

Greater Milwaukee Foundation New Grants Portal Guide



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Grants Portal Overview

In February 2019, Greater Milwaukee Foundation released a new Grants Portal replacing Philanthropy Online (POL) to facilitate our competitive grantmaking process.

This web portal is a web-based, secure platform that provides nonprofit organizations a single access point for information on the Foundation's competitive grantmaking process.

Upon log-in, users have access to their organization's contact information, grant requests and grants received since 2019.

Grants Portal Overview (cont.)

- ❖ Improved modern technology
- ❖ Better information sharing
- ❖ Same application questions
- ❖ Same grantmaking priorities



Application process

- Eligibility requirements
 - Board membership of 10 percent people of color
 - 501(c)(3) nonprofit organization
 - Milwaukee, Waukesha, Ozaukee and/or Washington counties
- Organizations register in the Grants Portal
 - New applicants create new profiles
 - Organizations that received discretionary funding through POL within the last five years will already have a profile
- All applications are accessed through Grants Portal

Access Grants Portal

1. Via the Foundation's [website](#), click on 'Grants Portal' in upper right corner
2. Directly, [Grants Portal](#)



Step 1: Login to Grants Portal



Step 1: Login (cont.)

If you already have login credentials, enter them in the spaces provided (below, left) OR click ‘create an account now’ for new applicants (below, right). If this is your first time in the new system, you will need to create a new account.

Greater Milwaukee Foundation Grants Portal

Invalid Credentials

Login Now:

Sign in

[Reset or create password](#)

New to the Grants Portal?

Create Your Organizational Profile

In order to be considered for funding, the first step is for you to introduce yourself and tell us about your organization. Please click on the "Create an account Now" button below to start. You will not be able to edit your profile after submission, so please ensure you have entered accurate information (including email address) when completing the registration form.

You will then receive an email notification from the Foundation with login information, which will give you access to the portal and our application forms. Should your funding application be successful, this portal will give you access to our reporting templates.

Create an account now



[Privacy Policy](#) [Accessibility](#)

Step 1: Login (cont.)

TIP

Username: The username is the email address entered during registration.

Password: Password must be at least 4 characters in length. Alpha, numeric and special characters are accepted. The password cannot repeat the same character back-to-back.

Step 2: Basic navigation

The screenshot shows the Greater Milwaukee Foundation (GMF) Grantee Portal. On the left is a dark gray sidebar with a search bar at the top containing 'Le Pays 1234'. Below the search bar are several menu sections: INFORMATION (with 'Grantee Portal' and 'Apply for Funding' links), ORGANIZATIONS (with 'Organizations' link), CONTACT (with 'People' link), REQUESTS (with 'Draft Requests', 'Full Applications to Submit', 'Scholarships to Submit', 'Requests to Edit', 'Submitted Requests', and 'Declined Requests' links), and GRANTS (with 'Active' and 'Closed' links). The main content area is white and titled 'Welcome to the Grantee Portal!'. It features a section 'From this webpage, you can . . .' with a bulleted list of actions: 'Submit a proposal for funding', 'Track the status of your pending proposal', 'Upload your signed grant agreement', 'Review your current grants and report due dates', 'Submit reports', and 'Monitor grant payments'. Below this is a horizontal line followed by the section 'HOW TO USE THE PORTAL', which contains a paragraph explaining that icons on the left are called 'cards' and that clicking links leads to specific sections. Under 'HOW TO USE THE PORTAL' are two sub-sections: 'REQUESTS' and 'GRANTS'. 'REQUESTS' includes 'Pending Requests' (with a note about read-only versions), 'Request to Edit' (with a note about email alerts and editing), and 'Submitted' (with a note about the Submitted Requests link). 'GRANTS' includes 'Active' (with a note about countersigned agreements and read-only versions). Three red arrows with numbers 1, 2, and 3 point to specific elements: arrow 1 points to the 'Grantee Portal' link in the sidebar; arrow 2 points to the 'Upload your signed grant agreement' link in the 'From this webpage, you can . . .' list; and arrow 3 points to the 'HOW TO USE THE PORTAL' section header.

GMF Greater Milwaukee FOUNDATION greater together

Welcome to the Grantee Portal!

Le Pays 1234

INFORMATION

- Grantee Portal
- Apply for Funding

ORGANIZATIONS

- Organizations

CONTACT

- People

REQUESTS

- Draft Requests
- Full Applications to Submit
- Scholarships to Submit
- Requests to Edit
- Submitted Requests
- Declined Requests

GRANTS

- Active
- Closed

From this webpage, you can . . .

- Submit a proposal for funding
- Track the status of your pending proposal
- Upload your signed grant agreement
- Review your current grants and report due dates
- Submit reports
- Monitor grant payments

HOW TO USE THE PORTAL

The icons on the left-hand side are called "cards". When you click on the link beneath each card, you are access the following:

REQUESTS

- Pending Requests
Once you have submitted a proposal, you can find a read-only version here.
- Request to Edit
Once you have been invited to submit a proposal, the application is available via this link. If the staff have any questions about your you will receive an email alert to login. You can find the proposal here, available for editing.
- Submitted
Once you have submitted your proposal, the proposal appears in the Submitted Requests link.

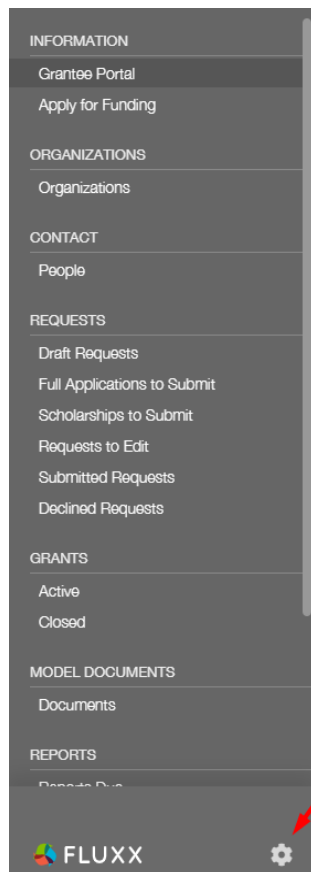
GRANTS

- Active
After the staff has received the countersigned agreement, you can find a read-only version here via this link.

1. Left-side, gray panel shows different portal sections; click on 'Grantee Portal'
2. A listing of functions available within this section
3. Review information in 'How To Use The Portal'

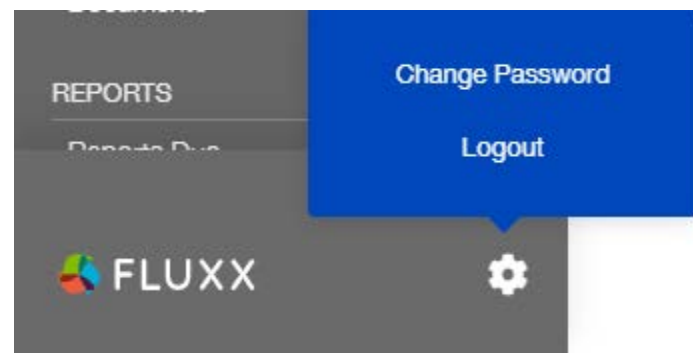
Each link within the left-side panel will provide access to different sections of the portal.

Step 2: Basic navigation (cont.)



At the bottom of the left-side panel and to the right of the Fluxx logo there is a cog/gear symbol for settings.

Click on it the symbol to change your password or to log out.



Step 3: Creating an account



Greater Milwaukee Foundation Grants Portal

<https://greatermilwaukeefoundation.fluxx.io/>

[e password](#)

New to the Grants Portal?

Create Your Organizational Profile

Please click on the "Create a New Account" button below to start. You will not be able to edit your profile after submission, so please ensure you have entered accurate information (including email address) when completing the registration form.

You will then receive an email notification from the Foundation with login information, which will give you access to the portal and our application forms. Should your funding application be successful, this portal will give you access to our reporting templates.

If you already have an account and a password, please sign in now by filling in a user name and a password.

Create a New Account

Click on 'Create a New Account' to go to the profile registration page.

Step 3: Creating an account (cont.)

Greater Milwaukee Foundation Grants Portal

Registration

GuideStar Profile Lookup

[Search](#)

Organization Info

Organization Name

Address 1

Address 2

City

Country

State/Province

Postal Code (Zip)

Organization E-mail

Organization Phone

Tax ID

Is this a minority or woman-run organization?

Does the organization have a policy which states that it does not discriminate against age, race, religion, gender, sexual orientation, disability or national origin?

Organization's total operating budget for current fiscal year

Enter the nine-digit federal Employee Identification Number (EIN) in field labeled 'GuideStar Profile Lookup' and click search.

Provided the EIN entered is registered as a 501(c)(3) with the IRS, the Organization Info fields will auto-populate based on the information in GuideStar.

If the information does not auto-populate, manually enter information in all fields. This could occur when the organization is a public school or other government entity. Please reach out to ciadmin@greatermilwaukeefoundation.org if you have any questions about this.

Step 3: Creating account (cont.)

Registration

GuideStar Profile Lookup

39-6036407 Search

GuideStar Database

We found the following organization. Do you want to use its information?

Greater Milwaukee Foundation, Inc.
Milwaukee WI 53212
39-6036407
<http://www.greatermilwaukeefoundation.org>

No Yes

State/Province

Postal Code (Zip)

If the information did auto-populate per GuideStar, this popup box will appear.

Select 'yes' if the information is correct.

Select 'no' if the information is incorrect, manually populate the fields.

Tip: Please consider updating GuideStar with current organization information. This will ensure it is correct not only on the Foundation's applications but for other funders relying on GuideStar as well.

Step 3: Creating account (cont.)

City

Country
United States ▼

State/Province

Postal Code (Zip)

Organization E-mail

Organization Phone

Tax ID

Is this a minority or woman-run organization?
▼

Does the organization have a policy which states that it does not dis
age, race, religion, gender, sexual orientation, disability or national c
▼

Organization's total operating budget for current fiscal year

Primary Contact Info

First Name

Last Name

Work Phone

E-mail

Once all of the new fields are completed and confirmed correct, click the 'Submit Request' button. A popup box will appear.



Step 3: Creating account (cont.)



A screenshot of a 'SET YOUR PASSWORD' popup box. The box is dark gray with white text. It contains two input fields: 'Password' and 'Password confirmation'. Below the input fields are two buttons: 'Cancel' and 'Set Password and Log in'. The popup is overlaid on a background of colorful, abstract shapes in green, blue, orange, and purple.

Proceed to the email account associated with the address entered in your organization's profile and look for an email from 'Greater Milwaukee Foundation.'

Click on the link provided in the email to verify the account. The 'Set Your Password' popup box will appear.

Password Tip: Password must be at least 4 characters in length. Alpha, numeric and special characters are accepted. Cannot repeat the same character back-to-back.

Step 4: Apply for funding

Greater Milwaukee Fo

Invalid Credentials

Login Now:

Username

Password

Sign in

<https://greatermilwaukeefoundation.fluix.io/>

Login to Grants Portal.

Before starting an application, it is important to ensure your nonprofit's information is correct. Review the 'Organizations' and 'People' sections, updating as needed.

Once information is confirmed correct, select 'Apply for Funding'.

INFORMATION

Grantee Portal

Apply for Funding

ORGANIZATIONS

Organizations

CONTACT

People

REQUESTS

Draft Requests

Step 5: Apply for funding (cont.)

BASIC APPLICATION

Description, Eligibility, Additional Information, and Application Links

- Text Description

[APPLY \(Basic Application\)](#)

BRANCHING APPLICATION

Description, Eligibility, Additional Information, and Application Links

- Text Description

[Apply for Branching Application](#)

COMPREHENSIVE APPLICATION

Description, Eligibility, Additional Information, and Application Links

- Text Description

[Apply for Comprehensive Application](#)

There will be several different application options. Each will have a complete description to help you choose which application is best for your situation.

Click on the correct option and proceed with the completion of the application.

Contact information:

Foundation's Grants Portal Help Desk

ciadmin@greatermilwaukeefoundation.org

[Brad Ambelang](#), Program & Grants Associate, 414.336.7074

[Liliane McFarlane](#), Grants Manager, 414.336.7043

www.greatermilwaukeefoundation.org

Coming Soon:

Stay tuned for Grants Portal Guide updates including:

- Communicating with Greater Milwaukee Foundation staff
Grants Portal as a communication tool
- Grant Agreement
How to sign a Grant Agreement via DocuSign within the Grants Portal
How to view your executed Grant Agreement(s)
- Payments
How to use the Grants Portal to view a grant payment schedule
- Reports
How to use the Grants Portal to see report schedule
How to submit a grant report within the Grants Portal