



# Region of Waterloo Arts Fund Online Grant Application

## **USER GUIDE**

This User Guide will be updated as required.  
Last revision: February 2021.

# HELPFUL TIPS

- Turnaround time for assistance with questions/technical difficulties is 24-48 hours, Monday to Friday during regular business hours. We recommend that you plan accordingly.
- We have provided the application questions, available [here](#) in the event you would like to prepare your responses before logging in to the portal.
- The online granting system tracks users by email address that is entered when you [sign up](#) – if you are preparing an application on behalf of a collective or organization, please use the appropriate email. If a personal email is used, all future applications will be tied to that email.

# LOGIN PAGE

[https://webportalapp.com/sp/region\\_of\\_waterloo\\_arts\\_fund\\_spring\\_2021](https://webportalapp.com/sp/region_of_waterloo_arts_fund_spring_2021)

- As a returning user you can login in here
- As a new user you can sign up here

## TIPS

- You will not receive a confirmation for signing up. You will be directed to complete your user profile.
- The system 'identifies' you by email address – so ensure that this is the best email to use for this project (for example, if applying on behalf of an organization, please use an email associated with that organization not your personal email)



region of waterloo

ARTS FUND

### Sign In/Sign Up Instructions

#### For New Users:

By clicking **Sign Up**, you will be prompted to enter your email address and create a password. Once you have chosen your password, your account will be created and you will gain access to the portal.

#### For Returning Users:

Sign into the portal using the email address and the password you created when you originally signed up for the portal. If you have forgotten your password, click "**Forgot your password?**" and follow the prompts to reset your password.

### Sign In

Email

Password



Log In

[Forgot your password?](#)

### Need an Account?

Sign Up

# PROFILE

- Once you have signed up you will be directed to this profile page. You can edit this page as necessary.
- Assessers will only see your Full Name/Name of Org/Name of Artist and City.
- When you have completed the form Click Save Changes.
- You must complete ALL required fields in order to move on to the next stage of the application.

region of waterloo ARTS FUND

Waterloo Arts Fund > Profile

Welcome, email@email.com

## Profile ▾

[Save Changes](#)

### Applicant Information

**Name of Organization or Collective (if applicable)**

**Name of Artist (if applicable)**

If the name you use for your artistic practice is different than your formal name, please include here, otherwise leave blank.

**First Name \***

**Last Name \***

**Address \***

This field is required

**City/Town \***

This field is required


# DASHBOARD

- Once you have completed your profile, this is where you will land each time you log on.
- This dashboard will provide you with access to the relevant documents depending on your stage of the application process.
- The email that you used to sign on will appear here.
- If at any time you need to log out, click here and the Logout option will appear.

The screenshot displays the Waterloo Arts Fund dashboard. At the top right, there is a logo for the 'region of waterloo ARTS FUND'. Below the logo, a navigation bar shows 'Waterloo Arts Fund' on the left, 'Welcome' followed by an email address 'email@email.com' in the center, and a settings gear icon on the right. A red arrow points from the text 'The email that you used to sign on will appear here.' to the email address. Below the navigation bar, a message reads: 'Please click **"Create a Profile to Get Started"** to begin. You can always edit your Profile by clicking "Edit". You cannot move forward until you have completed your Profile.' Below this message is a 'Profile' card. The card shows the word 'Profile' on the left, the status 'Complete' in green text in the center, and an 'Edit' button on the right. A red arrow points from the text 'and the Logout option will appear.' to the 'Edit' button. Below the profile card, there is a section titled 'To begin, click **"Get Started"** below. When you return to this Homepage, you can see the status of your submission by the colored status bar below the submission card.' This section contains three bullet points: '• If the status bar is gray, your submission is under review, and no action needs to be taken.', '• If the status bar is blue, there is an action required. Click on the Submission Card to complete.', and '• If the status bar is red, there is an error. Please reach out to info@artsfund.ca for support.' At the bottom of this section is a dashed gray box containing a blue plus sign and the text 'Get Started'.

# DASHBOARD

Waterloo Arts Fund > Sunflower Seed

Welcome [email@email.com](mailto:email@email.com) 

## Sunflower Seed

Order by: Newest to Oldest 

To start your application click Open. You can start with your budget or your application. To continue editing once you have begun, click 'Edit'. You can continue to edit until you have clicked SUBMIT.

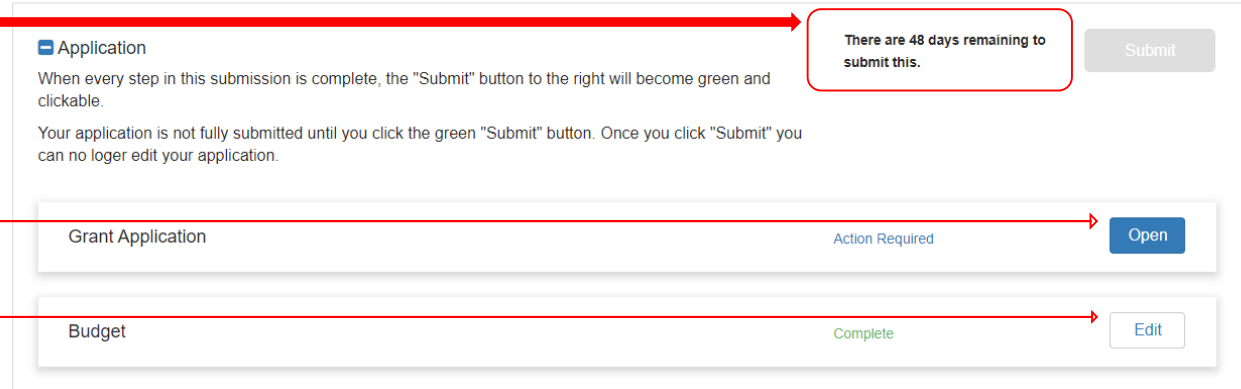
When you have completed all required fields for that form, it will no longer state "Action Required" but "Complete". When both forms are 'Complete' the "Submit" button will turn green, which indicates that you can now submit. Click SUBMIT to formally submit your full application. Once submitted that action cannot be undone. The application deadline is October 16, 2020 11:59PM. Applications will not be accepted after that date and time.

- A countdown until due date. An application cannot be submitted after the deadline date.

- To Open your application or budget for the first time click OPEN.

- Click EDIT, to continue to editing the form. You can continue to edit until:

1. you have submitted the full application and/or
2. it is not past the application due date.



The screenshot shows the application dashboard with the following elements:

- Application Section:** A grey box containing the text "Application" with a blue icon. Below it, instructions state: "When every step in this submission is complete, the 'Submit' button to the right will become green and clickable." and "Your application is not fully submitted until you click the green 'Submit' button. Once you click 'Submit' you can no longer edit your application." To the right is a grey "Submit" button. A red box highlights the text: "There are 48 days remaining to submit this." A red arrow points from this box to the "Submit" button.
- Grant Application Row:** A white box with "Grant Application" on the left, "Action Required" in blue text in the middle, and a blue "Open" button on the right. A red arrow points from the "Open" button to the right.
- Budget Row:** A white box with "Budget" on the left, "Complete" in green text in the middle, and a grey "Edit" button on the right. A red arrow points from the "Edit" button to the right.

# GRANT APPLICATION FORM - ELIGIBILITY

- This series of questions will determine if you are eligible to apply for funding.
- Please ensure you have read the Application Guidelines, linked here, to confirm that you meet the eligibility requirements and before you continue with your application.
- If you have any questions regarding your eligibility, please email [info@artsfund.ca](mailto:info@artsfund.ca).

Are you a municipality? \*

No

Are you a commercial enterprise? \*

No

A for-profit entity such as a store or company.

Are you an educational institution? \*

No

Are you 18 years of age or older (or will someone over 18 be signing for you)? \*

Yes

Do you (artist, majority of the collective or organization) work or reside in Waterloo Region? \*

Yes

Are you legally entitled to work in Canada? \*

Yes

Do you or your collective/organization currently have any money owing to the Waterloo Region Arts Fund from past, uncompleted projects? \*

No

I am applying to the Arts Fund as an \*

Individual

I have read the Region of Waterloo Arts Fund Guidelines \*

Arts Fund Guidelines can be found here: <https://artsfund.ca/Application-Guidelines.htm>

Yes

No

Save Draft

Mark Complete

Close

# APPLICATION CONT'D

- You can save your progress here at any time by clicking **SAVE DRAFT**

- When the application form is completed to your satisfaction click **MARK COMPLETE**

- To return to your Dashboard click **CLOSE**

Waterloo Arts Fund > Sunflower Seed > Grant Application Draft Welcome, email@email.com ⚙️

## Grant Application ▾

[Save Draft](#) [Mark Complete](#) [Close](#)

Please complete all required fields.

You can save as a draft and return later to complete by clicking 'Save Draft'. After clicking 'Save Draft' click 'Close' to return to your home page.

When this application form is complete, please click the blue "Mark Complete" button.

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### Grant Application Form

Are you a municipality? \*

No

Are you a commercial enterprise? \*

No

A for-profit entity such as a store or company.

Are you an educational institution? \*

No

Are you 18 years of age or older (or will someone over 18 be signing for you)? \*

Yes

Do you (artist, majority of the collective or organization) work or reside in Waterloo Region? \*

Yes



# BUDGET

## REVENUES

- You will be asked to identify all of your sources of revenue in the budget.
- Please provide as much detail as possible.

## EXPENSES

- You will be asked to provide details for any expenses. Please provide a breakdown where applicable.
- A breakdown would include: rate of pay, fees, hours worked etc.

### Revenue

Region of Waterloo Arts Fund Contribution

How much are you asking the Arts Fund for?

How many sources of funding do you have from a City/Region/Municipality?

City of Kitchener, City of Cambridge etc

Name of Funder \*

### Expenses

Fees for artists

Fees may include what you are paying yourself for subsistence or may include what you are paying other artists. This will vary from project to project.

Please provide a breakdown of your artist fees \*

If you do not have artist fees please write n/a. Otherwise please provide a breakdown of their rate/time.

Fees for other personnel

Please provide a breakdown of personnel fees \*

If you do not have personal fees please write n/a. Otherwise please provide a breakdown of their rate/time.

# COMPLETED APPLICATION



## DAISY

Order by: Newest to Oldest ▾

To start your application click Open. You can start with your budget or your application. To continue editing once you have begun, click 'Edit'. You can continue to edit until you have clicked SUBMIT.

When you have completed all required fields for that form, it will no longer state "Action Required" but "Complete". When both forms are 'Complete' the "Submit" button will turn green, which indicates that you can now submit. Click SUBMIT to formally submit your full application. Once submitted that action cannot be undone. The application deadline is October 16, 2020 11:59PM. Applications will not be accepted after that date and time.

This button turns green when both forms have been completed and you are ready to submit!

### Application

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

Your application is not fully submitted until you click the green "Submit" button. Once you click "Submit" you can no longer edit your application.

There are 56 days remaining to submit this.

Submit

### Grant Application

If you have not started, please click the "Edit" button to the right.

If you have already started, please click the "Edit" button to the right to continue.

If you have completed and would like to view or print, please click the "View" button to the right.

Complete

Edit

Complete - turns green when form is fully completed, but edit is still available

### Budget

If you have not started, please click the "Edit" button to the right.

If you have already started, please click the "Edit" button to the right to continue.

If you have completed and would like to view or print, please click the "View" button to the right.

Complete

Edit

Complete - turns green when form is fully completed, but edit is still available

# DASHBOARD



## DAISY

Order by:  Newest to Oldest ▼

To start your application click Open. You can start with your budget or your application. To continue editing once you have begun, click 'Edit'. You can continue to edit until you have clicked SUBMIT.

When you have completed all required fields for that form, it will no longer state "Action Required" but "Complete". When both forms are 'Complete' the "Submit" button will turn green, which indicates that you can now submit. Click SUBMIT to formally submit your full application. Once submitted that action cannot be undone. The application deadline is October 16, 2020 11:59PM. Applications will not be accepted after that date and time.

### Application



This has been submitted.

Thank you for submitting an application to the Region of Waterloo Arts Fund.  
Your application will be reviewed by our review panel and you will be notified in early December via email.

### Grant Application

If you have not started, please click the "Edit" button to the right.  
If you have already started, please click the "Edit" button to the right to continue.  
If you have completed and would like to view or print, please click the "View" button to the right.

[View](#)

### Budget

If you have not started, please click the "Edit" button to the right.  
If you have already started, please click the "Edit" button to the right to continue.  
If you have completed and would like to view or print, please click the "View" button to the right.

[View](#)

Identifies that app has been submitted

Can only VIEW, no longer edit app

Can only VIEW, no longer edit budget

# AWARDED

- You will receive your grant notification via email.
- You will be directed to log back in and complete your Award Acceptance.
- Click here to move forward.

Waterloo Arts Fund Welcome [email@email.com](#) ⚙️

You can always edit your Profile by clicking "Edit".

Profile Complete Edit

To begin, click **"Get Started"** below. When you return to this Homepage, you can see the status of your submission by the coloured status bar below the submission card.

- If the status bar is **gray**, your submission is under review, and no action needs to be taken.
- If the status bar is **blue**, there is an action required. Click on the Submission Card to complete.
- If the status bar is **red**, there is an error. Please reach out to [info@artsfund.ca](mailto:info@artsfund.ca) for support.

DAISY

Created on 08/21/2020

Award Acceptance

# Award Acceptance

- When the form is complete you can click **SUBMIT** – it will be green when it is ready to submit.

## DAISY

Order by:

To start your application click Open. You can start with your budget or your application. To continue editing once you have begun, click 'Edit'. You can continue to edit until you have clicked **SUBMIT**.

When you have completed all required fields for that form, it will no longer state "Action Required" but "Complete". When both forms are 'Complete' the "Submit" button will turn green, which indicates that you can now submit. Click **SUBMIT** to formally submit your full application. Once submitted that action cannot be undone.

### Award Acceptance

When every step in this submission is complete, the "Submit" button to the right will become green and clickable.

The submission is not fully submitted until you click the green "Submit" button. Once you click "Submit" the submission will no longer be editable.

Submit

### Award Info & Agreement

Action Required

If you have not started, please click the "Edit" button to the right

If you have already started, please click the "Edit" button to the right to continue.

If you have completed and would like to view or print, please click the "View" button to the right.

Open

- Click here to complete your Award Acceptance Form.

# ACCEPTANCE FORM

- You will receive an email from DocuSign with your Grant Agreement.
- Once you have signed the agreement, download your fully signed copy and then upload it here.
- You can download the Direct Deposit (EFT) form [here](#). Download, complete and upload it here.
- Click Accept, sign here and save changes.

## Award Info & Agreement ▾

Save Changes

Close

Please complete all required fields.

You can save as a draft and return later to complete by clicking "Save Changes". After clicking 'Save Changes' click 'Close' to return to your home page.

When your budget is complete, please click the blue "Mark Complete".

Last saved on 8/25/2020 at 2:07:55 PM

This form is now marked complete.

### Grant Amount

\$

### Please upload your signed agreement

If you do not have a copy of your Grant Agreement please email [info@artsfund.ca](mailto:info@artsfund.ca)

+ Select a file  ?

### Please upload your Direct Deposit form

Direct Deposit form can also be found on the website [artsfund.ca](http://artsfund.ca)

+ Select a file  ?

### Check here to accept award: \*

Accept

### Signature \*

Enter your full name to indicate that you understand and accept the terms of your grant. We must receive a signed copy of your Grant Agreement in order for you to receive funds.

# EXTENSION/CHANGE REQUEST

- If at any time during your project you need to make a significant change to the project OR need an extension to the allotted 12-months to complete the project, you need to submit your Request here.
- The Arts Fund board must review and approve any Requests for Project Changes and/or Project Extensions in advance.

## DAISY

Order by: Newest to Oldest ▾

To start your application click Open. You can start with your budget or your application. To continue editing once you have begun, click 'Edit'. You can continue to edit until you have clicked SUBMIT.

When you have completed all required fields for that form, it will no longer state "Action Required" but "Complete". When both forms are "Complete" the "Submit" button will turn green, which indicates that you can now submit. Click SUBMIT to formally submit your full application. Once submitted that action cannot be undone. The application deadline is October 16, 2020 11:59PM. Applications will not be accepted after that date and time.

### Active Grant

#### Extension Request

Please click "Open" to the right to begin.

Optional

Open

### Award Acceptance

Thank you for submitting.

Your submission is now under review and you will be contacted if any additional information is needed.

This has been submitted.

#### Award Info & Agreement

If you have not started, please click the "Edit" button to the right.

If you have already started, please click the "Edit" button to the right to continue.

If you have completed and would like to view or print, please click the "View" button to the right.

View

# Extension Request

- Click and complete + New Request Form

## Extension Request

Close

Minimum required: 0

Maximum allowed: 5

Show:

All

+ New Request

You have not added any requests

- Complete extension request form and click send when complete.
- You will be directed back to your Dashboard and you will need to click SUBMIT.
- You will receive a confirmation that your Request for a Project Extension has been received.
- You will receive approval/denial for the extension via email.

(untitled) ▾

Delete

Save Draft

Send

Close

Please complete all required fields.

You can save as a draft and return later to complete by clicking "Save Draft" at the top of the page.

When you are ready to submit this step, please click the blue "Send" button at the top of the page.

This form is used to grant project extensions and project changes. Please provide as much detail as possible

### Email

info@artsfund.ca

### I am requesting a: \*

- Project Extension
- Project Change
- Project Extension and Change

Please provide us with the details of your project change and/or extension. Please be sure to include details on how this may affect your budget.



# FINAL REPORT FORM DUE

- You will receive a Notice via email two (2) months prior to the due date for your Final Report. (Note: the Final Report due date is also identified in your Award Letter.
- To complete your Final Report, log into the online granting system and click Final Report.
- You will also need to complete your Final Report Budget.
- When both forms have been completed you can click SUBMIT.
- You will receive an email confirmation that the Final Report has been received.
- You will receive an email confirmation when the Final Report has been approved/denied.

## DAISY

Order by: Newest to Oldest ▾

To start your application click Open. You can start with your budget or your application. To continue editing once you have begun, click 'Edit'. You can continue to edit until you have clicked SUBMIT.

When you have completed all required fields for that form, it will no longer state "Action Required" but "Complete". When both forms are "Complete" the "Submit" button will turn green, which indicates that you can now submit. Click SUBMIT to formally submit your full application. Once submitted that action cannot be undone. The application deadline is October 16, 2020 11:59PM. Applications will not be accepted after that date and time.

Final Report Due Submit

Final Report Complete Edit

If you have not started, please click the "Edit" button to the right.

If you have already started, please click the "Edit" button to the right to continue.

If you have completed and would like to view or print, please click the "View" button to the right.

Disbursements Open

Final Budget Complete Edit

The button will update to reflect how you can interact with this step.

# FINAL REPORT FORM

- When you have completed the Final Report, click 'Save Changes'.

## Final Report ▾

Save Changes

Close

Please complete all required fields.

You can save as a draft and return later to complete by clicking "Save Changes". After clicking 'Save Changes' click 'Close' to return to your home page.

When your budget is complete, please click the blue "Mark Complete".

### Final Report

Start Date

End Date

Please complete relevant stats based on your completed project; Please enter 0 if question is not applicable.

Total Audience/Attendance

Number of artists engaged/participated

Number of shows/performances/readings/exhibits

Number of volunteers

Number of units sold (magazines/CDS books) does not apply to ticket sales for performances

# FINAL REPORT FORM - BUDGET

- Click 'Save Changes' when you have completed the Final Budget form.

Final Budget ▾

Save Changes

Close

Last saved on 8/29/2020 at 1:31:17 PM

This form is now marked complete.

## Revenue

### Region of Waterloo Arts Fund Contribution

CAD

How much are you asking the Arts Fund for?

How many sources of funding do you have from a City/Region/Municipality?

City of Kitchener, City of Cambridge etc

How many sources of Provincial Funding do you have?

For example, Ontario Arts Council, Ministry of Heritage, Sport, Tourism and Culture, etc.

How many sources of Federal Funding do you have?

For example, Canada Council for the Arts, Canadian Heritage etc

# Still need assistance?

- If you are experiencing technical difficulty using the application OR if you have any questions about the online application process, please email [info@artsfund.ca](mailto:info@artsfund.ca) for assistance.