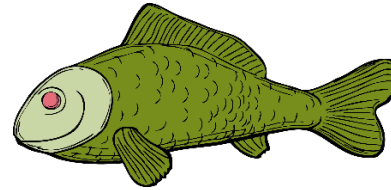
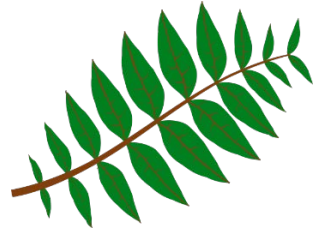


# Davis Conservation Foundation



## Online Application Guide

# Getting started *Login or create an account...*

*Please note: If you have applied to the Davis Conservation Foundation you should use the same login information for Davis Family Foundation.*

If you have an **existing account** from a previous grant round, enter an **email** and **password**.

If this is your **first time applying** to the Foundation **using the online application**, create an account here.

**\*\*Helpful Tip\*\*** Your organization should only have one account. We recommend an [info@...](#) email address.

The screenshot shows a login page with a header containing navigation links for 'Contact Us' and 'Exit'. The main content area is titled 'Please Sign In' and contains a list of instructions: 'If you have an applicant account, please log in using your E-mail Address and Password.', 'If you forgot your password, please click the "Forgot Password" link to send yourself a reset.', and 'First time applicants, please use the "New Online Applicant" link found below.' Below the text are two input fields labeled 'E-mail' and 'Password', a 'New Online Applicant?' button, a 'Forgot Password?' button, and a 'Login' button. Blue arrows from callout boxes point to the 'E-mail' field, the 'New Online Applicant?' button, the 'Login' button, and the 'Forgot Password?' button.

Click **Login** to start your new application.

What if you **forgot your password**? Click here to receive an email with a new password.

*The email address associated with your online account will receive notification when:*

- You create an account
- You save a draft of your application
- You submit your application
- You click "Forgot Password"
- Your grant completion report is due
- You save a draft of your grant report
- You submit your grant completion report

# Before You Begin

*This is the page you will see when you log in. Please review these instructions carefully.*

**1** Before You Begin    **2** Organization Information    **3** Contact Information    **4** Proposal Information    **5** Attachments    **6** Signature Page    **7** Review My Application

**Before You Begin**    Printer Friendly Version | E-mail Draft

*\* Required before final submission*

**Submission Deadlines:**

Applications must be received by April 10 and October 10. Trustees meet in May and November to consider requests. The Foundation normally notifies applicants of the Trustees' decision within one week of each regular meeting, and applicants receiving grants may expect to receive payment within a month of notification. Organizations that receive grants from the Foundation are required to submit completion reports.

If you have questions, please visit the [Foundation website FAQs](#) before contacting the Program Officer.

**Instructions:**

1. Navigate through the application with the tabs at the top of the screen or the Next button at the bottom. Do not use the browser's back or forward buttons.
2. When cutting and pasting from a word document, bold, bullets, italics, underlining, colored text etc will not carry over.
3. When you save your work, you will receive an email notification with information on how to return to the saved draft.
4. You will have the opportunity to review your completed application on the final page. Select the SUBMIT button to send your completed application to the foundation. You will receive an email confirmation with a copy of the application.

Please remember to **SAVE** your work using the Save & Finish Later button at the bottom of the page.

# Navigating the Application

*Navigation Tabs* guide you through the application. Select one to go to that page. The page you are on is **bold and highlighted**.

Click *Exit* to log out.



*Print or email* the application with these buttons.

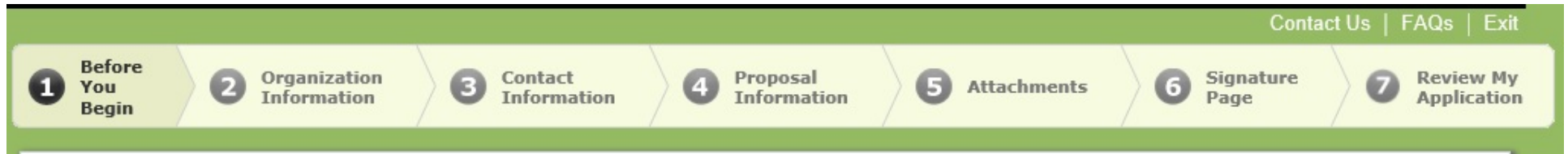
Save & Finish Later

Next

You can *save* your application at any time and return to it later, or proceed to the *next* page. This is at the bottom of every page except the last.

**\*\*\*Helpful Tip\*\*\*** Save your application often. This will not log you out, but will take you to your account homepage.

# Information Requested by Page



***Before You Begin*** - Please read carefully prior to starting your application

- Submission Deadlines
- Link to Foundation website FAQ
- Instructions

## ***Organization Information***

- Address, Phone
- Tax ID Number
- Website Address
- Organization Annual Budget
- Year Established
- Mission Statement
- Fiscal Sponsor Name

## ***Contact Information***

- Organization Primary Contact
- Proposal Primary Contact

## ***Proposal Information***

- Grant Request Amount
- Total Project Budget
- Estimated Start and End Dates
- Title or Name of Project (20 word limit)
- Brief Proposed Use of Funds – For example, “Funding to replace windows, to purchase equipment, for programming to...” (50 word limit)

- What is the Purpose of Your Project? (500 word limit)
- List 1-3 Expected Results of Your Project (150 word limit)
- How Will Your Results be Measured? (150 word limit)
- Geographic Area Served (50 word limit)
- Number of People Served

### *Attachments*

- Current IRS determination letter clarifying applicant's 501(c)(3) and 509(a) status.
- Current list of Directors/Trustees and Officers of applicant. Please include name, town of residence, and affiliation.
- Project budget: financial income and expense details of the project. Please include detail of additional funding for this project: list source, amount, and status (received, committed and/or requested to date). Link to information on Project Budgets and an example.
- Most recent audited financial statements if available (or a review or compilation). If your organization does not have an audit, submit the most recent Form 990. If your organization does not have an audit or 990, please explain in the "additional information" field below. Explain any significant losses in the field below
- Balance Sheet (assets and liabilities) for the most recently completed fiscal year. Please explain any significant losses in the below field. Link to information on Balance Sheets and an example.
- Income Statement (profit and loss) for the most recently completed fiscal year. Please explain any significant losses in the below field. Link to information on Income Statements and an example.
- Operating budget for the current fiscal year. For land conservation projects, please provide a map of the project land and adjacent protected land when applicable.
- Brief supplemental material regarding the project in addition to the required information. Please do not include general organization newsletters, annual reports, etc.

### *Signature Page*

- Acknowledgement of Information Submitted

### *Review My Application*

- If you make any changes, review before submitting
- You must click the "Submit" button to submit your application, located at the bottom of the page

# Uploading Attachments

*Step 1 -- Click “Choose File” to select your document*

\* 1. Current IRS determination letter clarifying applicant's 501(c)(3) and 509(a) status.

No file chosen

*Step 2 -- Click “Upload” to attach your document*

\* 1. Current IRS determination letter clarifying applicant's 501(c)(3) and 509(a) status.

No file chosen

*Step 3 – You will see the **document name**, **date uploaded**, and **file size** when it is attached*

\* 1. Current IRS determination letter clarifying applicant's 501(c)(3) and 509(a) status.

File Name	Uploaded	Size
<a href="#">Sample IRS Determination Letter.docx</a>	7/19/2017 3:07 PM	12KB

# Your Account Homepage

When you select the “**Save and Finish Later**” button, you are taken to your account page. You will also get to this page when you log into your account once your application is in process, and when you login to submit your completion report, if awarded.

When you log in to your account you land on the “**Applications**” page.

If awarded a grant, grant reports are posted under the “**Requirements**” page. Click the button to navigate to that page.

The **drop down menu** allows you to select to view your In Progress or Submitted applications or Requirements.

The screenshot shows the 'Applications' page interface. At the top, there are two tabs: 'Applications' and 'Requirements'. Below the tabs, the page title is 'Applications'. A welcome message reads: 'Welcome to your Applicant Account page! This is where you will manage your work.' Below this, there are four numbered instructions: 1. Select **In-Progress** or **Submitted** from the drop down menu to view your applications. 2. If you select In Progress, you will be able to continue working on your saved application. 3. To delete an application you do not intend to submit, click the trash icon next in the Actions column. 4. You may e-mail drafts and transfer ownership of an application using the Action icons. On the right side, there is a 'Show' dropdown menu with 'In Progress Applications' selected, and 'Submitted Applications' as an option. Below the dropdown is a checkbox labeled 'Hide Viewer Only Applications'. At the bottom, there is a table header with columns: Application Name, Project Title, Requested, ID, Last Updated, My Role, and Action.

Applications Requirements

## Applications

Welcome to your Applicant Account page! This is where you will manage your work.

1. Select **In-Progress** or **Submitted** from the drop down menu to view your applications.
2. If you select In Progress, you will be able to continue working on your saved application.
3. To delete an application you do not intend to submit, click the trash icon next in the Actions column.
4. You may e-mail drafts and transfer ownership of an application using the Action icons.

Show **In Progress Applications**  
Submitted Applications  
 Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
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# Tips for the Online Application

- We encourage you to cut and paste your narrative responses from a word processing application to ensure work is not lost. The Online Application Preview document to the right under "Downloads" can be used for this purpose.
- Save your work frequently as you are filling out the application.
- Click the "Next" button at the bottom of each page to move through the application. You may also click on the page title tabs at the top of the application to toggle between pages. Do not use your browser's back and forward arrows.
- Click on the "Review My Application" tab at the top of any page to view the application in its entirety. The field will be populated with your completed answers. You will have a final chance to review and amend your work prior to submission.
- The Foundation does not have access to your draft applications.
- After each deadline, any un-submitted applications will be deleted.

# Troubleshooting

<b>Problem</b>	<b>Solution</b>
I am signed in to my account but I can't find where to start a new application.	Even if you have an existing account, all new applications <b>MUST</b> be started by clicking the "New Application" link found on the <i>Apply</i> page of the website.
Our <b>staff has changed</b> , and we lost our login information.	Contact staff to update your account to a new email address. Using "info@..." or a more generic account for your organization may help alleviate this problem in the future.
One of my documents <b>will not attach</b> .	Chances are your file is too large. Sometimes using a PDF can help. If it continues to fail to attach, please contact staff for assistance.

Contact: Katie Howard, Program Officer  
Lisa Smith, Grants Associate

[khoward@davisfoundations.org](mailto:khoward@davisfoundations.org) (207) 846-9132 x 13  
[lsmith@davisfoundations.org](mailto:lsmith@davisfoundations.org) (207) 846-9132 x 16