Portal Resource Guide:
Core Support

The William Penn Foundation is pleased to invite you to its online Grantee Portal to apply for Core Support funding. An online account is necessary to log in to the portal to complete these forms. Please contact portal@williampennfoundation.org at any time if you are experiencing technical difficulties.

This document provides information on accessing and navigating the portal; communications; and form layout and requirements.

The Foundation typically uses a two-stage submission process for Core Support applications – first pre-Proposal, then Proposal. Core Support funding eligibility requirements are posted on the WPF website as well as in the pre-Proposal instructions in the Portal.

Submission of a pre-Proposal does not guarantee that Foundation staff will invite a Proposal application for funding consideration. Submission of a proposal application does not guarantee funding will be awarded.

PORTAL LINK

The Foundation's online Grantee Portal can be accessed at https://williampennfoundation.force.com

USER LOG-ON

When you navigate to the WPF Grantee Portal, you will be prompted to log in.

Returning Portal Users
- If you have previously logged into the Portal to develop inquiries proposals for other funding programs, please use your prior credentials.
- If you have previously logged into the Portal, but have not retained your password, please select "Can't access your account" (located under the "Sign In" button) and enter your User ID. In most cases, your User ID is formulated as firstname.lastname . Our system will email you a re-set password link.
- If you *do not know* if you have an account, feel free to email portal@williampennfoundation.org and we will take a look. Alternatively, you can select "Can't access your account" (located under the "Sign In" button) and enter your User ID. In most cases, your User ID is formulated as firstname.lastname . Our system will email you a re-set password link.
- If you have forgotten your password and you are locked out of your account (5 or more incorrect entries), please email portal@williampennfoundation.org

New Portal Users

- If you are visiting the WPF Grantee Portal for the first time, you will need to create a new account. To do so, select "New User?" under the "Sign In" button.

- Please enter your organization EIN in the format xx-1234567 so that we can match your entry with an Organization in our system

- You will be prompted to use an email address that is not already in use. We recommend using your professional email address such as Name@YourOrganization.org -- as opposed to a shared email addresses such as development@YourOrganization.org

- Next, you will be prompted to submit your contact information

- Finally, you will be prompted to create a username and password. We recommend using first.last for your username and a secure password of your choosing.

As a new Portal User, you will not immediately have access to your organization's complete funding history through WPF. If you expect to see prior grants that are not visible to you, please email portal@williampennfoundation.org so that we can share appropriate grant records with you. Unfortunately, we can only do this by request only.

DASHBOARD NAVIGATION

Upon logging into the portal, the Grantee Portal will display the Portal User's Dashboard (image below) with requests currently in development as well as awarded legacy grants. Lists may be sorted by clicking on the column heading labels.

You may use the browser's Zoom function to adjust sizing of the screen.

✔ , Edit, View, Delete, and Amend Icons

- **Edit** –Active when a new Request has been invited or reopened for edits. Click the icon to open the document to edit.

- **View** – once a pre-Proposal or Proposal has been submitted, editing is locked and the Edit icon will disappear. User can only view what has been submitted.

- **Delete** – Inactive—not in use

- **Amend** – TBD for future use. ***When editing an application, use the Edit icon and not Amend***.

- ✔ – expands an awarded grant record to show reports related to the grant. ***Please note that at this time, Interim and Final reports are not being accepted through the portal, but should be submitted using the standard reporting templates provided by Grants Management.***

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Annotations on the image:
- **application in edit mode** (pointing to edit icon)
- **Awarded grant with report schedule expanded**
- **Planning grant approved. Viewable only**

CREATING A NEW REQUEST

Now that you have logged into the WPF Grantee Portal and you can navigate the Dashboard, you will need to create a new Request to begin your Core Support pre-Proposal. Please visit the "Explore Grant Opportunities" tab to find the Core Support application. (See image below). Then, select "Core Support 2018."

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Next, select "Create Request" (blue button in the bottom right corner) to start your pre-Proposal.

Upon selecting "Create Request" – you will see a screen with instructions and requirements. Please review them carefully and then click "Save" or "Save and Next" to finish creating your application.

If you have created your Request AND saved it properly, when you return to your Dashboard (by clicking the Dashboard tab in the top of your screen), you will see that you have a Request in progress named "Core Support 2018." Feel free to edit, save, log in, and log out as frequently as you need to as you craft your pre-Proposal.

If you select "Create Request" but you do not click "Save" or "Save and Next," the system will *not* save your Request. If you visit your Dashboard (by clicking the tab at the top of your screen), your Core Support 2018 request will not appear. That is because it was not saved properly. Please repeat the instructions (go to Explore Grant Opportunities, select Core Support, click "Create Request" and click "Save and Next") to start a new Request. If this happens to you, you likely have not lost any data because you have not answered any questions yet!

If you create TWO Core Support requests (accidentally), our system will prompt you that you have a similar request in progress. Please click "Go To Dashboard" if you see this error.   If you continue with the second Request, you will see in your Dashboard that there are now **two** records named "Core Support 2018." Please email portal@williampennfoundation.org if you need us to delete a duplicate Request.

ABOUT THE FORMS – LAYOUT AND NAVIGATION

❖ The pre-Proposal begins with an Instructions Tab. Please review eligibility instructions carefully before proceeding.

❖ Next, you will be required to provide financial information for your organization. There are three questions on the Financial Information tab that are required before you can move on. If you do not have access to that information at first, populate those questions with "test" data (not your final numbers) so that you can proceed to the next tab.

❖ For the Contact Information tab, we need your help to identify an Organization Leader and a Proposal Contact (who is often *you!)* for your Core Support request. Please click the magnifying glass icon on the right side of your screen next to each question and use the search function to find the name of a contact in our system. If the appropriate contact does not exist in our system yet, please email grants@williampennfoundation.org so that we can add the contact record for you. Click "Save and Next" to proceed to the next tab.

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❖ All of the questions on the Grant Request tab are required. You can write as much or as little as you feel is necessary. There is a character limit of 10,000 *per question* (equivalent to 3 pages, assuming single spacing and 12 point font, including spaces). Click "Save and Next" to proceed to the next tab.

❖ The following tab is for uploading Attachments. For each document, select "Choose File" and then search for the file in your computer. When you have selected your file, click the blue "Upload" button. You will see a yellow bar that says "File upload successful" upon completing your upload. *If you do not see this yellow bar, you probably have not clicked the Upload Button.* Click "Save and Next" to proceed to the next tab.

❖ The final tab is for inviting Collaborators. We encourage organizations to create multiple Portal Users instead of sharing an account and a password. If you would like to add a collaborator, please email portal@williampennfoundation.org and we will help your colleague create an account and add them to your Core Support request. You will all have "edit" access to the Request (including potential for saving-over each others' work) until someone makes the final Submission. After the request is submitted, no users will have Edit access unless the Request is re-opened by a WPF staff member or a Proposal is invited.

PORTAL AND APPLICATION TIPS AND TRICKS

❖ Data entered at the pre-Proposal stage automatically pre-populates the Proposal if one is invited.

❖ Save your work frequently by clicking the "SAVE" button at the bottom of each tab. Click "SAVE and NEXT" to move to the next section. You can log out, return to your application, and make edits at any time prior to your Request submission. It is not required to complete the application all in one "sitting."

❖ Review your application prior to submission through the Review/Submit button. Forms cannot be submitted if required information is missing. A window appears at the top of the dashboard indicating fields of missing or incomplete data.

❖ The option to print the application is shown after you select Review/Submit.

❖ The application is viewable at any time through the Portal.

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