GOAPPLY USER GUIDE

A GUIDE FOR GOAPPLY VERSION 2 USERS/APPLICANTS

CONTENTS

INTRODUCTION

The Lapeer County Community Foundation uses a system called GOapply to accept grant applications. The following guide will take you through the process of creating an account, starting an application, and submitting an application.

First, a brief overview of how applications are set up in GOapply. When you login to GOapply, you will see an application that you are eligible to apply for. An application with multiple phases will be advanced by Lapeer County Community Foundation. Once the next phase is available to you, you will see it in your Applicant Dashboard.

Please note, the screenshots in this guide are to be used for general reference, the appearance of GOapply or any related emails may be different in your experience due to formatting and branding, however the functionality remains the same.

BEFORE YOU START

Here are some helpful hints for making the grant application process less stressful.

- Give yourself adequate time to complete the GOapply application.
- Visit www.lapeercountycf.org to be certain your request is covered.
- Read ALL instructions to be certain you will have all the information needed gathered and ready before starting the grant application process.
- It is best to use a personal computer (laptop or desktop) to complete your application. Avoid using smartphones and tablets. Be sure your cookies are enabled on your internet browser and use a strong internet signal.
- If you copy and paste text from outside GOapply, paste as plain text (not rich text).
- You will be required to upload or attach several documents to your application. These documents must already be saved on your computer before you can browse and upload them to your application.
- Avoid applying on the deadline day. Early account registration and application submission will ensure time for Lapeer County Community Foundation to respond to questions.
- Be Patient! The system may take a moment to register and save your answers.
- When you submit, be patient and do not close your browser until you receive the Submission Confirmation Email.

INFORMATION TO GATHER BEFORE STARTING APPLICATION

Organization Information

- Legal Name of Organization
- Organization's Tax ID Number
- Organization's Address, Telephone Number, and Web Address
- Organization's Mission Statement
- Year Organization was Founded
- Organization's Primary Goals, Major Programs or Services
- Number of Paid Staff
- The Name, Phone Number and Email of the Organization's Board President/Chair

Financial Information

- The Fiscal Year End Date of the Organization
- Total Income from Last Fiscal Year
- Total Expenses from Last Fiscal Year
- Total Annual Organization Budget for Current Fiscal Year
- Name of bookkeeper or Accounting Firm
- Name of Firm that Conducts your Annual Audit
- An Organization Budget

Proposal Information

- Total requested amount being sought
- Total Annual Budget for the Current Fiscal Year (January to December)
- The percentage of the requested amount in relation to the Overhead/Administrative Budget
- An Annual Budget for the Current Fiscal Year (This will be uploaded as an attachment)
- The Organization's top three anticipated organizational goals for the current fiscal year
- List ten major funding sources and amounts committed for the current fiscal year (Operating Gifts Only)
- List ten major funding sources and amounts pending for the current fiscal year (Operating Gifts Only)
- A Recent Strategic Plan

Terms of Submission

- By submitting an online application, you are confirming that you have authority to submit the application and that you have the support of the organization's executive director and/or board chair.

FILE UPDATES

All documents should be in PDF format to ensure proper upload. Please note we do allow .xls, .doc., .jepg, but prefer PDF. Please refrain from uploading encrypted files, password protected files, or any files that are damaged. Avoid scanning text documents to produce the required PDFs. It is best to produce documents using your word-processing software and then convert the documents to PDF. Scanning paper documents may hamper automated processing of your application. We recognize that sometimes scanning is necessary, especially when including letters of support or other signed documents on business letterhead.   Videos cannot be imbedded in an application but are accepted under limited circumstances as post-submission material such as a link to a video in YouTube or Vimeo.

File Names - Save all document attachments with descriptive file names of 50 characters or less using the naming convention "name_applicantname_documentname." Avoid using special characters like &, @, #.

GETTING STARTED

To get started, you will need to register a new account. Then every time you login, you will use the login information (user name and password) you previously created.

REGISTER

If this is your first time using GOapply, you'll need to register your account. Click on "register a new account" on the login screen. You will register as an organization.

Register as:

INDIVIDUAL	ORGANIZATION

GOapply allows for two different types of accounts – individuals and organizations. If you are applying for a scholarship or award (something that is for you or your work as an individual), select Individual applicant. If you are applying on behalf of an organization, nonprofit, or other group, select Organization applicant.

As an Organization

Search for your Organization

Choose your region: United States   Canada

Search by Charity Employer Identification Number (EIN)

Every charity has its own unique federal employer identification number (EIN), which it obtains by applying to the IRS. An EIN is typically a nine-digit number, shown like 12-3456789. A few charities have EINs with eight or fewer digits (normally shown with a leading zero like 01-2345678).

US IRS Tax Exempt Organization Search Tool

EIN / Tax ID

Skip, manually enter   Search

WITH TAX ID

Enter your Tax ID then Search. If you don't know your Tax ID, click on the US IRS Tax Exempt Organization Search Tool to find it. After inputting your Tax ID, GOapply will search for your organization then ask you to confirm that it is correct on the next screen. If your organization is correctly displayed, click Select.

Organizations matching: 37-1235999   Search again Skip, manually enter

AMERICAN ASSOCIATION OF UNIVERSITY WOMEN

📍 416 Fairmont Dr
   Decatur, IL 62526   Select

🏷 501(c)(4) Public Charity

Fill in the form with your organization's information and your contact information. The email address you enter will be what you use to log in. Click Register. The Lapeer County Community Foundation will need to approve your registration. You will be notified via email when you have access to GOapply.

Fill out this information to create your account

* Organization Name   EIN / Tax ID
🏛 AMERICAN ASSOCIATION OF UNIVERSITY WOMEN   37-1235999

Address line 1
📍 416 Fairmont Dr

Address line 2
📍

* City   State   * Zip code
Decatur   IL   62526

* First Name   * Last Name

* Email
✉

* Password   * Confirm Password
🔑   🔑

                                                              REGISTER

TO ENTER WITHOUT KNOWING YOUR TAX ID

If you choose to register manually, you'll be taken directly to your organization profile. Fill in the form with your organization's information and your contact information. The email address you enter will be what you use to log in. Click Register. The Lapeer County Community Foundation will need to approve your registration. You will be notified via email when you have access to GOapply.

Fill out this information to create your account

* Organization Name		EIN / Tax ID	

Address line 1

Address line 2

* City	State	* Zip code

* First Name	* Last Name

* Email

* Password	* Confirm Password

REGISTER

PASSWORD ASSISTANCE

If you forgot your password, click "Forgot Password" from the log in screen and follow the steps to reset.

You can also reset your password at any time by clicking on the dropdown next to your name in the top right and going to User Settings.

DASHBOARDS

Once you are approved and logged into GOapply, you'll see two pages, Submissions and Opportunities. Organizational applicants will see a third page for their Organizational Profile.

Submissions: The Submissions dashboard shows which applications you have in progress and allows you to view your submitted applications.

- **In Progress**: Click In Progress to continue working on the application

- **Submitted**: Click View to view your submitted application or download the submitted application in PDF by clicking the download button all the way to the right.
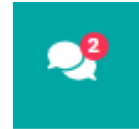
Opportunities: The Opportunities Dashboard shows which applications are available to you. Click "View" to see details about the application. Click "Apply" to start working on the first phase.

Organization Profile: for Organization users (if you registered as an organization), this is where you can view or edit information about your organization.

Messages: If the Lapeer County Community Foundation sends you a message through GOapply, a red number will appear in the message bubble in the top right corner of the screen. Click there to view your messages.
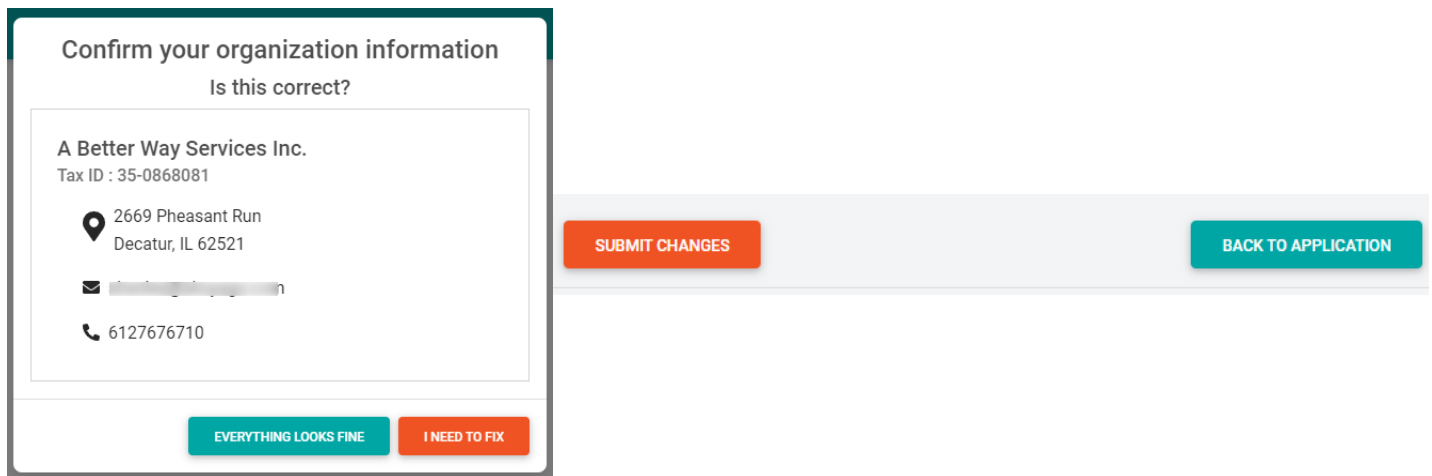
COMPLETING APPLICATIONS

Starting an application: To begin, choose an application from your Opportunities dashboard. Click "View," then "Apply" from the application home page.

The application homepage is where you can find the due date, a summary and a brief description, and the contact for that application. If you need assistance with the application, please reach out to the application contact.

Upon clicking Apply, you will be asked to confirm that your Organization Profile information is correct. A pop-up window will ask you to verify or edit if needed. If anything is missing or inaccurate, click "I Need To Fix," edit information, and click "Submit Changes." After your changes are saved, click "Back To Application" to continue the application.

On each page, you can either save a draft or continue without saving. Drafts will appear in your In-Progress dashboard. When you're finished with the phase, click Submit.

If you access an application from your Opportunities dashboard and see the below message, it means you either already submitted or have a draft submission of the application that you can finish from your In-Progress dashboard.
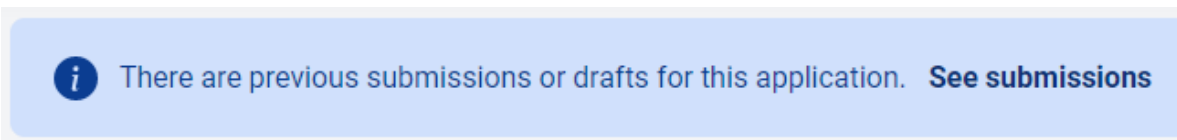
Advancing to the next phase: When the next phase is available, it will appear in your In-Progress dashboard. If you'd like to reference information you submitted in the previous phase, look in Submissions. You'll complete each phase as it becomes available, with the option to save a draft on each page.

Submitting: You can view all your submitted phases in your Submissions dashboard. Changes to an application cannot be made after submitting.

If you have any questions, please contact Nancy Boxey at nboxey@lapeercountycf.org or Jennifer Phillips at jphillips@lapeercountycf.org.