2021-2023 GRASSROOTS FUND
USER GUIDANCE

NOTE: This document is NOT the application form.

The 2021-2023 Grassroots Fund will be hosted on the SurveyMonkey Apply online platform. Please visit the program's landing page for additional resources about the funding opportunity's requirements. https://stlcsf.smapply.io/prog/csf_2021-2023_grassroots_funding_opportunity.

RECOMMENDATIONS AND ITEMS TO NOTE

- SurveyMonkey Apply, the online application platform, will function in a variety of internet browsers but operates most efficiently in the **Google Chrome** internet browser.
- Please follow the instructions for registering on SurveyMonkey Apply website on the next page of this document.
- CSF recommends answering narrative application questions in a word processing program (such as Microsoft Word) for editing and retention purposes. When complete, narrative answers from the word processing file can be copied and pasted into the appropriate SurveyMonkey Apply text boxes.
- This symbol(ⓘ), located throughout the application in the top right corner allows applicants to:
    - contact the site administrator at keepingkidsfirst@stlouisco.com for questions about application content
    - access frequently asked questions about the SurveyMonkey Apply platform, or
    - contact SurveyMonkey Apply with technical concerns regarding the SurveyMonkey Apply platform
- SurveyMonkey Apply will auto-save regularly during an open work session. A “Save and Continue Editing” button is also available at the bottom of each application section.

INSTRUCTIONS FOR REGISTERING ON SURVEYMONKEY APPLY WEBSITE

Step One	Please talk to colleagues within your organization and establish who will be the Primary Administrator for the organization's SurveyMonkey Apply account before beginning the registration process. The Primary Administrator will have responsibility for submitting the completed application(s) and will be the sole point of contact for all emails and alerts from SurveyMonkey Apply related to the application(s). The individual who is designated as the Primary Administrator should begin the registration process.	**Tips:** Instructions for adding collaborators to your organization's application(s) are delineated below, once initial registration is complete. If at any point the Primary Administrator needs to transfer management to another user on the Organization's account, please follow the instructions as found here.
Step Two	Open a web browser window. Go to: https://stlcsf.smapply.io/prog/csf_2021-2023_grassroots_funding_opportunity You are now on the Homepage or landing page for CSF's Grassroots Funding Opportunity.	**Tips:** SM Apply works best in Chrome. Using Internet Explorer and Safari may lead to slower loading time and formatting issues.
Step Three	In the upper right corner of the browser window, click Register.	
Step Four	After entering your name and email address and selecting a password for your user account, you will be prompted to provide the following information about your organization: • Organization Name • Organization Address • Organization Email	
Step Five	Before you can complete all the tasks and submit an application, you will need to verify your email address. To verify your email address, click "Send verification link" at the top of the Homepage. You will receive an email from SurveyMonkey Apply with a link. Once you have clicked the link to verify your email address you will be able to begin your application(s) for the COVID-19 Humanitarian Response Fund.	
Adding Collaborators	To add colleagues as members of your organization and collaborate on the applications, click "Manage organization" in the top right-hand corner from the Homepage (when signed in as the Primary Administrator). After you have selected "Manage organization", select the "Members" tab, and click "Add member". Add the person's name, email address, and select the role they should have on the organization's account. You can also create Teams within your organization to edit and contribute to specific tasks in your application(s) using the "Teams" tab.	**Tips:** *Administrators* will be able to edit and remove non-administrative members, or inactive Administrators and can create and submit program applications. *Non-admin members* will be able to edit applications on behalf of the organization but will not have access to manage the organization's profile and members. They will also not be able to create or submit applications for an organization.

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2021-2023 Grassroots Fund

SurveyMonkey Apply User Tips

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SurveyMonkey Apply Helpful Tips

- Application Guide
- Google Chrome
- Character Limits
- Word Processing File to SurveyMonkey Apply
- Auto-Save
- ⓘ

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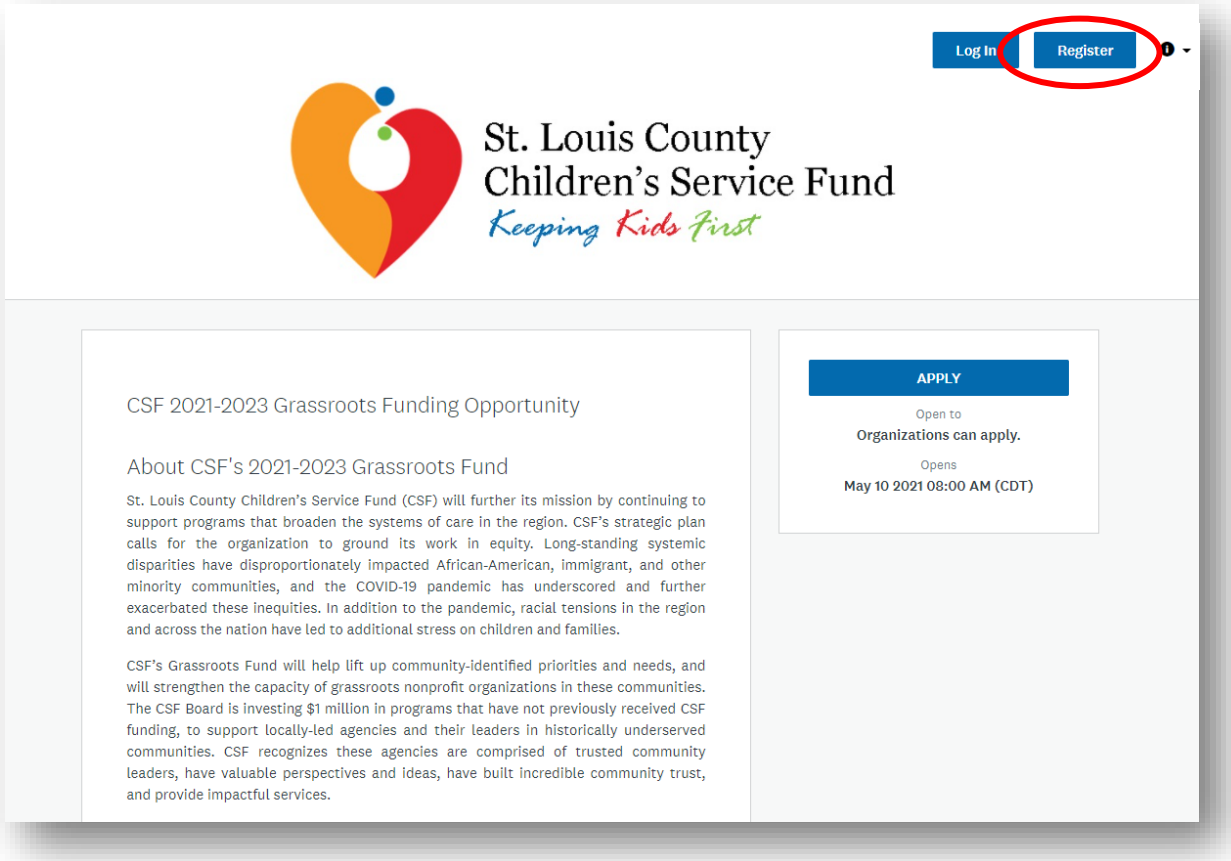
SurveyMonkey Apply User Tips

- Go to the funding opportunity landing page: https://stlcsf.smapply.io/prog/csf_20212023_grassroots_funding_opportunity
- Your organization must register and log in as an organization before you can begin or open an application
- The application is only open to nonprofit organizations; individuals cannot apply
- Pick someone in your organization who will be the leader in completing the online application: this person will be called the "Primary Administrator" on SurveyMonkey Apply
- Please follow the instructions for setting up the organization account on the User Guidance document provided
- Save your log-in information in a safe place. The site administrator cannot restore your password; you will have to contact SurveyMonkey Apply directly to reset or recover account information



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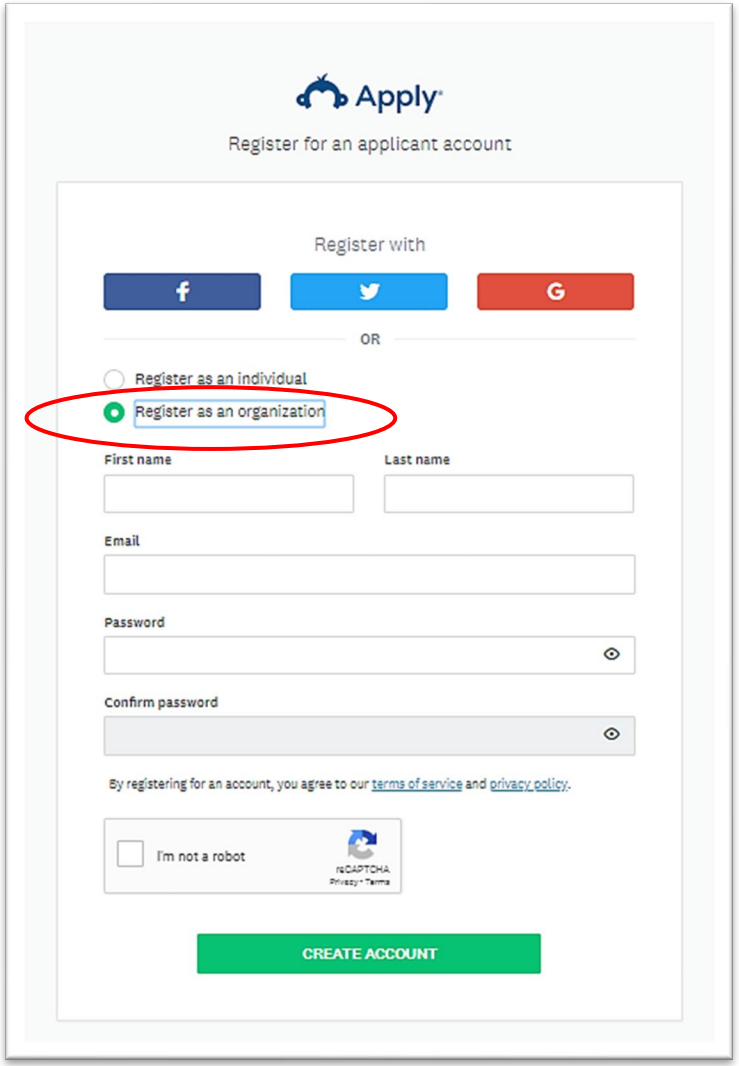
SurveyMonkey Apply Registration Errors

SETTING UP YOUR ORGANIZATION'S ACCOUNT

- ❑ When you or the identified Primary Administrator in your agency goes to register your organization for an account, select "Register as an organization"
  - You will be prompted to provide some basic information on your agency, including the organization's name, address, and phone number.
- ❑ To add collaborators on your organization's SurveyMonkey Apply account follow the instructions included in the User Guidance document provided



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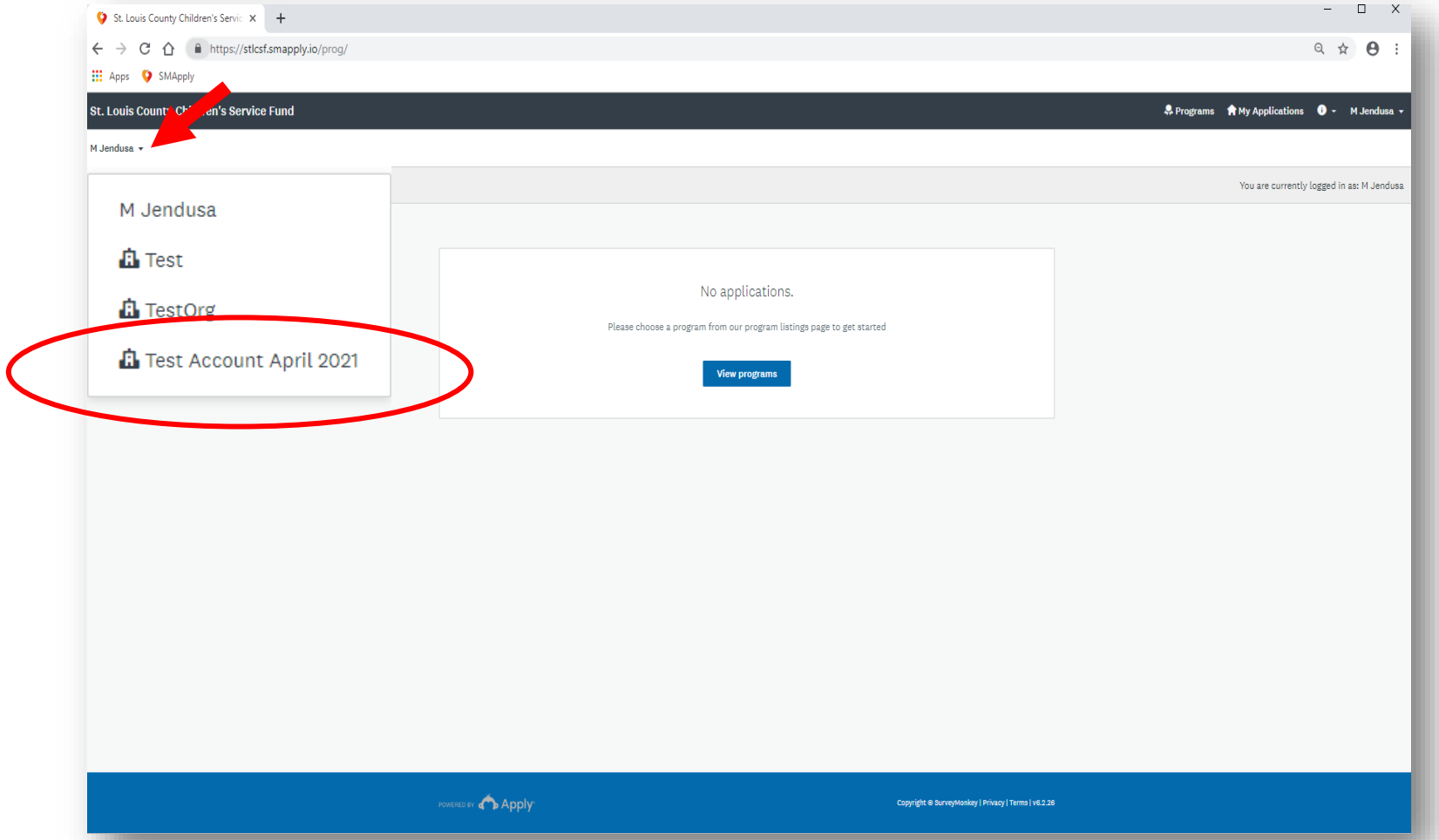
SurveyMonkey Apply Login Errors

- Once your organization has been registered on SurveyMonkey Apply and you have been added as an individual user and member of your organization's account, log into your individual account on SurveyMonkey Apply
- Immediately upon logging into your individual account, you will find that you do not have any program applications available to open
- You will need to tell SurveyMonkey Apply that you want to open an application for your organization (for which you have been added as a collaborator on by the Primary Administrator) by clicking on your user name in the upper left hand corner of your screen and selecting the organization's name.



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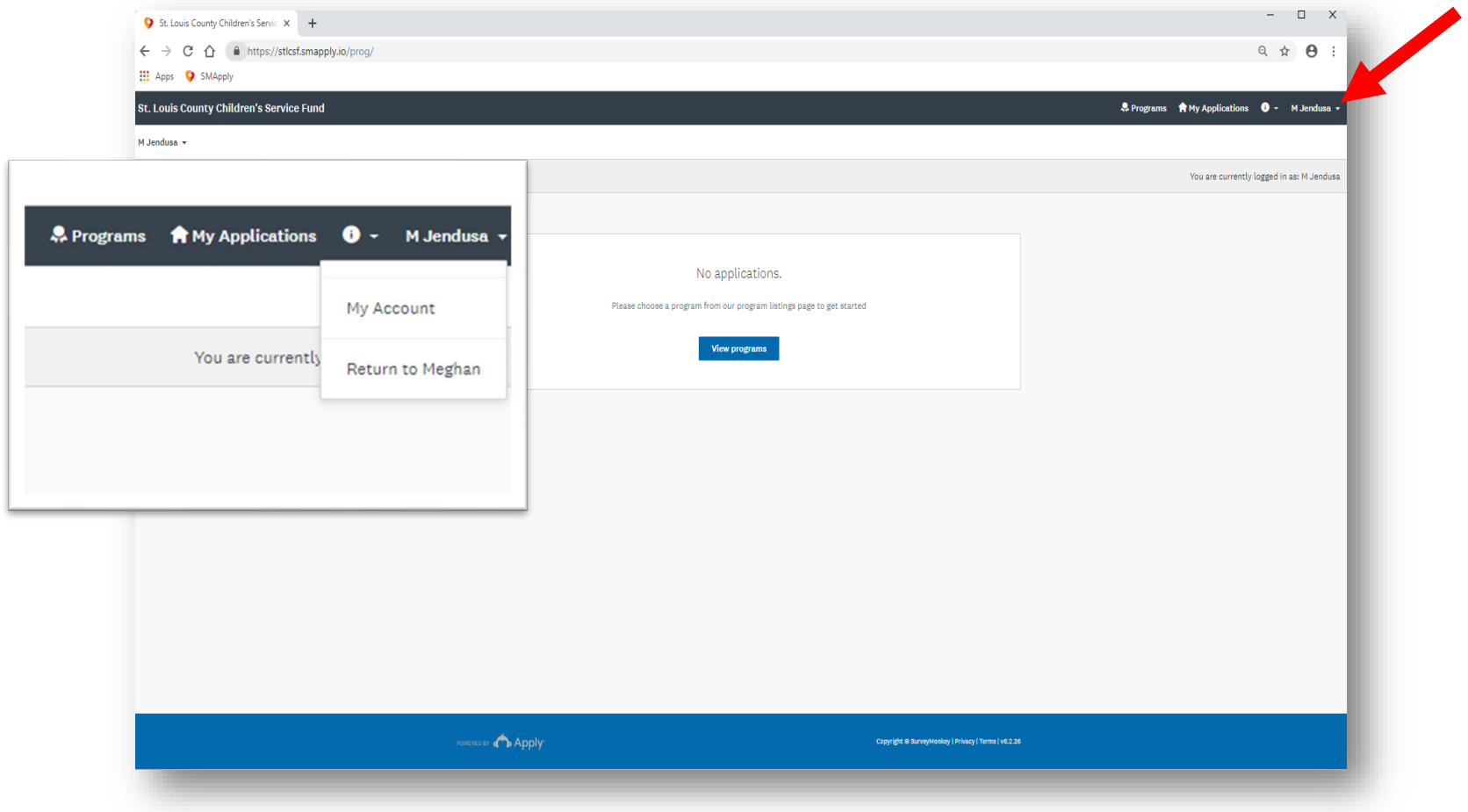
SurveyMonkey Apply Login Errors

- If the drop down menu with your organization is not available, double check to make sure that your organization is registered and that your individual account is actually linked to the organization's account.
- If you are sure that your agency is not registered, and you already are registered and logged-in as an individual user, you can register your agency for an organization account by clicking on your user name and "My Account".
  - You can set up an organization account from the Account Settings page and then add your agency's name, address, and email information.



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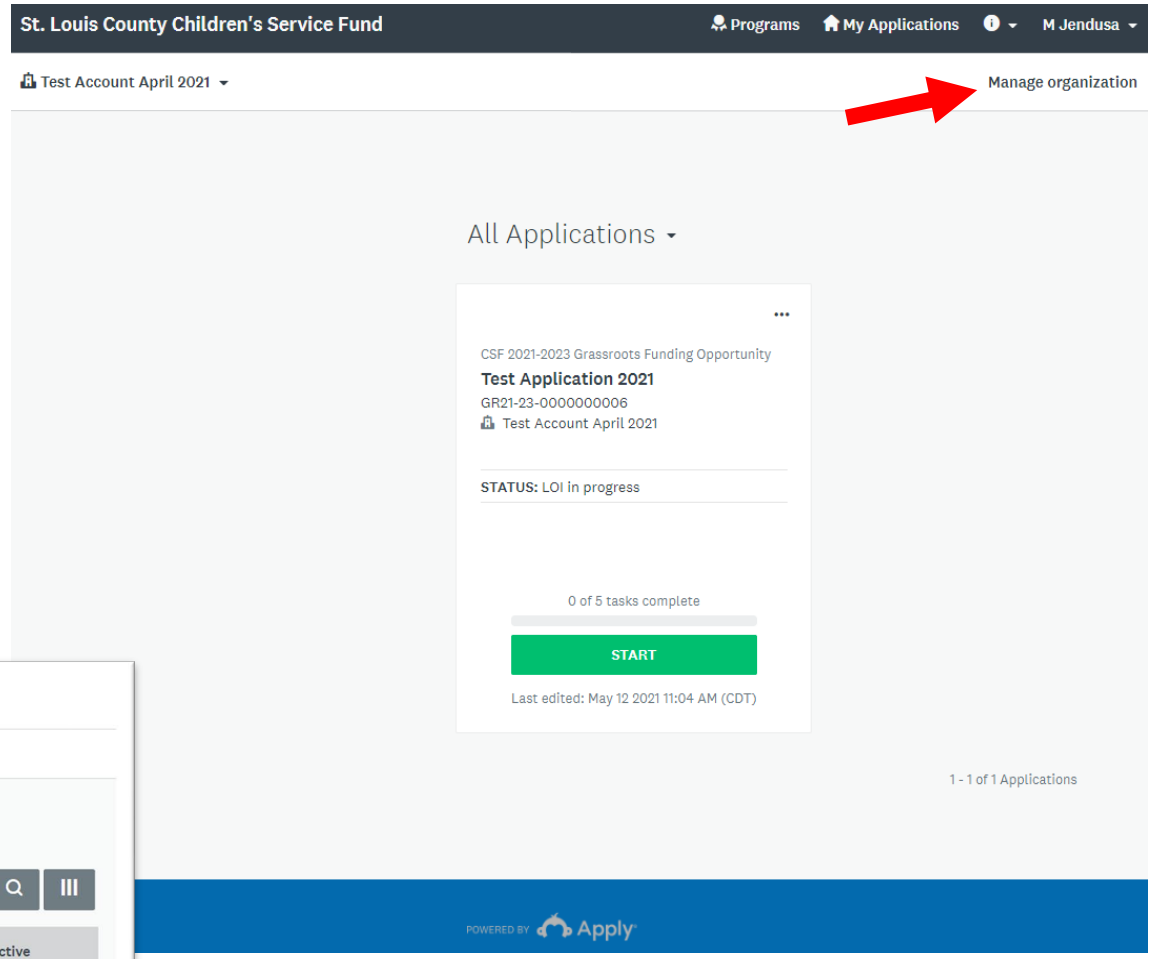
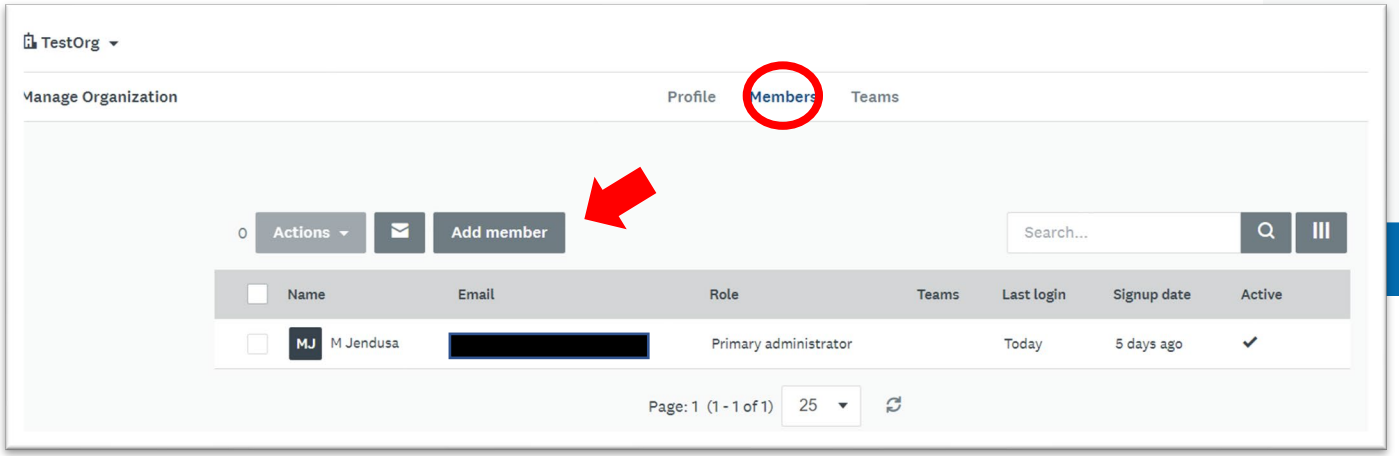
SurveyMonkey Apply Login Errors

- To double check that your individual account is actually linked to the organization's account, have your Primary Administrator log in to their account, select the organization from the upper left corner of the screen (as demonstrated previously), and then select "Manage organization" in the ribbon bar
- Once in the organization's profile, click on the "Members" tab to review all individual users who have been added as collaborators to the organization





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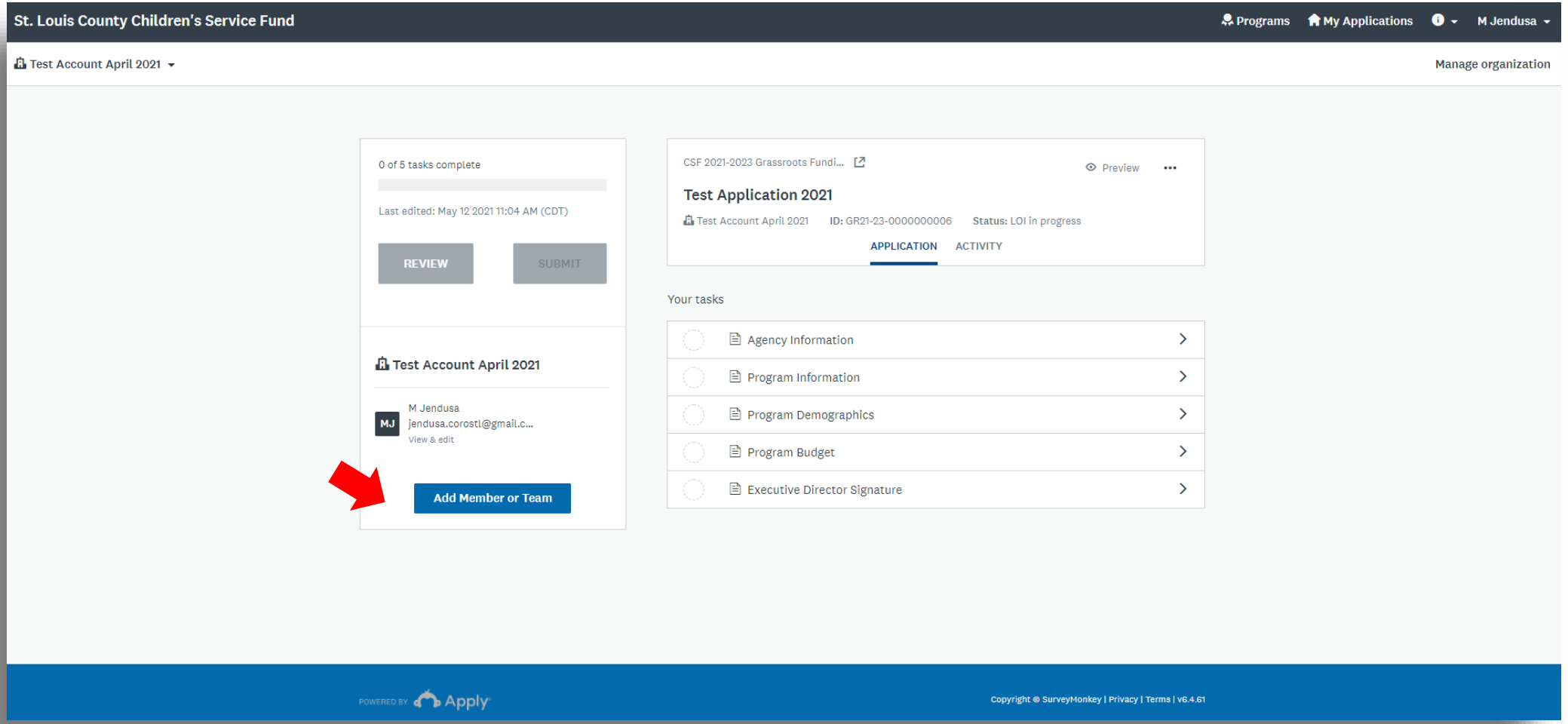
SurveyMonkey Apply Tasks



- ❑ After the Primary Admin. adds the new user to the organizational account, they must then navigate to the program or application and grant the user access to that particular application by clicking on the "Add Member or Team" button as shown on their program dashboard.

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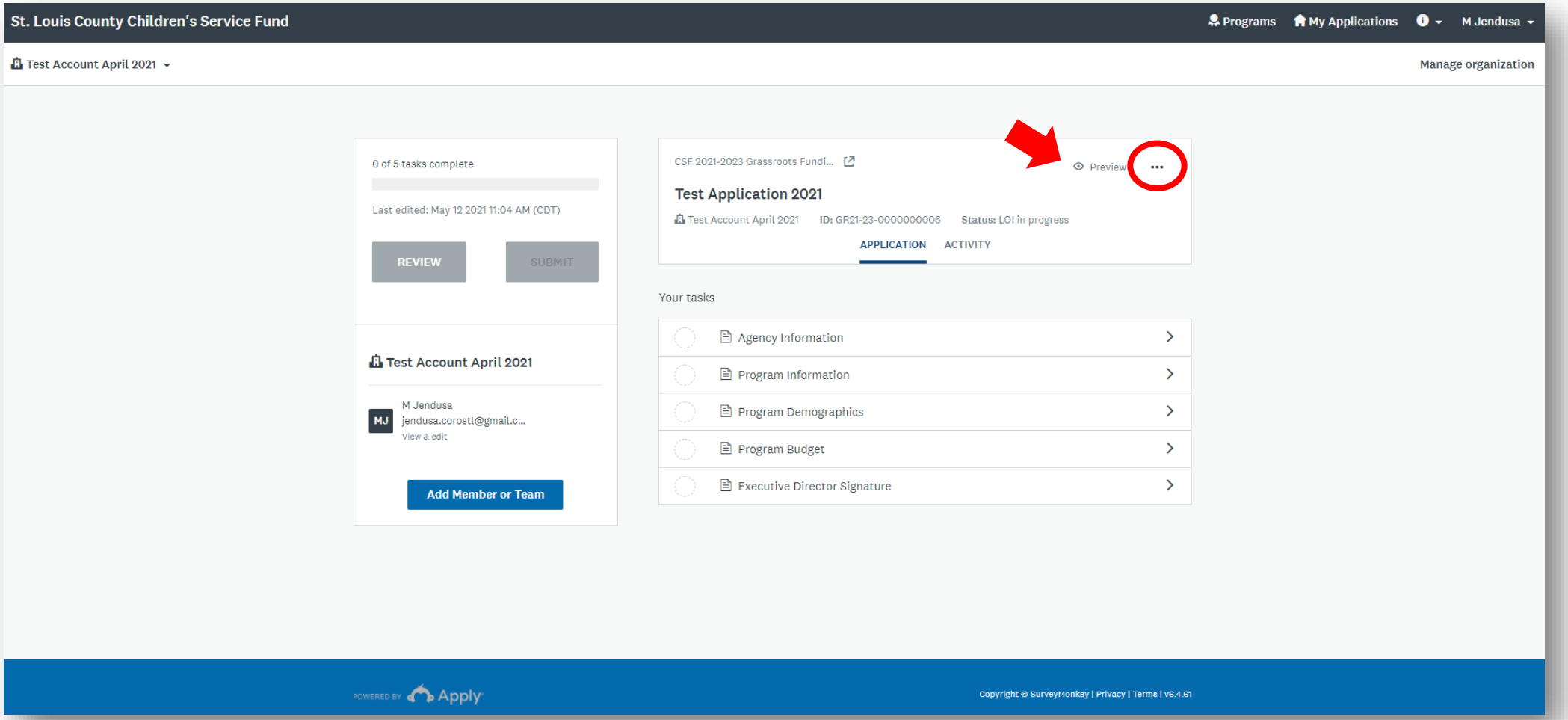
SurveyMonkey Apply Tasks



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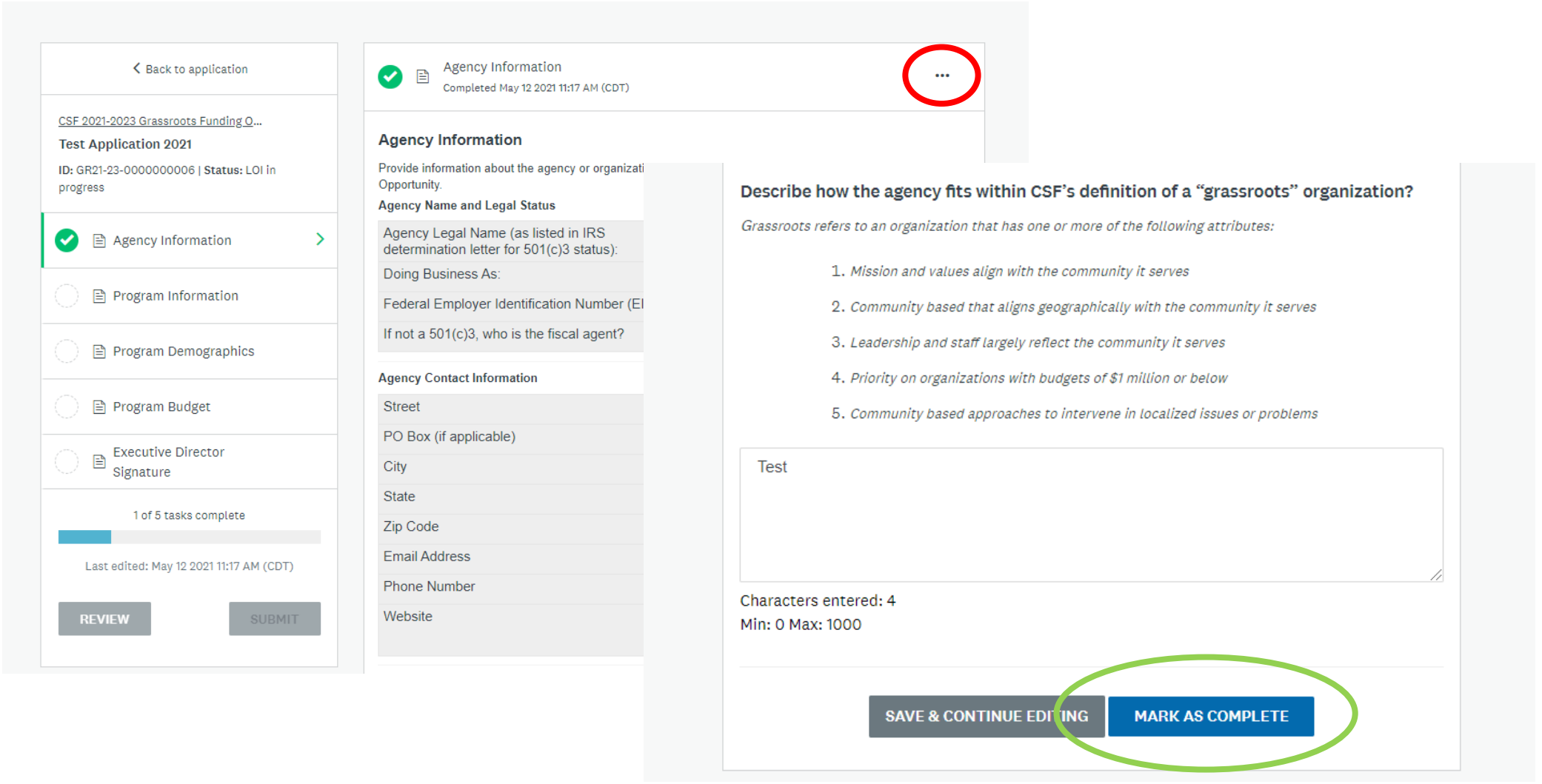
SurveyMonkey Apply Tasks



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Email JSiedle@stlouiscountymo.gov with any questions!