

## Grantee Portal Framework and Questions

The Foundation launched a new online portal on March 2, 2020. **ALL organizations are required to create an account through the new portal in order to submit requests.** The Foundation **only** accepts requests through our online portal.

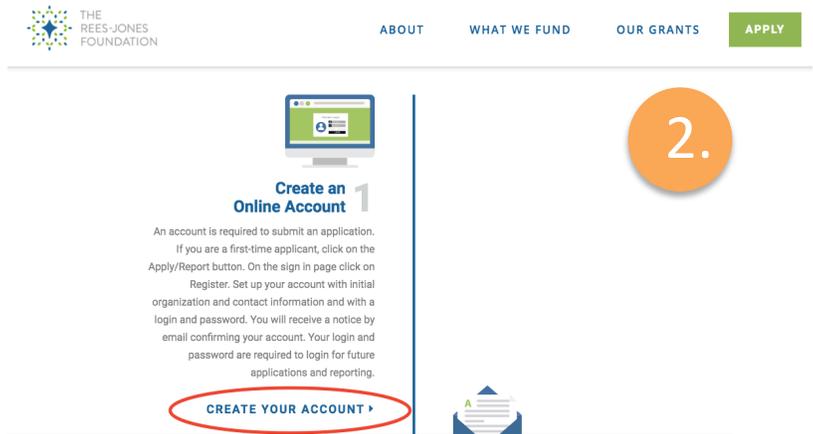
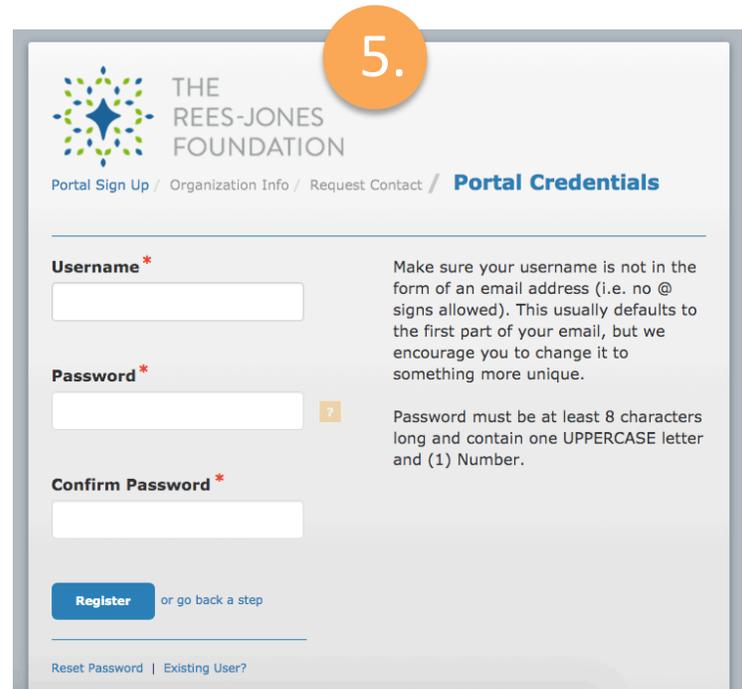
Read below for more details on all steps of the grant application and reporting process.

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## Create an Account

1. Go to <https://www.rees-jonesfoundation.org/apply>
2. Scroll down and click “Create an Account”
3. Complete the form and click “Next” at the bottom of the page. **You’ll be asked for the following info in this step:**
  - a. Organization Legal Name
  - b. Organization Name/DBA
  - c. EIN
  - d. Physical Address (Street, City, State, Zip, Country)
  - e. Organization Phone Number
  - f. Mailing Address (Street, City, State, Zip, Country)
  - g. Website
4. Complete the form and click “Next” at the bottom. **You’ll be asked for the following info in the step:**
  - a. Salutation
  - b. First and Last Name
  - c. Title
  - d. Phone
  - e. Email
5. Set-up portal credentials and click “Register” at the bottom. You’ll need to create a username (**not in the form of an email address**) and password (at least 8 characters and contain one UPPERCASE letter and number).
6. You’ll receive an email confirmation to notify you that your account has been created. **Save your username and password as it will be required for all applications and grant reports.**

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Portal Sign Up / Organization Info / Request Contact / **Portal Credentials**

**Username \***

**Password \***

**Confirm Password \***

**Register** or go back a step

Reset Password | Existing User?

Make sure your username is not in the form of an email address (i.e. no @ signs allowed). This usually defaults to the first part of your email, but we encourage you to change it to something more unique.

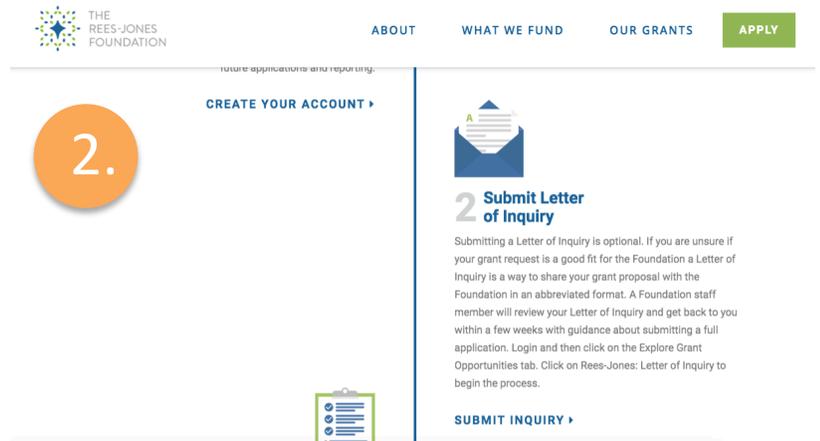
Password must be at least 8 characters long and contain one UPPERCASE letter and (1) Number.

## Submit a Letter of Inquiry

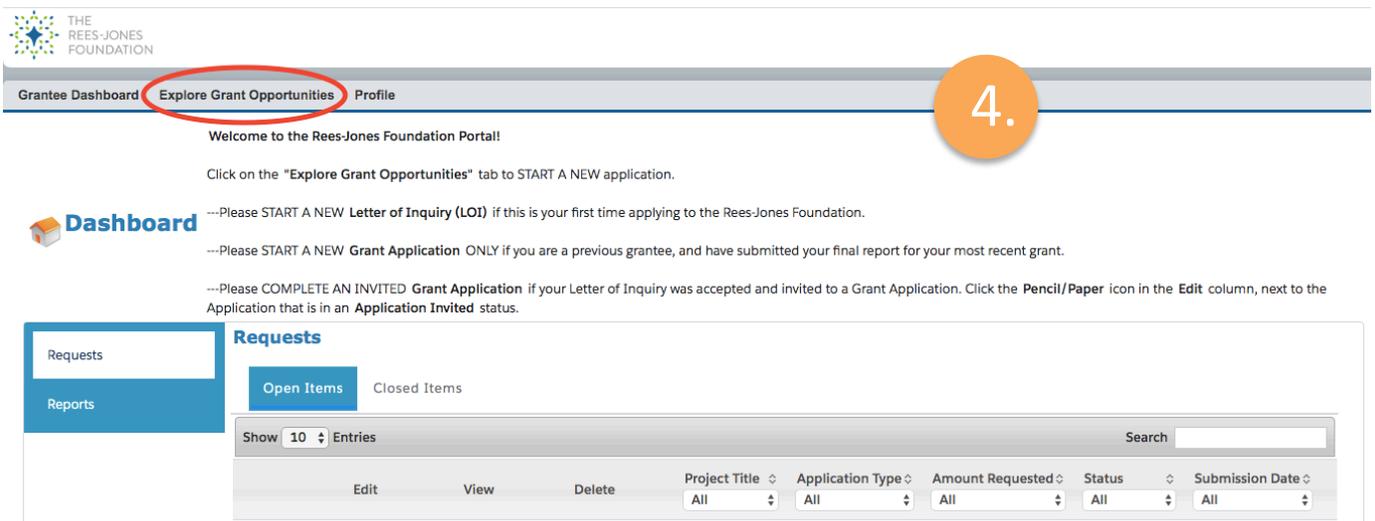
**Submitting a Letter of Inquiry is optional.** If you are unsure if your grant request is a good fit for the Foundation a Letter of Inquiry is a way to share your grant proposal with the Foundation in an abbreviated format.

A Foundation staff member will review your Letter of Inquiry and get back to you within a few weeks with guidance about submitting a full application.

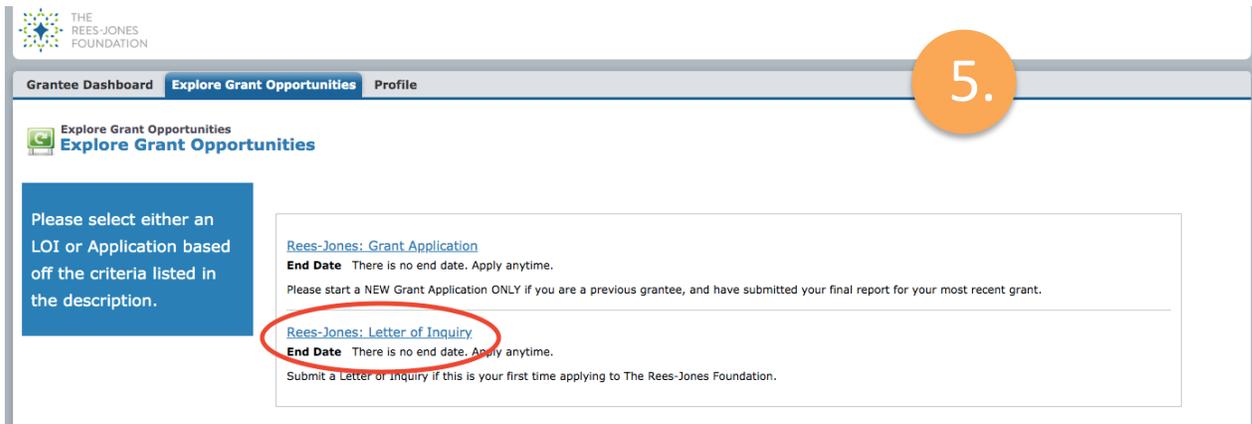
1. Go to <https://www.rees-jonesfoundation.org/apply>
2. Scroll down and click on “Submit Inquiry”
3. If you already have an Account, log in. **If you do not have an Account, see the *Create an Account* portion of the guide.**



4. Once you login, go to “Explore Grant Opportunities” in the toolbar at the top.



5. Click the second option that reads “Rees-Jones Letter of Inquiry”.



Grantee Dashboard Explore Grant Opportunities Profile

Explore Grant Opportunities

Please select either an LOI or Application based off the criteria listed in the description.

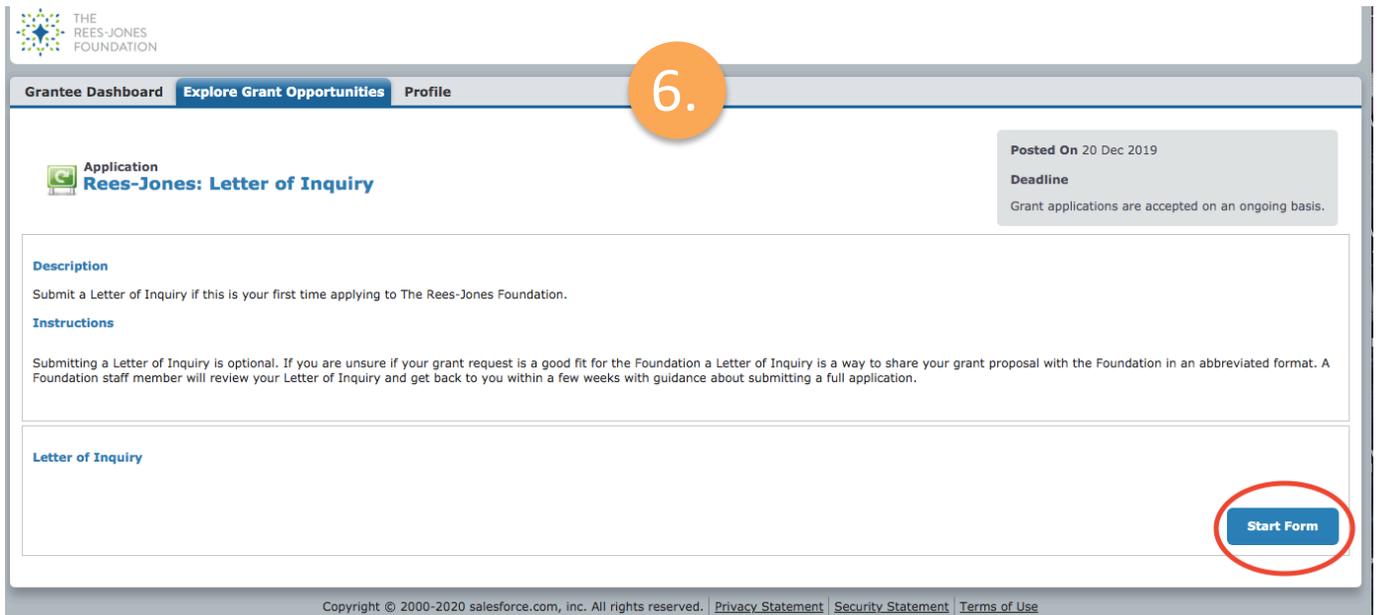
[Rees-Jones: Grant Application](#)  
**End Date** There is no end date. Apply anytime.  
 Please start a NEW Grant Application ONLY if you are a previous grantee, and have submitted your final report for your most recent grant.

[Rees-Jones: Letter of Inquiry](#)  
**End Date** There is no end date. Apply anytime.  
 Submit a Letter of Inquiry if this is your first time applying to The Rees-Jones Foundation.

6. Click “Start Form” to begin your LOI.

a. You can save your progress as you compile your LOI.

b. Once you’d completed your LOI, you’ll be prompted to “Review & Submit”. From the review page, you’ll be able to print your LOI for your records.



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Grantee Dashboard Explore Grant Opportunities Profile

Application  
**Rees-Jones: Letter of Inquiry**

Posted On 20 Dec 2019  
**Deadline**  
 Grant applications are accepted on an ongoing basis.

**Description**  
 Submit a Letter of Inquiry if this is your first time applying to The Rees-Jones Foundation.

**Instructions**  
 Submitting a Letter of Inquiry is optional. If you are unsure if your grant request is a good fit for the Foundation a Letter of Inquiry is a way to share your grant proposal with the Foundation in an abbreviated format. A Foundation staff member will review your Letter of Inquiry and get back to you within a few weeks with guidance about submitting a full application.

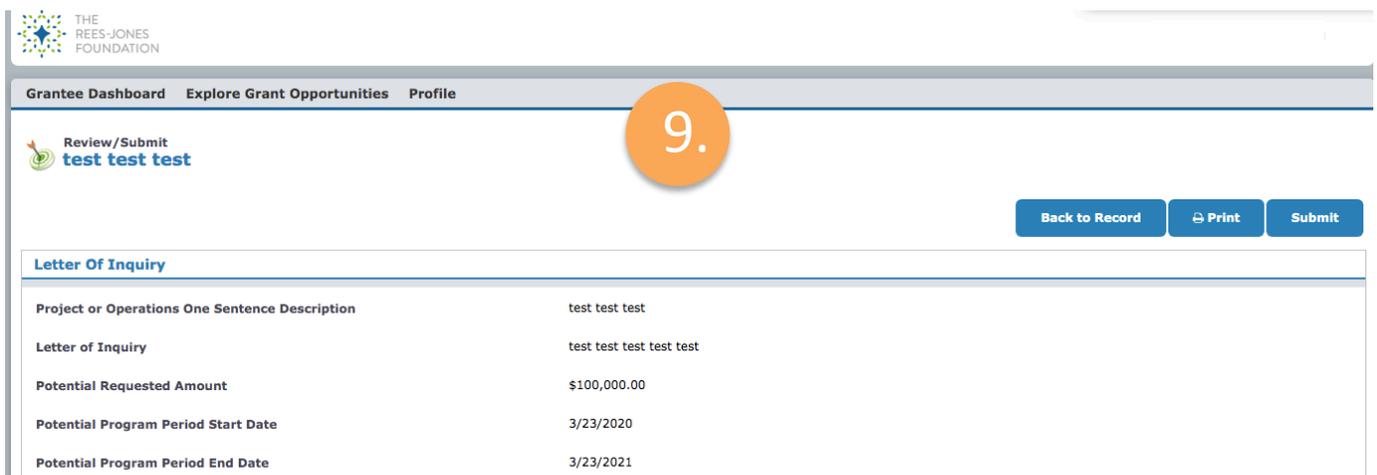
**Letter of Inquiry**

Start Form

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**7. In the following section, you'll be required to provide the following:**

- a. Project or Operations (one sentence description of your project or request – 120 characters max)
  - b. The Letter of Inquiry (5,000 character max), **which should include:**
    - i. Brief organization background
    - ii. Description of need addressed
    - iii. Brief project description (if appropriate include timeline and potential requested amount)
    - iv. Desired impact or outcome
  - c. Potential Requested Amount
  - d. Potential Program Person Start Date (use the start of a fiscal year or program year)
  - e. Potential Program Period End Date (use the end of a fiscal year or program year)
8. If you are done, click “Review/Submit” at the top of the page. If you are not ready to submit, use the “Save” button at the bottom of the page.
- a. **You must save before you will be allowed to submit.**
9. Once you click “Review/Submit”, you’ll see a preview of your LOI.
- a. **To make edits, click “Back to Record”**
  - b. **To print a copy for your records or save a copy as a PDF for your records, click “Print”**
  - c. **If you’re ready to submit your LOI, click “Submit”**

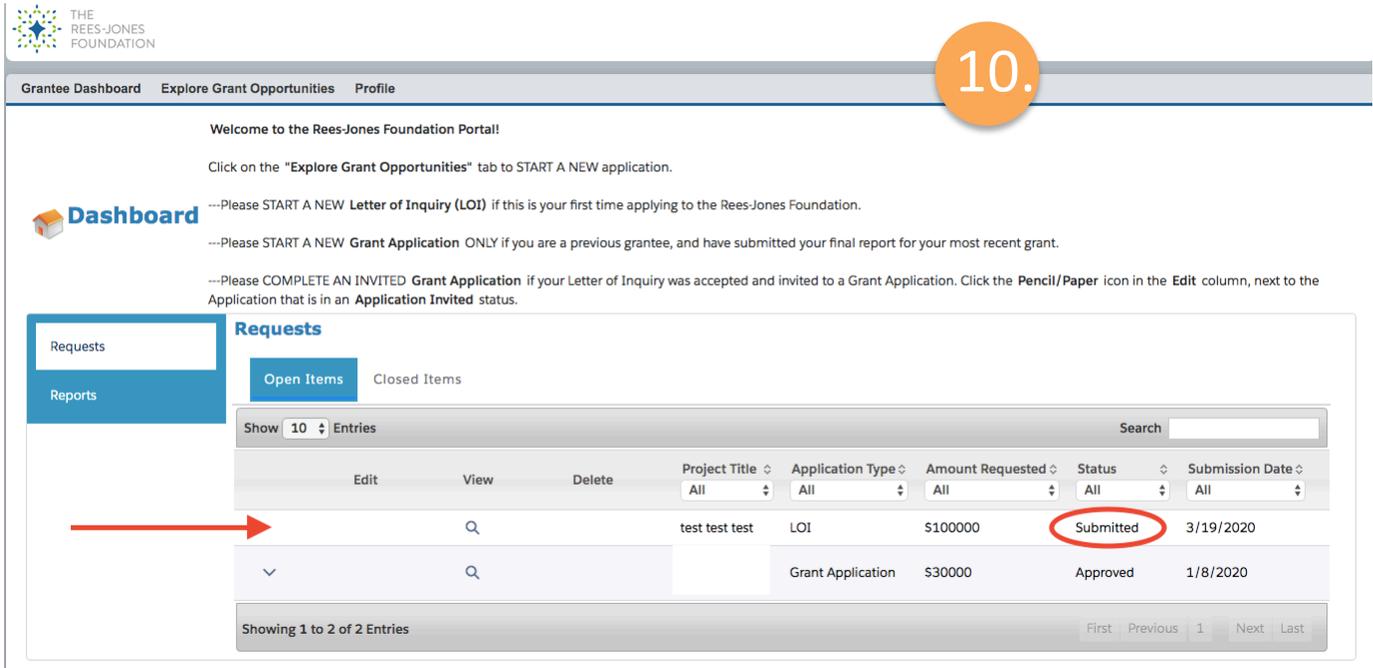


The screenshot shows the 'Review/Submit' page of the Rees-Jones Foundation Grantee Dashboard. A large orange circle with the number '9.' is overlaid on the page. At the top, there are navigation links for 'Grantee Dashboard', 'Explore Grant Opportunities', and 'Profile'. Below these is a 'Review/Submit' button with a green checkmark icon. On the right side, there are three buttons: 'Back to Record', 'Print', and 'Submit'. The main content area is titled 'Letter Of Inquiry' and contains a table with the following data:

Project or Operations One Sentence Description	test test test
Letter of Inquiry	test test test test test
Potential Requested Amount	\$100,000.00
Potential Program Period Start Date	3/23/2020
Potential Program Period End Date	3/23/2021

10. Once you've submitted, you'll be re-directed back to your home page where you can see all of your LOIs and Applications.

*If you've saved your LOI, to re-open it and make edits, click the pencil in the edit column on the home page next to the LOI.*



The screenshot shows the 'Grantee Dashboard' with a 'Requests' sidebar. The main content area displays a table of requests under the 'Open Items' tab. A red circle highlights the 'Submitted' status of a request, and a red arrow points to the 'View' icon for that same request.

Project Title	Application Type	Amount Requested	Status	Submission Date
test test test	LOI	\$100000	Submitted	3/19/2020
	Grant Application	\$30000	Approved	1/8/2020

**A Foundation staff member will review your Letter of Inquiry and get back to you within a few weeks with guidance about submitting a full application.**

## Submit an Application

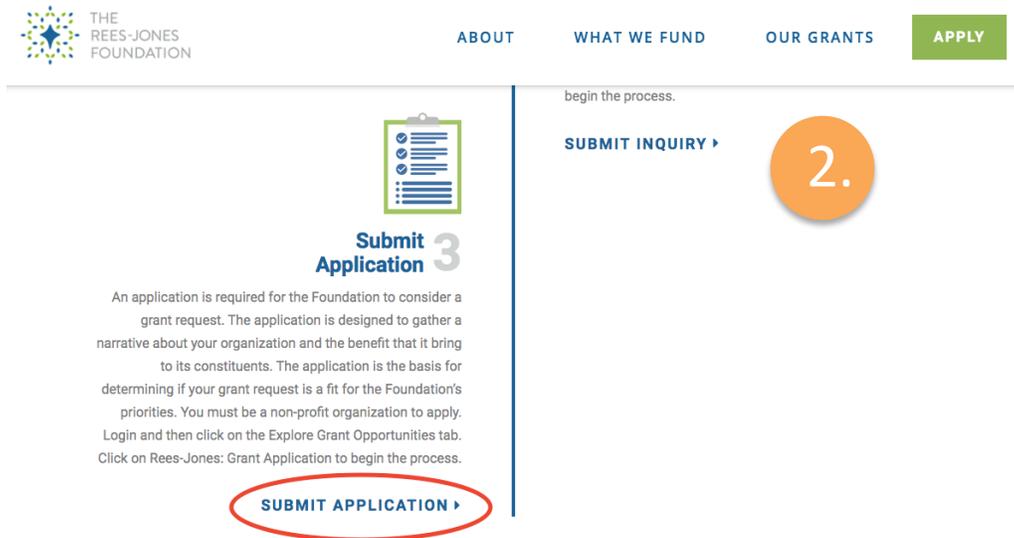
An application is required for the Foundation to consider a grant request.

**You CAN save and return to the application at any time before you submit the final.**

The application is designed to gather a narrative about your organization and the benefit that your organization brings to its constituents.

The application is the basis for determining if your grant request is a fit for the Foundation's priorities. You must be a non-profit organization to apply.

1. Go to <https://www.rees-jonesfoundation.org/apply>
2. Scroll down and click on "Submit Application"



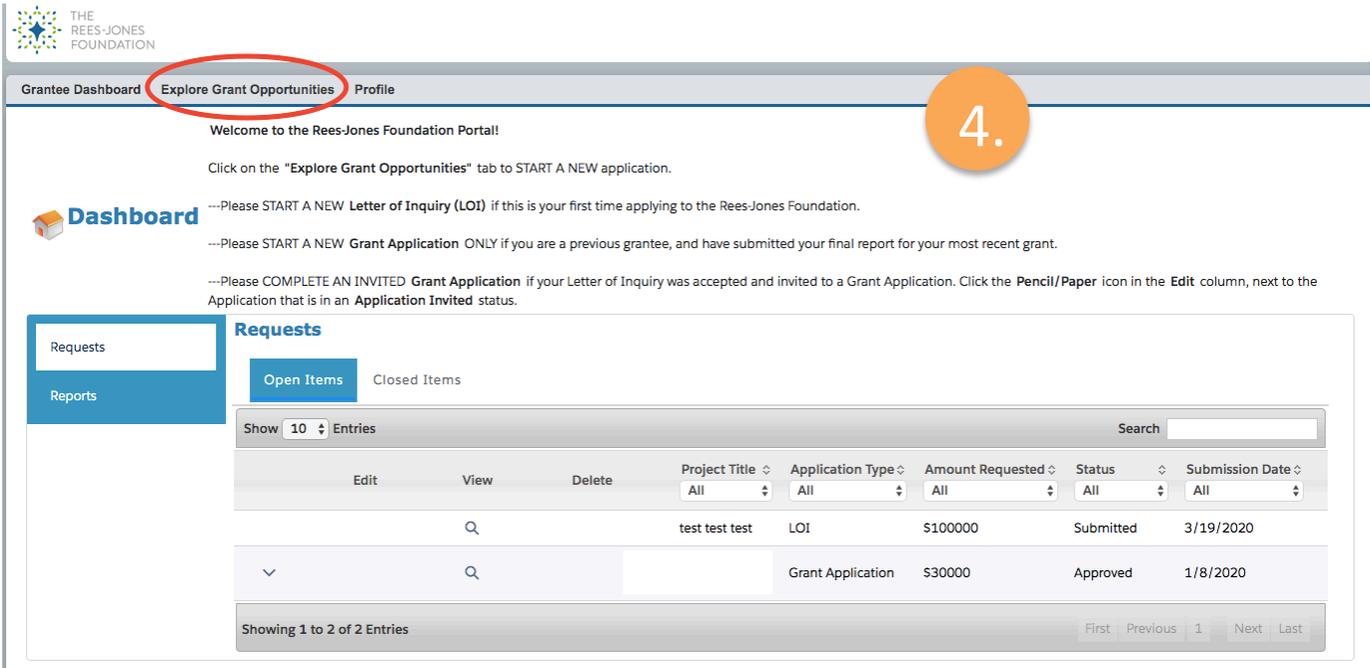
The screenshot shows the website's navigation bar with the logo on the left and links for 'ABOUT', 'WHAT WE FUND', 'OUR GRANTS', and 'APPLY'. The main content area is divided into two columns. The left column features a clipboard icon, the heading 'Submit Application 3', and a paragraph of text: 'An application is required for the Foundation to consider a grant request. The application is designed to gather a narrative about your organization and the benefit that it bring to its constituents. The application is the basis for determining if your grant request is a fit for the Foundation's priorities. You must be a non-profit organization to apply. Login and then click on the Explore Grant Opportunities tab. Click on Rees-Jones: Grant Application to begin the process.' Below this text is a blue button labeled 'SUBMIT APPLICATION' with a right-pointing arrow, which is circled in red. The right column contains the text 'begin the process.' and a blue button labeled 'SUBMIT INQUIRY' with a right-pointing arrow. To the right of this button is a large orange circle containing the number '2.'

3. If you already have an Account, log in.

**If you do not have an Account, see the *Create an Account* portion of the guide.**

4. To create a new Application, click **“Explore Grant Opportunities”** in the top toolbar.

**If you’re editing an existing Application draft**, click on the pencil that corresponds to the appropriate grant under Requests on the Dashboard



Grantee Dashboard **Explore Grant Opportunities** Profile

Welcome to the Rees-Jones Foundation Portal!

Click on the "Explore Grant Opportunities" tab to START A NEW application.

---Please START A NEW **Letter of Inquiry (LOI)** if this is your first time applying to the Rees-Jones Foundation.

---Please START A NEW **Grant Application** ONLY if you are a previous grantee, and have submitted your final report for your most recent grant.

---Please COMPLETE AN INVITED **Grant Application** if your Letter of Inquiry was accepted and invited to a Grant Application. Click the **Pencil/Paper** icon in the **Edit** column, next to the Application that is in an **Application Invited** status.

**Requests**

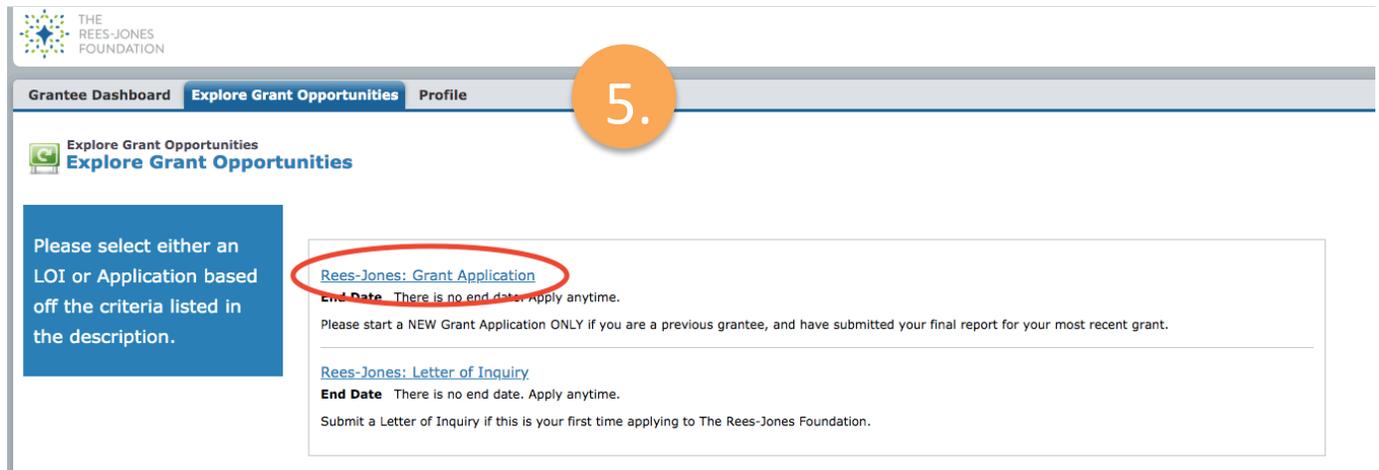
Open Items Closed Items

Show 10 Entries Search

Edit	View	Delete	Project Title	Application Type	Amount Requested	Status	Submission Date
	Q		test test test	LOI	\$100000	Submitted	3/19/2020
∨	Q			Grant Application	\$30000	Approved	1/8/2020

Showing 1 to 2 of 2 Entries First Previous 1 Next Last

5. Click the first link that says **“Rees-Jones: Grant Application”** to begin a new Application.



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Grantee Dashboard **Explore Grant Opportunities** Profile

Explore Grant Opportunities

Please select either an LOI or Application based off the criteria listed in the description.

[Rees-Jones: Grant Application](#)  
**End Date** There is no end date. Apply anytime.  
 Please start a NEW Grant Application ONLY if you are a previous grantee, and have submitted your final report for your most recent grant.

[Rees-Jones: Letter of Inquiry](#)  
**End Date** There is no end date. Apply anytime.  
 Submit a Letter of Inquiry if this is your first time applying to The Rees-Jones Foundation.

6. Click **“Start Form”** at the bottom of the page to begin a NEW APPLICATION.

**You CAN save and return to the application at any time before you submit the final.**

The save button is at the bottom of each page.

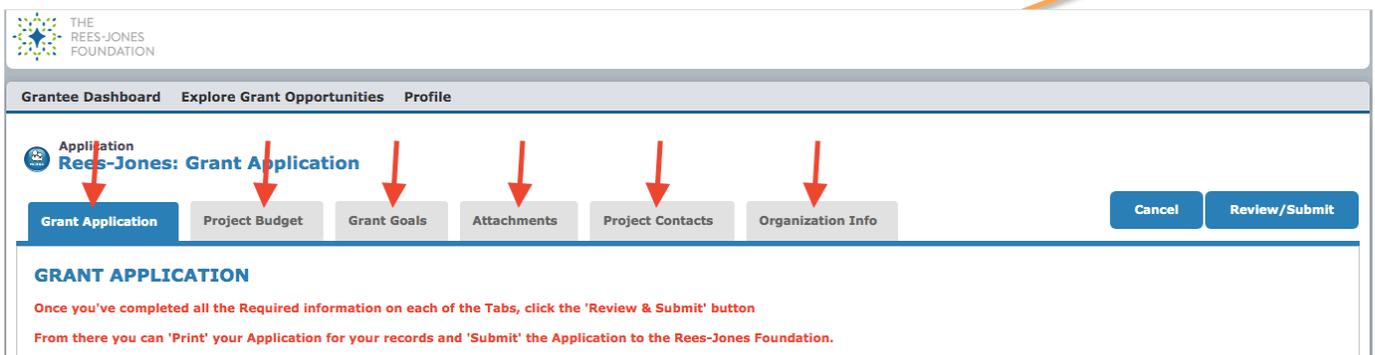
7. There are six parts of the Application. *See step 4A if you need to edit an existing application that you started previously.*

**The six sections are:**

- a. Grant Application
- b. Project Budget
- c. Grant Goals
- d. Attachments
- e. Project Contacts
- f. Organization Info

You can toggle between sections of the application by clicking the gray tabs at the top. **The tab that you are on will be blue.**

**A breakout of each section of the application is provided on the following pages.**



8. **If you are done, click “Review/Submit” at the top of the page. The next step will allow you to review your entire application before you are prompted to submit.**

If you are **not** ready to submit, use the “Save” button at the bottom of the page.

**You must save before you will be allowed to submit.**

9. Once you click **“Review/Submit”**, you’ll see a preview of your Application.

**To make edits**, click “Back to Record”

**To print a copy for your records or save a copy as a PDF for your records**, click “Print”

**If you’re ready to submit your Application**, click “Submit”

10. Once you’ve submitted, you’ll be re-directed back to your home page where you can see all of your LOIs and Applications.

**A breakout of each section of the application is provided on the following pages.**

## Grant Application

The first section of the application is called “Grant Application”.

### In this section, you will be required to provide the following:

- **Project or Operations Description:** Provide a one sentence description of your project or operations request (120 characters)
- **Requested Amount**
- **Program Start Date** (use the start of a fiscal year or program year)
- **Program End Date** (use the start of a fiscal year or program year)
- **Need Addressed by the Request:** Describe the problem that the grant request seeks to address (4,000 characters max)
- **Constituents Served:** Describe the constituents served, including geography, demographics, and information on how the constituents are more effectively served (4,000 characters max)
- **Project Description:** Describe the project or ongoing operations, including components, logistics, and sustainability plans (10,000 characters max)
- **Project Staffing:** Describe the staff and volunteers that enable the project or operations, including qualifications, training, and other characteristics that are important to the organization (4,000 characters max)
- **Project Partnerships:** Describe the organizational partnerships that are important to the project or operations, e.g., project collaborators, research partners, referral partners, governmental agencies, other funding sources (4,000 characters max)
- **Risk Management:** Describe the risk management practices of the organization, particularly practices related to keeping children and youth safe (4,000 characters max)
- **Number of Constituents Served by the Request:** Provide the total number of constituents served by the request
- **Other Output/Outcome Measures:** Describe measures of activity that are pertinent to the project or operations (4,000 characters max)
- **Long-Term Impact:** Describe the longer-term impact of the project or operations. Cite internal analysis or outside research with citations if applicable (4,000 characters max)

## Project Budget

This budget template is designed to capture the revenue and expenses of the programming for which funding is being requested.

**If you are requesting general operating funding, fill in the categories with general operating values for the organization.**

**If the request is for a specific project or program, fill in the categories with values that are specific to the project or program.**

### INSTRUCTIONS REGARDING PROJECT YEARS

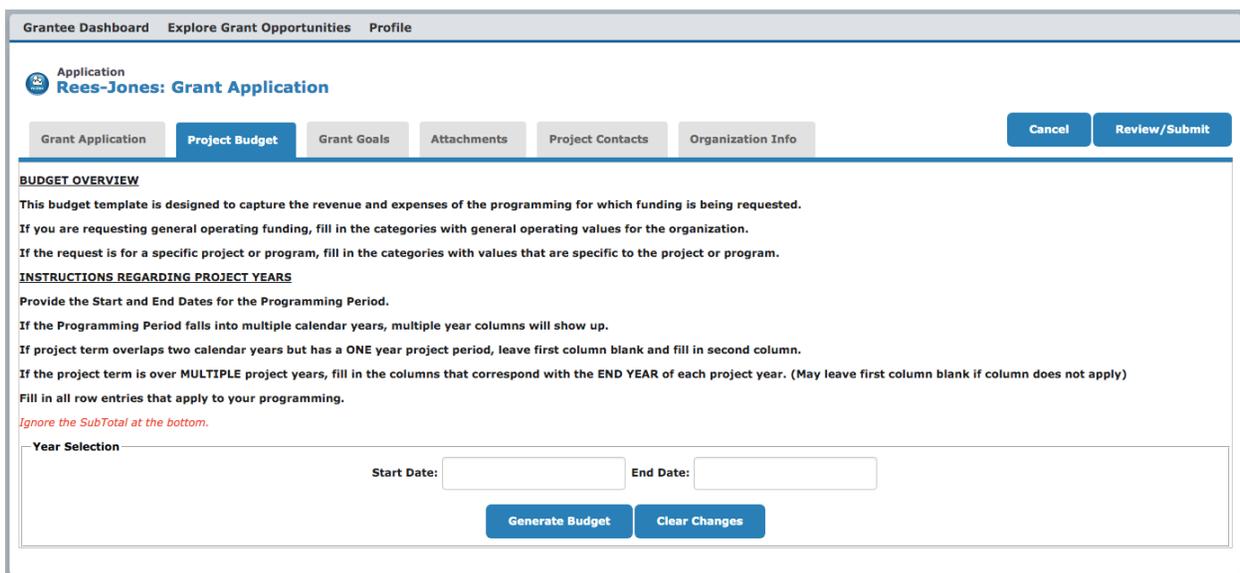
#### Provide the Start and End Dates for the Programming Period.

If the Programming Period falls into **multiple calendar years**, multiple year columns will show up.

If project term **overlaps two calendar years but has a ONE-year project period**, leave first column blank and fill in second column.

If the project term is over **MULTIPLE project years**, fill in the columns that correspond with the **END YEAR** of each project year (may leave first column blank if column does not apply).

Enter the start and end date then click **“Generate Budget”**.



The screenshot shows a web application interface for a grant application. At the top, there are navigation links: "Grantee Dashboard", "Explore Grant Opportunities", and "Profile". Below this is a header for the application: "Application Rees-Jones: Grant Application". A series of tabs are visible: "Grant Application", "Project Budget" (which is active), "Grant Goals", "Attachments", "Project Contacts", and "Organization Info". On the right side of the tabs, there are two buttons: "Cancel" and "Review/Submit".

The main content area is titled "BUDGET OVERVIEW" and contains the following text:
 

- This budget template is designed to capture the revenue and expenses of the programming for which funding is being requested.
- If you are requesting general operating funding, fill in the categories with general operating values for the organization.
- If the request is for a specific project or program, fill in the categories with values that are specific to the project or program.

 Below this is a section titled "INSTRUCTIONS REGARDING PROJECT YEARS" with the following text:
 

- Provide the Start and End Dates for the Programming Period.
- If the Programming Period falls into multiple calendar years, multiple year columns will show up.
- If project term overlaps two calendar years but has a ONE year project period, leave first column blank and fill in second column.
- If the project term is over MULTIPLE project years, fill in the columns that correspond with the END YEAR of each project year. (May leave first column blank if column does not apply)

 At the bottom of the instructions, it says: "Fill in all row entries that apply to your programming. Ignore the SubTotal at the bottom."

At the bottom of the form, there is a "Year Selection" section with two input fields: "Start Date:" and "End Date:". Below these fields are two buttons: "Generate Budget" and "Clear Changes".

Fill in all row entries that apply to your programming. Leave field blank if it does not apply to your program or project. Ignore the SubTotal at the bottom.

Budget				
Parent Category	Grantee Budget Category	2020	Total	Comment
PROGRAM REVENUE	General Operating Budget Line Item	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM REVENUE	Designated Contributions, Individuals	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM REVENUE	Designated Contributions, Foundations	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM REVENUE	Designated, Government Grants	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM REVENUE	Program Service Fees	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM REVENUE	Special Events	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM REVENUE	Sales	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM REVENUE	Other	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM EXPENSES	Salaries and Employee Benefits	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM EXPENSES	Risk Management	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM EXPENSES	Professional Consultation Expenses	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM EXPENSES	Program Materials and Subscriptions	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM EXPENSES	Supplies to Distribute	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM EXPENSES	Constituent Engagement Expenses	<input type="text" value="0"/>	\$0.00	<input type="text"/>
PROGRAM EXPENSES	Activity Expenses	<input type="text" value="0"/>	\$0.00	<input type="text"/>

In this section, you will be prompted to provide the following:

**PROGRAM REVENUE:**

- General Operating Budget Line Item
- Designated Contributions, Individuals
- Designated Contributions, Foundations
- Designated, Government Grants
- Program Service Fees
- Special Events
- Sales
- Other

**PROGRAM EXPENSES:**

- Salaries and Employee Benefits
- Risk Management
- Professional Consultation Expenses
- Program Materials and Subscriptions
- Supplies to Distribute
- Constituent Engagement Expenses
- Activity Expenses
- Administration Expenses
- Facility Expenses
- Training Expenses
- Donor Engagement Expenses
- Transportation and Mileage
- Dues and Fees
- Insurance
- Other

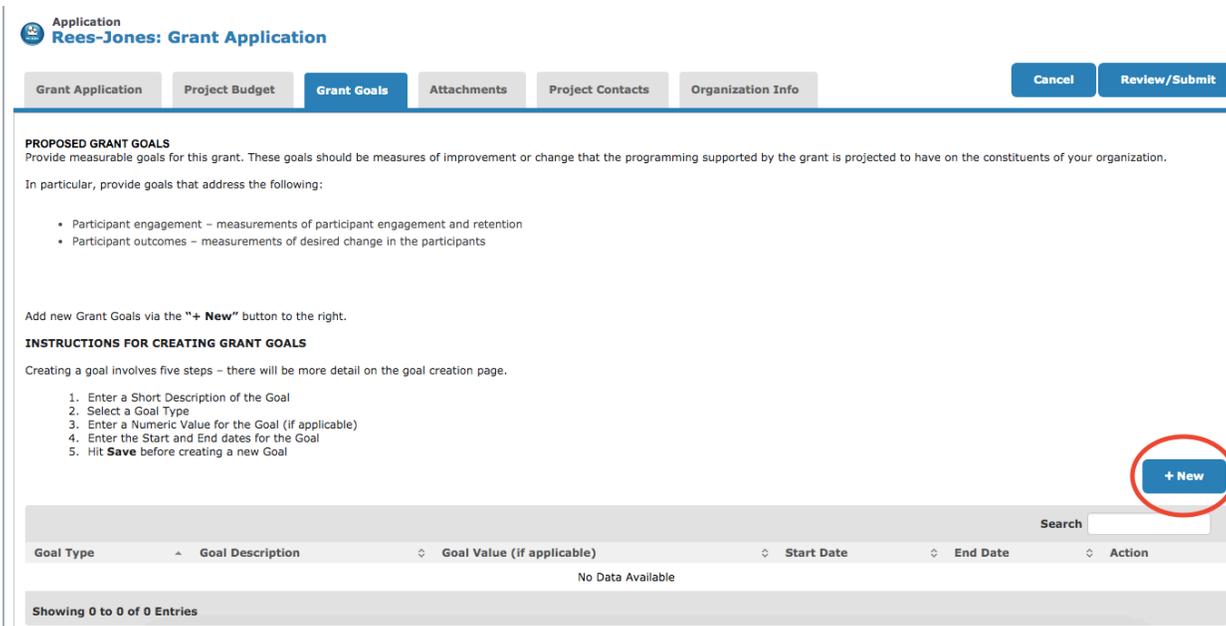
## Grant Goals

Provide measurable goals for this grant. **These goals should be measures of improvement or change that the programming supported by the grant is projected to have on the constituents of your organization.**

In particular, provide goals that address the following:

- **Participant engagement** – measurements of participant engagement and retention
- **Participant outcomes** – measurements of desired change in the participants

To add new Grant Goals, click the “+ New” button to the right.



Application  
Rees-Jones: Grant Application

Grant Application | Project Budget | **Grant Goals** | Attachments | Project Contacts | Organization Info | Cancel | Review/Submit

**PROPOSED GRANT GOALS**  
Provide measurable goals for this grant. These goals should be measures of improvement or change that the programming supported by the grant is projected to have on the constituents of your organization.

In particular, provide goals that address the following:

- Participant engagement – measurements of participant engagement and retention
- Participant outcomes – measurements of desired change in the participants

Add new Grant Goals via the “+ New” button to the right.

**INSTRUCTIONS FOR CREATING GRANT GOALS**  
Creating a goal involves five steps – there will be more detail on the goal creation page.

1. Enter a Short Description of the Goal
2. Select a Goal Type
3. Enter a Numeric Value for the Goal (if applicable)
4. Enter the Start and End dates for the Goal
5. Hit **Save** before creating a new Goal

+ New

Search

Goal Type	Goal Description	Goal Value (if applicable)	Start Date	End Date	Action
No Data Available					

Showing 0 to 0 of 0 Entries

*Continued on next page*

## Instructions for Creating Grant Goals

Creating a goal involves five steps – there will be more detail on the goal creation page.

1. Enter a Short Description of the Goal
2. Select a Goal Type
3. Enter a Numeric Value for the Goal (if applicable)
4. Enter the Start and End dates for the Goal
5. Save before creating a new Goal

### STEP 1: Enter a Short Description of the Goal

These may include process and/or impact outcomes: # of participants, target % of behavioral change. The Short Description should not be longer than 250 characters.

Example: A minimum of 100 participants to be enrolled in the program and assessments completed

### STEP 2: Select a Goal Type

Choose ONE of the following for each Anticipated Outcome: Dollar Amount, Number or Percent (for quantitative outcomes) or Narrative (for qualitative outcomes)

### STEP 3: Enter Numeric Value (if any)

Should be ONLY the Dollar Amount, Number or Percent of the Grant Goal. If you chose "Narrative" for Goal Type, please leave blank.

### STEP 4: Enter the Start and End Dates for the Goal

This is the targeted date range for starting and completing each Goal

**Start Date**

**End Date**

### Attachments

You will be prompted to upload several documents, some of which are **required (noted with \*)**.

- Current Year Organization Operating Budget\*
- Prior Year Statement of Financial Position & Statement of Activities\*
- Last Certified Audit (or last 990 if audit not available)\*
- Project Budget: Attach a copy of the project budget *if it is significantly different in format from the budget template*
- Strategic Plan Documents: Attach relevant strategic plan documents for your organization. A Theory of Change document or Strategic Plan document would be appropriate



### **Project Contacts**

You will be required to provide two contacts for the grant – **Program Contact and Report Contact** (staff member responsible for grant reporting).

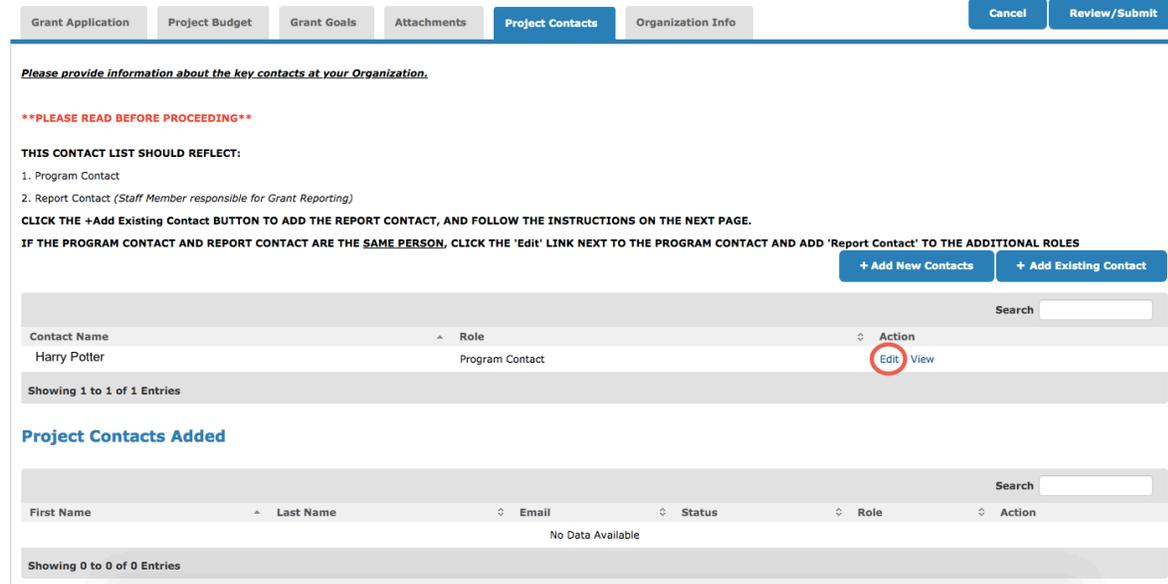
**If the program contact and the report contact are the same person**, click the “Edit” link next to the program contact and add “Report Contact” to the additional roles.

*Continued on next page*

## How to submit one contact as both Program and Report Contact

\*Please note that only Contacts that currently have portal access will appear on this page, i.e. only those who have registered/created accounts

1. Click “Edit” next to the person listed



Grant Application | Project Budget | Grant Goals | Attachments | **Project Contacts** | Organization Info

Cancel | Review/Submit

Please provide information about the key contacts at your Organization.

**\*\*PLEASE READ BEFORE PROCEEDING\*\***

**THIS CONTACT LIST SHOULD REFLECT:**

1. Program Contact
2. Report Contact (Staff Member responsible for Grant Reporting)

**CLICK THE +Add Existing Contact BUTTON TO ADD THE REPORT CONTACT, AND FOLLOW THE INSTRUCTIONS ON THE NEXT PAGE.**

**IF THE PROGRAM CONTACT AND REPORT CONTACT ARE THE SAME PERSON, CLICK THE 'Edit' LINK NEXT TO THE PROGRAM CONTACT AND ADD 'Report Contact' TO THE ADDITIONAL ROLES**

+ Add New Contacts | + Add Existing Contact

Contact Name	Role	Action
Harry Potter	Program Contact	Edit View

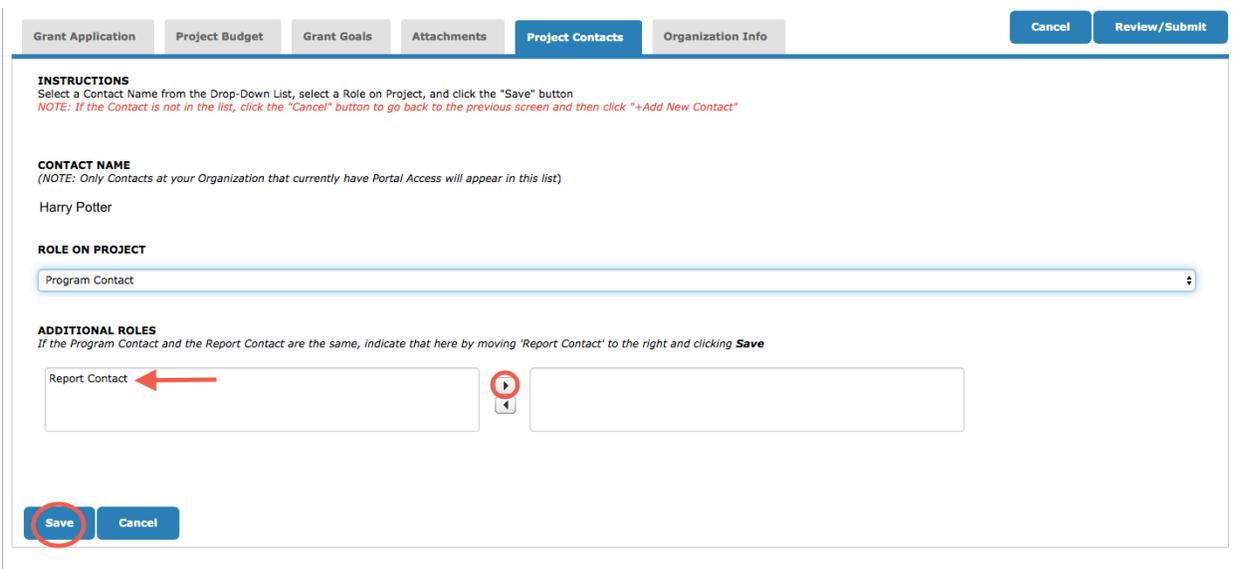
Showing 1 to 1 of 1 Entries

**Project Contacts Added**

First Name	Last Name	Email	Status	Role	Action
No Data Available					

Showing 0 to 0 of 0 Entries

2. Click on the role you want to add then click the > to move the role to the right column



Grant Application | Project Budget | Grant Goals | Attachments | **Project Contacts** | Organization Info

Cancel | Review/Submit

**INSTRUCTIONS**  
Select a Contact Name from the Drop-Down List, select a Role on Project, and click the "Save" button  
*NOTE: If the Contact is not in the list, click the "Cancel" button to go back to the previous screen and then click "+Add New Contact"*

**CONTACT NAME**  
*(NOTE: Only Contacts at your Organization that currently have Portal Access will appear in this list)*  
Harry Potter

**ROLE ON PROJECT**  
Program Contact

**ADDITIONAL ROLES**  
*If the Program Contact and the Report Contact are the same, indicate that here by moving 'Report Contact' to the right and clicking Save*

Report Contact 

Save | Cancel

3. Save

## To change the existing contact's role

1. Click **"Edit"** next to the Contact

Grant Application   Project Budget   Grant Goals   Attachments   **Project Contacts**   Organization Info   Cancel Review/Submit

**INSTRUCTIONS**  
Select a Contact Name from the Drop-Down List, select a Role on Project, and click the "Save" button  
*NOTE: If the Contact is not in the list, click the "Cancel" button to go back to the previous screen and then click "+Add New Contact"*

**CONTACT NAME**  
*(NOTE: Only Contacts at your Organization that currently have Portal Access will appear in this list)*

Harry Potter

**ROLE ON PROJECT**

Program Contact  
 Report Contact

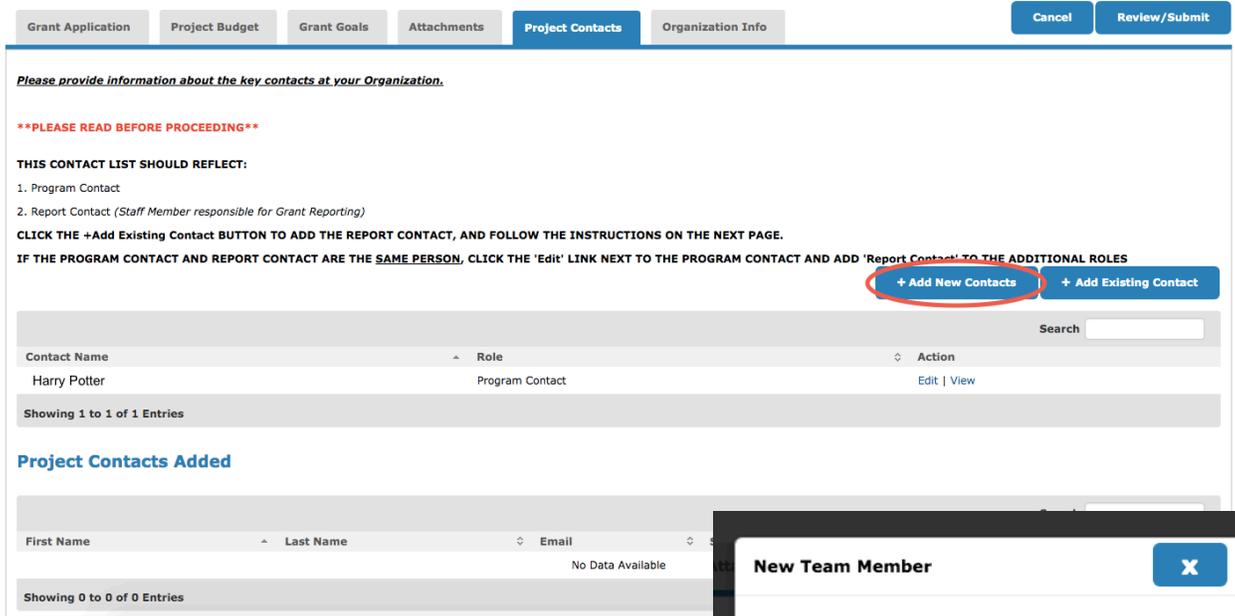
**ADDITIONAL ROLES**  
*If the Program Contact and the Report Contact are the same, indicate that here by moving 'Report Contact' to the right and clicking **Save***

Report Contact

2. Use the drop-down to select a different role
3. Save

To add a new contact

1. Click “Add New Contacts”



Grant Application | Project Budget | Grant Goals | Attachments | **Project Contacts** | Organization Info | Cancel | Review/Submit

*Please provide information about the key contacts at your Organization.*

**\*\*PLEASE READ BEFORE PROCEEDING\*\***

**THIS CONTACT LIST SHOULD REFLECT:**

1. Program Contact
2. Report Contact (*Staff Member responsible for Grant Reporting*)

CLICK THE +Add Existing Contact BUTTON TO ADD THE REPORT CONTACT, AND FOLLOW THE INSTRUCTIONS ON THE NEXT PAGE.

IF THE PROGRAM CONTACT AND REPORT CONTACT ARE THE SAME PERSON, CLICK THE 'Edit' LINK NEXT TO THE PROGRAM CONTACT AND ADD 'Report Contact' TO THE ADDITIONAL ROLES

+ Add New Contacts | + Add Existing Contact

Contact Name	Role	Action
Harry Potter	Program Contact	Edit   View

Showing 1 to 1 of 1 Entries

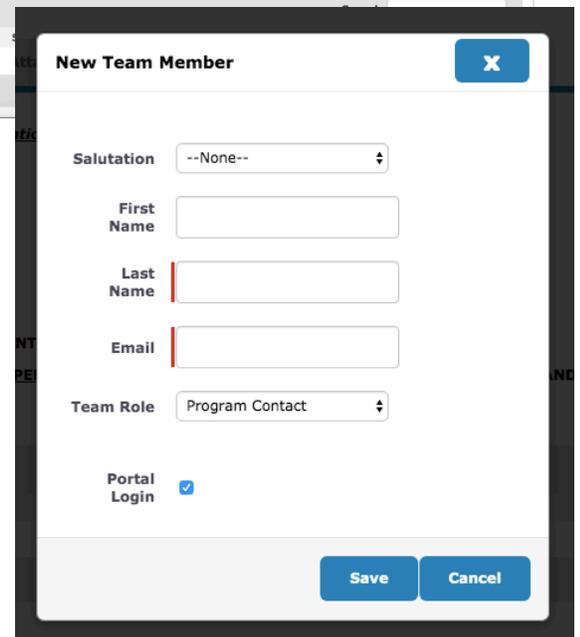
**Project Contacts Added**

First Name	Last Name	Email
No Data Available		

Showing 0 to 0 of 0 Entries

2. You'll be prompted to enter the following information:

- First and Last Name
  - Email
  - Team Role
  - Check “Portal Login” if you'd like this person to be able to access the portal
3. Save



**New Team Member** [X]

Salutation: --None--

First Name: [ ]

Last Name: [ ]

Email: [ ]

Team Role: Program Contact

Portal Login:

Save | Cancel

### Organization Info

The information that you provided when you created your account will auto-populate in this section of the application.

**Please provide additional info if prompted or update any contact info.**

Organization Profile consists of:

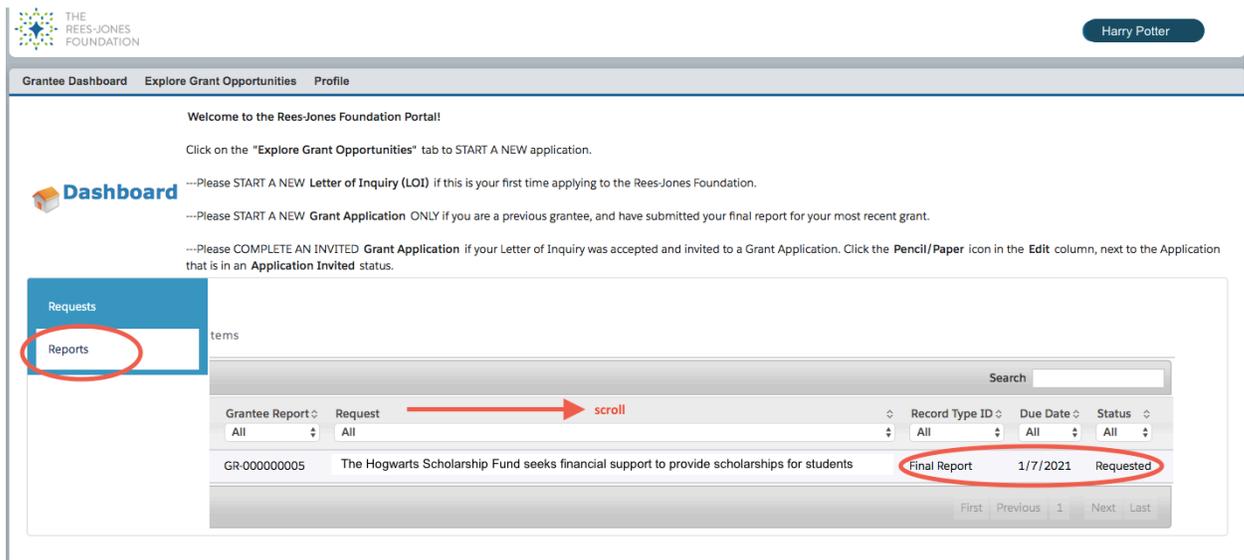
- Legal Name
- EIN
- Phone
- Annual Budget
- Last Month of Fiscal Year
- Mailing Address
- Physical Address
- Website
- Organization Mission
- Organization History and Strategy
- Executive Director/CEO Name, Email and Bio
- Board Chair Name and Bio/Background
- List of Board Members

## Reporting

### Access Your Reports

1. Login to the portal
2. On the left-hand side of the dashboard, click “Reports”
3. **When The Foundation assigns a Report to you it will appear here. You will be able to edit and save reports before submitting the final.**

You can scroll to the right while in the grey box area to see the report due date.



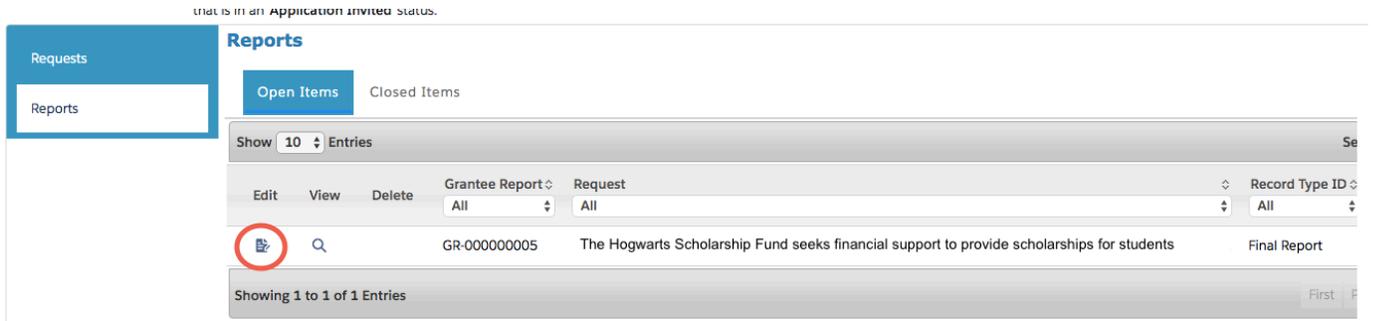
The screenshot shows the Grantee Dashboard for Harry Potter. The left sidebar has a 'Reports' tab selected. The main content area displays a table of reports. A red arrow points to the right side of the table header, indicating that users can scroll to see the due date. The table contains one report entry.

Grantee Report	Request	Record Type ID	Due Date	Status
GR-000000005	The Hogwarts Scholarship Fund seeks financial support to provide scholarships for students	Final Report	1/7/2021	Requested

## Edit a Report

1. Log in to the portal
2. Go to Reports
3. Click the **pencil icon next to the Report** that you would like to work on

that is in an Application invited status.



The screenshot shows the 'Reports' section of the portal. On the left, there are tabs for 'Requests' and 'Reports'. The 'Reports' tab is active, showing a table with columns: Edit, View, Delete, Grantee Report, Request, and Record Type ID. The first row of the table has a pencil icon circled in red, indicating the report to be edited. The report details are: GR-000000005, 'The Hogwarts Scholarship Fund seeks financial support to provide scholarships for students', and 'Final Report'. The table shows 'Showing 1 to 1 of 1 Entries'.

4. **You CAN save and return to the report at any time before you submit the final.** The save button is at the bottom of each page.

There are five parts of the report, which you can toggle between (like the application) by clicking the various tabs, but **be sure to save any work before changing tabs.**

**The five sections are:**

- a. Grantee Report
- b. Feedback
- c. Goal Updates
- d. Budget Updates
- e. Attachments

**A breakout of each section of the report is provided on the following pages.**

5. If you are done, click **“Review/Submit”** at the top of the page. **The next step will allow you to review your entire report before you are prompted to submit.**

If you are not ready to submit, use the “Save” button at the bottom of the page.

**You must save before you will be allowed to submit.**

6. Once you click **“Review/Submit”**, you’ll see a preview of your Report.
  - a. **To make edits, click “Back to Record”**
  - b. **To print a copy for your records or save a copy as a PDF for your records, click “Print”**
  - c. **If you’re ready to submit, click “Submit”.**
  
7. Once you’ve submitted, you’ll be re-directed back to your home page where you can view your dashboard.

**A breakout of each section of the report is provided on the following pages.**

## Grantee Report

This section of the report should be submitted in narrative form.

### **You will be asked the following questions:**

#### **Strengths of Programming: What was successful about the programming over the grant term?**

- How were constituents positively impacted by the organization and the programming?
- What positive constituent trends were observed?
- How did the organization succeed in achieving its mission and programming objectives?

#### **Weaknesses of the Programming: What were the challenges over the grant term?**

- How could constituents have been served better?
- What negative constituent trends were observed?
- What were some organizational challenges that impacted delivery on mission and programming?

#### **Opportunities**

- What opportunities outside of the organization presented themselves over the grant term?
- What opportunities within the organization's constituency presented themselves over the grant term? How did the organization take advantage of those opportunities?

#### **Threats**

- What threats outside of the organization presented themselves over the grant term?
- What threats within the organization's constituency presented themselves over the grant term? How did the organization deal with those threats?
- What negative constituency population trends were observed over the grant term?

### **Grant Process Feedback**

This section of the report seeks your feedback of us! We encourage you to provide feedback to The Foundation about your satisfaction with the grant process.

#### **You'll be asked to answer the following questions:**

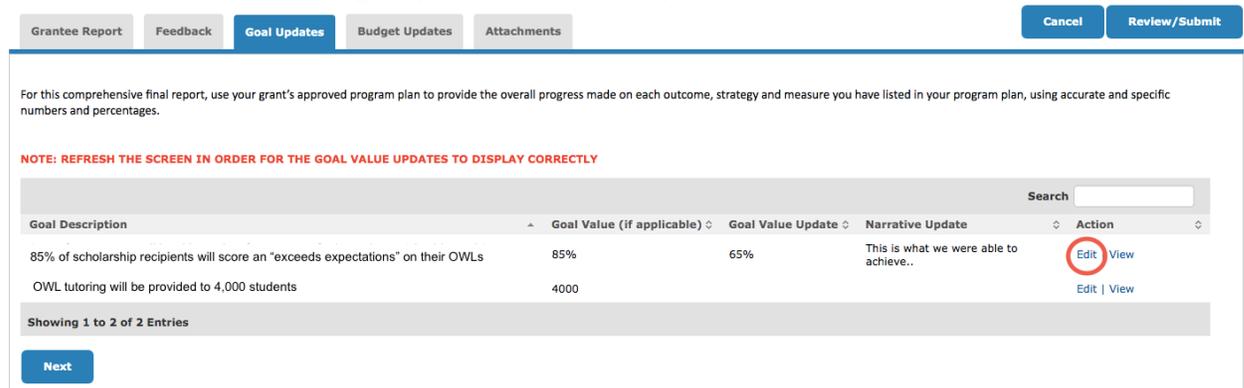
1. What is your overall satisfaction with the online application and online reporting process?
2. What is your overall satisfaction with the Foundation's responsiveness?

## Goal Updates

For this comprehensive final report, use your grant’s approved program plan to provide the overall progress made on each outcome, strategy and measure you have listed in your program plan, using accurate and specific numbers and percentages.

### To update your goals with outcomes:

1. Click **“Edit”** next to the goal you would like to update



Grantee Report Feedback **Goal Updates** Budget Updates Attachments Cancel Review/Submit

For this comprehensive final report, use your grant’s approved program plan to provide the overall progress made on each outcome, strategy and measure you have listed in your program plan, using accurate and specific numbers and percentages.

**NOTE: REFRESH THE SCREEN IN ORDER FOR THE GOAL VALUE UPDATES TO DISPLAY CORRECTLY**

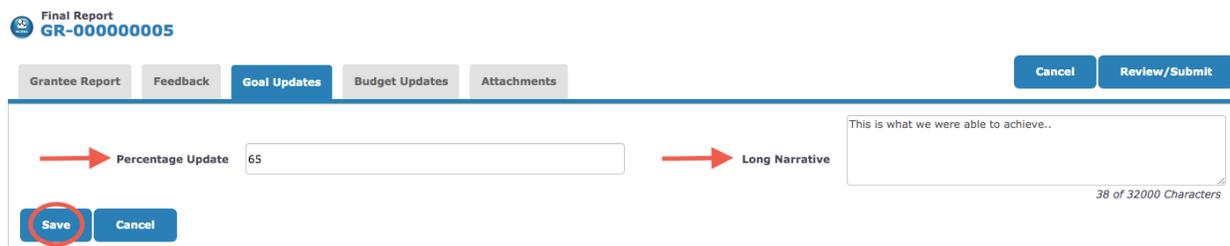
Search

Goal Description	Goal Value (if applicable)	Goal Value Update	Narrative Update	Action
85% of scholarship recipients will score an "exceeds expectations" on their OWLs	85%	65%	This is what we were able to achieve..	<a href="#">Edit</a> <a href="#">View</a>
OWL tutoring will be provided to 4,000 students	4000			<a href="#">Edit</a>   <a href="#">View</a>

Showing 1 to 2 of 2 Entries

[Next](#)

2. Enter the goal outcome. You can also write a narrative pertaining to your goal outcome.



Final Report GR-000000005 Cancel Review/Submit

Grantee Report Feedback **Goal Updates** Budget Updates Attachments

Percentage Update  Long Narrative

[Save](#) [Cancel](#) 38 of 32000 Characters

3. Save.

## Budget Updates

This is where you will provide details on how grant funding was actually spent throughout the grant period.

### To edit a budget line item:

1. Click “Edit” next to the appropriate line item

Final Report  
GR-00000005

Grantee Report Feedback Goal Updates **Budget Updates** Attachments Cancel Review/Submit

Please provide an update with your Budget Actuals to date.

Action	Parent Category	Grantee Budget Category	Current Period Expenses	Comment	Expenditures to Date	Approved Budget	Available Budget	Percentage Used
<a href="#">Edit</a>	PROGRAM EXPENSES	Training Expenses	\$0.00		\$0.00	\$3,000.00	\$3,000.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Facility Expenses	\$0.00		\$0.00	\$48,000.00	\$48,000.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Administrative Expenses	\$0.00		\$0.00	\$2,000.00	\$2,000.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Activity Expenses	\$0.00		\$0.00	\$44,440.00	\$44,440.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Constituent Engagement Expenses	\$0.00		\$0.00	\$14,240.00	\$14,240.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Supplies to Distribute	\$0.00		\$0.00	\$0.00	\$0.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Program Materials and Subscriptions	\$0.00		\$0.00	\$7,600.00	\$7,600.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Professional Consultation Expenses	\$0.00		\$0.00	\$4,000.00	\$4,000.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Risk Management	\$0.00		\$0.00	\$16,000.00	\$16,000.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Salaries and Employee Benefits	\$0.00		\$0.00	\$563,090.00	\$563,090.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	Other	\$0.00		\$0.00	\$0.00	\$0.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	Sales	\$0.00		\$0.00	\$0.00	\$0.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	Special Events	\$0.00		\$0.00	\$0.00	\$0.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	Program Service Fees	\$0.00		\$0.00	\$0.00	\$0.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	Designated, Government Grants	\$0.00		\$0.00	\$152,000.00	\$152,000.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	Designated Contributions, Foundations	\$0.00		\$0.00	\$450,000.00	\$450,000.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	Designated Contributions, Individuals	\$0.00		\$0.00	\$100,370.00	\$100,370.00	0.00%
<a href="#">Edit</a>	PROGRAM REVENUE	General Operating Budget Line Item	\$0.00		\$0.00	\$0.00	\$0.00	0.00%

2. Update the following fields and save when finished:

- a. Current Period Expenses
- b. Comments (if applicable)

Grantee Report Feedback Goal Updates **Budget Updates** Attachments Cancel Review/Submit

Please provide an update with your Budget Actuals to date.

Approved Budget \$48,000.00 Available Budget \$48,000.00  
 Expenditures to Date \$0.00 Grantee Report GR-000000005  
 Percentage Used 0.00% Grantee Budget Category Facility Expenses

Current Period Expenses
 Comment

Save Cancel

0 of 32768 Characters

3. Repeat for all appropriate line items

Please provide an update with your Budget Actuals to date.

Action	Parent Category	Grantee Budget Category	Current Period Expenses	Comment	Expenditures to Date	Approved Budget	Available Budget	Percentage Used
<a href="#">Edit</a>	PROGRAM EXPENSES	Training Expenses	\$0.00		\$0.00	\$3,000.00	\$3,000.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Facility Expenses	\$2,500.00	Water leak so water bill was more expensive than planned	\$2,500.00	\$48,000.00	\$45,500.00	5.21%
<a href="#">Edit</a>	PROGRAM EXPENSES	Administrative Expenses	\$0.00		\$0.00	\$2,000.00	\$2,000.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Activity Expenses	\$0.00		\$0.00	\$44,440.00	\$44,440.00	0.00%
<a href="#">Edit</a>	PROGRAM EXPENSES	Constituent Engagement Expenses	\$0.00		\$0.00	\$14,240.00	\$14,240.00	0.00%

### **Attachments**

The last section of the report is for any documents that you would like to include or your program officer has requested that you include.

## Frequently Asked Questions

### **What types of organizations does The Foundation support?**

The Foundation distributes grants only to qualified public entities or organizations exempt from tax under Section 501(c) (3) of the Internal Revenue Code.

### **What types of programs does The Foundation support?**

The Foundation is guided by its mission statement and funding priorities. The funding areas of The Foundation are Animal Welfare, Child Welfare, Mental Health, Youth Disabilities, and Youth Experiences. The Foundation makes International grants by invitation only.

### **What are the financial guidelines for a grant request?**

As a guideline, The Foundation typically will not fund more than 25 percent of a project's budget or more than 10 percent of an organization's total annual operating budget.

### **What are the deadlines for grant applications?**

The Foundation accepts grant applications throughout the year. However, it is a good idea to submit an application at least four months before the funding is needed.

### **What types of grants does The Foundation fund?**

The Foundation will fund general operating expenses, requests for specific programs or projects, and capital requests.

### **What will The Foundation not fund?**

The Foundation typically does not make grants to underwrite fundraising events, scholarships, professional conferences, symposiums, performances, competition expenses, or to fund endowments.

The Foundation does not support lobbying of any kind. The Foundation does not support other private foundations or commercial businesses.

The Foundation does not make loans or grants to individuals.

### **What geographic region does The Foundation fund in?**

The Foundation makes grants to organizations in the Dallas/Fort Worth area and adjoining counties. Most of our grants go to agencies that work in underserved communities in this region.

The Foundation supports select international organizations by invitation only.

### **Is a letter of inquiry required before submitting a proposal?**

A letter of inquiry is not required, but one may be sent if there is uncertainty about a grant request being a match for The Foundation.

### **Are grant requests required to be in a particular form?**

All grant requests must be submitted through The Foundation's online application.

**The Foundation launched a new grant portal on March 2, 2020. ALL organizations must create an account through the new portal in order to submit requests and reports.**

### **Can a meeting be scheduled to discuss a possible grant request?**

Preliminary meetings are discouraged due to time constraints and the volume of applications that The Foundation receives. The process begins by reviewing an application or letter of inquiry. If the staff determines that a meeting or site visit would be beneficial, you will be contacted.

### **How often are grant requests considered by the board?**

The Foundation's board typically meets eleven times a year to consider grant requests.

### **How will I know of an application has been accepted or rejected?**

All applicants will receive written communication regarding the disposition of their application. Grant requests are typically processed within three to four months after an application has been received.

### **If The Foundation approves a grant request, when can payment be expected?**

Upon approval, The Foundation will send a grant award letter and a grant contract, which must be signed and returned. **The grant will not be paid until The Foundation receives the contract.**

Generally, the contract will state the payment schedule and any conditions required before payment. If there are specific deadlines for a project, those deadlines will be clearly stated in the contract. If there are conditions to the grant, which is typical of matching or challenge grants, notification must be made with reasonable evidence that the conditions have been met prior to payment.

### **If a grant request is declined, when can another grant request be submitted?**

Although a new grant request can be submitted earlier, the board will not consider a new request until 12 months after the decision to decline the previous grant request.

**If a grant request is accepted, can another grant request be submitted?**

Although a new grant request can be submitted earlier, the board will not consider a new request until 12 months after the decision to approve the previous grant request **AND** The Foundation has received the final report.

New grant requests from an organization that has received a multi-year grant from The Foundation will not be considered until the grant term is complete **AND** The Foundation has received the final report.

**If a grant request is approved, will I need to report on the grant?**

Organizations funded by The Foundation must provide a full report of previous grant expenditures and outcomes of the grant.

Specific details on the grant reports can be found in this guide.

**I am a new organization and don't have all the information requested. Can I still apply?**

New organizations may submit a grant request. Include the most current information available in the application. Once the grant application is reviewed a Foundation staff member, you will be contacted if additional information is required.

**Should an organization wait to hear from The Foundation before applying to other foundations?**

An organization should not wait. It is a good idea to submit applications to multiple funding sources, as doing so will improve the chances of raising funds.

**I have a different question. Who can I talk to?**

Questions can be sent to [info@rees-jonesfoundation.org](mailto:info@rees-jonesfoundation.org) or you can call (214) 751-2977.