

PhilNet: Philanthropy Network for Broward Nonprofit Organization User Manual



PhilNet: Philanthropy Network for Broward User Manual

Introduction

Welcome to PhilNet: Philanthropy Network for Broward, a web-based technology that allows you as a nonprofit organization to manage the Community Foundation grants process online.

With the re-launch of PhilNet, **all** grant proposals will be submitted online. We want to make it easier for you to apply for and manage grants, freeing up your time to focus on your mission.

What are the big changes?

Area	Benefit to You!
General	<ul style="list-style-type: none">• A much simpler process
Profile Info	<ul style="list-style-type: none">• Edit your profile information directly on the application. Do not need to navigate to a separate profile section.
Applications	<ul style="list-style-type: none">• CEO/President/ED email address as login• Easier navigation• Open attachments from draft and submitted applications• Email a draft application to others in your organization right from PhilNet• Word limitations for answers, not character limitations
Reports	All grant reports can now be submitted via email in a Word document

How Does PhilNet: Philanthropy Network for Broward work?

Once a proposal is submitted through PhilNet, it is thoroughly reviewed by Community Foundation staff who determines if the proposal represents an innovative project that would address an area of considerable need and have significant positive impact in the community. If so, the proposal will be posted on PhilNet and is then available for staff to easily find and recommend to our Fundholders and our philanthropic partners. PhilNet is also a unique services for our donor advised Fundholders (those Fundholders who make grant recommendations directly from their charitable Funds). They have access to PhilNet and are able to search for projects that meet their interests.

An account is required for all nonprofits to use PhilNet. Once registered, you will be able to:

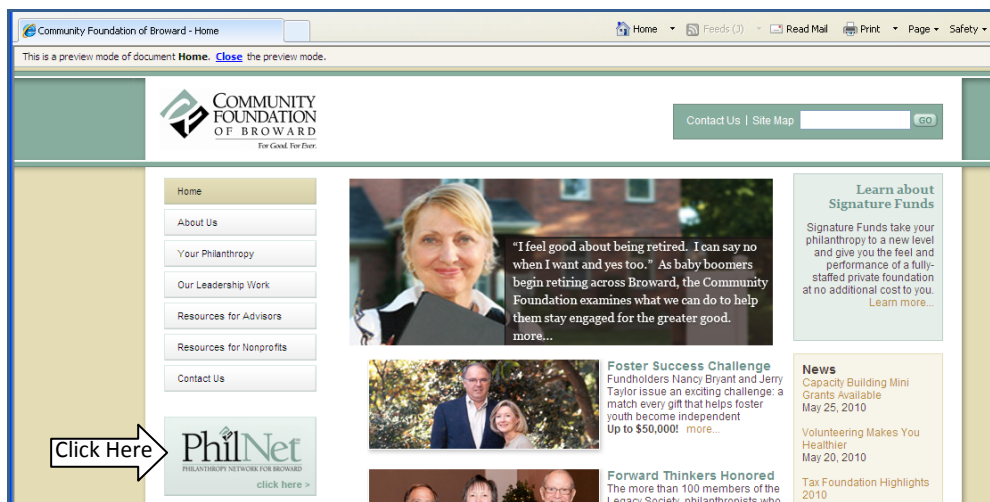
- submit proposals for grants
- update organizational information
- track draft and submitted proposals

Please review the following material to help you better understand the process and get you started. If you have any questions, please call Nancy Rogan, manager of grants and initiatives, 954-761-9503.

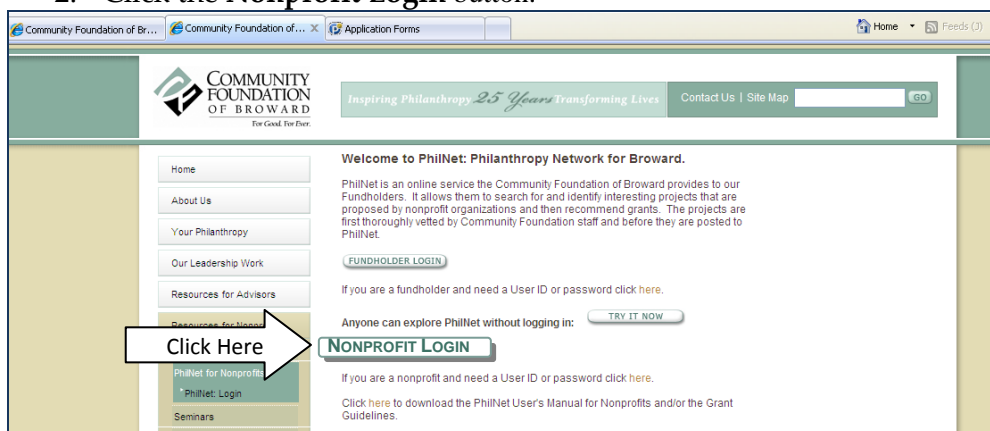
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Get Started in New PhilNet

1. From Community Foundation of Broward home page, click the PhilNet link



2. Click the **Nonprofit Login** button.



Phil Net Account Registration/Login page

From this page, you can:

- Login in to an existing account
- Create a new account

The screenshot shows the PhilNet login page. At the top left is the PhilNet logo with the tagline 'PHILANTHROPY NETWORK FOR BROWARD'. Below the logo are links for 'Account Login', 'Contact Us', and 'Click here for PhilNet Resources and Forms'. A callout box points to the 'Click here for PhilNet Resources and Forms' link, stating: 'Access grant information before you login by clicking on the [PhilNet Resources and Forms](#) link at the top of the'. Below the navigation is a 'Please Sign In' section. A red-bordered box on the left contains a tip: '**PhilNet User Tip:** Even though your organization may have registered for the old version of PhilNet, you will need to re-register to create an account in the New PhilNet.' The main content area is titled 'Welcome to PhilNet for Grantseekers' and includes a welcome message, a note about online submissions, and a list of capabilities: 'Track submitted proposals', 'Submit multiple proposals', and 'Access RFP information and applications'. It also states that new users must register. Below this are radio buttons for 'I am a new online applicant' and 'I am a returning online applicant', a password field, and a 'Continue' button. A 'Forgot your password? Click here' link is at the bottom. A callout box points to this link, stating: 'Click here if you forgot your password. You must create an account in New PhilNet to request a password. Passwords will be mailed to the CEO/ED/President's email address.'

Create an Account

Each organization should have **one** account with only **one** user ID (CEO/ED/President's email address) and **one** password.

The screenshot shows the 'Account Creation' page. At the top left are links for 'Contact Us' and 'Click here for PhilNet Resources and Forms'. The main heading is 'Create an Account'. Below the heading is an explanatory paragraph: 'An account allows you to access your saved and submitted applications at anytime. It also allows us to send you a submission confirmation e-mail and notify you if additional information is necessary to process your application.' Below this is a form with the following fields: 'E-mail Address:' with the value 'Your CEO/ED/President@nonprofit.org' (highlighted in a red box), 'Confirm E-mail:', 'Password (minimum of 5 characters):', and 'Confirm Password:'. A 'Create an Account' button is at the bottom. Below the button is a link: 'Click here to go back to the login page'.

Your Account

Once you create an account, or logon to an existing one, your PhilNet Account page will open.

The screenshot shows the 'My Account' page for PhilNet. At the top, there is a navigation bar with 'My Account' and a link for 'PhilNet Resources and Forms'. A callout box points to this link, stating: 'You can access grant guidelines, PhilNet manual, RFPs and forms by clicking the [PhilNet Resources and Forms](#) link at the top of the page.'

The main content area is titled 'Welcome to PhilNet for Grantseekers'. It includes a welcome message, a list of preferences for proposals, features of the system, and current RFPs available. A callout box points to the 'Community Foundation of Broward Grant Application' link, stating: 'Open new applications here!'.

Under the 'Open' section, there is a table of draft applications. A callout box points to this table, stating: 'Draft applications are filed here!'.

Under the 'Submitted' section, there is a table for submitted applications. A callout box points to this table, stating: 'Submitted applications are filed here!'.

The bottom of the page shows the Windows taskbar with the start button and several open applications, including Microsoft Office and Internet Explorer.

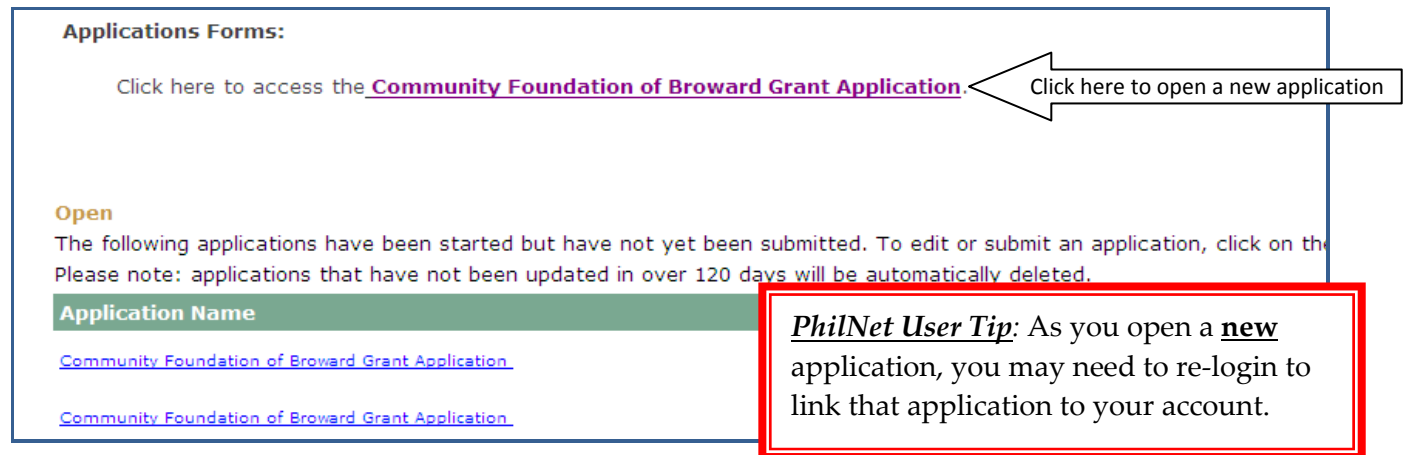
To Submit a Proposal

I. Application Worksheet

1. Download a copy of the worksheet from the [PhilNet Resources and Forms](#) link at the top of the page. Use the worksheet to spell check and check your word count before submitting the online proposal. Cut and paste your answers from the worksheet into the online form.

PhilNet User Tip: The online form has word limitations. It will not move to the next section in the application if the answers exceed the limits.

II. Open a New Application



Applications Forms:

Click here to access the [Community Foundation of Broward Grant Application](#). Click here to open a new application

Open

The following applications have been started but have not yet been submitted. To edit or submit an application, click on the link. Please note: applications that have not been updated in over 120 days will be automatically deleted.

Application Name
Community Foundation of Broward Grant Application
Community Foundation of Broward Grant Application

PhilNet User Tip: As you open a **new** application, you may need to re-login to link that application to your account.

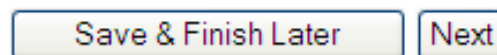
III. Your Profile Information:

Organization profile information is entered when you begin your first application. Each subsequent application will open with the information already entered. You can review it and update as necessary, **right from the form**.

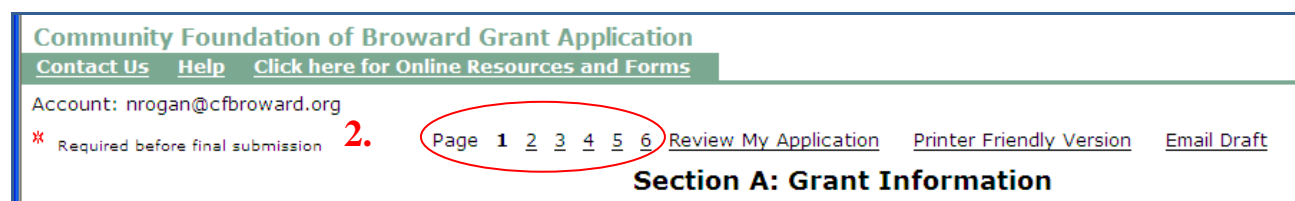
IV. Application Basics

Navigation

1. Use the buttons on the bottom of the screen to navigate through the application.
 - a. **Save and Finish Later** will close the application and take you to your Account page.
 - b. **Next** will move to the next page



2. Use the page numbers at the top of the page to jump from section to section. Just click on a number and the application will take you to that page. **So easy!**



Community Foundation of Broward Grant Application

[Contact Us](#) [Help](#) [Click here for Online Resources and Forms](#)

Account: nrogan@cfbroward.org

* Required before final submission **2.** Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [Review My Application](#) [Printer Friendly Version](#) [Email Draft](#)

Section A: Grant Information

View/Review

1. **Review My Application** allows you to review the application and make edits. This link will also highlight required fields that have not been completed (Does not allow user to add or delete attachments).
2. **Printer Friendly Version** will print out the full application with text.
3. **Email Draft** will email a proposal to another email address (this should not be used to submit proposals). *This is a great feature to use to have someone proof or approve the application.*

Community Foundation of Broward Grant Application

Contact Us Help Click here for Online Resources and Forms

Account: nrogan@cfbroward.org

* Required before final submission Page 1 2 3 4 5 6 **1.** Review My Application **2.** Printer Friendly Version **3.** Email Draft

Section A: Grant Information

V. Application Question Details

The section will highlight application changes and explain questions that are crucial in describing your project.

Project Summary

The information here is the first description of your project a reviewer will see. A reviewer could be Foundation Staff, other philanthropic partners or Community Foundation Fundholders. This summary statement should grab their attention and **provide a powerful snapshot** of what your project will accomplish.

* Project Summary

Please provide a compelling statement that tells what your project will do, who it will impact and how many, what is improved for target population, and what is the **measurable outcome** for the target population/Broward County. Please use the format outlined below.

To provide **what services** to **how many** and **what target audience** so to/that will **improve what situation/condition** and **achieve what outcomes**. *Limit 60 words.*

PhilNet User Tip: The **Project Summary** should give all reviewers, even those **not** familiar with your organization or the services you provide, a clear understanding of **what** your project will accomplish.

Outcomes

1. **Measurable Outcomes:** Articulate what measurable changes will occur in your target population as a direct result of your program.
2. **Outcome Strategy:** Describe the specific service/assistance/training you will provide/ implement, etc... to achieve the above outcome.
3. **Outcome Evaluation:** Identify how you will evaluate your project so you are able to determine how effective your project was.

Project Measurable Outcomes

What are the measurable outcomes this project will accomplish? For each outcome:

- Describe the strategy you will use to achieve the Outcome
- Describe how you will evaluate each Outcome.

Limit for each field below 60 words.

* Measurable Outcome One

* Strategy to Achieve Outcome One

* Outcome One Evaluation

Project Description

The information here should **paint a picture** of your project. The reader should be able to visualize what will take place so they fully understand the project's design and how it is implemented.

* Project Description

Provide a clear narrative describing how your project will be delivered (do not use bullets). Paint a picture as to how this project will achieve the outcomes listed previously by outlining:

What are the exact services provided, **how** they will be implemented, **when & where** they occur (days/time/location/duration), **who** will implement them, **how** target population will access your project. *Limit 400 words.*

PhilNet User Tip: The **Project Description** should give any reviewer, even someone who is **not** familiar with your organization or the services you provide, a clear understanding of **how** your project will accomplish the outcomes.

- Please do not use technical jargon.
- Spell out acronyms.

VI. Attachments

Please upload the following attachments. If documents are not electronic, they will need to be scanned to upload to the application. The different attachments are uploaded by clicking on the down arrow in the options field.

1. Fully completed **Budget Forms**. Complete all three tabs on the Excel spreadsheet.
2. The current **IRS determination letter**.
3. Most recent **annual financial statement** (independently audited, if available; if not available, attach IRS Form 990). Include a copy of management letter.
4. List of members of your **Board of Directors** with their affiliations (this information will not be shared with other parties).
5. **Letters of support**. Letters of support are required if third party is involved in delivering program. If no third party is involved, you may still include letters of support that verify project need and your organization's ability to deliver proposed program. Letter should be on the third party's letterhead.
6. **Annual report** or any marketing material(s) about your organization (if available) Limit to two items.

PhilNet User Tip: You MUST click into page #6 to add or delete attachments from this page.

Community Foundation of Broward Grant Application
Contact Us Help Click here for Online Resources and Forms
Account: nrogan@cfbroward.org
* Required before final submission Page 1 2 3 4 5 **6** Review My Application Printer Friendly Version Email Draft

Attachments

Please upload the following attachments. If documents are not electronic, they will need to be scanned to upload to the application.

To upload attachments, click on the down arrow in the **Title** field near the bottom of the page, choose the document to upload, click **Browse**, locate the document and click **Upload**.

- Fully completed **Budget Bundle Forms**. Complete all three tabs on the Excel spreadsheet. It is required to use the Community Foundation's Budget Bundle. You can download a copy from the **Online Resources and Forms** link at the top of the page.
- The current **IRS determination letter**.
- Most recent **annual financial statement** (independently audited, if available; if not available, attach IRS Form 990). Include a copy of management letter.
- List of members of **Board of Directors** with their affiliations (this information will not be shared with other parties).
- **Letters of support**. Letters of support are required if third party is involved in delivering program. If no third party is involved, you may still include letters of support that verify project need and your organization's ability to deliver proposed program. Letter should be on the third party's letterhead.
- **Annual report** or any marketing material(s) about your organization (if available) Limit to two items.

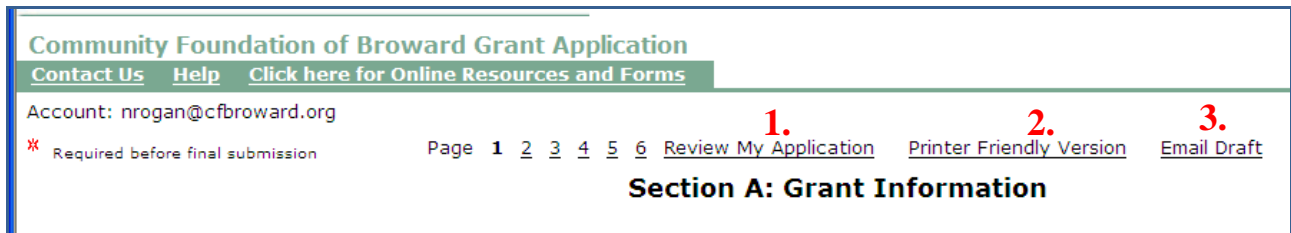
Upload
The maximum size for all attachments combined is 25 MB. Please note that files with certain extensions (such as ".exe", ".com", ".vbs", or ".bat") cannot be uploaded.

Title: Budget Bundle (Required) [v]
File Name: Budget Bundle (Required) [Browse...]
Financial Statement
IRS Determination Letter (Required)
List of Board of Directors (Required)
Annual Report
Marketing Material
Marketing Material
Letters of Support
Letters of Support

Review & Submit

VII. Finishing and Submitting Your Application

1. The **Review My Application** link at the top of the page will:
 - a. Allow you to review your application
 - b. Point out any required sections you are missing
 - c. Make edits in this view to text. Are **not** able to edit attachments in this view.
2. **Printer Friendly Version** will print a hard copy of your entire application.
3. **Email Draft** will email a copy of the application. This may be used to have others review a draft prior to submitting.



4. **Save & Finish Later** button will close the application and save it in the Open application section on your home page.
5. Once you are satisfied with the application, click the **Submit** button. You will receive an email notification of your submission of your application.



4.

5.

6. You can access submitted applications and saved draft applications from the Account page.

