Portland Children's Levy – WebGrants Application Guide

How to Use this Guide

This guide is meant to help everyone submit their Portland Children's Levy application in WebGrants as smoothly as possible. If you are new to using a grant portal, you may want to review the guide step by step and follow along while you work in the WebGrants system. If you are very comfortable using grant portal software we recommend you skim this guide, carefully review areas with this exclamation point icon shown in the right-hand margin, and review the Troubleshooting section at the end of the guide.

Table of Contents

What is WebGrants? 2

Registration 2

Preparing to Apply 2

Select a Funding Opportunity 3

How to Start an Application 4

How to Navigate to your Application 7

How to Preview the Application Questions 8

How to Complete your Application 9

- Saving and Editing 9
- Required Questions 10
- Marking Steps as Complete 11
- Submitting Your Application 13

Application Form Details 14

- Step 1 – Eligibility 14
- Step 2 – Program Data 15
- Step 3 – Program Service Details 16
- Step 4 – Budget Request 17
- Step 5 – Narrative upload 19

Questions, ADA Accommodations & Troubleshooting..... 19

What is WebGrants?

WebGrants is the grants management system for the City of Portland. To apply for a Portland Children's Levy grant, you will need to register in WebGrants and submit your application through the system.

WebGrants will track your application and all related documents for your organization.

Registration

Multiple people can register under your organization and work on the same grant application in WebGrants. Important: New users, please register as a WebGrants user right away. For help registering, see our WebGrants registration guide here: https://portlandchildrenslevy.org/grants/2024-25-funding-round/grant-applications#webgrants-user-guides. If you have an existing WebGrants account, you will not need to register again. The deadline to register for this PCL grant opportunity is **October 21, 2024**.

If you need an Americans with Disabilities Act (ADA) accommodation or are having trouble with WebGrants, please reach out to info@portlandchildrenslevy.org with "WebGrants" in the subject line. PCL staff will be happy to help.

Preparing to Apply

We highly recommend you thoroughly review the full application for the program area you will apply in before beginning your application in WebGrants. The full application includes background information and instructions, application questions, glossary, budget guidance, and scoring criteria. You can find the program area applications here: https://portlandchildrenslevy.org/grants/2024-25-funding-round/grant-applications/

We also highly recommend that you plan to submit your application a day or two ahead of the submission deadline. This will allow PCL staff to respond to any

technical issues that may be preventing you from submitting your application in WebGrants.

How to Log In

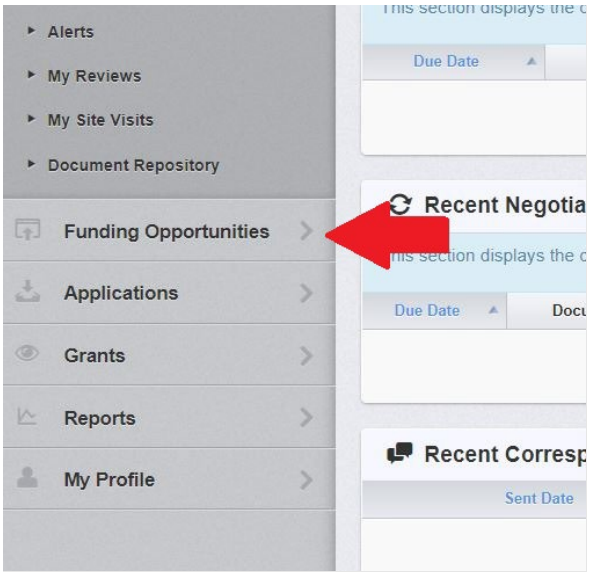
Once you are registered, go to https://cityofportlandgrants.net/ on a computer. WebGrants does not work on a phone. Enter your user ID and password, and click the green “sign in” button.

You get your User ID and Password via email when you register. If you forgot either of them, click on the blue links below the sign in button and follow the steps to recover them.

Select a Funding Opportunity

Once you are logged in, you will see all funding opportunities offered by the City of Portland. Make sure you select a PCL funding opportunity. These are the six program categories that the Levy funds – After School, Child Abuse Prevention and Intervention, Early Childhood, Foster Care, Hunger Relief, and Mentoring.

On the left-hand bar, click on the Funding Opportunities section.



Then click on the Funding Opportunity you want to apply for. Your application will "live" under this funding opportunity.

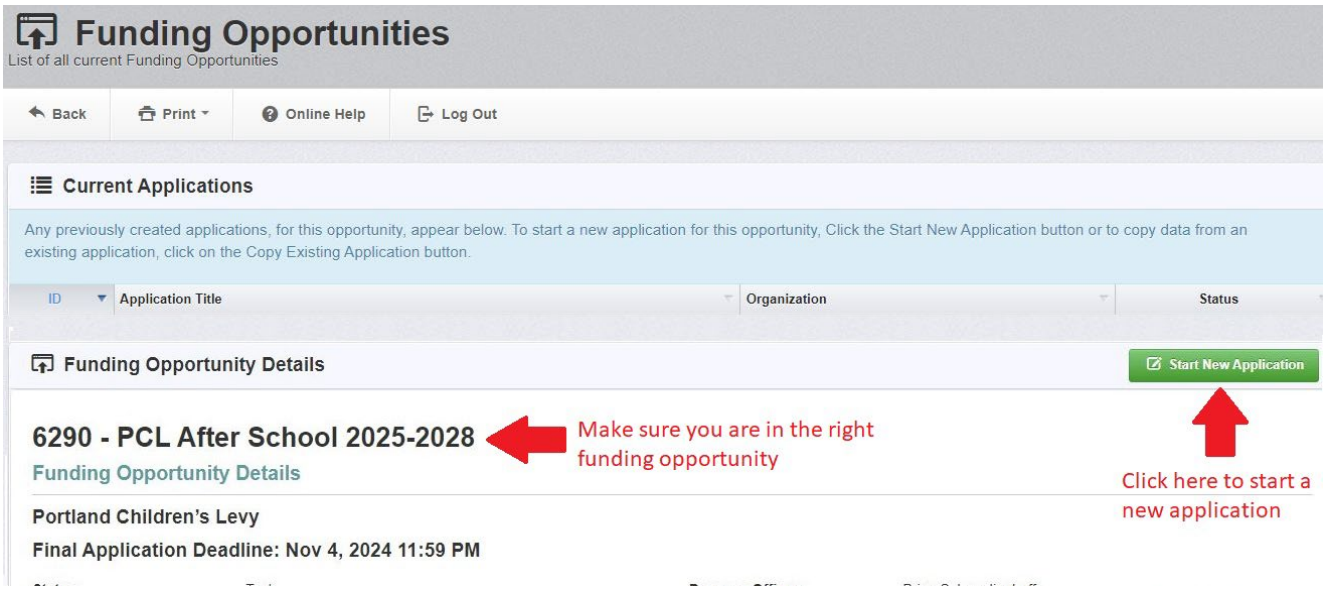
Agency	Program Area	Title
Bureau of Planning & Sustainability	Portland Clean Energy Fund	[TEST] RFP 3 Community Responsive Grants - Implementation
Portland Children's Levy	Portland Children's Levy	PCL Mentoring 2025-2028
Portland Children's Levy	Portland Children's Levy	PCL Foster Care 2025-2028
Portland Children's Levy	Portland Children's Levy	PCL Child Abuse Prevention and Intervention 2025-2028
Portland Children's Levy	Portland Children's Levy	PCL After School 2025-2028
Portland Children's Levy	Portland Children's Levy	PCL Early Childhood 2025-2028
Portland Children's Levy	Portland Children's Levy	PCL Hunger Relief 2025-2028

7 entries

You may create multiple applications in each funding opportunity (e.g., you have two different mentoring programs you want to apply for). You may also have multiple applications under multiple funding opportunities (e.g., you are applying for an after school program, a hunger relief program, and a mentoring program). <u>If you have multiple applications, please take care to make sure you are working in the correct Funding Opportunity and editing the correct application.</u>

How to Start an Application

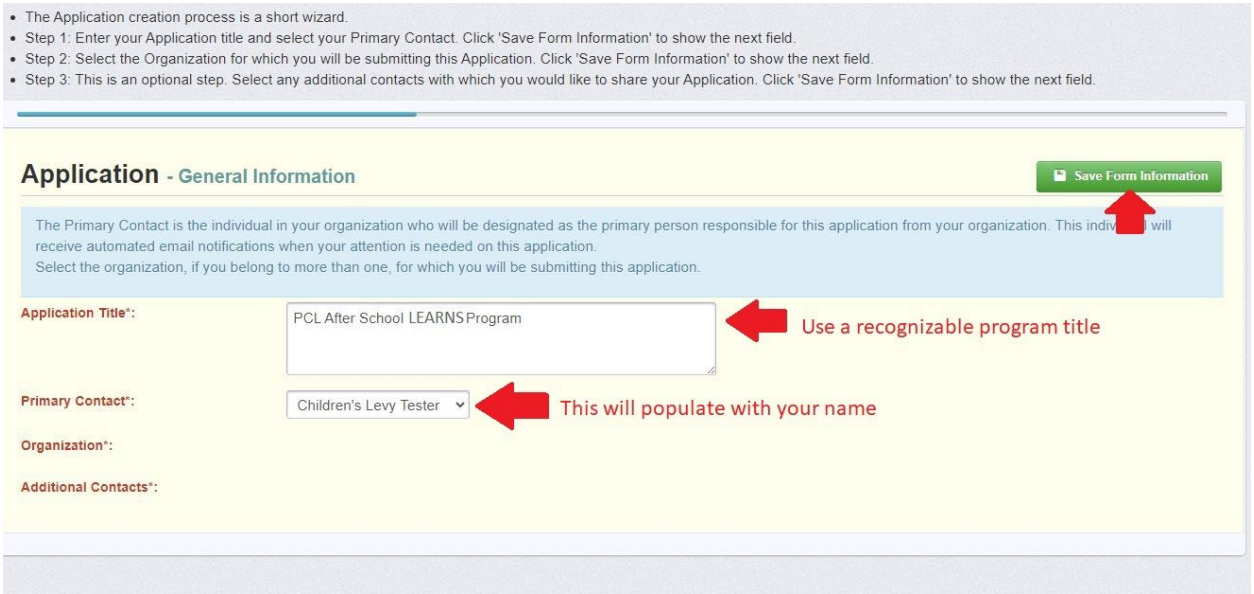
To start an application, click on the green "start new application" button on the right-hand side of the screen in the funding opportunity.



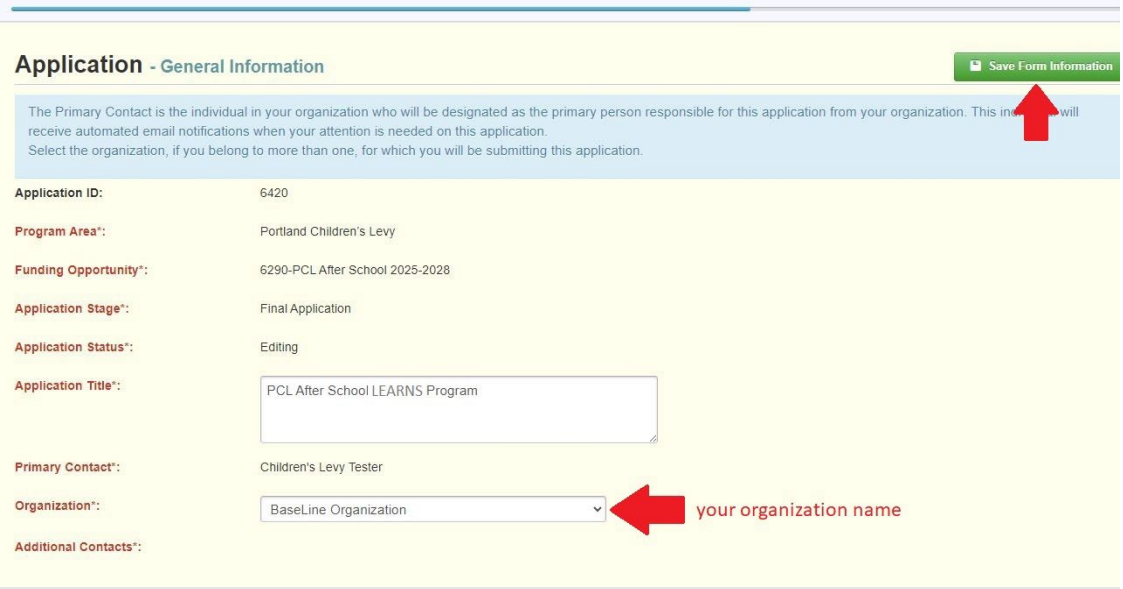
You will be taken to the "Application Creation Wizard". Under "Application Title", enter the title of your application, which should include your organization's name/acronym and a distinct program name. This is particularly important if you have multiple applications – make sure to use a title that will make it clear which application is which.

Under Primary Contact, your name should appear as the default in the drop-down menu. This is the person who will get the email notifications from the WebGrants system (if you need to change the primary contact later in the process, you can).

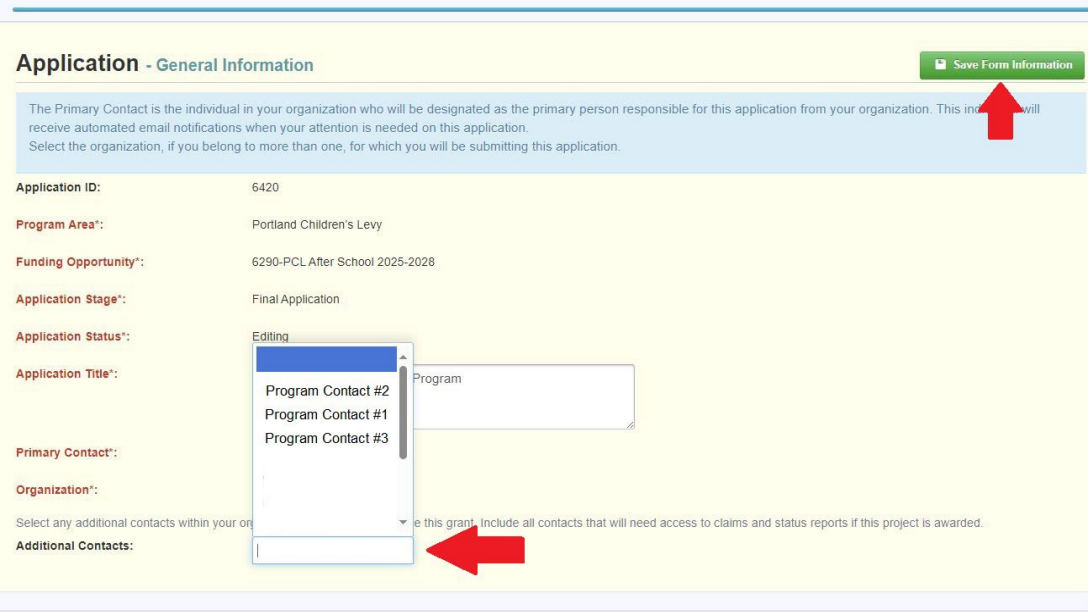
Click "Save Form Information" to save this info and bring up the next field to edit.



After you click “save form information”, the organization field will pop up. It will auto-populate your organization name in the drop-down menu. Click “save form information” again to bring up the last field to edit.

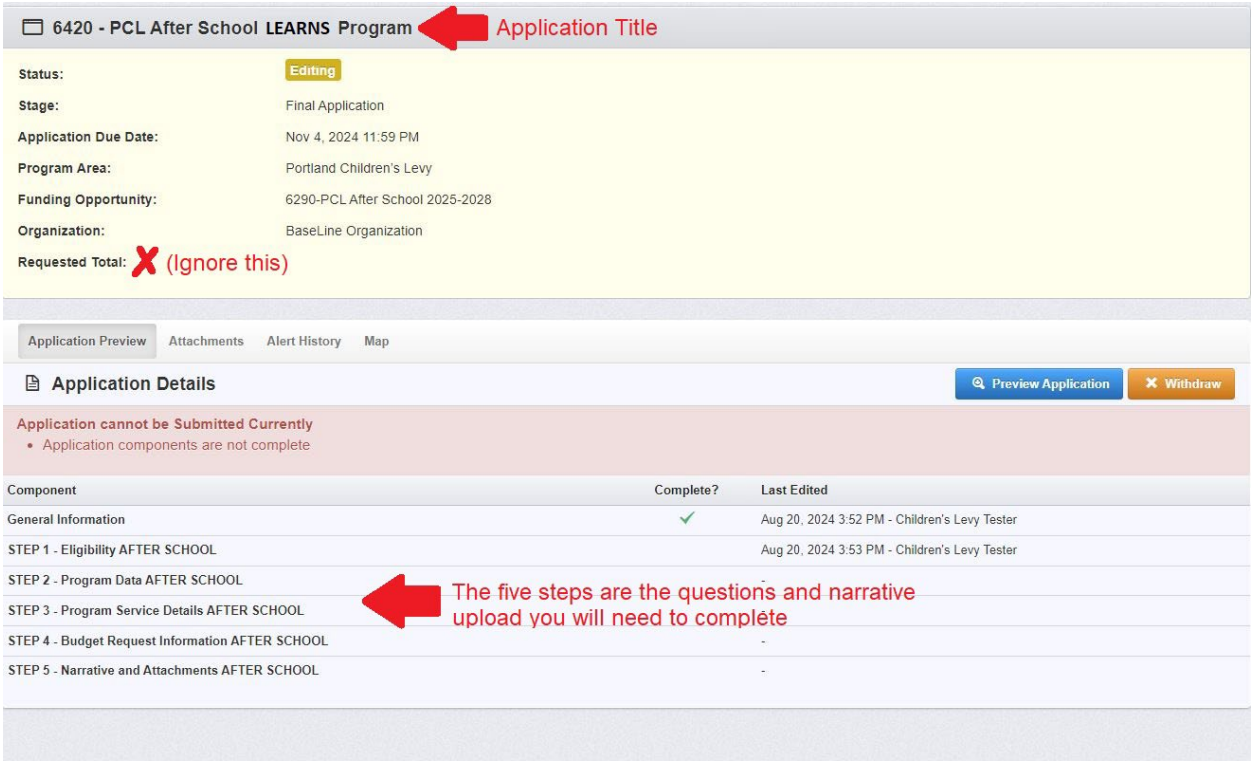


After you click save, the optional “additional contacts” field will pop up. The drop-down menu will auto-fill with every individual who is registered in WebGrants and associated with your organization. You will want to select everyone who will want to edit the application or upload documents. If someone isn’t registered yet, you can add their name later. Then click “save form information” to complete this section.



Once this section is done, you have created the application in the system to work in. You will automatically be taken to the application view. Here you have a summary view of your application – the title of your application will be at the top, and the components of the application you need to complete will be listed as steps 1-5 towards the bottom.

Note: ignore the "requested total" amount in the application summary, it will always say "$0.00" even after you fill out the budget form and submit your application. Don't worry about it, PCL staff will fix that later.

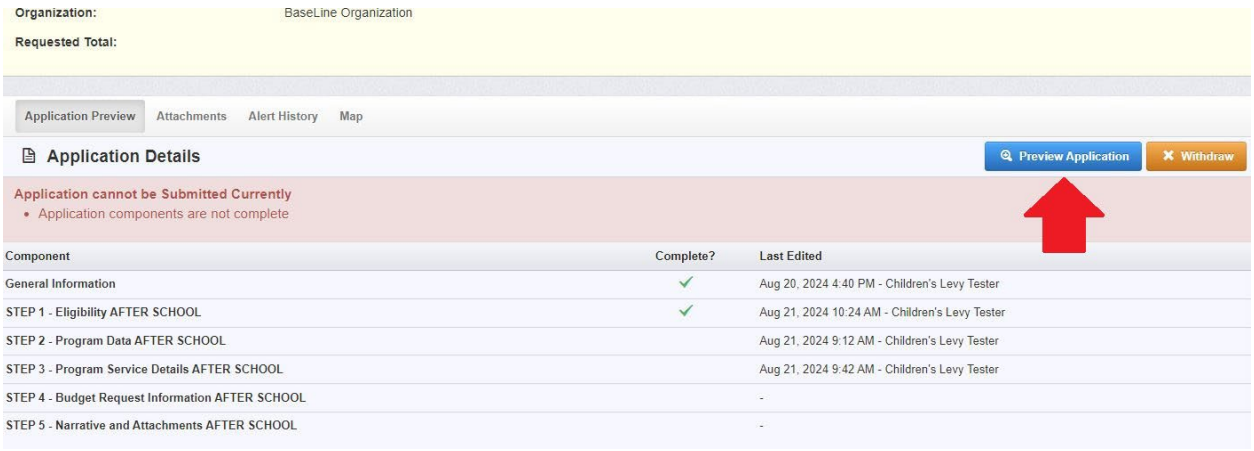


How to Navigate to Your Application

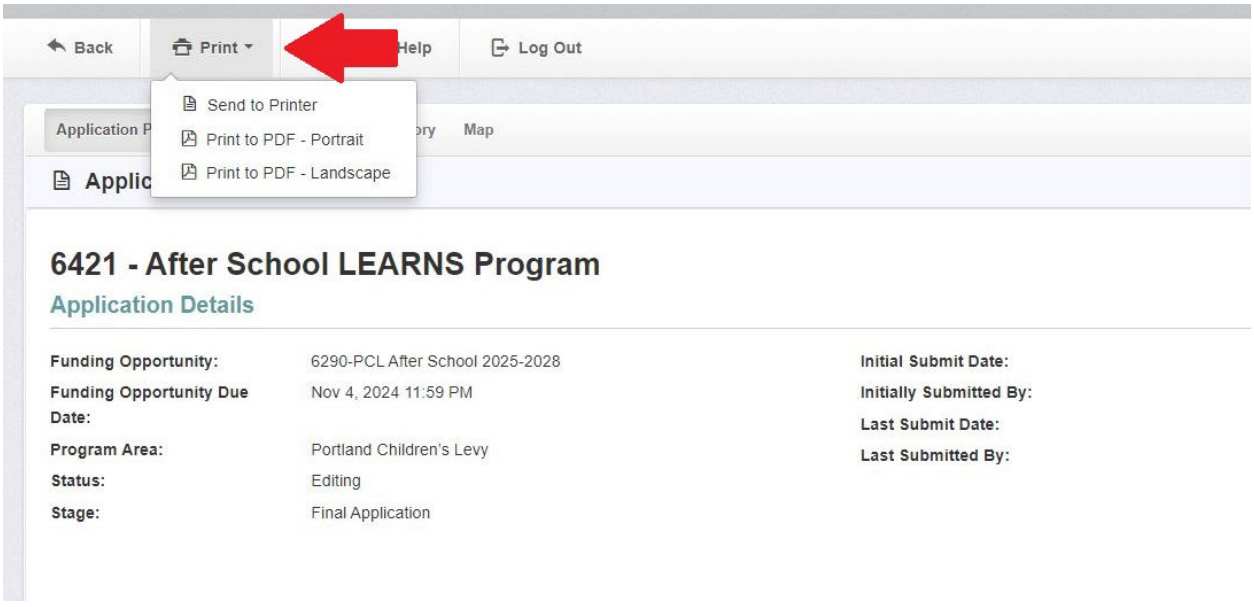
Once the application is created, there are several ways to open it in WebGrants if you save your work and log out. We recommend clicking on the Funding Opportunities tab on the left-hand navigation bar, clicking on the funding opportunity you are applying in, and then in the next menu clicking on the application title for the application you want to edit. If you have multiple applications in different funding opportunities (e.g., an application in after school and an application in mentoring), this will make it easier to make sure you are working in the right one.

How to Preview the Application Questions

When you are in the application view screen, you can click the blue “Preview Application” button to see all the application questions that are listed in WebGrants.



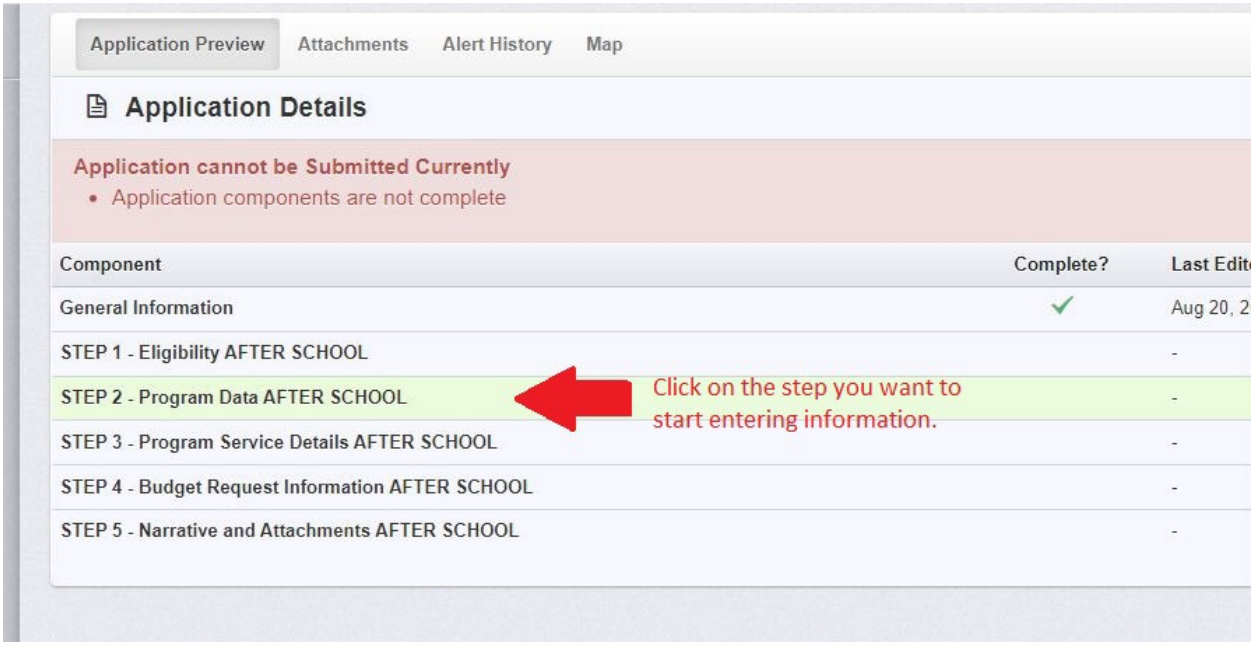
In the preview screen, you can print your application by clicking on the grey “print” tab up toward the top of the page, and it will give you drop-down options to send it to a printer or convert it to a .pdf. This is a good way to review the WebGrants questions or look over your application responses before you submit.



How to complete your application

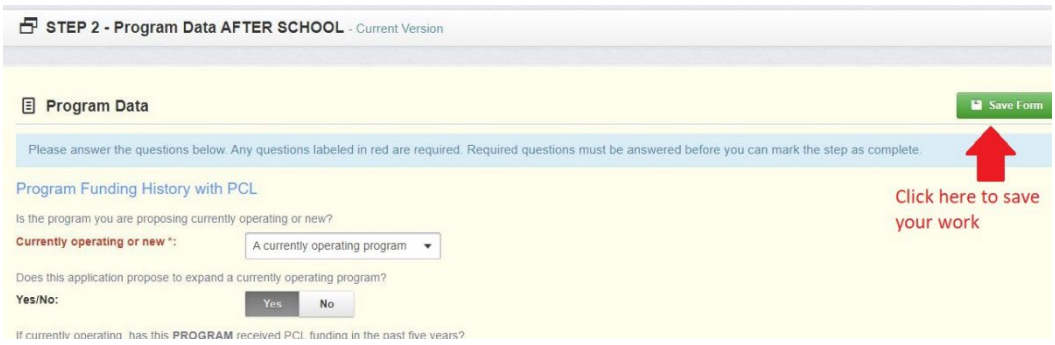
There are five sections to the application – steps 1-5. Steps 1-4 have questions about program eligibility, your service population, program model, and budget summary. Step 5 is where you upload your grant narrative and attachments. You can find the narrative template to fill out here: https://portlandchildrenslevy.org/grants/2024-25-funding-round/grant-applications#requirements-for-narrative-section

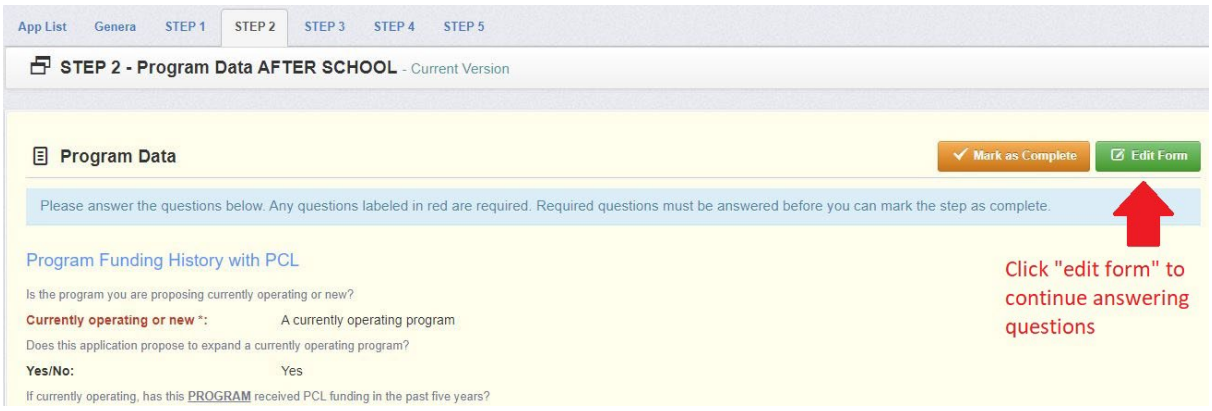
To start answering questions, click on the step you want to work on in the application view. You can work on them in any order and save your progress as you go.



Saving and Editing

When you click on a Step, you will be able to enter information. Save your work at any time by clicking the green “save form” button in the upper right. After you click “save form”, you will need to click the green “edit form” button to go back into the form to keep answering questions or change your answers.

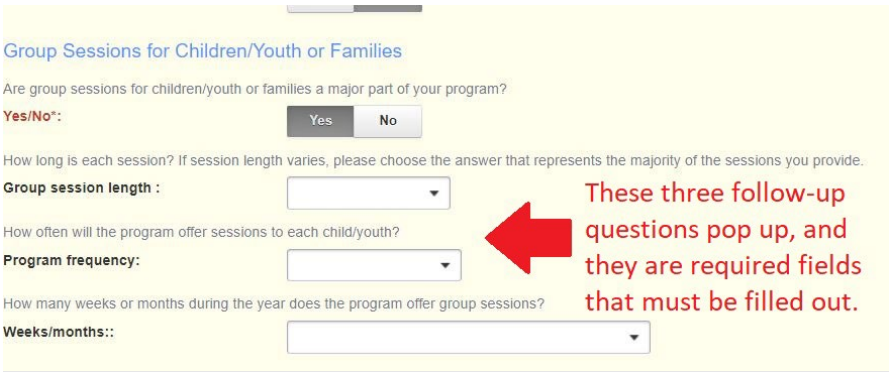




Required Questions

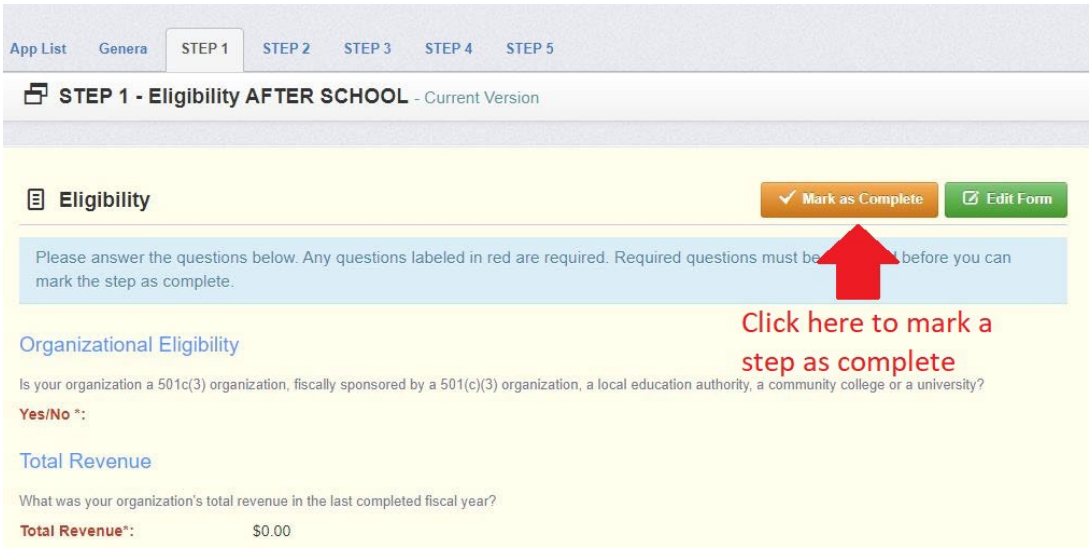
All fields with a red label are required and must be filled out before you can mark a step as complete.

Some follow-up questions “pop up” based on your responses to previous questions. For example, in step 3, if you click “yes” to any of the yes/no program model questions, several follow-up questions pop up beneath them. Even though these follow-up questions do not have a red label, they are also required fields that must be filled out to mark a step complete.

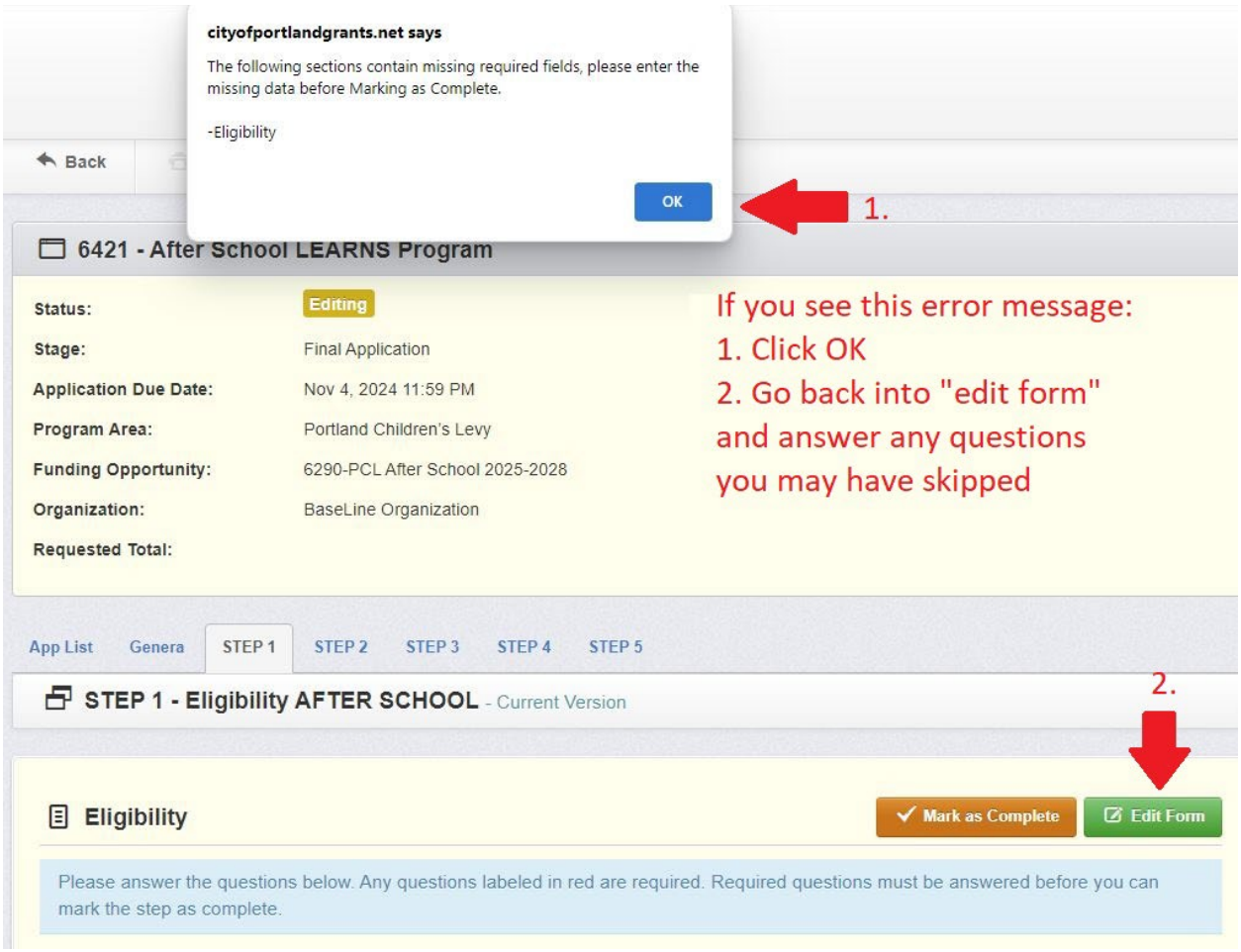


Marking Steps as Complete

You must mark each step complete before you can submit your application. If you have filled out all the required questions in a step, you click the save button and then click the orange “Mark as Complete” button.



If you click the “Mark as Complete” button but you have not filled out all the required questions, you will get a pop-up error message. The error message will show the name of the Step form, but not the name of the question that is missing. Review the Step form to complete any questions that may be blank.

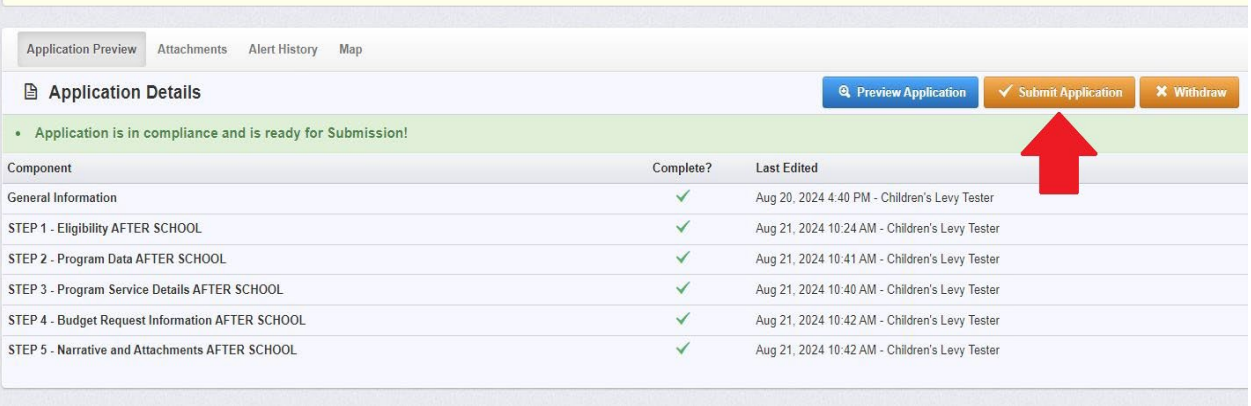


When you successfully mark a step as complete, you will be taken back to the application summary view, where you will see a green check mark that shows the step has been completed.

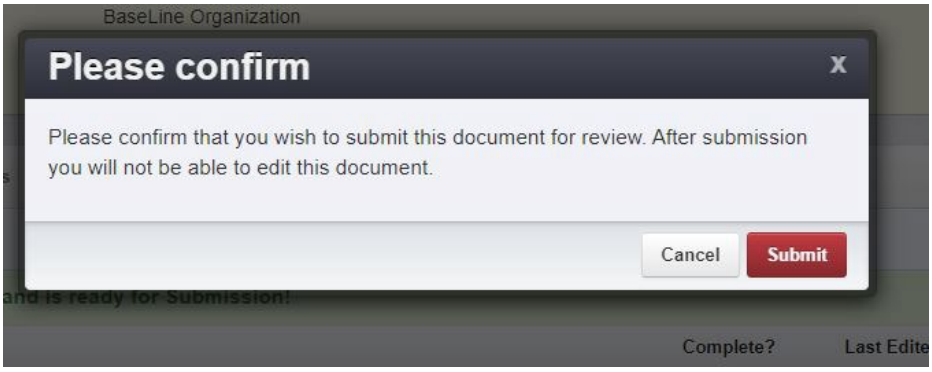
Note: after you mark a step as complete, you can still make changes in it. You click on the step and click “edit form” and make whatever changes you need, just like before. Once you have marked a step as complete, however, it stays marked as complete regardless of any changes you make – so you cannot ever mark it “incomplete” in the system.

Submitting Your Application

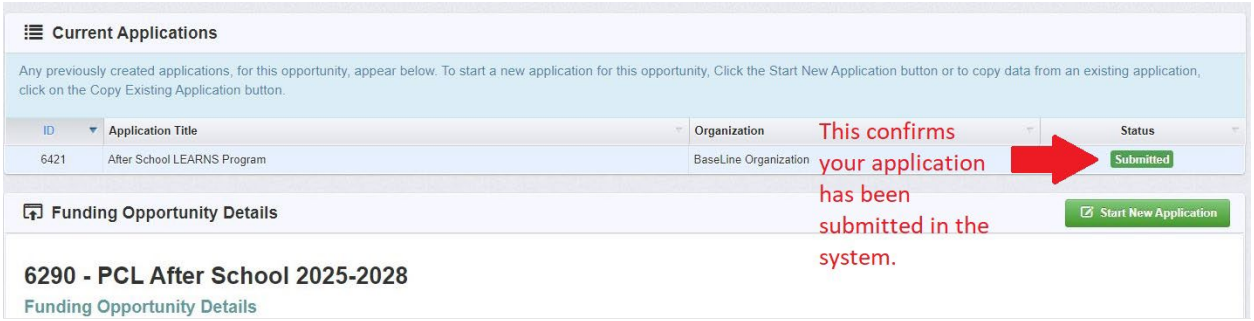
Once all five steps are filled out, documents are uploaded, and the steps are all marked as complete, the orange “submit application” button will appear in the application view screen. You **MUST** click on this button to submit your final application to PCL. Once you have submitted, you cannot edit your application.



You will get a pop-up message to confirm you wish to submit the grant. Click “Submit”.



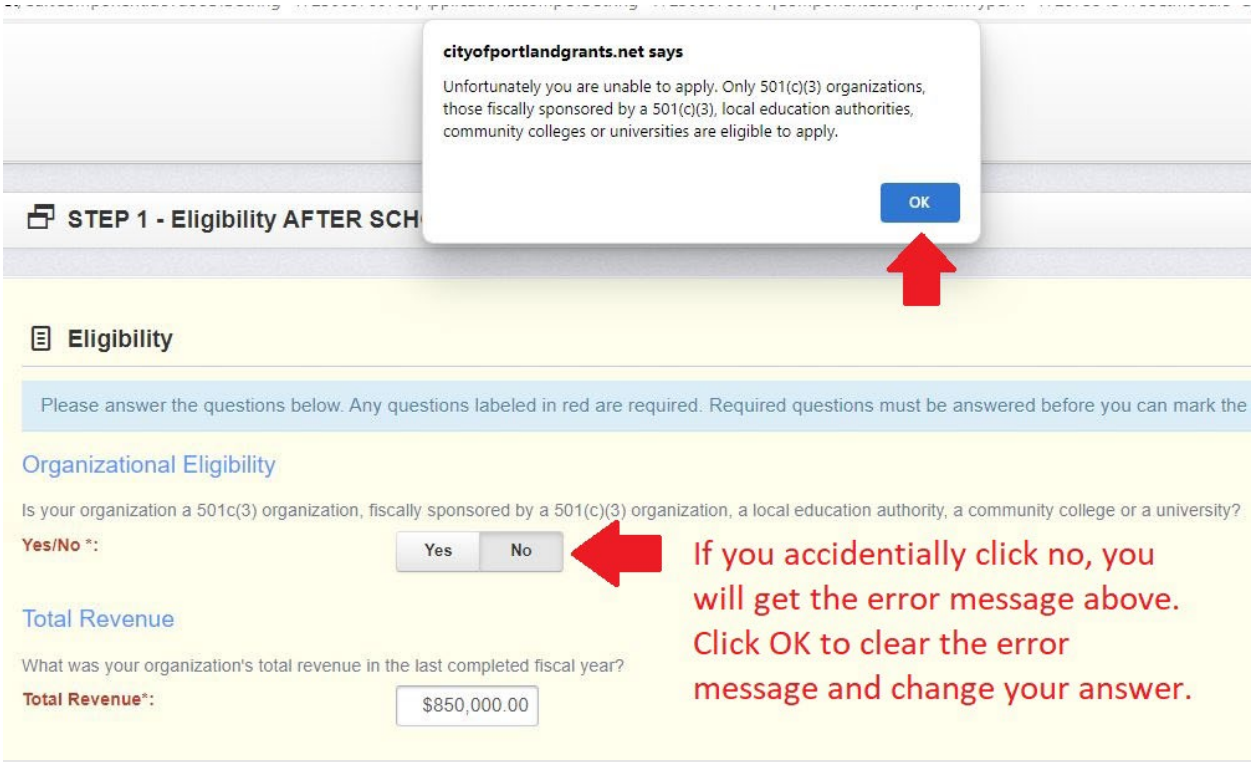
You can confirm your application is submitted by navigating back to the Funding Opportunity, where you will see your application with a green “submitted” status.



Application Form Details

Step 1 – Eligibility

Step 1 covers basic eligibility questions. If you make a mistake and receive a pop-up message saying your organization is not eligible, click OK on the pop-up message and correct your answer in the question below. If you answered the question correctly, but still see the pop-up message saying your organization is not eligible, your organization is not eligible for this large grant funding cycle. Contact PCL staff if you have additional questions.

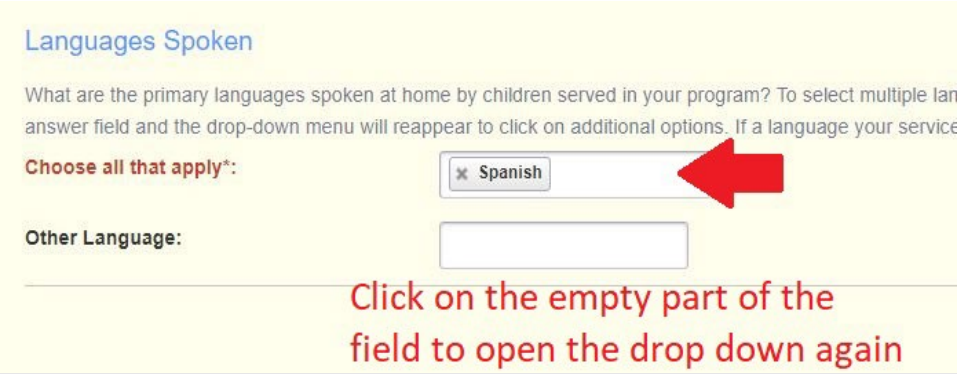


You must also choose “yes” for at least one of the numbered funding priorities listed at the end of Step 1 to be eligible for PCL funding.

Step 2 – Program Data

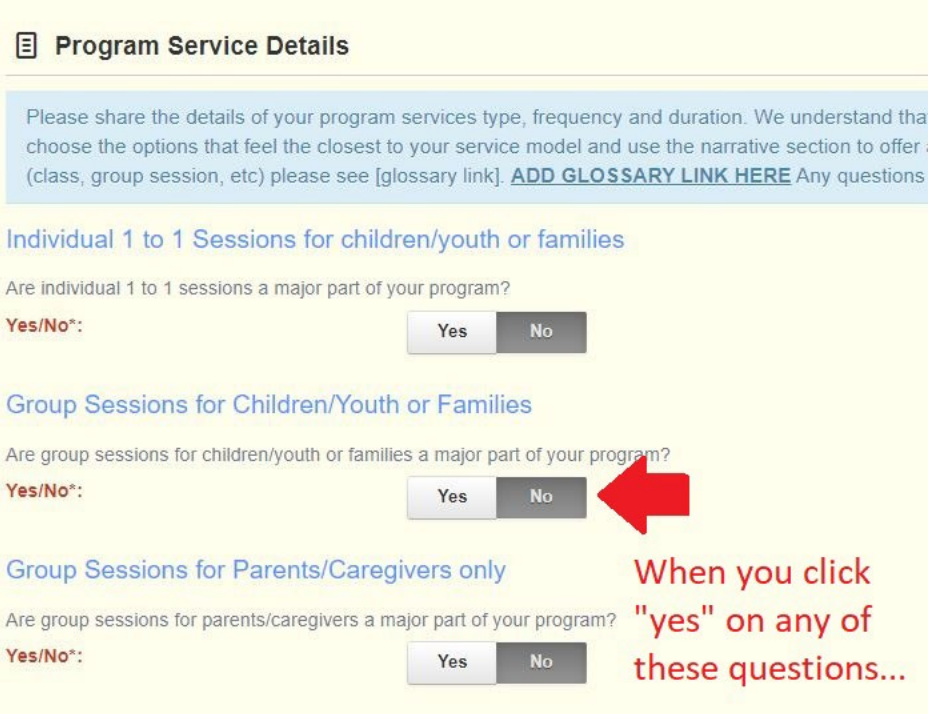
Depending on your answer to the first question, follow-up questions may pop up. If they do, these questions are required.

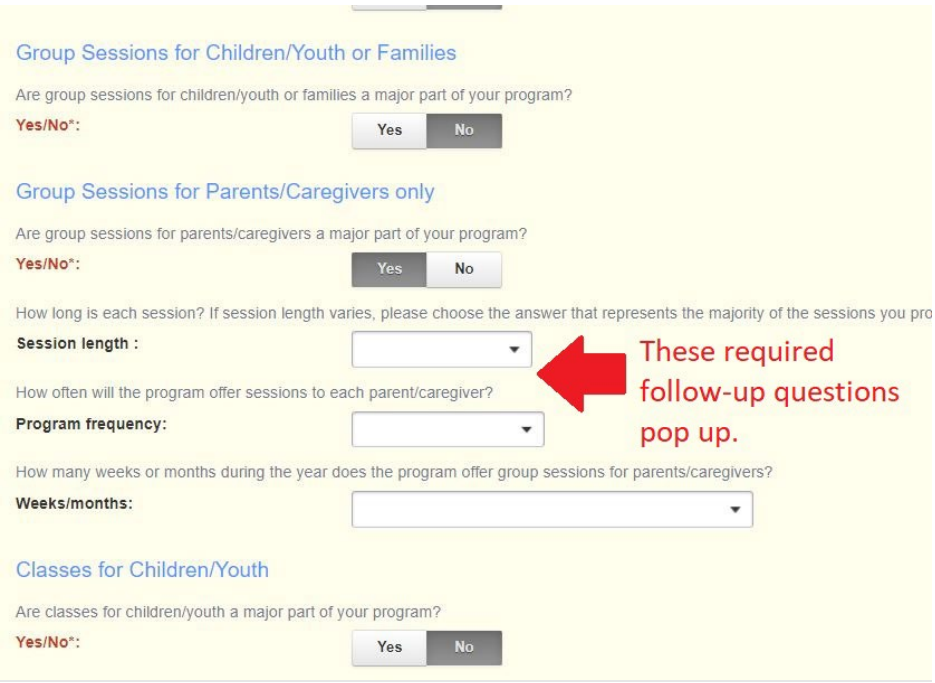
For the "Languages Spoken" question, if you are selecting multiple languages, click on one language, then click on the empty part of the drop-down field to open the drop down again and select more languages. You may select as many as apply to your program population.



Step 3 – Program Service Details

Step 3 has yes or no questions related to the structure of your program model. When you choose "yes" for one or more of these questions, three or four follow-up questions will pop up as a result. These follow-up questions require answers before you can mark the step as complete.



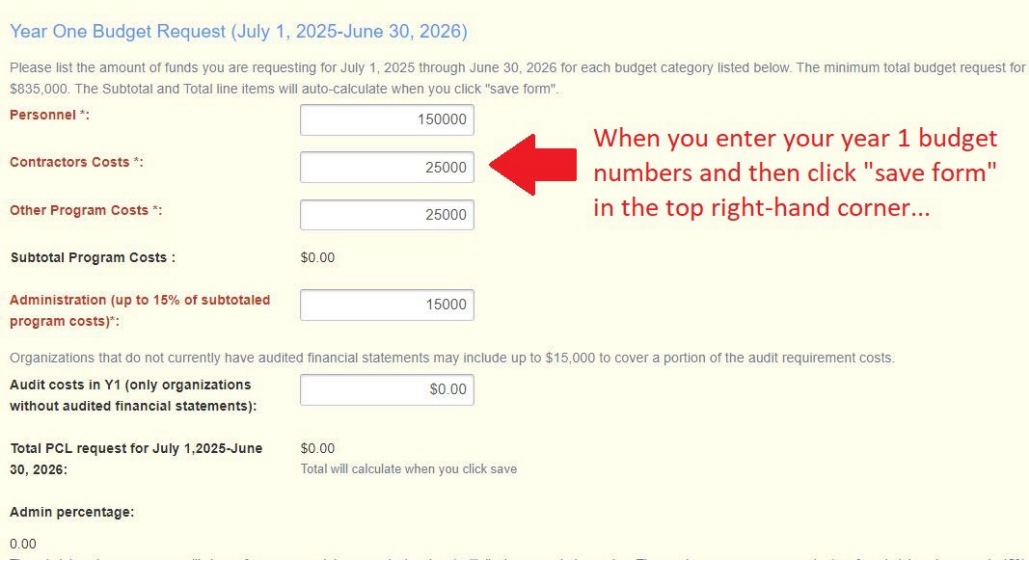


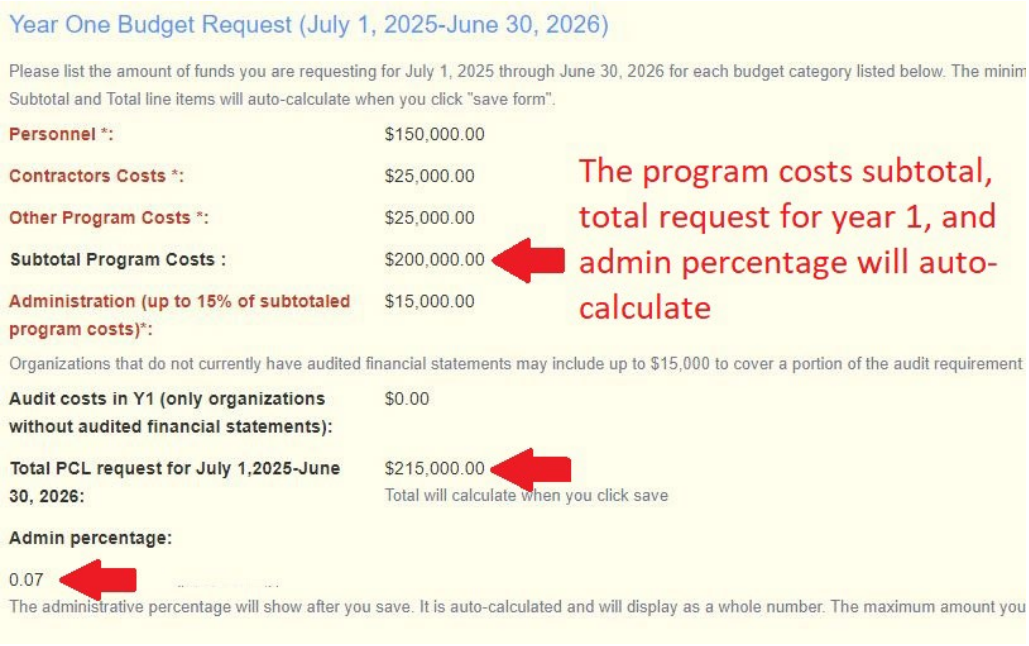
If you need to change your answer from a "yes" to a "no", the follow-up questions will automatically go away, and you don't have to worry about deleting the information that was in those fields.

Step 4 – Budget Request

The budget form will accept numbers either as integers (34152) or with currency formatting ($34,152.00)

After you enter your year 1 budget numbers, click "save form" and the form will auto-calculate the subtotal and total costs, as well as the admin percentage. You will not see the subtotal and admin percentage until you click "save form."





You will want to check your year one total to make sure you have entered the numbers correctly, and check your admin percentage to make sure it is 15% or lower (the admin percentage displays as a whole number, so it will need to show as 0.15 or lower)

At the bottom of the form, after you enter your year 2 and year 3 costs, make sure your budget fits within the minimum and maximum range for annual requests listed in the application.

Note: the budget form fills each field with a zero by default, and the form sees fields with zeros in them as already "filled out". So it is possible to save and mark this form as complete by accident, when an important field is not filled out. Please review this form carefully to make sure you have entered data in every field that is relevant to your program budget.

Step 5 – Narrative upload

In this step, upload the relevant files in the category where they belong. Make sure you are using the available template for your narrative document, and that it meets font size and page length requirements. If your budget information is broken up into two documents, you may upload two separate documents. You are also welcome to upload both requested budgets in one combined document.

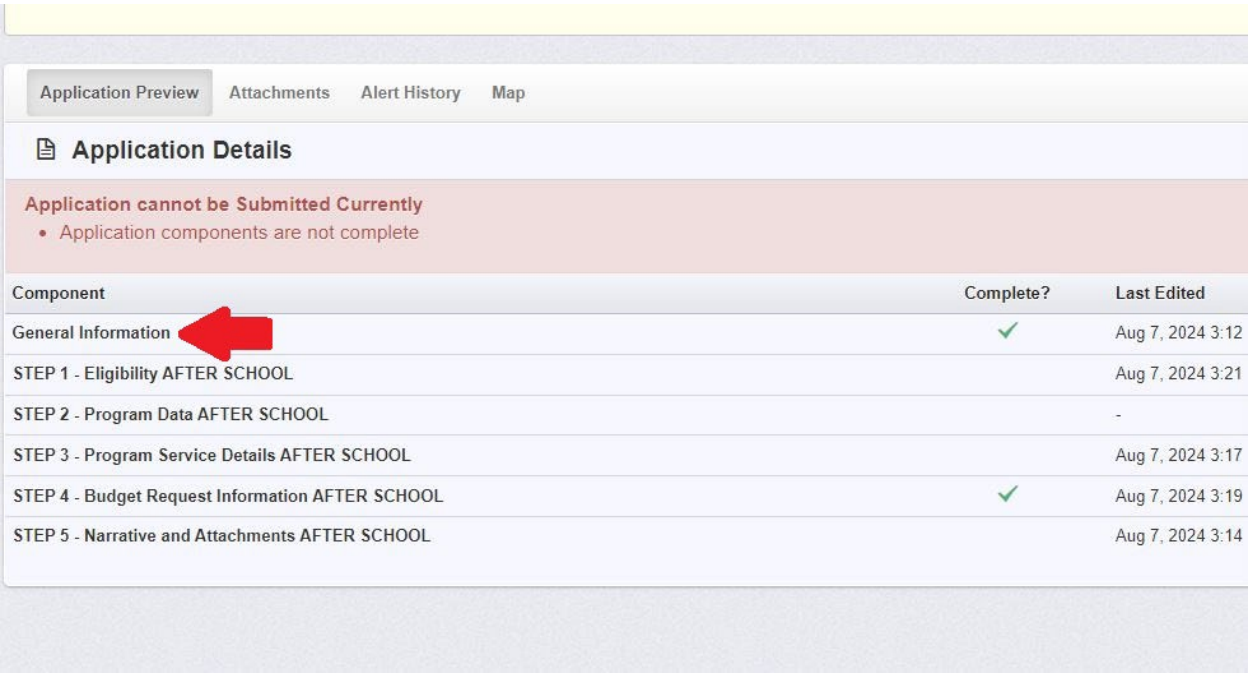
Please upload your documents as .pdf files if possible. The system can accept Word and Excel documents, but it can sometimes cause formatting issues with these documents when we go to review them if they are not in .pdf form.

Questions, ADA Accommodations & Troubleshooting

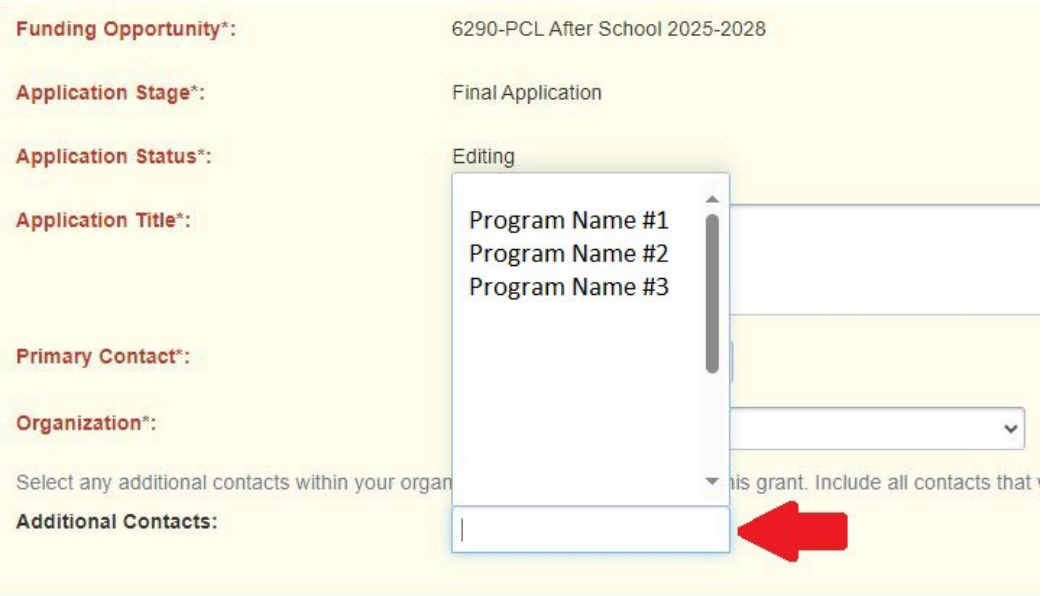
If you need an Americans with Disabilities Act (ADA) accommodation or are having trouble with WebGrants, please reach out to info@portlandchildrenslevy.org with "WebGrants" in the subject line. PCL staff will be happy to help.

- *I need to add another contact so they can have access to the WebGrants application. What do I do?*

1) Have your colleague register in WebGrants.
2) Once their registration is approved by PCL staff, they will get their user ID and password to log on via email.
3) Once they get their user ID and password, go into the application summary page and click on the "general information" section.



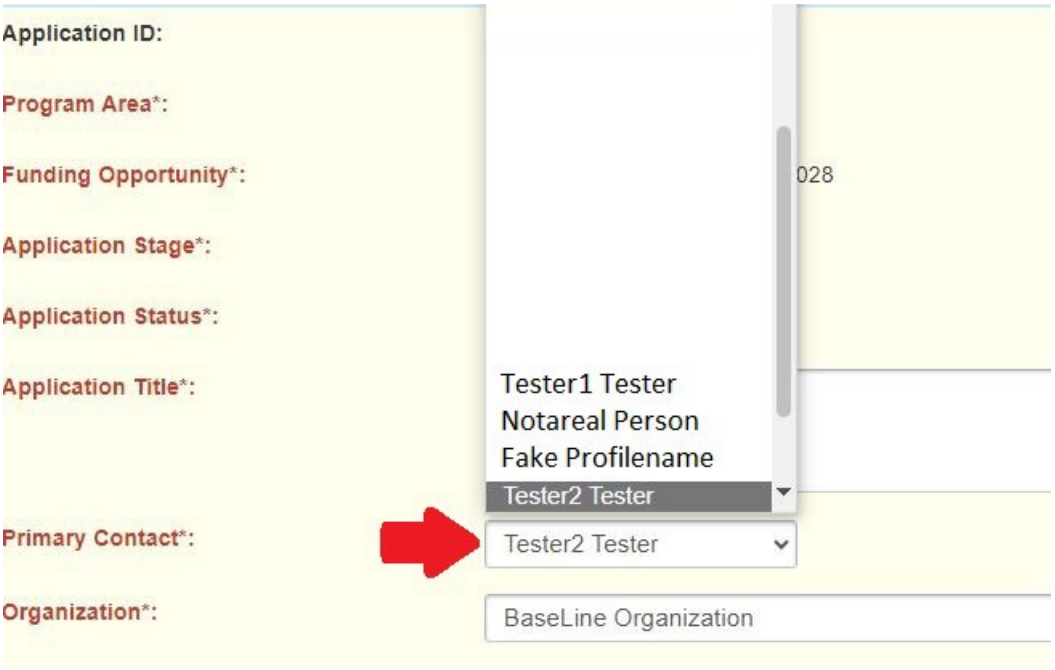
4) Click on the “Additional Contacts” field and add the person’s name from the drop-down menu



5) Click “save form information”. Your colleague should now be able to access the grant application.

- *I need to change the primary contact, so someone else gets the WebGrants system alerts. How do I do that?*

1) Follow the steps 1-4 from the question above to get your colleague registered in WebGrants and click on the “general information” section of the application.
2) Click on the “primary contact” drop-down menu, and choose the name of the person affiliated with your organization who needs to be the primary contact.



- *I marked one of my grant forms as “complete” but then I needed to change something. How do I mark it as “complete” again? I don’t see the orange button anymore!*

Once you mark a step as complete, it stays marked as “complete” in the system, even if you change or delete information. After you make changes to a completed step and click save, the orange “mark as complete” button will not be available to click. You can confirm this by going to the main application summary view, where it shows all the steps and shows the green checks for each section that is marked as complete.

- *I am not getting WebGrants-related emails confirming anything (registration or grant submission). What do I do?*

1) Make sure you check your spam folder for any WebGrants emails.
2) Add cityofportland@mail.webgrantscloud.com as a safe sender in your email filter settings.
3) If this does not work, contact PCL staff at info@portlandchildrenslevy.org for assistance with "WebGrants help" in the subject line.

- *I tried to mark a form as complete, but I got an error message. All the red fields are filled out. What do I do?*

Sometimes there are follow-up questions that pop up which are required. These questions do not have red labels, so they may not be as easy to see at first. Return to the step editing function and fill out any blank fields, and then mark the step as complete.

- *I was working in the budget form, and I entered some numbers and clicked save, and then I got a very long and confusing error message – what happened?*

If you enter two decimal points into one field (for example, $2500.00.0) the system experiences an error that takes you to an intimidating-looking error screen. Click the back button on your browser, check your numbers, and remove any extra decimal points.

- *I want to read through my entire application before I click submit. How do I do that?*

See "how to preview the application questions" on page 8 and follow those steps to "print" your application to a .pdf file. If you have uploaded your narrative documents in a .pdf format, they will show up in the "printed" application and you can review your entire grant application.