



## **Portal Resource Guide** **Inquiry and Application Submissions**

The William Penn Foundation is pleased to invite you to its Online Portal for inquiry and application submission. An online account is necessary to log in to the portal to complete these forms. Please contact [portal@williampennfoundation.org](mailto:portal@williampennfoundation.org) for any questions or concerns regarding your account.

This document provides information on accessing and navigating the portal; communications; and form layout and requirements. Instructions for completing the Project Budget and Results, Milestones, and Activities are attached as separate documents to the invitation email.

The Foundation typically uses a two-stage submission process for grant development – first is an initial inquiry and second is full proposal application. Both are invited by WPF program staff through an email notification. The Foundation accepts applications only through the online portal. Sending inquiries or applications through email attachments is discouraged.

Submission of an inquiry does not guarantee that Foundation staff will invite a full proposal application for funding consideration. Submission of a proposal application does not guarantee funding will be awarded or awarded at the requested level.

### **PORTAL LINK**

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

### **DASHBOARD NAVIGATION**

Upon logging into the portal, the Foundation's main Dashboard displays requests currently in development and awarded legacy grants. Lists may be sorted by clicking on the column heading labels.

Use the browser's Zoom function to adjust sizing of the screen.

## ✓, Edit, View, Delete, and Amend Icons

- **Edit** – Active when a new inquiry or proposal application has been invited or reopened for edits. Click the icon to open the document to edit.
- **View** – once an inquiry or application is 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.**

application in edit mode

Awarded grant with report schedule expanded

Planning grant approved. Viewable only

| Request | Project Title   | Application Type           | Invited Date                            | Submission Date | Staff           |
|---------|---|----------------------------|---|-----------------|-----------------|
| ✓       | Implement early literacy mini-grant program   | Great Learning - Implement | 4/10/2018                               | -               | James Liou      |
| ✓       | Planning to establish K-3 model schools   | Great Learning - Planning  | -                                       | 10/4/2017       | James Liou      |
| ✓       | Signed Grant Agreement  | 60-18                      | Planning to establish K-3 model schools | 2/9/2018        | Approved        |
| ✓       | Final Report  | 60-18                      | Planning to establish K-3 model schools | 2/28/2019       | Scheduled       |
| ✓       | Asses the viability of and propose a design for a competitive mini-grant program to support targeted school-based initi | Legacy Application         | -                                       | 6/27/2017       | James Liou      |
| ✓       | Cultivate citywide and community support for public education.  | Legacy Application         | -                                       | 1/13/2017       | Elliot Weinbaum |
| ✓       | Toward the construction of Chester A. Arthur School "Play & Learning Lab."  | Legacy Application         | -                                       | 1/17/2016       | Shavn McCaney   |

## **PORTAL ACCOUNTS AND COMMUNICATIONS**

- For each request, WPF designates a “Project Team.”
- The Project Team is the basis for our communications with the organization and includes people related to the request for either a programmatic or administrative purpose.
- Each member of this team is assigned a role.
- At a minimum, the Project Team includes the Org Lead and a Primary Project Contact.
- WPF also defines a “Portal User Team.”
- The sole purpose of the Portal User Team is access to the portal to complete inquiries or applications.
- Not everyone assigned on the Project Team automatically gets assigned to the Portal Access Team.
- The initial Portal Access Team is designated by WPF. Applicants may request other names to be added to the Portal User Team at any time by contacting [portal@williampennfoundation.org](mailto:portal@williampennfoundation.org)
- Each Portal Access member requires a portal account. The setup of the account sends an email notification to that person providing instructions on setup.
- Each portal access member will also receive notifications when applications are initially submitted or changed. Please manage access on this team sparingly.

## **ABOUT THE FORMS – LAYOUT AND NAVIGATION**

- ❖ Data entered at the inquiry stage pre-populates the full application if one is invited.
- ❖ Certain fields have specific character counts that are indicated. Check character counts offline before entering them into the proposal form.
- ❖ Save work frequently by clicking the “SAVE” button at the bottom of each tab. Click “SAVE and NEXT” to move to the next section.
- ❖ 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 Project Budget will not print with the application. To print the budget, use the “Export to CSV” link located on the top left of the Project budget tab.
- ❖ The application is viewable at any time through the Portal.
- ❖ Once submitted, a viewable copy of the form can be accessed at any time by signing on to the Portal. Updates to the form can only be made prior to submission or if the form is reopened by Foundation staff.
- ❖ The matrix on the following page describes each tab on the online inquiry and application forms as well as when the information is required to be completed.

| REQUIRED AT |             |                                 |   |  |
|-------------|-------------|---------------------------------|---|--|
| Inquiry     | Application | Form Section                    | Description   |  |
| X           | X           | Organization                    | General information regarding applicant organization  |  |
|             | X           | Financial                       | General financial data for current fiscal year and most recently completed audit year   |  |
|             | X           | Demographic                     | Identify demographics of the beneficiaries the project seeks to serve.  |  |
| X           | X           | Contact                         | Org Leader and Primary Proposal Contact   | <i>Other names may be added to the Project Team or Portal User Team by contacting <a href="mailto:portal@williampennfoundation.org">portal@williampennfoundation.org</a></i>   |
| X           | X           | Project                         | Questions that describe the project for which funds are requested. Character limits for each question are provided for your reference, but the proposal form does not contain an actual character counter.      |  |
|             | X           | Project Budget                  | Budget categories on how requested funds will be used. For each budget line item, the total for the project and the amount requested from WPF is required.  | <i>See "Completing the Project Budget" instructions attached separately to the invite email.</i>   |
| *           | X           | Results                         | Results, Milestones, and Activities anticipated to be achieved through successful completion of the proposed work, as well as the key activities and milestones that will be critical to achieving that result. | <i>*Draft RMAs are required at the inquiry stage for Watershed Protection requests only. See the "RMA Template" instructions attached separately to the invite email. A maximum of 10 milestones and 10 activities for each milestone may be entered</i> |
|             | X           | Other Funding                   | Additional sources of funding for this work, including committed and prospective funds  |  |
|             |             | <b>Key Required Attachments</b> |   |  |
| X           | X           | Audited Financial Statement     | <i>Additional documentation may be required or submitted to help the Foundation understand the project in more detail. Please see the Attachments tab for required and requested materials.</i>                 |  |
|             | X           | Current Year Operating Budget   |   |  |
|             | X           | Profiles of Key Staff           |   |  |
|             | X           | Board of Directors List         |   |  |
|             |             | <b>Request Team Members</b>     | Inactive  |  |
|             | X           | Schools                         | <b>Great Learning and Arts Education requests only.</b><br>Identify each partner school or ECE center   |  |

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Questions on completing the forms or accessing the portal may be directed to [portal@williampennfoundation.org](mailto:portal@williampennfoundation.org)