

Portal Resource Guide: Racial Equity Grant Fund

The William Penn Foundation is pleased to invite you to its online Grantee Portal to apply to the Racial Equity Grant Fund. 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, communication, form layout, and requirements.

Please review Racial Equity Grant Fund eligibility requirements here:

<https://williampennfoundation.org/racial-equity-funding-initiative>

Submission of a proposal does not guarantee funding will be awarded.

Accessing the Portal

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

User Log-On

When you visit 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 or 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.

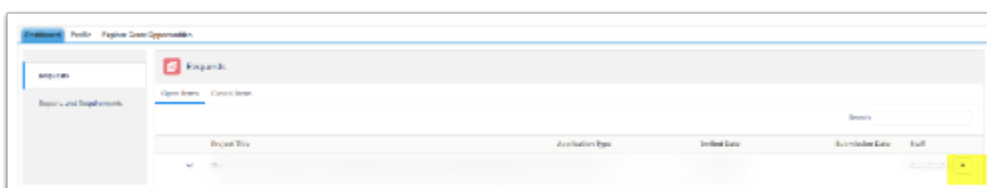
 *As a new Portal User, you will not immediately have access to your organization's complete funding history through WPF. If you expect to see prior grants that are not visible to you, please email portal@williampennfoundation.org so that we can share appropriate grant records with you. Unfortunately,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


If you would like to add other colleagues at your organization as grant collaborators for this funding request, please email portal@williampennfoundation.org for assistance.

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 previously awarded grants. Your view may be sorted by clicking on the column heading labels. If you are a new user, you will not see any Grants in progress - jump to the next step to create one!

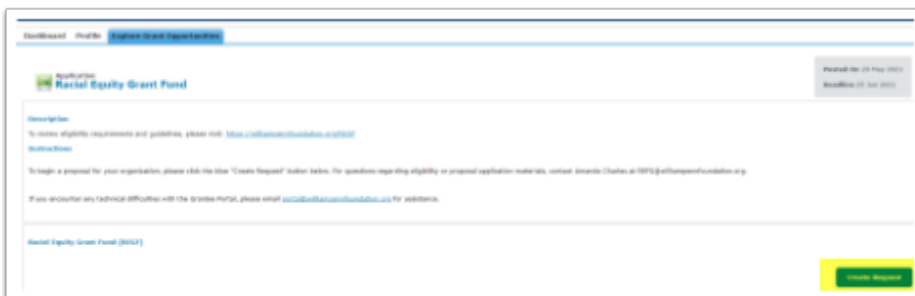
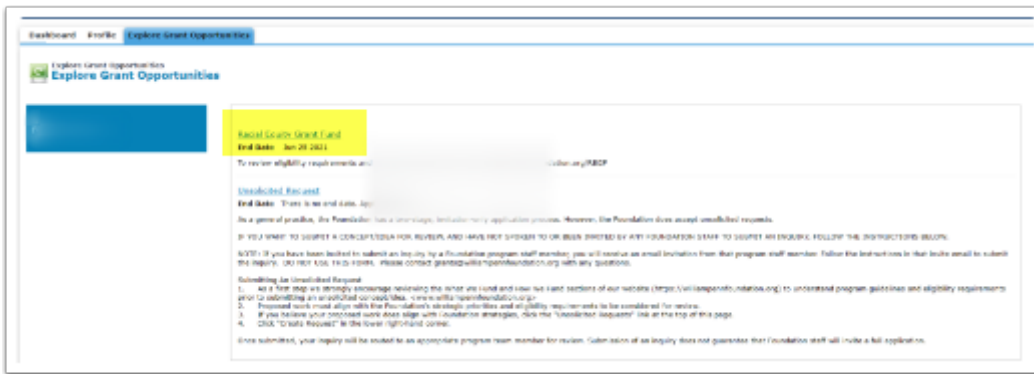
To edit or view a Request, click the downward facing arrow on the right side of the screen, and then select "Edit" or "View."



 For applicants that have historic grant records in our system, your Awarded (active) grants will appear on the "Open Items" tab and your historic (closed) grants will appear on your "Closed Items" tab.

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 application. Please visit the "Explore Grant Opportunities" tab to find the application (see image below). Then, select "Racial Equity Grant Fund." Next, select "Create Request" in the bottom, right corner.



Upon clicking "Create Request," you will redirect to your new application. On the first tab, please be informed that only some questions are required. Click "Save" or "Save & Next."

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 "Racial Equity Grant Fund." Feel free to edit, save, log in, and log out as frequently as you need to as you craft your Proposal.

If you select "Create Request" but you do not click "Save" or "Save & Next," the system will *not* save your Request. If you visit your Dashboard (by clicking the tab at the top of your screen), your active application will not appear. That is because it was not saved properly. Please repeat the instructions (go to Explore Grant Opportunities, select "Racial Equity Grant

Fund," 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 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 "Racial Equity Grant Fund." Please email portal@williampennfoundation.org if you need us to delete a duplicate Request.

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 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.