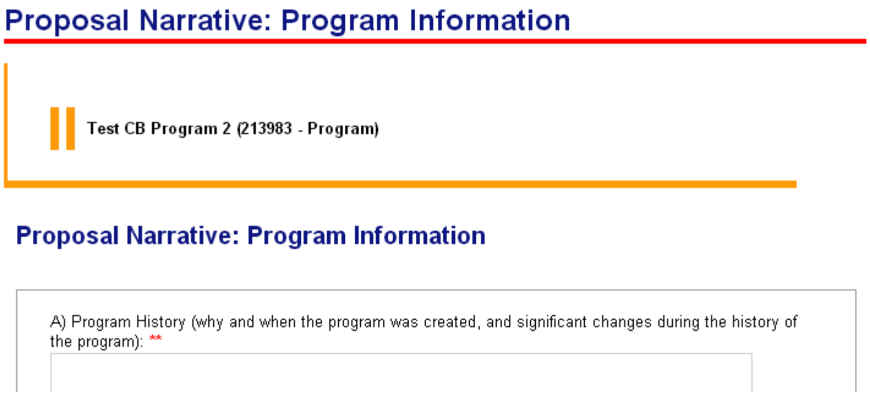
Section
Coverpage
Proposal Narrative: PROGRAM Information
Program Funding Sources (PLANNED)
Program Funding Source (PENDING)
Program Funding Sources (COMMITTED)
Program Staff
Client Statistics - Beneficiaries (Prior Year Actual) (Total = 0)
Client Statistics - Age (Prior Year Actual) (Total = 0)
Client Statistics - Gender (Prior Year Actual) (Total = 0)
Client Statistics - Ethnicity (Prior Year Actual) (Total = 0)
Client Statistics - Income (Prior Year Actual) (Total = 0)
Client Statistic - Zipcode (Prior Year Actual) (Total = 0)
Client Statistic - Beneficiaries (Current Year Estimated) (Total = 0)
Client Statistics - Age (Current Year Estimated) (Total = 0)
Client Statistics - Gender (Current Year Estimated) (Total = 0)
Client Statistic - Ethnicity (Current Year Estimated) (Total = 0)
Client Statistic - Income (Current Year Estimated) (Total = 0)
Client Statistic - Zipcode (Current Year Estimated) (Total = 0)
Client Statistics - Beneficiaries (Next Year Projected) (Total = 0)
Client Statistics - Age (Next Year Projected) (Total = 0)
Client Statistics - Gender (Next Year Projected) (Total = 0)
Client Statistics - Ethnicity (Next Year Projected) (Total = 0)
Client Statistics - Income (Next Year Projected) (Total = 0)

The next section of the online application is for program-related information.

If your agency has two or more programs, each has a separate section with corresponding forms.
The program title is listed at the top.

Please double-check to ensure sure you submit information for the appropriate program.

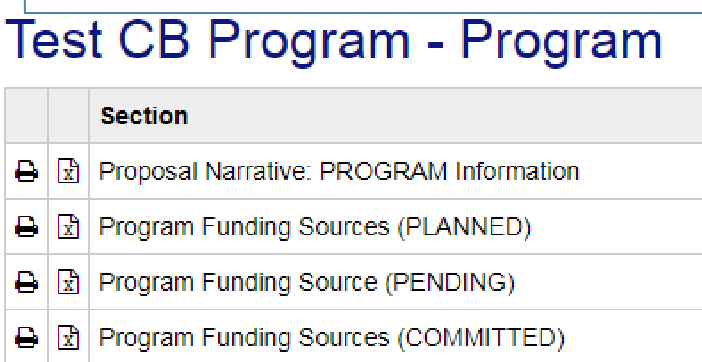
Proposal Narrative: Program Information



Please note that there are word limits for many of the questions.

For some questions, you may want to refer back to HLUW documents such as Community-Wide Goals and the RFP documents. You can access these by going to the funding page on United Way's website at: http://hlunitedway.org/our-partners/be-a-partner/nonprofits/funding-opportunties/ .

Program Funding Sources



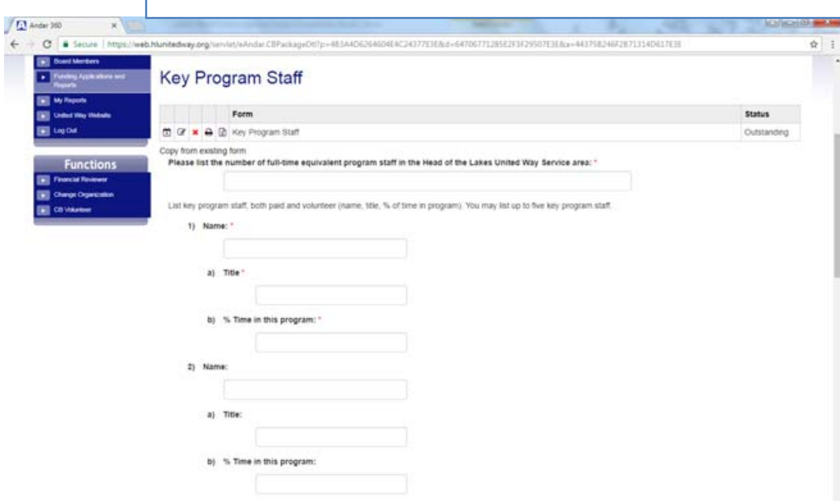
List the **program** funding sources for the timeframe of this request in the forms. Please note the combined total amounts should equate to your entire program budget.

Planned = Planning to submit a request for funding

Pending = Request for funding submitted but not awarded

Committed = Funding awarded

Program: Key Program Staff



You may provide information for up to 5 staff members.

Client Statistics

https://web.hlunitedway.org/servlet/eAndar.CBPackages?p=4B3A4D6264604E4C24377E3E

- Client Statistics - Beneficiaries (Prior Year Actual) (Total = 0)
- Client Statistics - Age (Prior Year Actual) (Total = 0)
- Client Statistics - Gender (Prior Year Actual) (Total = 0)
- Client Statistics - Ethnicity (Prior Year Actual) (Total = 0)
- Client Statistics - Income (Prior Year Actual) (Total = 0)
- Client Statistic - Zipcode (Prior Year Actual) (Total = 0)
- Client Statistic - Beneficiaries (Current Year Estimated) (Total = 0)
- Client Statistics - Age (Current Year Estimated) (Total = 0)
- Client Statistics - Gender (Current Year Estimated) (Total = 0)
- Client Statistic - Ethnicity (Current Year Estimated) (Total = 0)

There are a total of **18 Client Statistics** forms across 6 categories – this is because each type of demographic requires a different form on the application software. The first six forms should reflect actual numbers from the prior fiscal year. The next six forms are estimated numbers for the current fiscal year and the last 6 forms are your projected numbers.

Age

Remember: The total number at the bottom of this form MUST equal the totals given for the other forms from the same year. Do not submit any forms until you are sure that the totals are equal on each form. Submission will not be possible if the totals given are not equal.

Group	Number
Preschool (0-5)	0
Children (ages 6-11)	8
Youth (ages 12-14)	0
Youth (ages 15-18)	0
Adults (19-64)	0
Seniors (65+)	0
Unspecified	0
Total	**8**

Please note: All **Client Statistics** forms must equal the total number served by the program. Once you have completed the total beneficiaries form, every other form should equal the total beneficiaries form, or users will be asked to correct the client statistics form(s). Do not click **Submit** until all forms have been completed.

This rule does not apply to the income forms, since you can track either by household or individual.

Program Information for UW Marketing

Program Information for UW Marketing

Test CB Program (213546 - Program)

Client Stories

Please submit up to three examples of services provided by the program that a weekly contribution of $X dollars would make possible (i.e., $6 per week for one year shelters and feeds a family of four for four days). This information may be used for marketing during United Way's annual Campaign.

1. **

Helping kids read

UW will use this information about your program services in United Way's annual fundraising campaign.

Program Metrics & Evaluation

- Program Outcomes (Prior Year)
- Program Outcomes (Current Year Estimated)
- Program Outcomes (Next Year Proposed)
- Program Activities (Prior Year Actual)
- Program Activities (Current Year)
- Program Activities (Next Year Proposed)
- Program Outputs/Indicators (Prior Year Actual)
- Program Outputs/Indicators (Current Year Estimated)
- Program Outputs/Indicators (Next Year Proposed)

Please complete the 9 metric forms across the prior, current and prosposed years that will comprise your logic model and will be able to track the data from year to year to gauge progress and changes.

Please **ONLY** select **ONE** Community Outcome. Applicants can **ONLY** apply under **ONE** outcome per program application. After selecting the Program Outcome/Impact Area you will be asked to select the corresponding outcome indicator.

Completion Checklist

Large Grant Completion Checklist

Form
Large Grant Completion Checklist

Large Application for Funding Checklist: Please ensure your application includes ALL of only submit the agency financial review information once.

A. AGENCY & FINANCIAL Information Checklist:

1) Standards of Accountability

Yes No

2) Proposal Narrative (Section One ? Organization Information) *

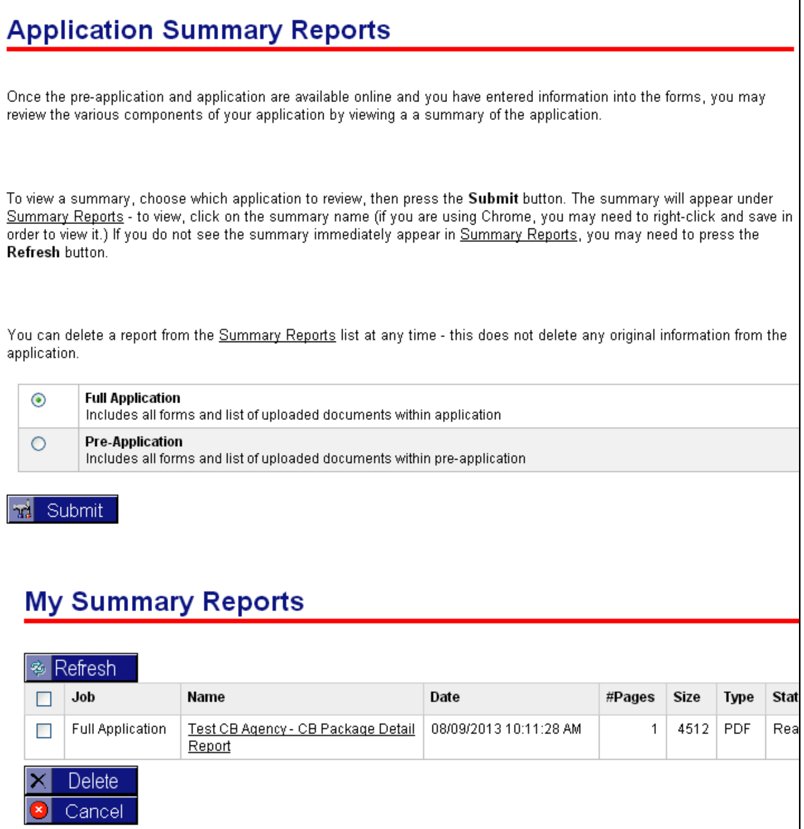
Yes No N/A

3) List of Board Members and Their Affiliations *

Yes No N/A

As the **FINAL** Step in the application process, please complete the checklist. This is an aid to ensure all elements were completed and all documents attached to the application.

Summary Reports



Application Summary Reports

Once the pre-application and application are available online and you have entered information into the forms, you may review the various components of your application by viewing a a summary of the application.

To view a summary, choose which application to review, then press the **Submit** button. The summary will appear under Summary Reports - to view, click on the summary name (if you are using Chrome, you may need to right-click and save in order to view it.) If you do not see the summary immediately appear in Summary Reports, you may need to press the **Refresh** button.

You can delete a report from the Summary Reports list at any time - this does not delete any original information from the application.

◉	**Full Application** Includes all forms and list of uploaded documents within application
○	**Pre-Application** Includes all forms and list of uploaded documents within pre-application

Submit

My Summary Reports

Refresh

☐	Job	Name	Date	#Pages	Size	Type	Stat
☐	Full Application	Test CB Agency - CB Package Detail Report	08/09/2013 10:11:28 AM	1	4512	PDF	Rea

Delete
Cancel

Summary Reports allows the user to create, print and/or save a complete PDF summary of all of the information submitted for the agency and program. The report will include all online forms, and will include a list of uploaded documents.

To print a summary, click on the application you wish to print and press **Submit**. Click **Refresh** to check status. When status is **Ready**, click on the underlined name and a PDF document will open. Save a copy of this summary to your desktop and/or print.

Summary reports are routinely deleted from the system after 30 days. Users can recreate the summary again if it was deleted from **My Summary Reports**. Deleting a summary document does not delete the original information in the application.

Questions or Problems?

Application content and methodology Questions Contact:

Michelle Hargrave
mhargrave@hlunitedway.org or 218.726.4771

Technical Questions on the online Platform Contact:

Elizabeth Mayne
emayne@Hlunitedway.org or 218.726.4779