



Portal Resource Guide **Unsolicited Requests for Funding**

Updated November 2018

The William Penn Foundation welcomes the opportunity to review projects and ideas that may align with our current grantmaking strategies.

We strongly encourage reviewing What We Fund and How We Fund sections of our website to understand program guidelines and eligibility requirements prior to submitting an unsolicited inquiry. Proposed work should align with the Foundation's strategic priorities and eligibility requirements. Further questions can be directed to a program staff member prior to submission. Contact information for program staff can be found in the What We Fund section.

Submission of an Inquiry does not guarantee that Foundation staff will invite a full application for funding consideration. Submission of an application does not guarantee funding will be awarded.

The Foundation accepts unsolicited requests online only through its WPF Grantee Portal. Follow instructions below to log in if you already have an account or to request new account set up.

Please contact portal@williampennfoundation.org at any time if you experience technical difficulties with the portal.

PORTAL LINK

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

USER LOG-ON

We recommend using Google Chrome as your browser but all common browsers are supported (Firefox, Internet Explorer, etc).

Returning Portal Users

- If you know your account username and password, use these credentials to log in to the Portal.
- To reset a forgotten password, click "Can't Access Your Account" (located under the "Sign In" button). Enter your User ID (formulated as firstname.lastname). An email will be sent to the address associated with your username and will include a reset password link. Follow the link and instructions for resetting the password and logging in to the Portal.
- Any questions regarding account credentials, logging in; accessing information on the portal, or portal lockout (occurs with 5 or more incorrect attempts) can be directed to portal@williampennfoundation.org at any time.

New Portal Users

- If you are visiting the WPF Grantee Portal for the first time, you will need to create a new account. Select “New User?” under the “Sign In” button.
- Enter your organization EIN in the format xx-1234567. This information is used to determine if your organization already exists in our system to avoid duplication.
- Enter an email address. The email address should not be one previously used or 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
- Enter your contact information
- Create a username and password.

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.

CREATING A NEW REQUEST

We strongly encourage reviewing What We Fund and How We Fund sections of our website to understand program guidelines and eligibility requirements prior to submitting an unsolicited inquiry. Proposed work should align with the Foundation's strategic priorities and eligibility requirements. Further questions can be directed to a program staff member prior to submission. Contact information for program staff can be found in the What We Fund section.

If you feel that your proposed project aligns with a Foundation program area and strategy, log into the portal to create a new Inquiry request (*screenshots follow below instructions*)

1. Navigate to the “Explore Grant Opportunities” tab.
2. Click on the “General Inquiry” link
3. Click “Create Request” in the lower right corner
4. Complete the Organization Information and Project Detail fields

Please answer all questions fully and clearly. Click “Save and Next” to proceed to the next tab. We recommend that you draft your responses in another program (ie Microsoft Word or Google Docs) that can provide real-time character counting and then paste your responses into the portal. **Spaces DO count towards your overall character count.**

Saving Your Request

Click the SAVE button at the bottom of the screen to save data entered on the form. To return to a “saved” form, click on the “Edit” button from the “Open Items” tab on the Dashboard.

Submitting the Form

Click on the Review/Submit button in the upper right corner
You will have the option to review the data entered and print the form.
Click Submit

Following are screen shots of the information explained on the preceding pages.

Navigating to the General Inquiry Link

William Penn Foundation
SamanthaXYZ Sha...

Dashboard Profile Explore Grant Opportunities

Dashboard

Requests Open Items Closed Items

| Show | 10 | Entries | Search | | | | | | |
|------|------|---------|--------|-------|---------------------------------|--------------------------------------|--------------|-----------------|---------------|
| + | Edit | View | Delete | Amend | Project Title | Application Type | Invited Date | Submission Date | Staff |
| ▼ | Q | 🔍 | | | ArtPlace America | New Audiences New Places - Implement | 12/12/2017 | 12/31/2017 | Olive Mosler |
| ▼ | Q | 🔍 | | | Wooden Boat Building Consortium | Watershed Protection - Implement | 12/18/2017 | - | Michele Perch |

Showing 1 to 2 of 2 Entries

Dashboard Profile Explore Grant Opportunities

Explore Grant Opportunities

roundCorner

General - Inquiry

End Date: There is no end date. Apply anytime.

The Foundation has a two-stage online application process which includes an initial inquiry and an invited full proposal. We have a team of program staff who manage active grants, build relationships in the field, review inquiries, and guide applicants through the application process. Quarterly board meetings guide our grant review process.

As a first step, we strongly suggest reviewing the program guidelines before submitting an Inquiry Form. This will allow you to confirm that your proposed work aligns with the Foundation's strategic priorities and eligibility requirements. You can learn more about our programs and priorities by visiting www.williampenfoundation.org/how-apply

Dashboard Profile Explore Grant Opportunities

Application **General - Inquiry**

Posted On 07 Feb 2018

Deadline

Grant applications are accepted on an ongoing basis.

Description

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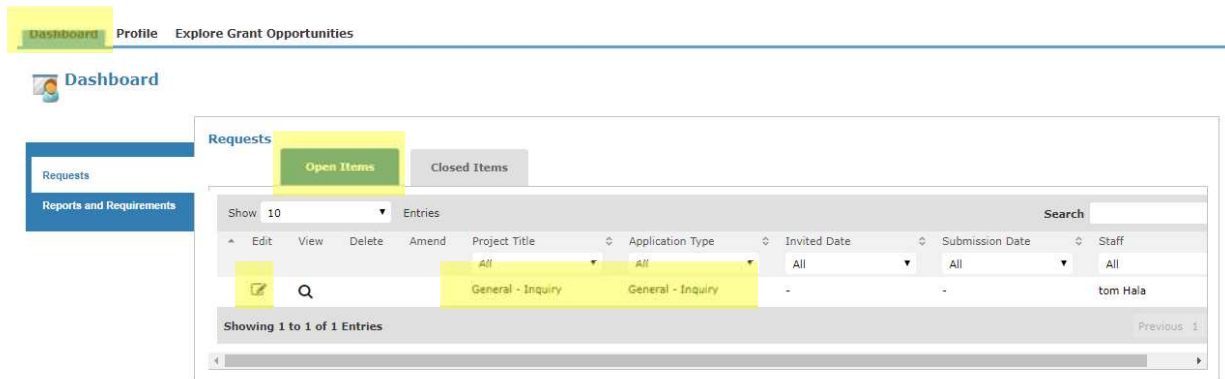
Instructions

Welcome to the William Penn Foundation Grantee Portal. We strongly recommend downloading our Portal Resource Guide which provides detailed instructions for each section of the Inquiry form. If you experience any difficulty with the portal, we encourage you to email portal@williampenfoundation.org and our grants management team will provide technical support.

General - Inquiry

Create Request

Returning to an Inquiry in Process



PORTAL AND APPLICATION TIPS AND TRICKS

- ❖ 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 submission.
- ❖ 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. Remember your account username and password.