

HOUSTON ENDOWMENT

GUIDE TO: Pre-Applications in GivingData

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ACCESSING THE PRE-APPLICATION



Accessing the Pre-Application

To access Houston Endowment's Pre-Application form, you will need to visit our web-based grantee portal hosted by GivingData. Type <https://houston-portal.givingdata.com/campaign/preapp> into an internet browser window. Please note: GivingData works best in Google Chrome and Safari browsers.

HOUSTON
ENDOWMENT Grantee Portal

Houston Endowment's Pre-Application

Welcome to Houston Endowment's pre-application process. Please follow the instructions on the right to submit your information.

Thank you,

Grants Management Team

Sign In

Sign in or [create an account](#) to submit a form for Houston Endowment's Pre-Application.

* Email Address

1

* Password

2

Sign In

3

[Forgot your password?](#)

[New user? Create an account.](#)

If you already have an account in our grantee portal, sign in following these steps:

1. Enter your email address.
2. Enter your password.
3. Click Sign in.

*If you do not have an account, you can create one by clicking **Create an account** and following the steps (detailed in the following pages).*

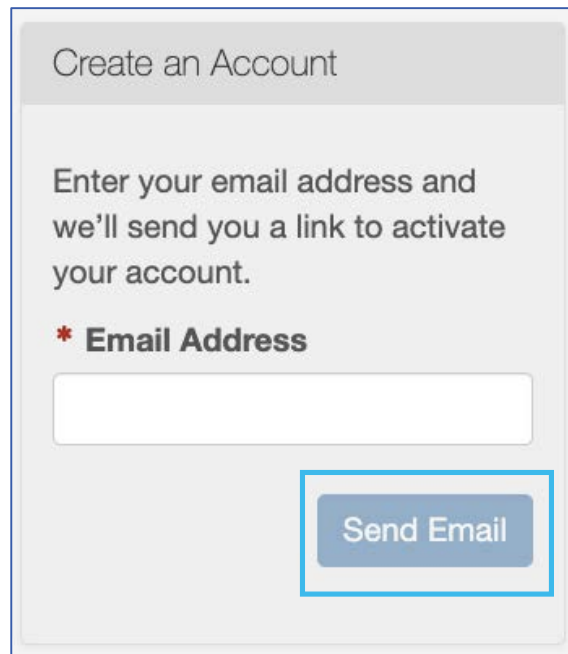
 GivingData

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Create an Account

After clicking **Create an Account**, you will see a screen asking you to enter your email address.

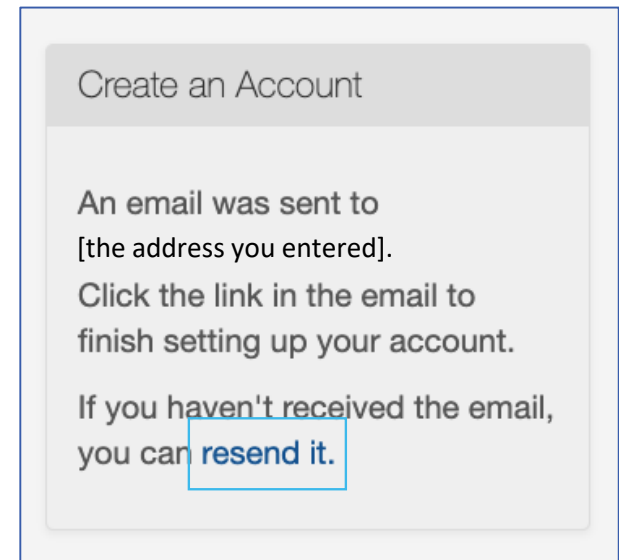
- **Enter your email address.**
- **Click Send Email.**



The screenshot shows a form titled "Create an Account". Below the title, it says "Enter your email address and we'll send you a link to activate your account." There is a red asterisk followed by the text "Email Address" above a white input field. A blue button labeled "Send Email" is positioned at the bottom right of the form.

You will then see a screen notifying you that an email was sent to the address you entered. Follow the link in the email to finish setting up your account.

If you do not receive an email after a few minutes, click the **resend it**



The screenshot shows a confirmation screen titled "Create an Account". The text reads: "An email was sent to [the address you entered]. Click the link in the email to finish setting up your account." Below this, it says: "If you haven't received the email, you can **resend it.**" The word "resend it." is highlighted with a blue box.

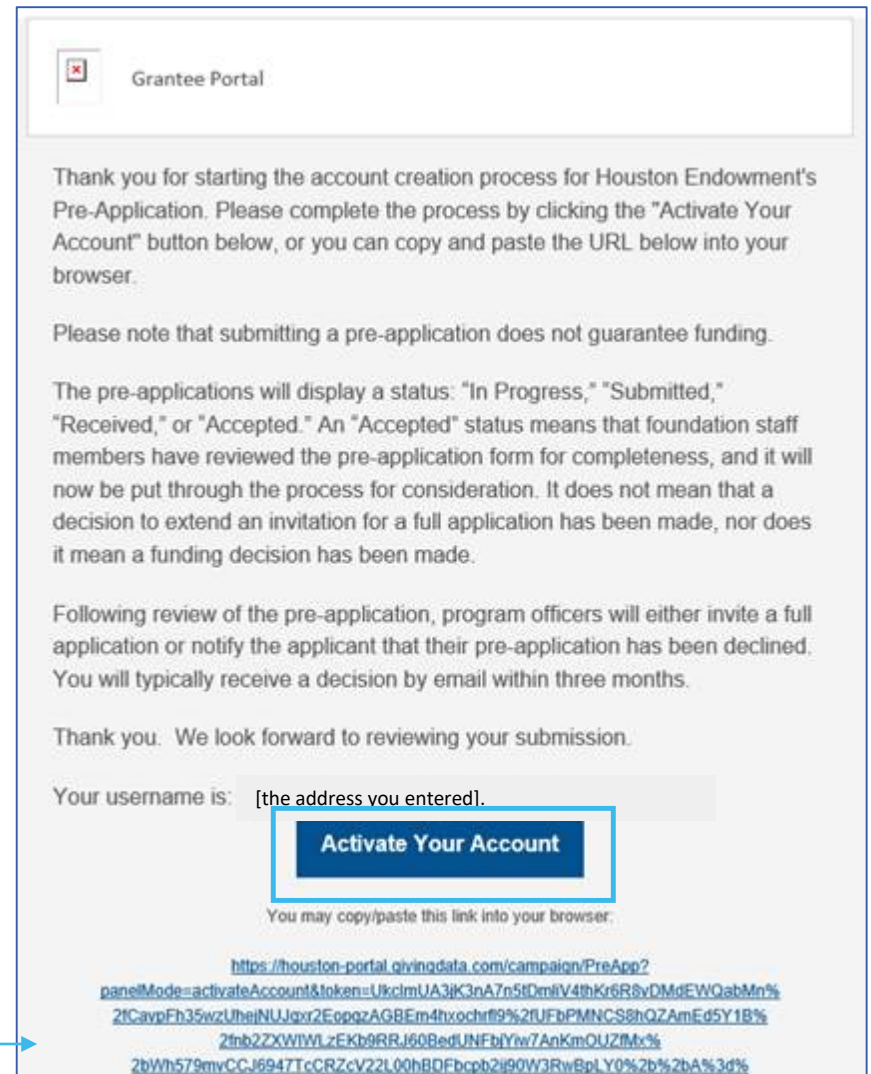
Email: Activate Your Account

Open the system generated email that was sent to the email address you entered. (A sample email is included here.)

Click the **Activate Your Account** button to continue setting up an account.

Note that your username is the email address that you used to create the account.

If the button does not work, copy and paste the link at the bottom of the email into a browser.



Activate Your Account

The **Activate Your Account** button and the URL found in the email will take you to an **Activate Your Account** form. Complete the form to finish activating your account.

Complete the following fields:

- First Name,
- Last Name,
- Create Password, and
- Confirm Password.

Please note that passwords are case sensitive and are required to contain:

- At least **6 characters**;
- A **special character** (!, @, #, &, \$, %, etc.);
- A **number**;
- A **lower-case letter**, and
- An **upper-case letter**.

Once you have completed the fields and entered as password that satisfies the requirements, click **Activate Account**.

The screenshot shows the Houston Endowment Grantee Portal interface. At the top left, the logo for HOUSTON ENDOWMENT is displayed next to the text 'Grantee Portal'. The main heading of the page is 'Submitting a Pre-Application form to Houston Endowment', with 'Grantee Portal' written below it. The central focus is a form titled 'Activate Your Account'. Inside this form, there is a sub-heading 'Activate Your Account' and a prompt: 'Complete the form to sign in with the account [the address you entered]'. Below this prompt are four required input fields, each marked with a red asterisk: 'First Name', 'Last Name', 'Create Password', and 'Confirm Password'. Each field is represented by a white rectangular input box. At the bottom right of the form area, there is a blue button with the text 'Activate Account', which is highlighted with a blue rectangular border. Below the form area, there is a link that says 'Already have an account? Sign In.'

Sign In

You will be redirected to a Sign In screen.

- Enter the **Email Address** you used to create the account.
- Enter the **Password**.
- Click **Sign In**.

1

2

3

Sign In

Sign in or [create an account](#) to submit a form for Houston Endowment's Pre-Application.

You have successfully activated your account. Please sign in with your email address and password.

* **Email Address**




* **Password**

[Sign In](#)

[Forgot your password?](#)

Grantee Portal Home

Upon login, you will see the **Home page**. Click  (Home) at any time to return to this view.

HOUSTON ENDOWMENT Grantee Portal    [Name]

Houston Endowment's Pre-Application

Houston Endowment's Pre-Application


The pre-application asks for general information about the organization seeking funding and an overview of the program or initiative for which support is sought. Organizations that are eligible for funding and whose funding requests have the potential to align with the foundation's funding priorities will then be invited to complete a full application, also accessible through GivingData.

Houston Endowment makes grants to a wide variety of eligible organizations whose work drives our vision of a vibrant city where all have the opportunity to thrive. We primarily focus on the results that the organization expects to achieve and how well those goals align with our vision, mission and priorities. Our staff also gauges the applicant's capacity to produce a measurable, long-term impact. Learn more about our [Focus Areas on our website](#).

You will see following statuses above your pre-application: "In Progress," "Submitted," "Received," or "Accepted." Please note: "Accepted" means that foundation staff members have reviewed the pre-application form for completeness, and it will now be put through the process for consideration. It does not mean that a decision to extend an invitation for a full application has been made, nor does it mean a funding decision has been made.

Following review of the pre-application, program officers will either invite a full application or notify the applicant that their pre-application has been declined. You will typically receive a decision by email within three months.

Pre-Applications

 [Start a new Pre-Application](#)

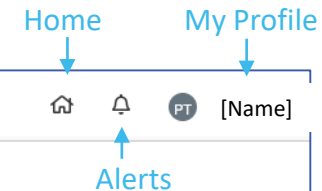
You have not started any Pre-Applications.

COMPLETING THE PRE-APPLICATION



Start a new Pre-Application

Upon login, you will see the **Home page**. From this page, click Start a new Pre-Application.



Houston Endowment's Pre-Application

Houston Endowment's Pre-Application


The pre-application asks for general information about the organization seeking funding and an overview of the program or initiative for which support is sought. Organizations that are eligible for funding and whose funding requests have the potential to align with the foundation's funding priorities will then be invited to complete a full application, also accessible through GivingData.

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Pre-Applications

 Start a new Pre-Application

You have not started any Pre-Applications.

Click to Start a new Pre-Application →

Select Organization

You will first be asked to select an organization to associate with the Pre-Application. If you are a new user and not already associated with an organization in our system, you will see the screen below. Click **Add New Organization** to create a new organization by either **Searching the IRS Database** or **Entering an Organization Name**.

The image displays three screenshots of the 'Start a New Pre-Application' dialog box, illustrating the process of selecting an organization.

Top Left Screenshot: Shows the initial 'Select Organization' screen. The 'Add New Organization' button is highlighted with a blue box and a blue arrow pointing to the right.

Top Right Screenshot: Shows the 'Add New Organization' screen. The 'Create Organization By' section has two radio buttons: 'Searching the IRS Database' (selected) and 'Entering an Organization Name'. Below this is a search input field labeled 'Search for an Organization...' and 'Search' and 'Cancel' buttons.

Bottom Left Screenshot: Shows the 'Select Organization' screen with a list of organizations. The 'Add New Organization' button is highlighted with a blue box and a blue arrow pointing to the right. An orange arrow points from the text 'Existing Account Users' to the radio button next to '[Existing Organization Name]'.

Existing Account Users

If your account is already associated with one or more organizations, you can select the name from a list by clicking the radio button next to the organization name (see an example in the image to the left). If you do not see the organization you want, follow the screens to add a new organization.

Open the Pre-Application

After selecting or adding your organization, you will return to the Home page. Select **Open Pre-Application** or **View/Print Full Pre-Application**.

The screenshot shows the 'Pre-Applications' page. At the top, there is a '+ Start a new Pre-Application' button. Below it is a blue bar with a pencil icon and the text 'In Progress'. Underneath, it says 'Pre-Application for [Organization Name]' and 'Last Updated: Aug 14, 2019'. At the bottom, there are two buttons: 'Open Pre-Application' and 'View/Print Full Pre-Application'. The 'View/Print Full Pre-Application' button is highlighted with a red rectangular box. A red arrow points from this box to the modal window on the right.

The modal window is titled 'Application: Pre-Application'. It contains the following text:
Hello, [Name]
Welcome to Houston Endowment's pre-application form.
This short pre-application asks for general information about your organization and an overview of the program or initiative for which support is sought. Organizations that are eligible for funding and whose funding requests have the potential to align with the foundation's **funding priorities** will then be invited to complete a full application, also accessible through GivingData.
We recommend you first review Houston Endowment's basic eligibility requirements and grantmaking priorities outlined on our website. See the **Eligibility and Criteria** and **FAQ** sections for further information.
If your organization meets these criteria, please complete this pre-application to help us determine your organization's basic eligibility and alignment with our strategic grantmaking practices.
Houston Endowment receives many more applications for funding than it is able to support. The selection process is highly competitive, and even strong proposals may not receive funding.
We thank you for your interest.

About Your Organization
Please tell us about your organization and the work that you do.
Thank you!
Legal Name
 Include responses
Close Print

View/Print Full Pre-Application opens a modal that allows you to preview, print, or download (by saving to PDF) a copy of the Pre-Application. You can opt to include your responses or view a blank version of the form by clicking or unclicking the Include responses box. Click Print to Print or Close to exit the modal.

Step: Introduction

The Pre-Application opens with an Introduction step. Read through the introduction and refer to the hyperlinks to learn more about the foundation's funding priorities, eligibility criteria, and FAQs. When you are ready to continue, click **Start Application** or select the next step from the step menu at the right.

You may notice in the tab menu that the Introduction has a green checkmark next to it. That is because there is no action for you to take on this step, so it is marked complete.

As you complete the fields for each step shown on the gray bar, seen left, the white circle will change to a green checkmark.

The portal will save your responses as you enter them.

Below the step menu, you have the option to select **Save and Come Back Later** or to **View/Print Full Application**.

HOUSTON ENDOWMENT Grantee Portal

Houston Endowment's Pre-Application

Step Menu

Pre-Application

Introduction ✓

About Your Organization ○

Contacts ○

Your Work ○

Review and Submit ○

Save and Come Back Later

View/Print Full Application

Hello, Portal

Welcome to Houston Endowment's pre-application form.

This short pre-application asks for general information about your organization and an overview of the program or initiative for which support is sought. Organizations that are eligible for funding and whose funding requests have the potential to align with the foundation's funding priorities will then be invited to complete a full application, also accessible through GivingData.

We recommend you first review Houston Endowment's basic eligibility requirements and grantmaking priorities outlined on our website. See the [Eligibility and Criteria](#) and [FAQ](#) sections for further information.

If your organization meets these criteria, please complete this pre-application to help us determine your organization's basic eligibility and alignment with our strategic grantmaking practices.

Houston Endowment receives many more applications for funding than it is able to support. The selection process is highly competitive, and even strong proposals may not receive funding.

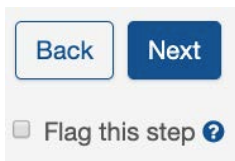
We thank you for your interest.

Start Application

Step: About Your Organization

To complete this step, add information about your Organization. See the Grantee Portal Overview starting on page 20 for details on each field type. Note: Required fields are denoted with a red asterisk.

At the bottom of each step, you will see navigation buttons that allow you to move to the next step or backwards to the previous step.



You can also Flag a step if you want to return to it later.

When you are ready to move forward, click the blue **Next** button at the bottom of the page or select the next step from the menu.



About Your Organization

Please tell us about your organization and the work that you do.

Thank you!

***Legal Name**

***Doing Business As**

***Website Address** ***Organization Type**

***Address**

Address Line 2 ***City**

Pre-Application

- Introduction
- About Your Organization**
- Contacts
- Your Work
- Review and Submit

Save and Come Back Later


View/Print Full Application

Step: Contacts

Enter the primary contact(s) for this Pre-Application. There should be at least one and not more than two contacts. (See page 28 for details on completing Contact Select fields.)

Contacts

Manage Contacts 1 Incomplete


 **Portal Tester**
⚠ Required: Title, Phone Number, Address

@ Business (Preferred):
mary+heipre@philanthropy.io






*** Primary contact for this inquiry:**

Portal Tester ✕

Enter at least 1 and no more than 2 contacts.

Flag this step 

Pre-Application

- Introduction 
- About Your Organization 
- Contacts** 
- Your Work 
- Review and Submit 

Step: Your Work

Enter information and respond to prompts about the work your of organization.

Your Work

Please limit responses to a few sentences.

*** Requested Amount:** *** Grant Term (months):**

*** Summarize the organization's work.**

” B I U ≡ ≡ ☯ ↺ ↻ Words: 0 Characters: 0

*** What opportunity or challenge would you like to address? How does it affect people in greater Houston?**

” B I U ≡ ≡ ☯ ↺ ↻ Words: 0 Characters: 0

Pre-Application

- Introduction
- About Your Organization
- Contacts
- Your Work**
- Review and Submit

Save and Come Back Later

View/Print Full Application

Final Step: Review and Submit

Review and Submit displays the **percent and number of steps completed** and the number of **flagged steps**.

If all steps have green check marks and are completed to your satisfaction, submit the application by clicking the green **Submit** button. (This button will be shaded grey until all steps are completed.)

Note: You will not be able to make edits after you click Submit. If you need to make a change after you submit the application, please email grantsupport@houstonendowment.org or call (713) 238-8150.

Review and Submit

Complete all steps and remove flags before submitting the Application.

100% 4 of 4 STEPS COMPLETED

0 STEPS FLAGGED

Back Submit

Pre-Application	
Introduction	✓
About Your Organization	✓
Contacts	✓
Your Work	✓
Review and Submit	○

Save and Come Back Later

View/Print Full Application

Successful Submission

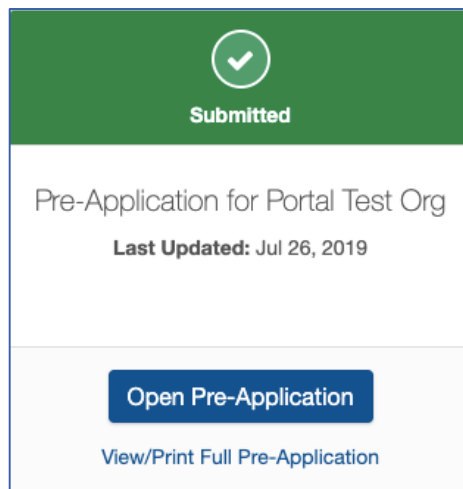
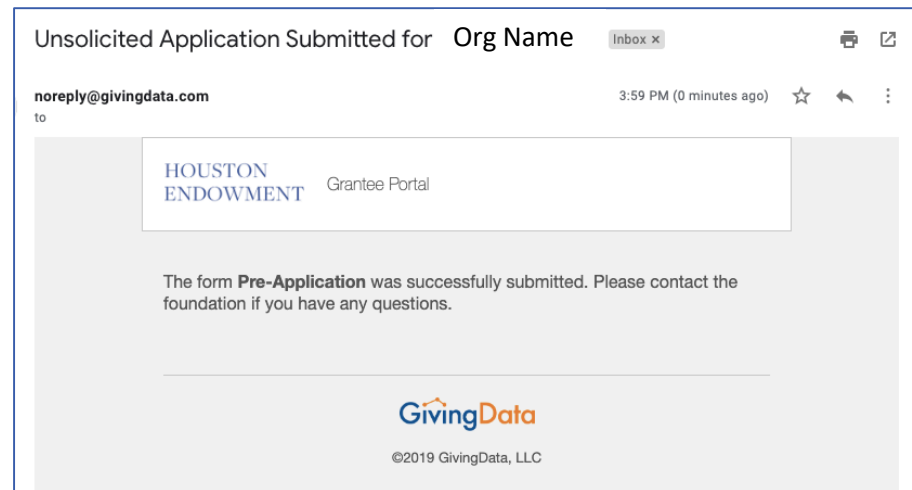
 The form has been successfully submitted.

[Return Home](#)

After you click **Submit**, a confirmation screen (above) will display.

You can use the **Return Home** link to go to the Grantee Portal Home page or use the top menu to navigate the portal.

You will also receive a confirmation email (right).












In this section, you will see a tile for each pre-application. The icon displays green to indicate that it has been submitted (left). From here you can **View/Print Full Application** or **Open Application** as read-only.

GRANTEE PORTAL OVERVIEW



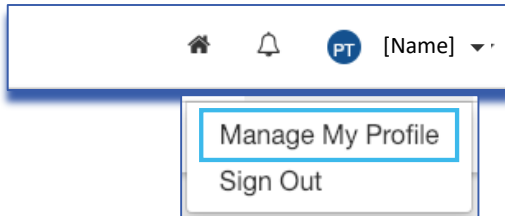
Legend of System Icons

	Home: clicking on this icon will take you to the home view.		Hamburger Menu drawer: click it to expand and view the steps menu. Click again to hide.
	Notifications: clicking on this icon will display a list of notifications (if any).		Question mark: click to display a description or instructional text.
	Hamburger Menu: Click to expand and view a menu. Click again to hide.		Incomplete Step
	Pencil: click to edit a field.		Completed Step
	Progress Indicator: In a modal (which is like a pop-up widow), this will indicate the number of steps and which step you are on.		Flagged Step

All changes saved

You may notice activity in the lower left corner of the window. GivingData will notify you as it is auto-saving or confirm that changes have been saved. If the system is not auto-saving, it will indicate that as well, so you know to save your work as you go.

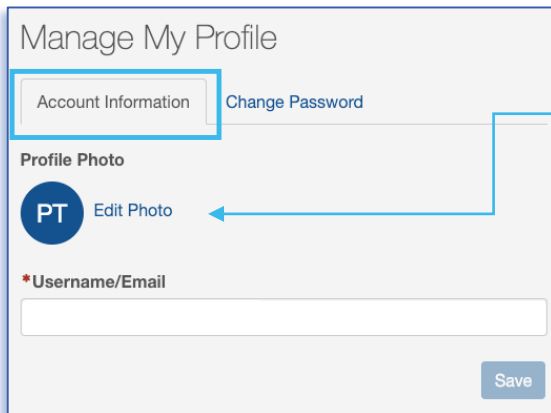
Manage My Profile



From the top menu, **click on your name** to expose a dropdown menu, then select **Manage My Profile**. The page has two tabs: **Account Information** and **Change Password**.

Account Information

Username/Email: Delete the existing information and type the username you prefer to use in the text field. Use this to login.



Profile Photo: To add or edit a photo, click **Edit Photo**.

An Edit Profile Photo modal will appear. **Drag** a file into the upload box **or** click **Select File** to choose a file. Once a file is successfully uploaded, it will appear in preview. You can drag, expand, and move the display area.

To delete the profile photo, click the red **Delete Profile Photo** button.

Once you have chosen the display area, click **Save**.

Change Password

To change your password, select this tab. Then enter your Current Password, followed by the new password twice. (Refer to password guidelines on page 4.) Click **Save** to save your changes.

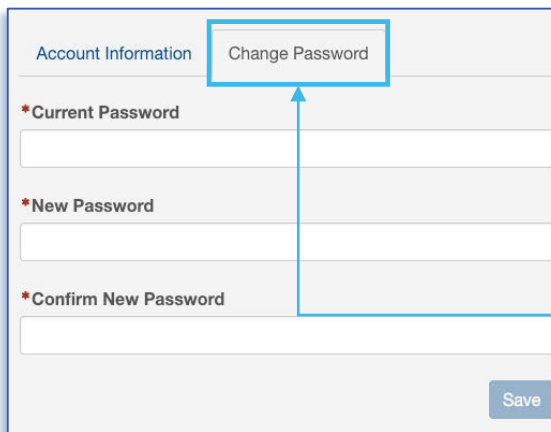
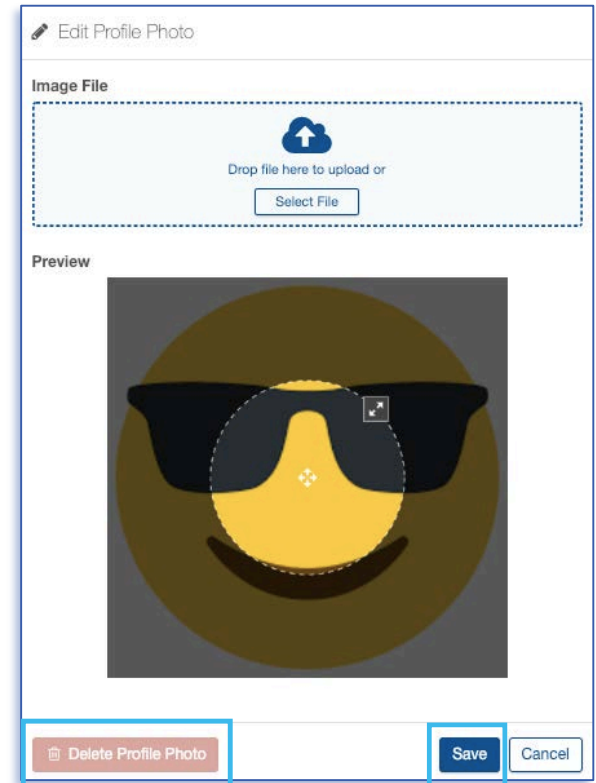


Photo Modal Window



Form Basics

The following are field types you may encounter as part of the pre-application process:

- Number
- Text
- Check box
- Paragraph with rich text
- Date
- Dropdown select
- Upload

Required Fields

Fields marked with red asterisks (*) are required and must be complete for a form to be submitted. If you leave a required field blank, you may see this error:  **Required.**

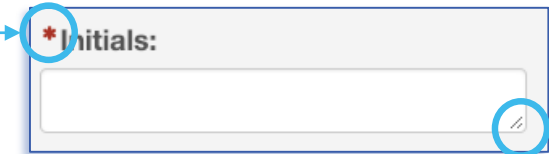
Field Expansion

Some text and paragraph fields have diagonal lines in their bottom right corners. You can click and drag these marks to expand the field.

View/Print Full Form

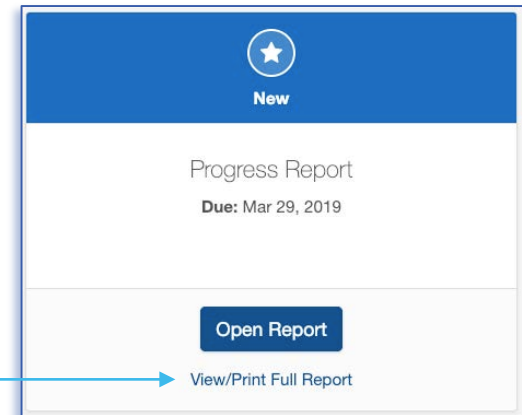
Each form gives you the option (from the tile and from the steps menu within) to View/Print the Full Form. Upon clicking the text or button, a modal will appear. Scroll to view all fields.

- **Include/Exclude Responses:** You will have the option to view the form with or without responses. Tick the box at the bottom of the modal to include or exclude responses.
- **Print:** To print, select the **Print** button from the bottom of the modal.
- **Close:** To exit the modal, click the **Close** button at the bottom or the **X** at the top right of the modal.



* Initials:

Text input field with a red asterisk and a diagonal line icon in the bottom right corner.



New

Progress Report

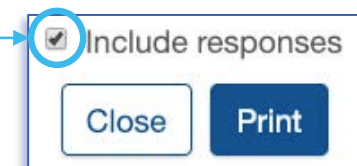
Due: Mar 29, 2019

Open Report

View/Print Full Report



View/Print Full Report



Include responses

Close Print

Field Types: Number, Text, and Check box

Number

Number fields are not specially marked in a way that distinguishes them from text fields. However, as you start to complete the field, the prompt will indicate if it is a number field by asking for a numeric value.

*** Grant funds received from Houston Endowment this past year:**

⚠ Number format is not valid. Valid format: 123

If you try to enter letters into a number field, you will get an error message in red (depicted above). If this occurs, delete the content and enter numbers.

Do not use symbols such as commas or periods as separators. This field only accepts whole numbers.

Text

The standard text field is a blank white box in which you can enter letters, numbers and characters. A text field is an indication that the response is meant to be short. (Paragraph fields are used for prompts that require longer responses.)

*** Initials:**

Check box

This type of field is exactly as it sounds: a box to be checked or unchecked. Click on the box to check or uncheck it as needed.

attest that I am authorized to submit this report on behalf of this organization.

Field Type: Paragraph with rich text

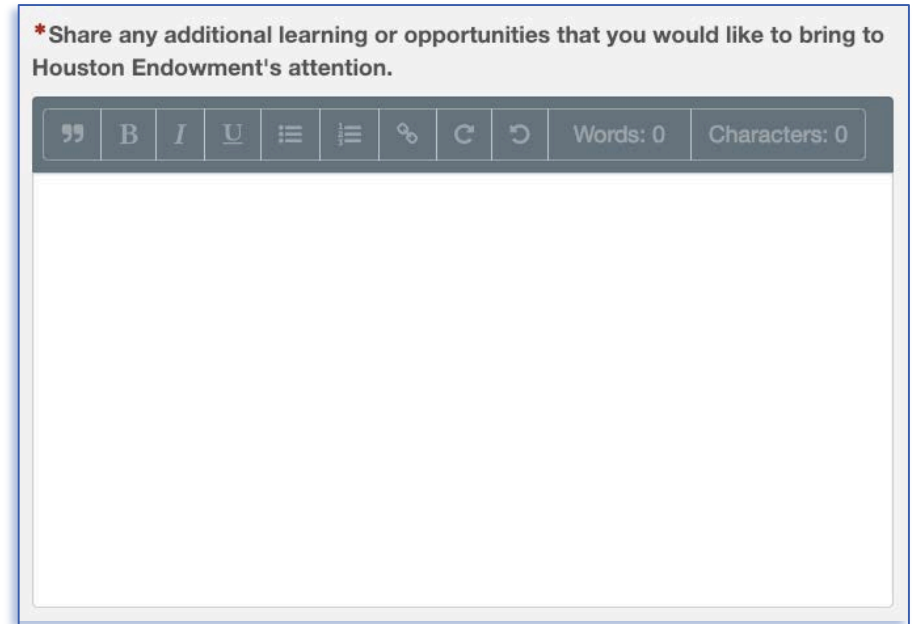
Paragraph with rich text

Paragraph fields are provided for prompts that require longer responses.

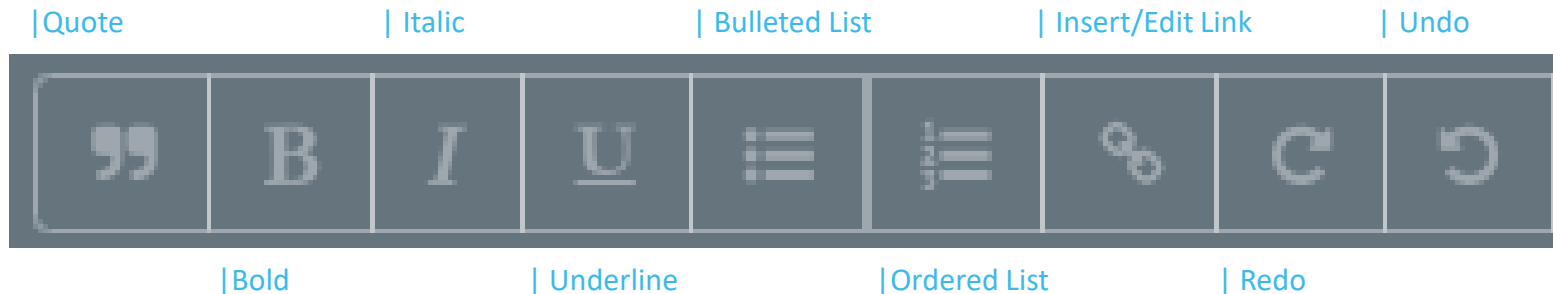
In addition to providing more space for your answer, they also include a grey formatting bar and a live word and character count.

The grey box labeled **Characters** provides a live count of your characters.


The grey box labeled **Words** provides a live count of your words.



Formatting bar symbols



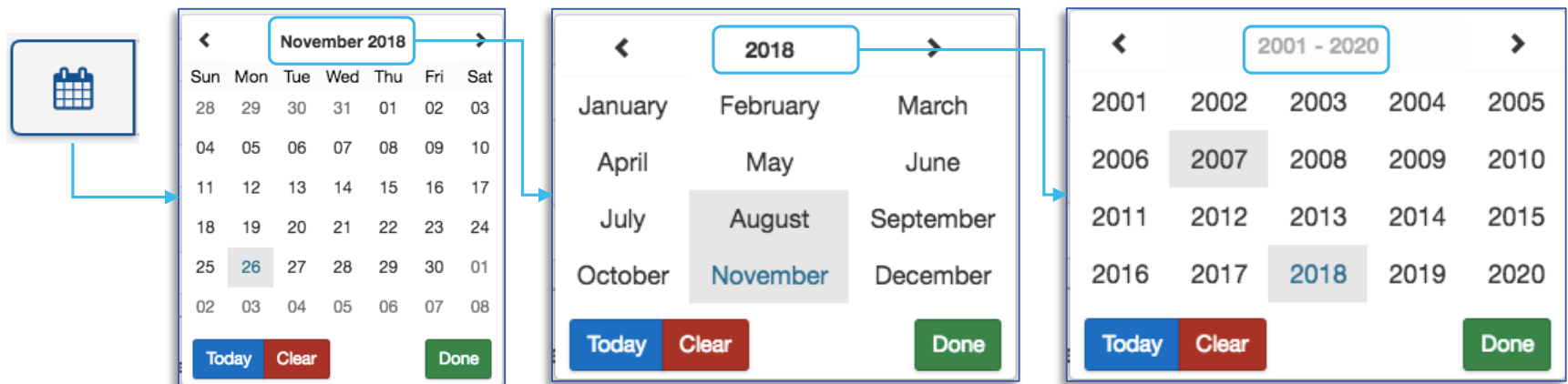
Field Type: Date

Date fields include a calendar select tool, indicated by a calendar icon . Click the icon and a calendar select tool (shown below) will open to a view of the current month.

You can use the arrows to navigate backward or forward in time.



To quickly navigate to different months or years, click the text (between the arrows) to view the level up. For instance, in the example below, if you are in a date view, clicking November 2018 will open a list of months; clicking 2018 will open a list of years. You can drill back down by selecting a Year, Month, and finally the day.




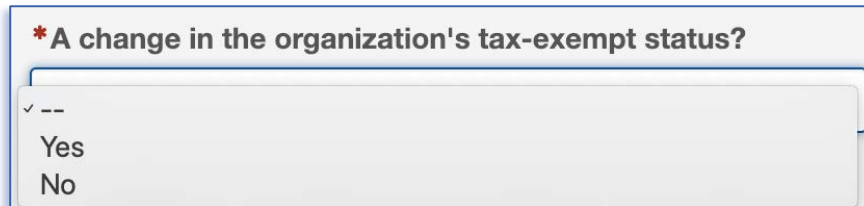
Other quick navigation options include clicking the blue **Today** button to select today's date or clicking the red **Clear** to start over.

Once you have selected the date, click **Done** and the selected date will populate the field.

Field Type: Dropdown Select and Upload

Dropdown Select

These fields are indicated by the presence of arrows () on the right side of the field. Click in the field to expose the dropdown menu. Select one of the options displayed.

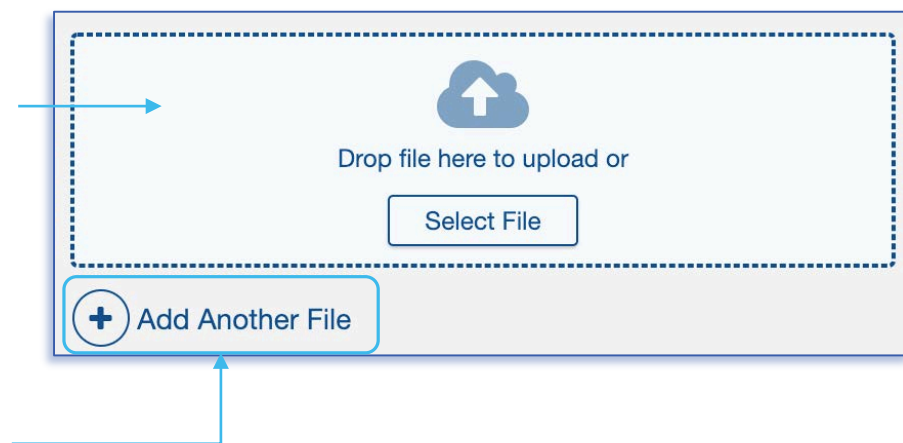


Upload

Within forms, you may be prompted to upload documents. When you see the upload box (right), you can either drop the file you want to upload by dragging it into the blue box or click **Select File** to open a window and search your computer's files.

We accept documents in the following formats: .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .pdf. Please do not include special characters (i.e., # : % * / (|) > ? +) in your file names.

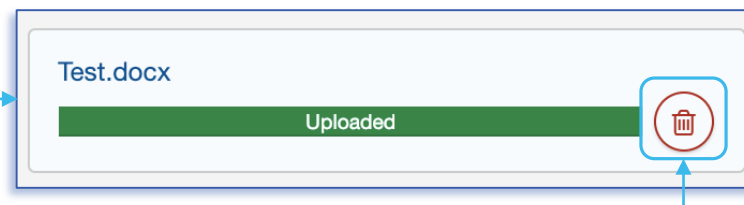
If only one box is present and you need to add additional files, click **Add Another File**. (Note: The system prevents you from uploading a document more than once. Each file name must be unique.)



A **successful upload** will be indicated by:

- the document name appearing as a blue hyperlink and
- a green bar labeled "Uploaded".

Remove an uploaded item by selecting the red trash can next to the green bar.



Field Type: Contact select

Contact select

This type of field will offer a dropdown list of your organization's contacts that are already in the system. **Select** the appropriate contact or click **Add New Contact** if the desired staff contact is not listed.

Once you **select a contact**, it will appear in the field highlighted in grey and in a box labeled Manage Contacts. If you wish to remove this contact, click the X next to the name in the field.

✎ Edit Contact: Basic Information ✕

Prefix

* First Name

Middle Name

* Last Name

Suffix

* Title

• • •

← Back Next → Cancel

Manage Contacts

1 Incomplete

✎ Portal Tester1

⚠ Required: Title, Phone Number

📧 Primary:
mary+he1@philanthropy.io

* Reporting Contact

Select Contact

+ Add New Contact

Portal Tester1

* Reporting Contact

Portal Tester1 ✕ Select Contact

Enter 1 contact.

Manage Contacts

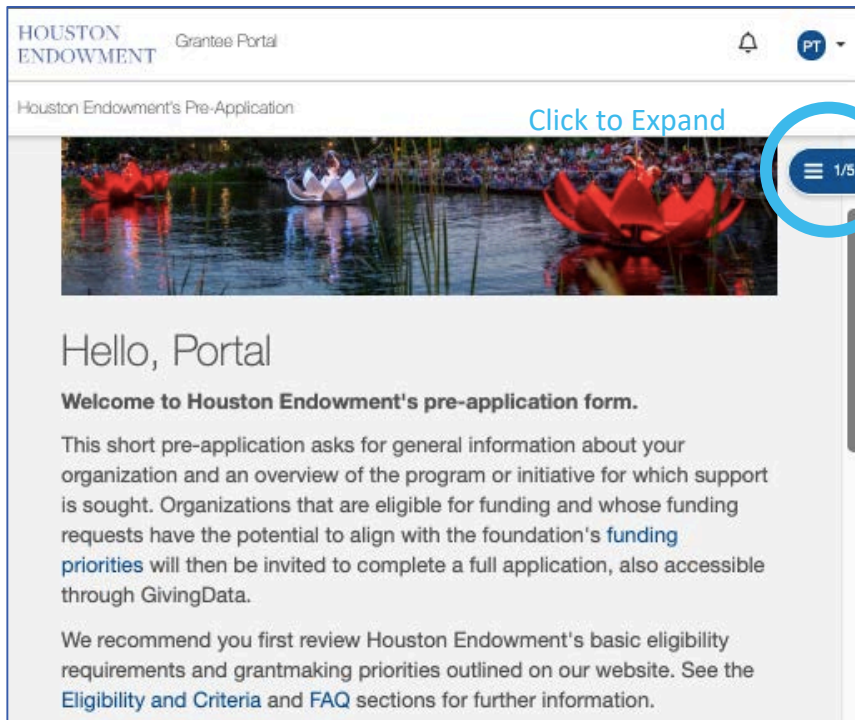
If one or more required field(s) is missing in the system, you will see an error message. Click the blue pencil icon to edit the contact's information.

The modal that appears is the same form that will appear should you click **Add New Contact**. Enter information in the required fields and use the buttons (**Back**, **Next**, and **Save**) to navigate through the modal. Once you have completed all required fields, click **Save**.

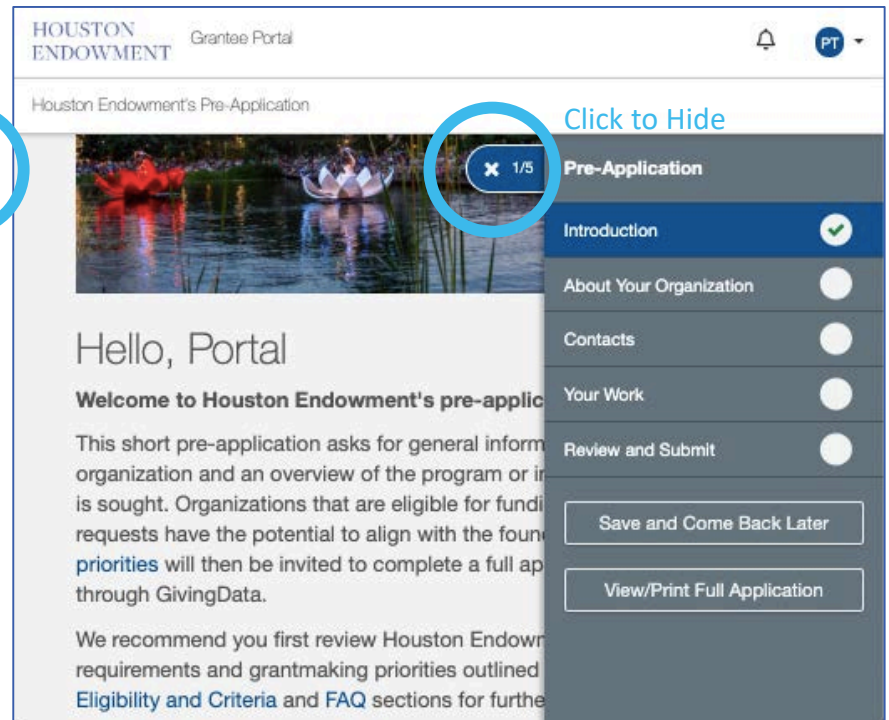
Mobile or Condensed View

If you are accessing the Pre-Application on a mobile device or a condensed view of a browser, the view you see may differ from many of the images below, but the functionality will remain the same. In a condensed or mobile view, the steps menu will be hidden, but you expand or hide them with a couple of clicks.

Hidden Step Menu



Expanded Step Menu



FREQUENTLY ASKED QUESTIONS



FAQs

What kinds of documents can I attach in GivingData?

We accept the following kinds of document formats: .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .pdf. Please do not include special characters (i.e., # : % * (|) > ? +) in your file names. Each file name must be unique.

Are all data fields within the online form required? How do I know which ones are and which ones are not?

Not all fields are required. A red asterisk (*) will indicate a required field.

Can I preview the questions that I will be required to complete?

Yes. Information about typical questions is found within this guide. You can also preview the form and print it once you are in the system by clicking View/Print Full Application.

Can Houston Endowment see my responses before I submit my report?

Technically, the system allows it, but it is not the practice of Houston Endowment to access incomplete applications.

Can I copy and paste information from other documents into the online portal question fields?

Yes. The system allows you to copy and paste information from other documents. Advanced formatting (italics, bold, bullets, etc.) may not be preserved.

Are there word or character limits on my responses?

No, there are no word or character limits on any of the paragraph fields. Please try to be as concise as possible while answering the question completely. For the longer paragraph fields, we ask that you limit your responses to 10 sentences.

Do I have to complete the entire grantee application in one sitting?

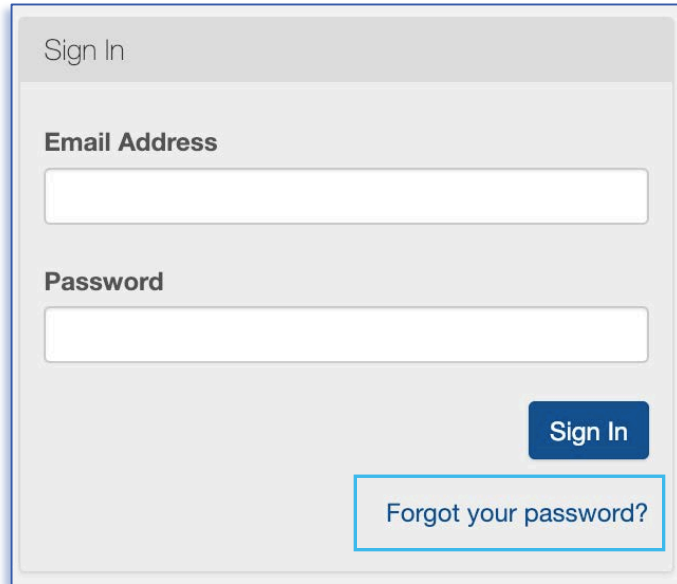
No. You may log in and out as often as you like. Answers autosave as you work. (Text in the lower left of the screen will indicate when the system is saving your responses and when your changes are saved.)

I don't have the Chrome Browser. Can I use this portal?

Yes. GivingData works in other browsers. You can use your preferred browser, or, if you want to install Chrome, visit www.google.com/chrome and follow the instructions.

For additional FAQs, visit www.houstonendowment.org/applicant-information/faq/. If you have questions about the system, please email grantsupport@houstonendowment.org or call (713) 238-8150.

Forgot your password?



Sign In

Email Address

Password

Sign In

Forgot your password?

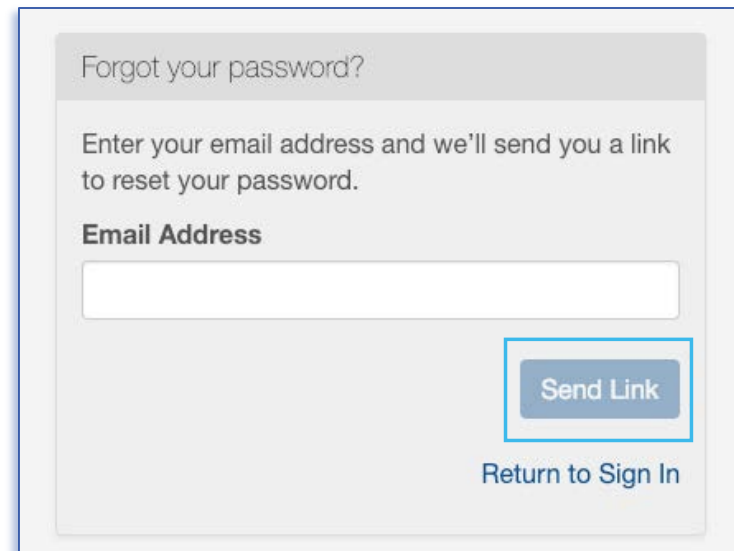
If you forget your password, don't worry. You can easily reset it yourself.

From the Sign In page (houston-portal.givingdata.com) click **Forgot your password?**

It will take you to a new window where you can:

- Enter your Email Address in the box.
- Click **Send Link**.

A green box will appear at the bottom left of your screen confirming that an email was sent to the email address you entered. Follow the instructions in the email you receive to reset your password.



Forgot your password?

Enter your email address and we'll send you a link to reset your password.

Email Address

Send Link

[Return to Sign In](#)