



2021 Tier I Certification Report Directions & Tips

Deadline
4:00 p.m., Friday, April 30, 2021

Presentation to SCFD Board:
1:00 p.m., Thursday, May 27, 2021 via Zoom

GETTING STARTED

SCFD receives submissions via an online system. Organizations must use the Fluxx online grants management portal to submit their Certification Report. If you are having difficulties with the online report, please try using a different web browser (Chrome is recommended).

TO ACCESS

1. Go to the SCFD website for all instructions and to access Fluxx:
<https://scfd.org/grantmaking/funded-organizations/tier-i/>
Or click this link to go directly to the application:
<https://scfd.fluxx.io>

SCFD has sent the organization's primary and secondary contacts an email with information on how to login into your Fluxx grant management account. Follow these directions and contact SCFD staff if you are having any problems. You do not need to "Create an account."

2. Log into your Fluxx Account by inputting your username and password and click "Sign in".

If you do not remember your username or password, click "Reset or create password." You will be prompted for your email address. If your email address is registered to an active account in Fluxx, you will receive an email prompting you to reset your password.

If you do not receive a password reset email from Fluxx, your email address might not be registered in our system. Contact the SCFD office for assistance.

3. If you have **forgotten your user login email**, please contact the SCFD office. **Do not** create a new user account with a different email address as grants are associated with your email used when first logged into the system.

Please Note: Each person who logs in on behalf of an organization will have their own user profile. Only one user can access the report at a time.

NAVIGATING THE GRANT APPLICATION PORTAL

After you are logged into the Fluxx grantee portal, use the navigation menu on the left side of the page.

1. If not already done, click on "Organizations" in the navigation menu on the left side of the page. Review your organizational information and complete your statutory discipline, focus area, and board approved mission statement by clicking "Edit". Be sure to "save" your updates.
 - Note: If you need to update any of the following in your Organization Profile, email scfd@scfd.org.
 - Organization Legal Name
 - Organization Legal Doing Business As

- Tax ID
- Tax Class

2. From the **Welcome page** (the first page you come to after logging in, also located under Information on the grey side bar) scroll down the page and **click on the green button “Apply for Tier I Funding”** which will take you to the full grant application.
 - Click the **“Save and Close”** button to save any information entered into the application.
 - The portal does not autosave; therefore, you must click the **“Save and Close”** button to ensure your data tables calculate and all information entered will not be lost.
3. **Continuing/editing your Grant Application**
 - **Once an application has been started it will be located under REQUESTS.**
 - To go back to your application at any time, go to REQUESTS then DRAFT and click on your draft request. Then click the **“Edit”** button on the top right of your application.
4. **Application Attachments – New in 2021!**

Fluxx accepts attachments in Word, Excel, and PDF formats. Please ensure your attachment is properly labeled and includes your organization name and attachment title.

The required format for your School List is EXCEL.

Hint: **bolded** fields in the application are required, and you must complete in order to submit your application.

All narratives and attachments must be completed. Any application missing information will be considered incomplete and will not be accepted.

If you need help after reading the directions and watching the tutorial(s) located on the Tier I webpage, call/email SCFD staff for support.

CERTIFICATION REPORT

NARRATIVE

TIP: Check the character limit!

- All narrative sections have a **2,000-character limit** including spaces. This equates to around half a page of text.
- Please note text boxes will expand as you type/paste.
- If pasting information from another document, ensure your information is accurate and complete.
- Please do not type in ALL CAPS.

LIST FORMULA FUND EXPENDITURES USED BETWEEN JAN 2020-DEC 2020 BY EXPENSE CATEGORY.

- Click on the blue + sign to add Expense Category rows. Try to limit to no more than eight lines.
- Include the SCFD amount spent for each expense category.
 - (e.g., Personnel 8467543, Marketing 546775)

LIST FUNDS PROJECTED FOR USE BETWEEN JAN 2021-DEC 2021 BY EXPENSE CATEGORY.

- Click on the blue + sign to add Expense Category rows. Try to limit to no more than eight lines.
- Include the SCFD budgeted amount for each expense category.
 - (e.g., Personnel 8560000, Marketing 542000)

WHAT ARE YOUR CURRENT DIVERSITY AND INCLUSIVENESS ENDEAVORS? HOW DO YOU MEASURE EFFECTIVENESS? The topics of Diversity and Regional Service are two focus areas for the SCFD Board of Directors.

NEW Question: Given the pandemic, SCFD understands organizations had to make operational and programmatic changes. What would you like to share with SCFD regarding 2020?

Be sure to answer the question about what you would like to share with SCFD regarding operational and programmatic changes due to the COVID-19 pandemic.

INCOME & EXPENSES

- Enter for most recently completed fiscal year ending 2020.
- Use the space to further explain your financials.

STAFF & ATTENDANCE

Please report the organization's overall attendance numbers for the most recently completed fiscal year. We are looking for actual numbers, *NOT* impressions.

For 2021: acknowledge meaningfully engaged virtual attendance based on the criteria below (general visitor, classes, and workshops, etc.) including the location of online users based on their county of origin, to the best of your ability.

REMINDER: Account for a person's attendance in only one category.

- **GENERAL VISITOR:** Please account for all people attending or participating in programming, performances or exhibits. Do NOT include classes/workshops or school events on this line. "Youth" includes anyone your organization classifies as a youth who buys a single ticket or attends an event.
- **CLASSES AND WORKSHOPS:** Attendance in Courses/Classes/Workshops is the number of people registered/enrolled. Do not include the person's attendance at each class. i.e., impressions. For example, if a person is enrolled in a five-day course and attends all five classes, that person counts as **ONE** enrollment, not five.
- **SCHOOL INFORMATION:** This attendance can be tied directly back to a school or home school. There is space for you to indicate both the number of children and adults served.
- **NUMBER OF SCHOOLS SERVED:** Based on all the schools your organization provided programming for, count each school once i.e., no repeats, and type the total into the field. If you do not work directly with schools, public, private or home schools, enter a zero for the number of schools served.
- **SCHOOL DEMOGRAPHICS (Optional):** If you have demographic data regarding school children served (gender, race, free lunch, etc.), please provide that information.
- **ATTENDANCE BY COUNTY:** Please break down your total attendance by county, to the best of your ability. Fill in the chart with the number of attendees, not percentages. This is important information. Attendance at programming should match the total attendance for counties.

ATTACHMENTS

- To upload the **SEVEN** required documents listed below, click on the blue + sign to the right of the required document. A new dialog box will open. Either select or drag files then start the upload.
- Each required attachment may be comprised of multiple documents, so upload in its entirety as a single document.
- As documents are uploaded successfully, the blue + sign will disappear, and the uploaded document will move under the Certification Documents box.
- If an attachment requires multiple documents; combine and upload as one PDF.
- **School List must be in an Excel spreadsheet.**

Required Attachments:

1. Organizational Audited Financial Statements of most recently completed fiscal year
2. Most recently filed IRS Form 990, ideally for the time period corresponding to the Audit, public version including all schedules and Form 990T, if applicable; 990 extension, if applicable
3. Most recent Annual Report (Optional) or Board/City Council List if the Annual Report is not applicable/available
4. Current Fiscal Year Budget

5. Key Staff List
6. School List (**in Excel format**) - include, at minimum, full name and county of each school served
7. Stories of interest; photos of programs, activities, or exhibits (limit to no more than three stories).

ASSURANCES

All applicants must complete the *Assurances* section. The authorizing official, who is named as the primary contact or primary signatory on the submission, is responsible for the content in each assurance statement. The authorizing official must read the completed submission and review all attachments before submitting.

REVIEW & SUBMIT

After you have completed all required report information, carefully proofread all content, ensure that all required attachments have been uploaded, all assurances have been answered then, click the “SUBMIT to SCFD” button.

WARNING: Once you click the “SUBMIT to SCFD” button you will not be able to change/correct any information!

IMPORTANT: If your submission was successful, you will see it in the “REQUESTS - Submitted Requests” section of the navigation menu on your grant portal. SCFD may review your submission and release your grant request back to you (prior to the deadline) if edits are required. It will then be located in the “REQUESTS - Requests to Edit” section of the navigation menu on your grant portal. Once your edits are made, resubmit before the annual submission deadline. There is no guarantee that SCFD will be able to review your submission.

REMINDER: Late/incomplete applications will not be accepted. SCFD recommends submitting as early as possible before the April 30, 2021 deadline.

QUESTIONS & CONTACT INFORMATION

SCFD Staff is available to help! Please contact the SCFD office at **303.860.0588** if you have any questions or concerns regarding SCFD reporting or grant application procedures.

303.860.0588 ext 112
303.860.0588 ext 114
303.860.0588 ext 115
303.860.0588 ext 111

Dana Manyothane, Program Manager
Heather Porter, Program Manager
Kendal Zimmermann, Program Manager
Jessica Kato, Deputy Director

dana@scfd.org
heather@scfd.org
kendal@scfd.org
jessica@scfd.org