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.**
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”.

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.
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”
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.*

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”

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.

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

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**”.

---

![Budget Template Image](image-url)
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.

<table>
<thead>
<tr>
<th>Parent Category</th>
<th>Grantee Budget Category</th>
<th>2020</th>
<th>Total</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROGRAM REVENUE</td>
<td>General Operating Budget Line Item</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Designated Contributions, Individuals</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Designated Contributions, Foundations</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Designated, Government Grants</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Program Service Fees</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Special Events</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Salaries and Employee Benefits</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Risk Management</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Professional Consultation Expenses</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Program Materials and Subscriptions</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supplies to Distribute</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Constituent Engagement Expenses</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Activity Expenses</td>
<td>0</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

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.

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

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

3. Save
To change the existing contact’s role

1. Click “Edit” next to the Contact

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

3. Save
To add a new contact

1. Click “Add New Contacts”

2. You’ll be prompted to enter the following information:
   a. First and Last Name
   b. Email
   c. Team Role
   d. Check “Portal Login” if you’d like this person to be able to access the portal

3. Save
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.
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

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

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

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

2. Update the following fields and save when finished:
   a. Current Period Expenses
   b. Comments (if applicable)

3. Repeat for all appropriate line items
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 or you can call (214) 751-2977.