

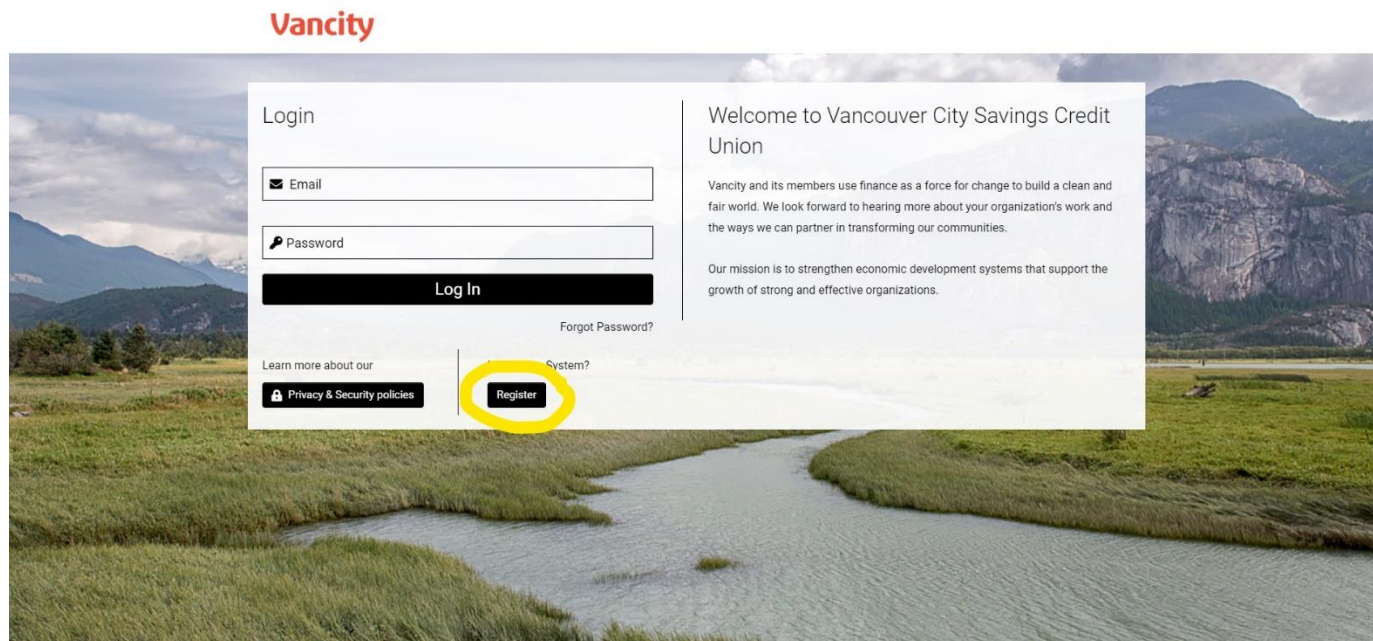
## Vancity Granting Portal Guide

Vancity has implemented a new online Granting Portal to receive, review and process grants. Please use the below guide to assist you in your application process.

To submit an application, you first need to create an account and register your organization. During registration, you will complete an organization profile and create an account for yourself as a contact for the organization. Once you submit your registration, you will be sent an email to set up your password. Setting up your password completes the registration process. Then, you can login and start your application!

### Organization Registration

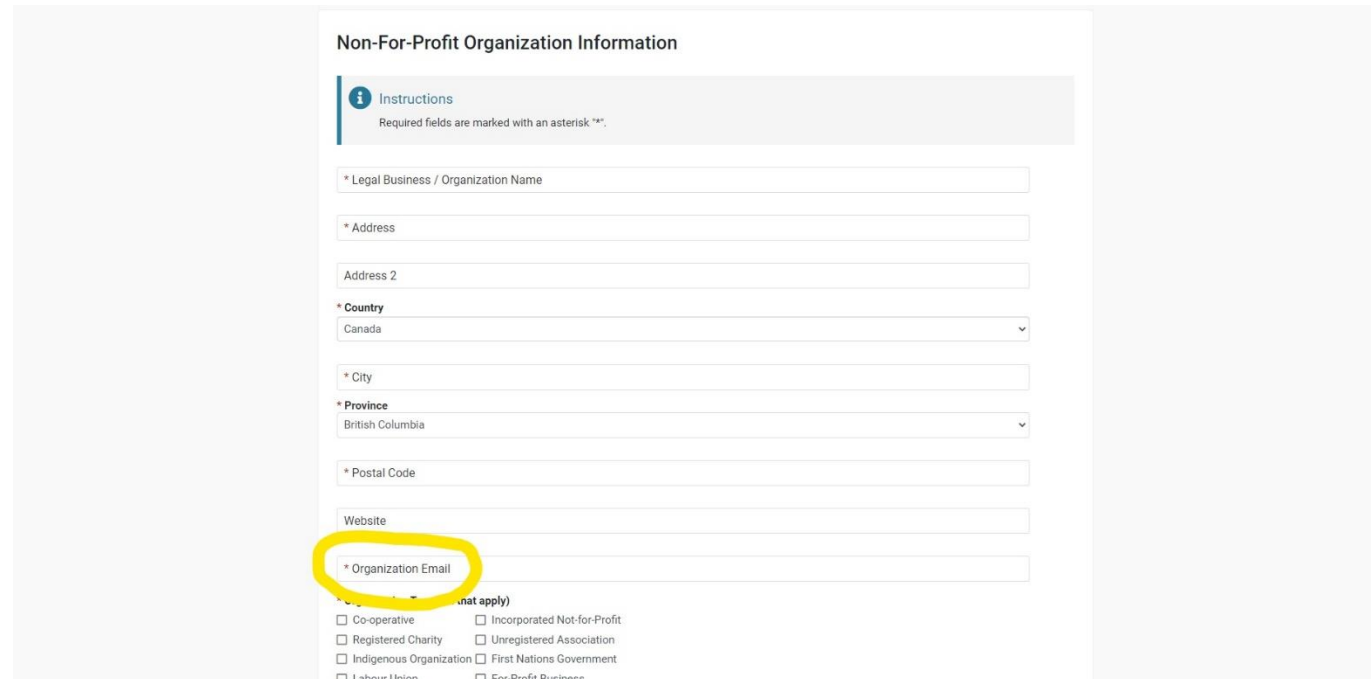
Register as a new user by clicking 'Register' on the login page



Choose the type of your organization

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Enter all the relevant organization details in the available fields. The email under this section should not be a specific person's email. Rather, it should be a generic email such as [info@organization.com](mailto:info@organization.com) that does not change for your organization.



**Non-For-Profit Organization Information**

**Instructions**  
Required fields are marked with an asterisk "\*\*".

\* Legal Business / Organization Name

\* Address

Address 2

\* Country  
Canada

\* City

\* Province  
British Columbia

\* Postal Code

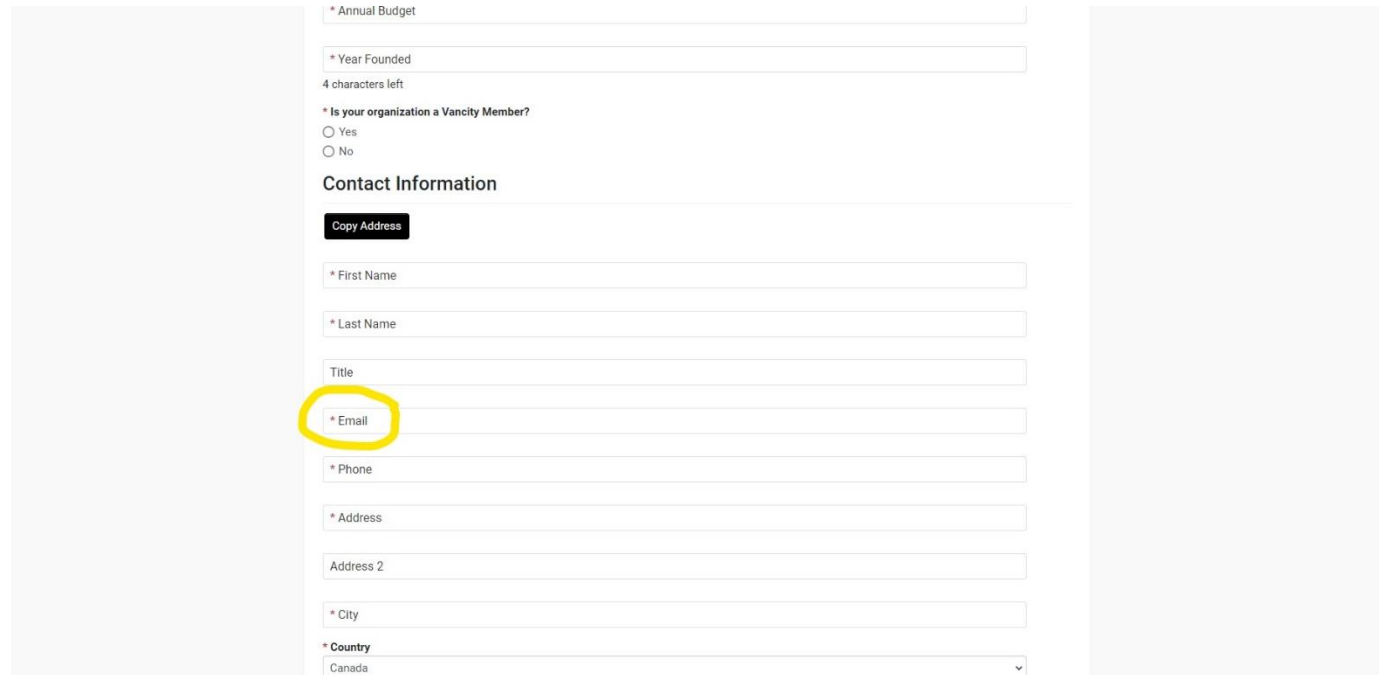
Website

\* Organization Email

Co-operative  Incorporated Not-for-Profit  
 Registered Charity  Unregistered Association  
 Indigenous Organization  First Nations Government  
 Labour Union  For-Profit Business

Under contact information, enter all relevant details as it relates to the contact person who will be submitting application (likely this is you!) Please note the email address under contact information should be for a specific contact person. More than one person can register for an account in an organization and will be added to the organization indicated in the above profile.

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\* Annual Budget

\* Year Founded

4 characters left

\* Is your organization a Vancity Member?

Yes

No

**Contact Information**

Copy Address

\* First Name

\* Last Name

Title

\* Email

\* Phone

\* Address

Address 2

\* City

\* Country

Canada

Once you have registered, you will receive an email **to the contact person's email address** with a link to create a password and login within 5-10 minutes. If you do not receive the email, please check your spam folder.

Click the link to set your password.

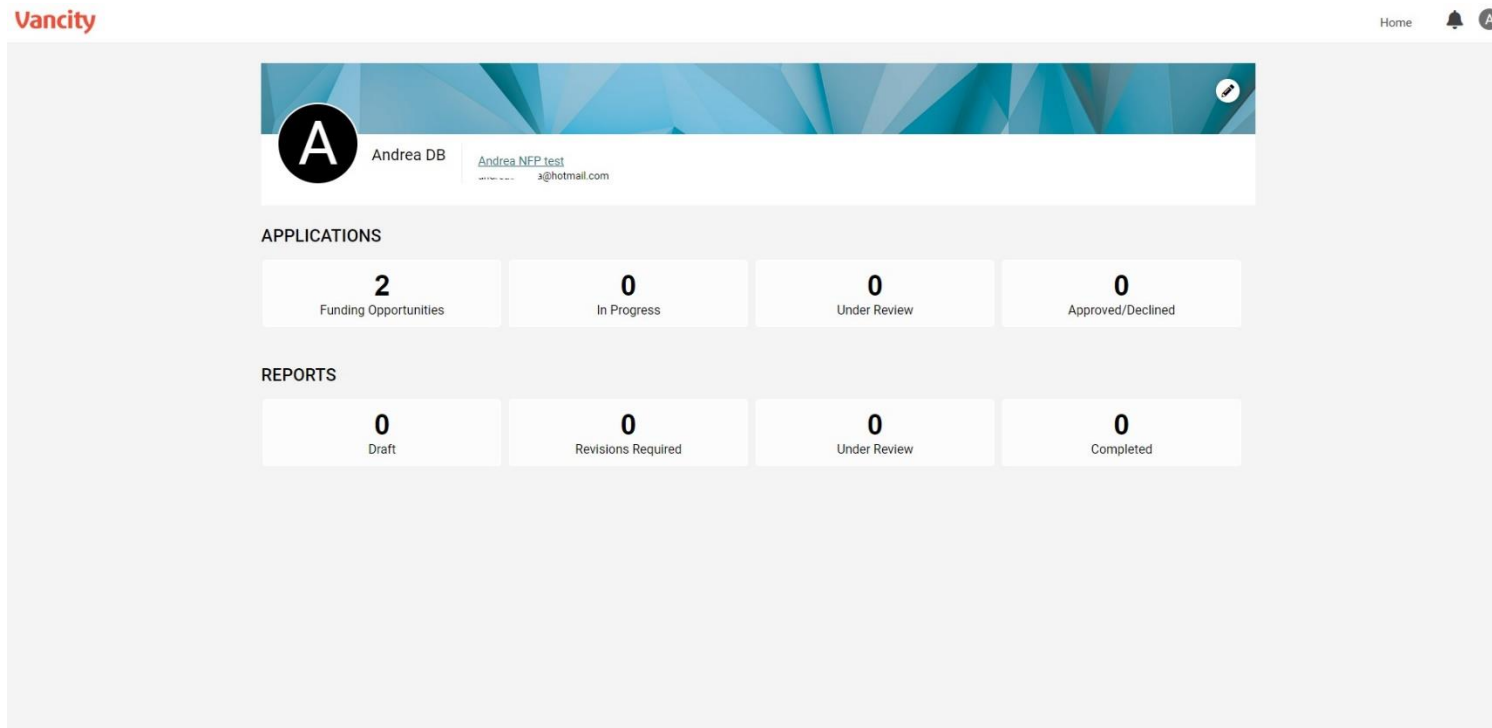
Once you have registered the organization, you can then access the Smart Simple platform.

### Log-in

Enter your username and password to log in.

Your **home page** will have square icons that list:

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Funding opportunities: this shows all the granting programs that are open and available to you.

In progress: this shows applications that have been started but not yet submitted.

Under Review: any applications that have been submitted and are currently undergoing due diligence by Vancity.

Approved/Declined: the result of your application can be found here.

# Vancity Granting Portal Guide

## Application

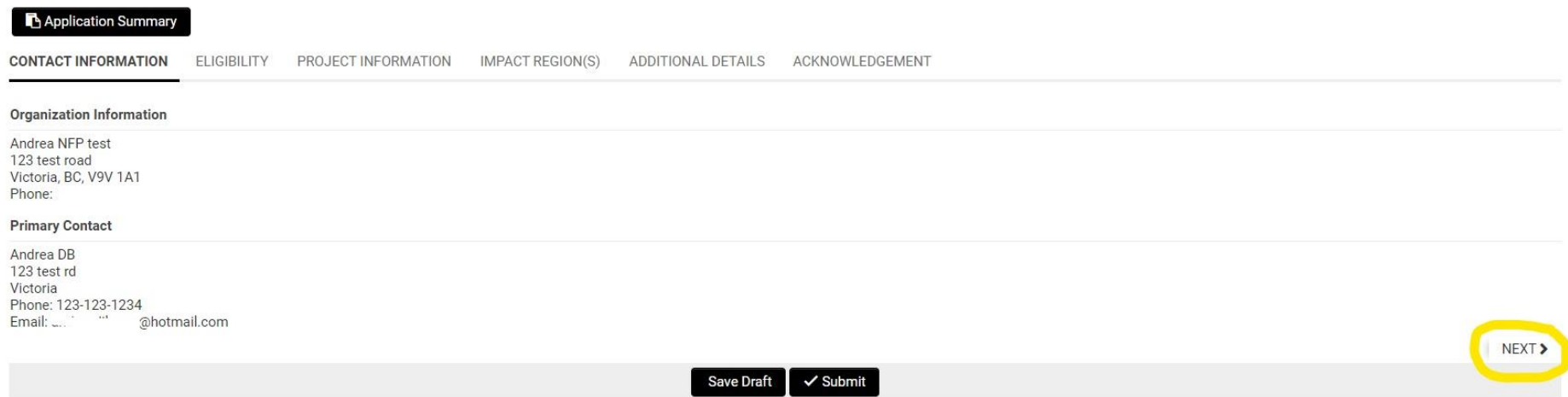
From the **home page**, click funding opportunities to see: Envirofund or CPP.

These programs are open from April to end of November.

Click either of the programs and complete all fields.

Use the NEXT button in the right corner to move between tabs.

The tabs are labelled: Contact Information, Eligibility, Project Information, Impact Region(s), Additional Details and Acknowledgement.



The screenshot shows the application form interface. At the top, there is a navigation bar with tabs: "Application Summary" (active), "CONTACT INFORMATION", "ELIGIBILITY", "PROJECT INFORMATION", "IMPACT REGION(S)", "ADDITIONAL DETAILS", and "ACKNOWLEDGEMENT". Below the tabs, the "CONTACT INFORMATION" section is visible, containing two sub-sections: "Organization Information" and "Primary Contact".

**Organization Information**

Andrea NFP test  
123 test road  
Victoria, BC, V9V 1A1  
Phone:

**Primary Contact**

Andrea DB  
123 test rd  
Victoria  
Phone: 123-123-1234  
Email: .....@hotmail.com

At the bottom of the form, there are two buttons: "Save Draft" and "Submit". On the right side, there is a "NEXT >" button, which is highlighted with a yellow circle.

You can click **save draft** at any time. Your drafts will be found on the home page under 'In Progress'.

Click the **Submit** button when you are done filling out all fields. If you are missing any information, a note will come up stating that your submission has failed. Complete identified missing fields and click **Submit**.

Once you have submitted your application, you will receive an email with a PDF summary of your application.

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CAUTION: This Email is from an EXTERNAL source. Ensure you trust this sender before clicking on any links or attachments. Report Phishing to [information\\_security@vancity.com](mailto:information_security@vancity.com)

Dear

Thank you for your interest in Vancity's granting programs. Your application has been successfully submitted! A PDF summary of the provided information is attached.

Requests are processed on a rolling basis and can take up to 12 weeks for review. To check back on the status of your request, please log back in to the portal anytime. As we review, we will reach out with any questions we may have. While we wish we could support all the great work being done in community, we receive a high-volume of requests and we only have a finite amount of resources, so applications that strongly align with our criteria will be given priority. Thank you for all the work you are doing to support our communities!

Best regards,  
Vancity's Community Investment Team

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This message is sent from a non-production version of SmartSimple Cloud

### **Follow up**

Application review can take up to 12 weeks.

Vancity may require more information, which will be requested via the Granting Portal. Keep an eye out in your inbox for an email from [vancity@smartsimplemailer.com](mailto:vancity@smartsimplemailer.com).

Once a decision has been made on your application, you will receive an email and can login to see your application has moved to 'Approved/Declined' on your home page.