

HOUSTON ENDOWMENT

GRANTEE GUIDE TO: **Applications in GivingData**

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ACCOUNT ACTIVATION & SIGNING IN



Invitation Email

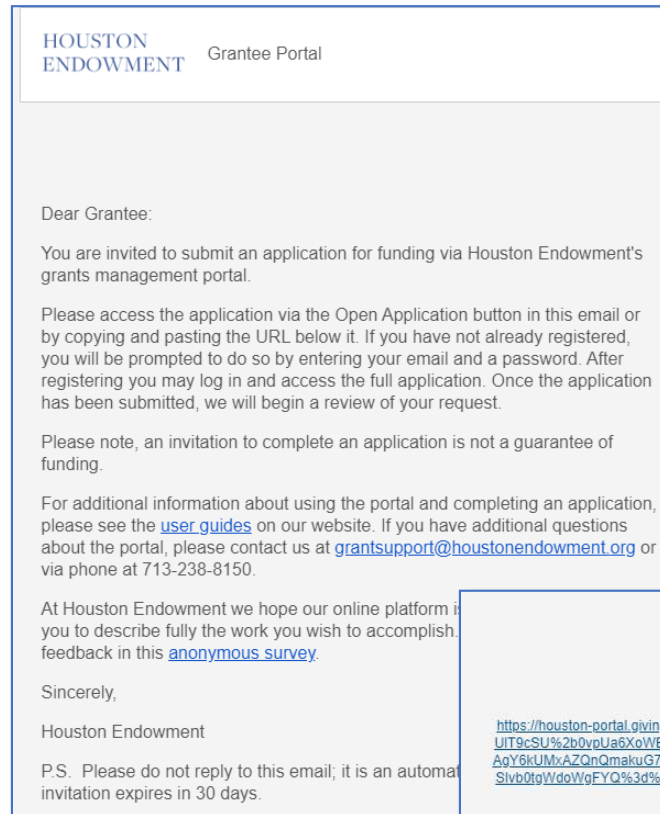
You will receive an email from our grants management system, GivingData, inviting you to submit an application via the grantee portal. **Please add mail@givingdata.com and noreply@givingdata.com to your email safe list/favorites to ensure that you receive the invitation and other communications.**

Follow the link in the email by clicking the blue **Open Application** button or by copying and pasting the URL below the button into your web browser. The URL is specific to your user. (Do not copy the URL in this guide.) Note that Chrome and Safari are recommended.

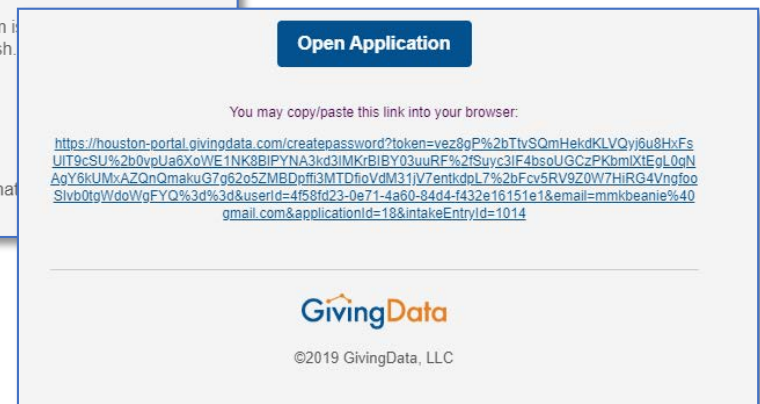
If you have previously registered, you can log in and proceed to the application section.

If you have not registered, you can do so now. (See page 5.)

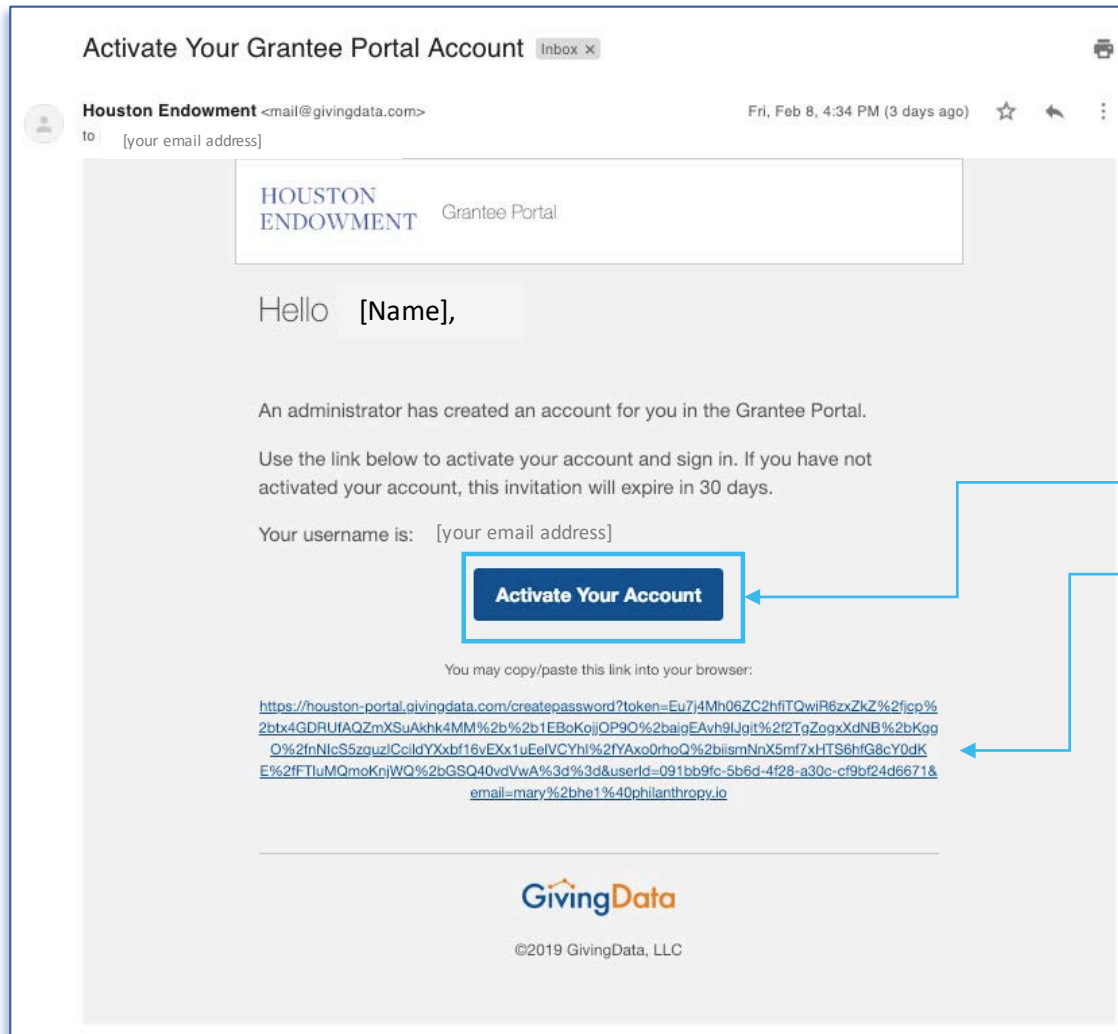
If you require assistance or additional log in credentials for other staff, contact grantsupport@houstonendowment.org or call (713) 238-8150.



Tip: GivingData works best in Google Chrome and Safari web browsers.



Account Activation Email



If you are new to the system, you may also receive an email inviting you to activate your grantee portal account.

From the body of the email you can click the **Activate Your Account** button to go directly to the site.

If the button does not work, copy the URL listed in blue and paste it into a browser. (Do not copy the URL shown in this guide, as each URL is unique to the user.)

Tip: GivingData works best in a Google Chrome web browser.

Create a Password

If you do not already have an account associated with your email address, when you visit the URL included in the Account Activation email or the Invitation email, you will be prompted to create a password, as depicted in the image below. (If you already have an account, you will see a sign in screen; see the next page for information on signing in.)

Your username is the email address to which the invitation was sent.

Before creating a password, please note the password requirements:

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

Once you have a password that complies with the requirements:

1. **Enter the password** in the first box.
2. **Retype** the password in the second box to confirm it.
3. Click **Save**.

If the password you attempt to create does not comply with the requirements, the field will be highlighted in red and a popup containing the requirements will display. Edit your password until it complies. You will only be able to click **Save** and complete this step when your password meets the requirements.

HOUSTON
ENDOWMENT Grantee Portal

Create Password

Create a password to sign in with the account
[your email address].

Password

Confirm Password

Save

Sign In

Once you have successfully created a password, a Sign In page will appear.

To sign in:

1. Enter your **Email Address**.
2. Enter your **Password**.
3. Click **Sign In**.

Tip: Bookmark the Sign In page so you can easily return to it:
houston-portal.givingdata.com.

Forgot your password? If you forget your password, click this link. A new screen will appear, where you can enter your email address and receive an email that contains a link to reset your password.

HOUSTON ENDOWMENT Grantee Portal

Sign In

1 Email Address

2 Password

3 Sign In

Forgot your password?


Bookmark this page to return to the Grantee Portal in the future.

GivingData

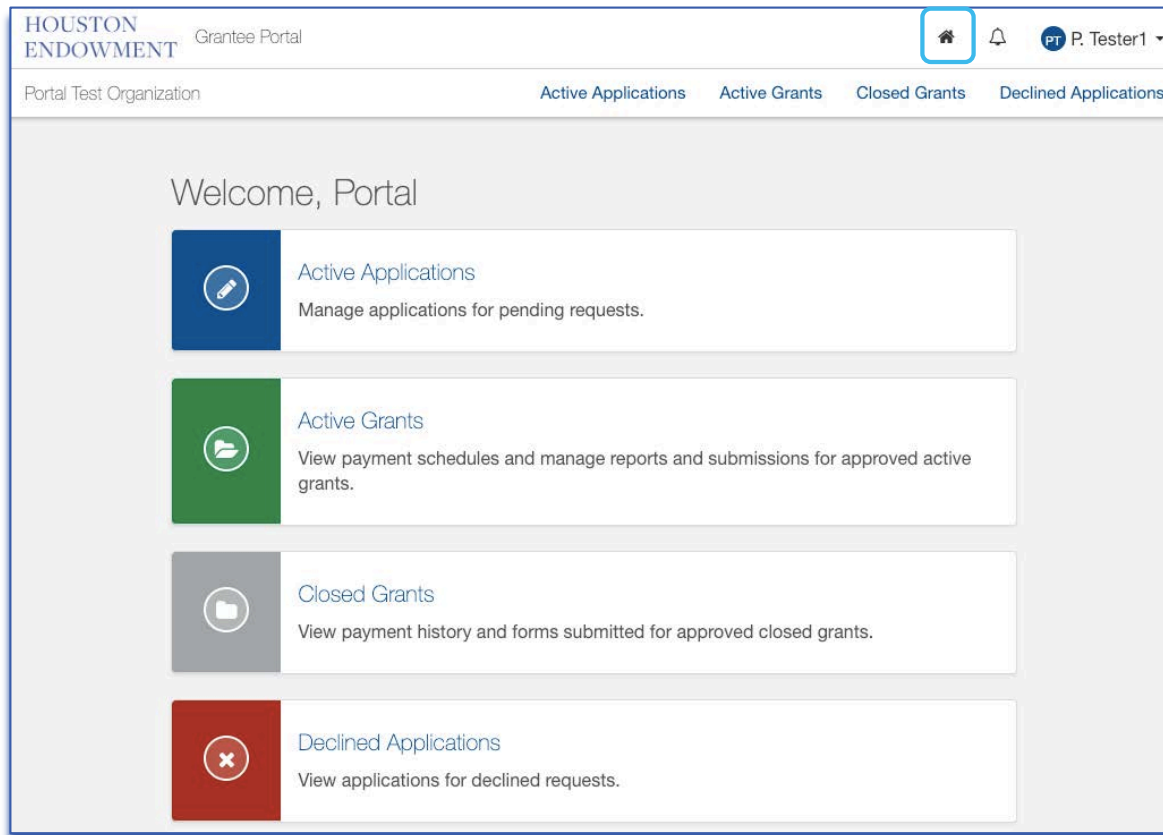
©2019 GivingData, LLC v4.3.10.1

Privacy Notice

Grantee Portal Home

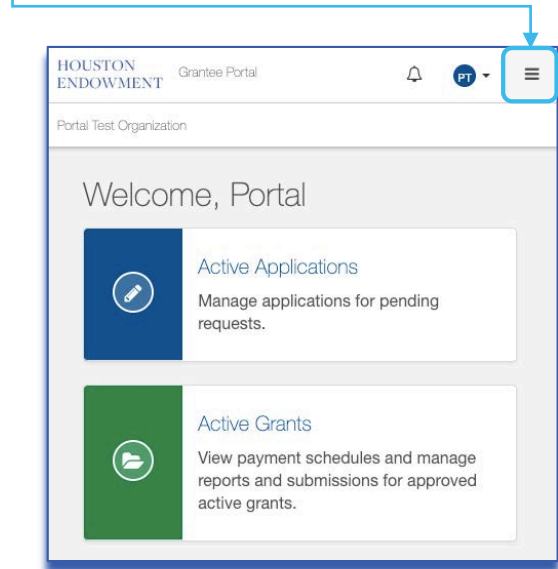
Upon login, you will see the **Home page**. Click  (Home) at any time to return to this view. (If your account is associated with one or more organizations, see the next page.)

Mobile device? This is a responsive platform, which means that the view will change as you shrink your browser window or if you are viewing it on your mobile device. The layout might look slightly different, but it will have the same functionality that is available in an expanded-web view.



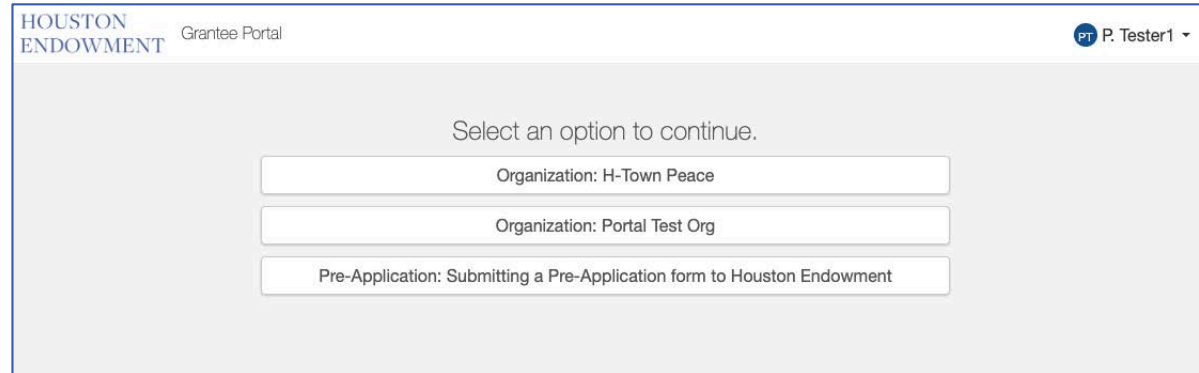
Mobile or Condensed-Web View

In this view the menu is collapsed into a hamburger menu (right and below). Click on it to view the menu.



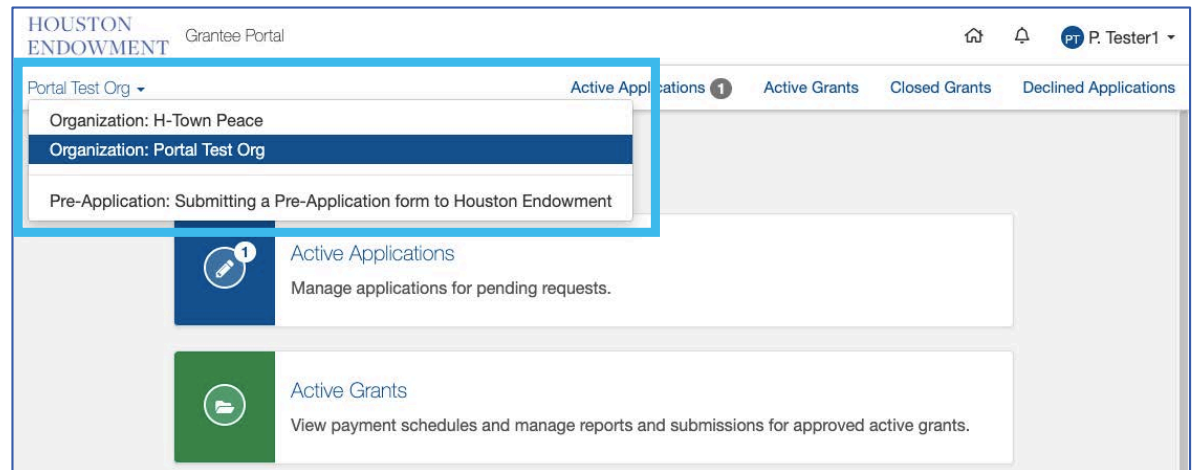
Multiple Organizations Landing Page

If your account is associated with more than one organization (or if you have created a Pre-Application), at login, before you get to the home page, you will be asked to select the organization you want to access. Click on the name of the organization to navigate to its homepage.



Switching Organizations


Once you have selected an organization and you want to navigate to another organization, click on the organization name in the upper left corner of the home page. A dropdown menu will appear from which you can select the organization you want to access.

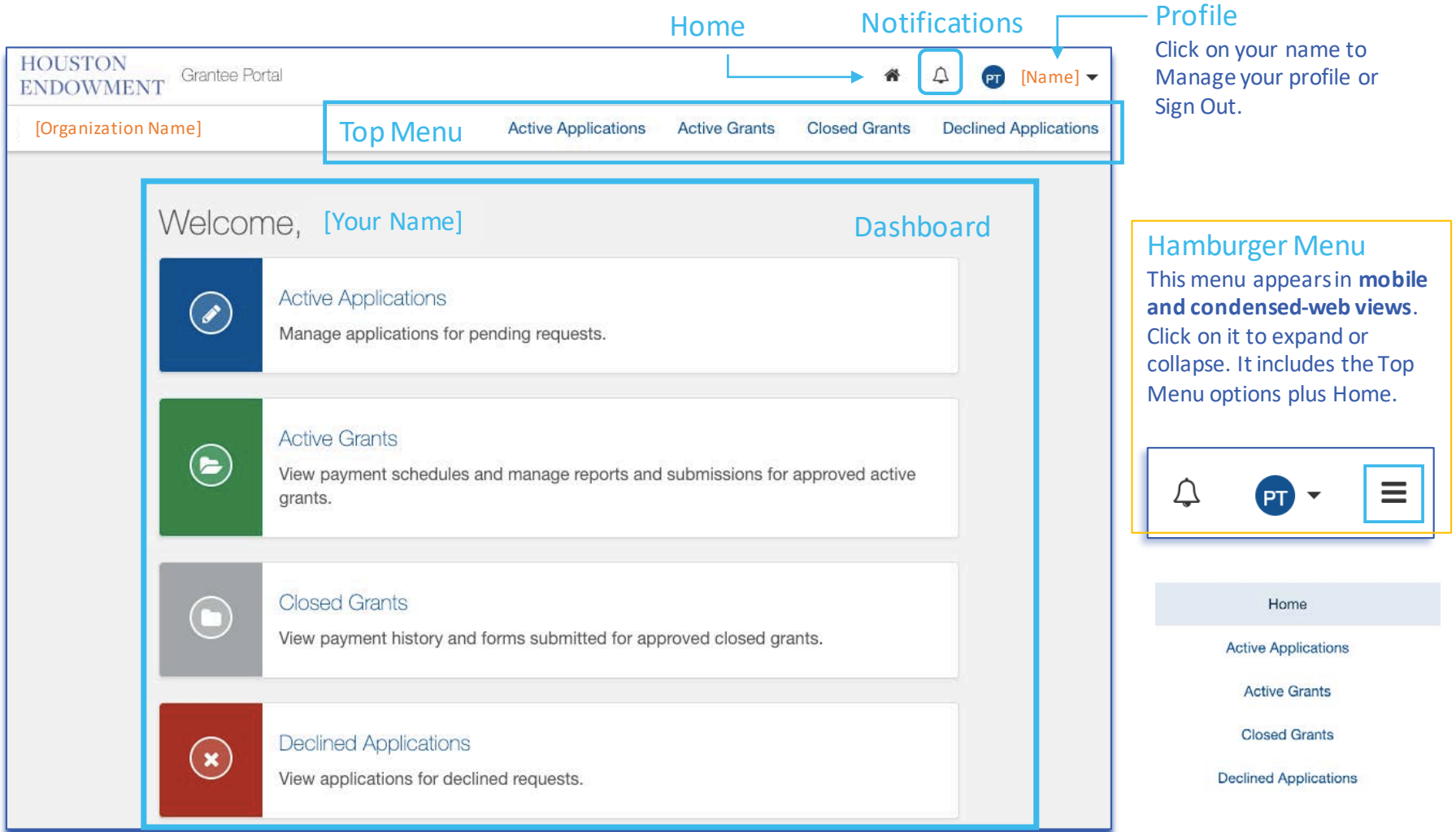


GRANTEE PORTAL OVERVIEW



Grantee Portal Home

Upon log in you will first see the **Home page**. You can access everything you need from this page. The key areas of the Home page are highlighted below. Click  (Home) from any page to return to this view.



Home **Notifications** **Profile**

Click on your name to Manage your profile or Sign Out.

HOUSTON ENDOWMENT Grantee Portal

[Organization Name] **Top Menu** Active Applications Active Grants Closed Grants Declined Applications















Welcome, [Your Name] **Dashboard**

- Active Applications**
Manage applications for pending requests.
- Active Grants**
View payment schedules and manage reports and submissions for approved active grants.
- Closed Grants**
View payment history and forms submitted for approved closed grants.
- Declined Applications**
View applications for declined requests.

Hamburger Menu
This menu appears in **mobile and condensed-web views**. Click on it to expand or collapse. It includes the Top Menu options plus Home.

- Home
- Active Applications
- Active Grants
- Closed Grants
- Declined Applications

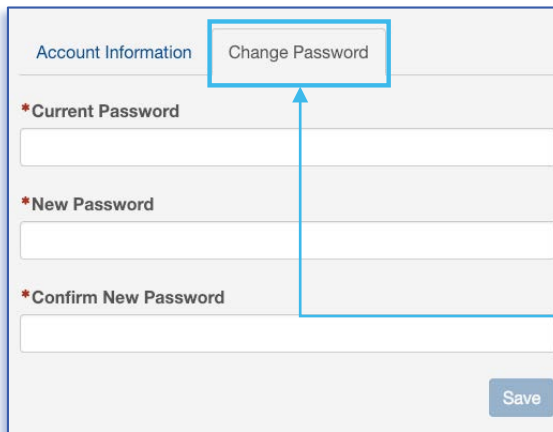
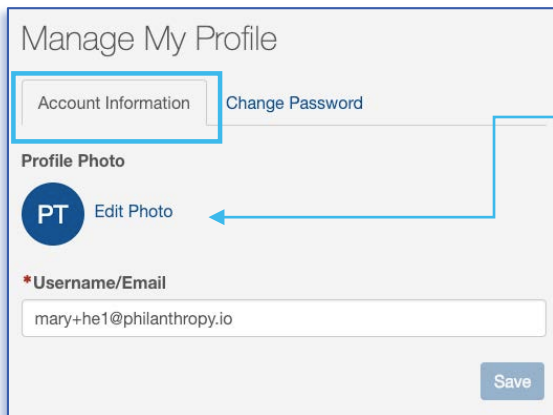
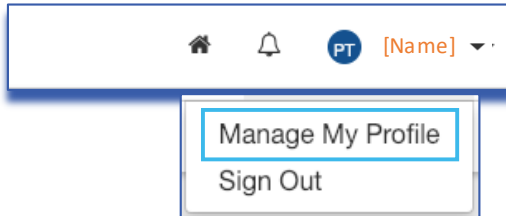
Legend of System Icons

System & Dashboard		Forms	
	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
	Active Applications		Completed Step
	Active Grants		Flagged Step
	Closed Grants		Pencil: click to edit a field.
	Declined Applications		Progress Indicator: In a modal, this will indicate the number of steps and which step you are on.

All changes saved

You may notice activity in the lower left corner of the window. GivingData will notify you as it is auto-saving to confirm that your 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: If you wish to use a different email address, delete the existing information and type the email address you prefer to use in the text field. Use this when you next login.

Profile Photo: To add or edit a photo, click **Edit Photo**. An Edit Profile Photo modal (right) 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.

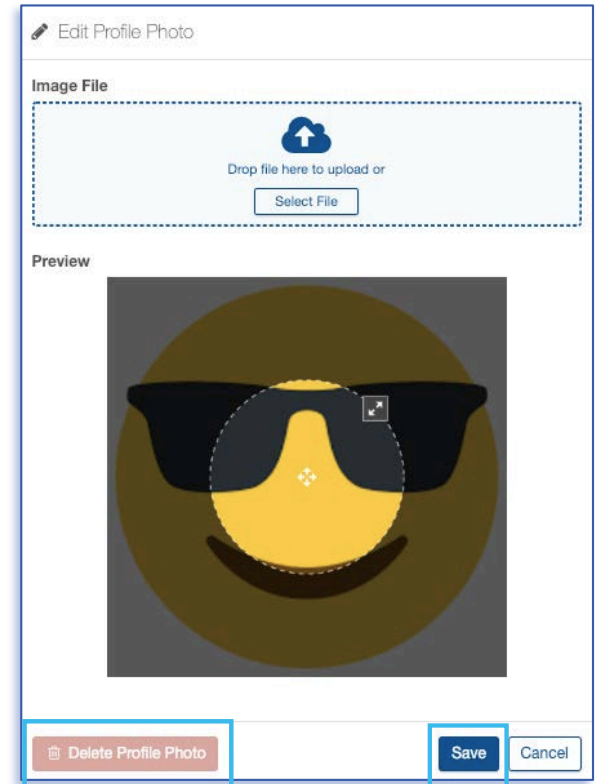
To delete the profile photo, click the red **Delete Profile Photo** button.

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.

Edit Profile Photo Modal

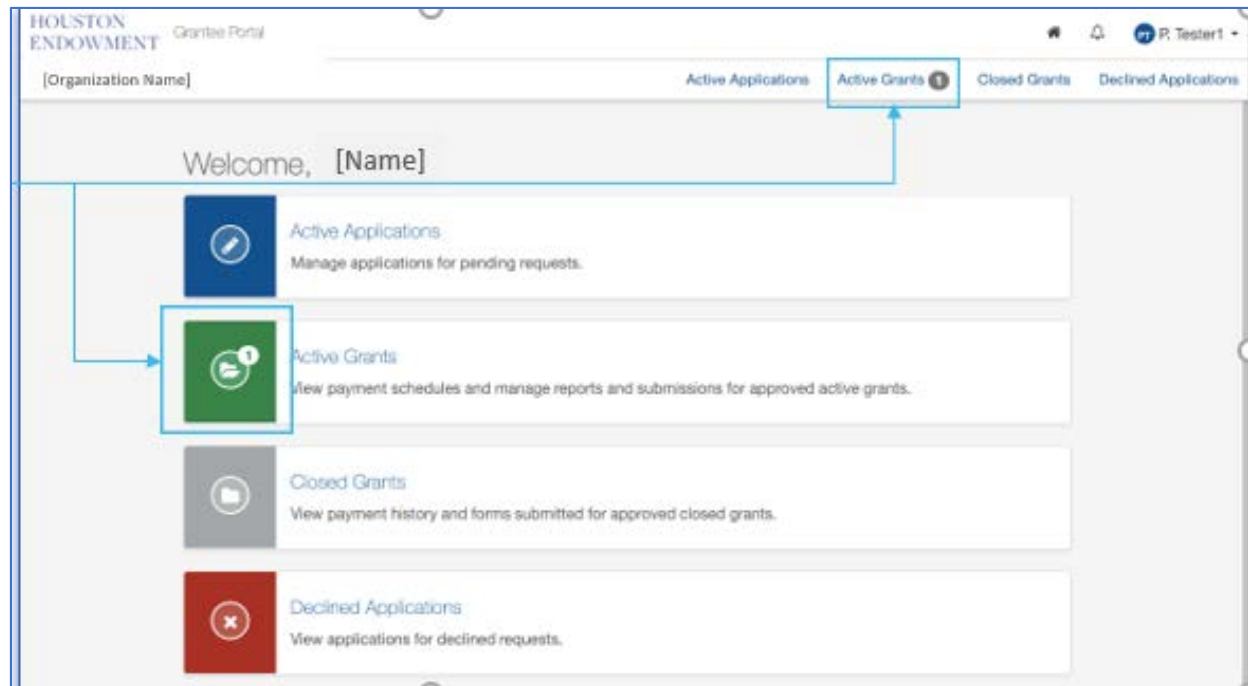


Navigation

Use the menu (Top, Dashboard, and Hamburger) to navigate throughout the portal. Each menu displays the same navigation options. Click on the title or an icon to access the corresponding section of the portal (i.e., clicking Active Grants will take you to the Active Grants section). Within sections and forms, you will find hyperlinks and buttons to help you navigate. Keep in mind that the hamburger menu will only display on mobile devices or condensed-browser views.

Alert Badges

The portal uses an alert-badge system to indicate how many items you have in each category. In the example right, a 1 appears in both the top menu, Active Grants, and on the icon on the Dashboard. These alerts indicate there is one (1) active grant.



« Back to Active Grants

Open Report

Hyperlinks and Buttons

Within each section and its corresponding forms (i.e. Applications and Reports), you will find hyperlinked text (top left) and buttons (lower left) with clear descriptions to help you navigate between pages.

Sections

Active Applications

If you have any pending requests for funding currently in the system, they will be listed here. Click this section to view the list and navigate to forms.

Active Grants





If you have any approved, active grants, they will be listed here. From the list view, you can navigate to view grant details. Detail view pages include general information, payment information, and forms related to the grant. Please note, grants submitted and approved in our previous system may have abbreviated information available.

Closed Grants

If you have previously approved and now closed grants, they will be listed here. Please note, grants submitted and approved in our previous system may have abbreviated information available.

Declined Applications

If you have submitted any applications that have been declined, they will be listed here.


	<h3>Active Applications</h3> <p>Manage applications for pending requests.</p>
	<h3>Active Grants</h3> <p>View payment schedules and manage reports and submissions for approved active grants.</p>
	<h3>Closed Grants</h3> <p>View payment history and forms submitted for approved closed grants.</p>
	<h3>Declined Applications</h3> <p>View applications for declined requests.</p>

Form Basics

Applications and Report forms are used to request information using the following field types:

- Comments
- 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.**

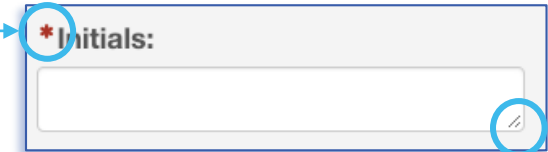
Field Expansion

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 (Report or Application)

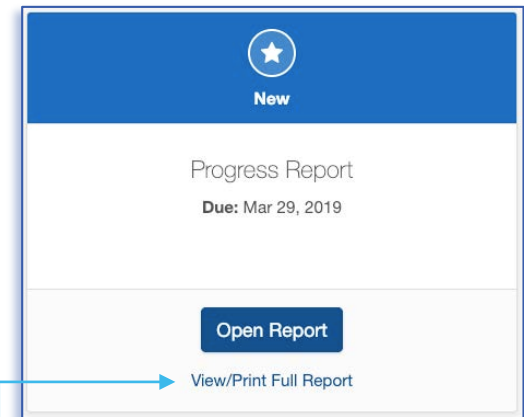
Each form gives you the option (from the tile and from the steps menu within) to View/Print the Full Form. Upon clicking the text or button, a modal will appear. Scroll to view all fields.

- **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:

A text input field with a red asterisk and the label "Initials:". A small icon with diagonal lines in the bottom right corner indicates field expansion capability.



New

Progress Report

Due: Mar 29, 2019

Open Report

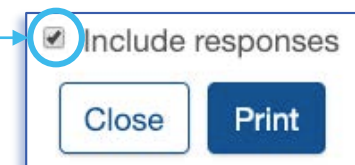
View/Print Full Report

A report tile with a blue header containing a star icon and the word "New". Below the header, the title "Progress Report" and due date "Due: Mar 29, 2019" are displayed. At the bottom, there is a blue "Open Report" button and a link "View/Print Full Report".



View/Print Full Report

A grey button with the text "View/Print Full Report".



Include responses

Close Print

A modal window with a checked checkbox and the text "Include responses". At the bottom, there are two buttons: "Close" and "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

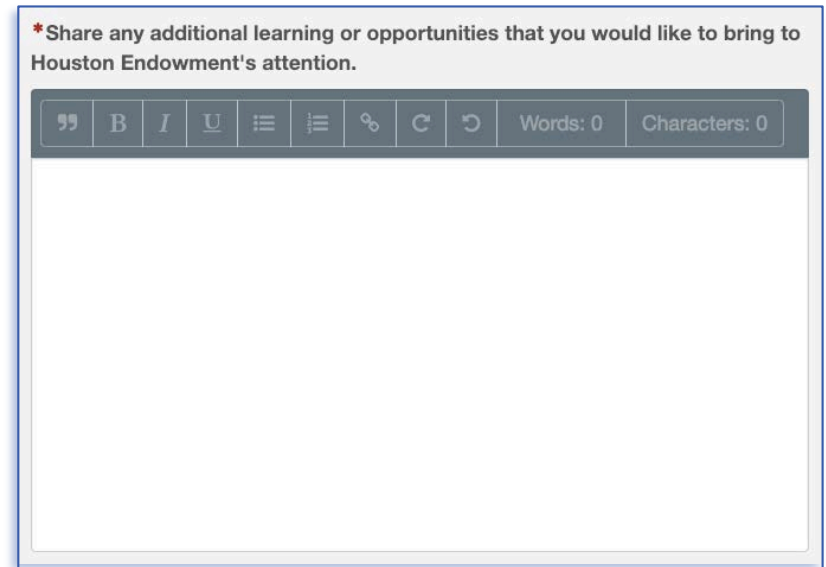
Paragraph fields are provided for prompts that require longer responses.

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

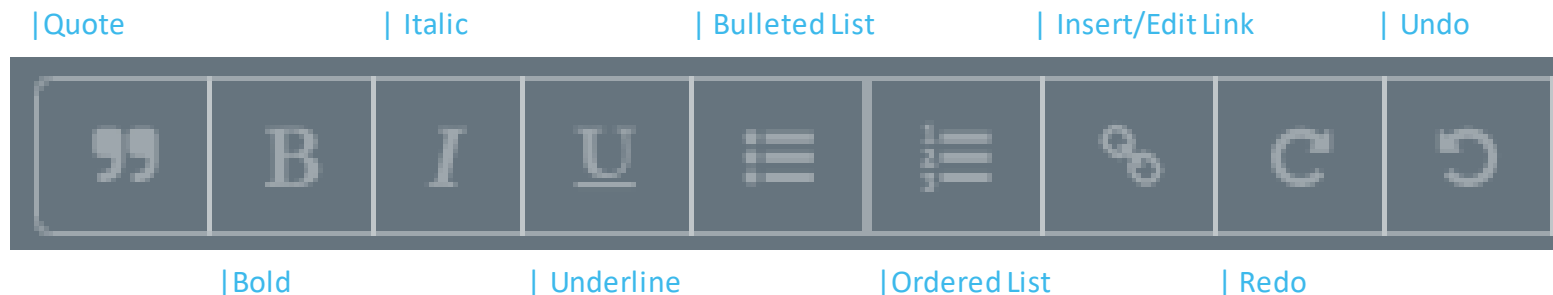
The grey box labeled **Characters** provides a live count of your characters.

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


Copying & Pasting: GivingData works best when you type directly into the fields. If you are copying and pasting content, we recommend that you right click and select Paste Plain Text (PC users) or Paste and Match Formatting (Mac users) when pasting into GivingData. Please be aware that formatting may not copy when pasting into GivingData.



Formatting bar symbols



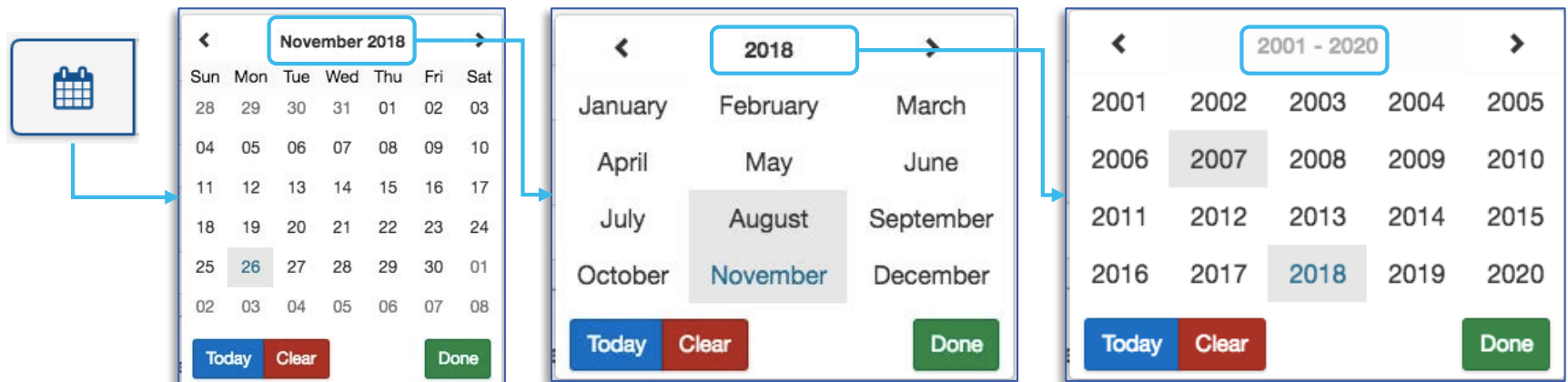
Field Type: Date

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.




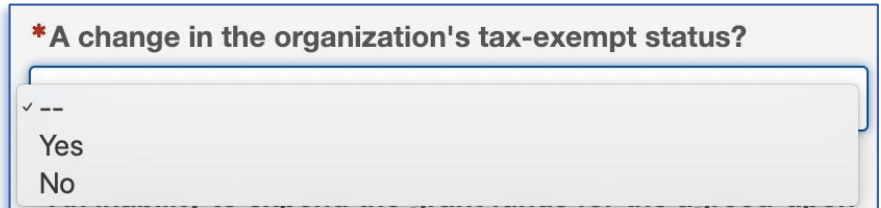
Other quick navigation options include clicking the blue **Today** button to select today's date or clicking the red **Clear** to start over.

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.



* A change in the organization's tax-exempt status?

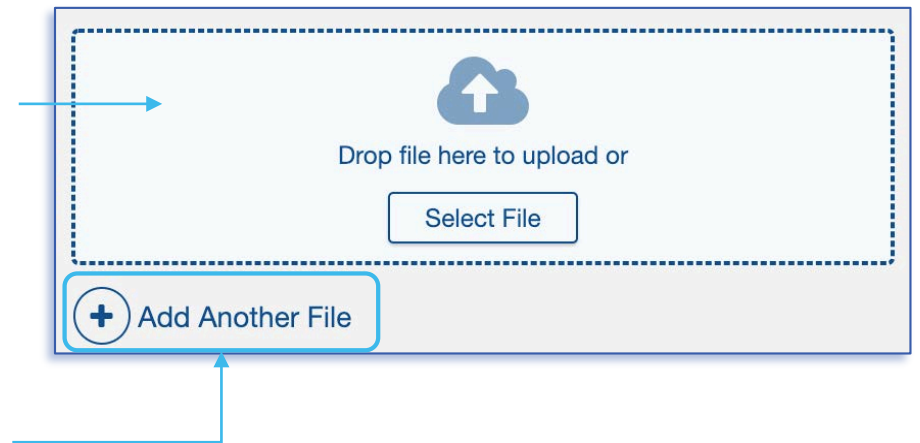
✓ --
Yes
No

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.)



Drop file here to upload or

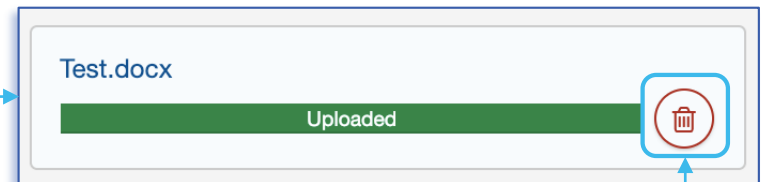
Select File

+ Add Another File

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.



Test.docx

Uploaded

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
Portal

Middle Name

* Last Name
Tester1

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 is missing in the system, you will see an error message. Click the blue pencil icon to edit the contact's information.

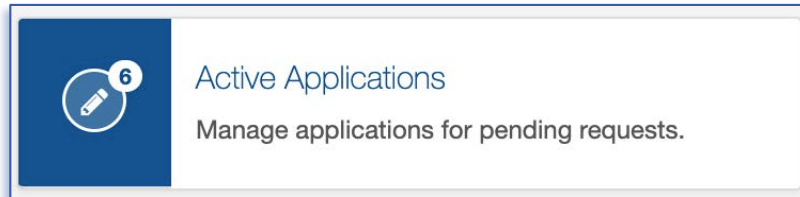
The modal that appears is the same form that will appear should you click **Add New Contact**. Enter information in the required fields and use the buttons (**Back**, **Next**, and **Save**) to navigate through the modal. Once you have completed all required fields, click **Save**.

APPLICATIONS OVERVIEW



Accessing Applications

After logging in, select **Active Grants** from any of the menus.

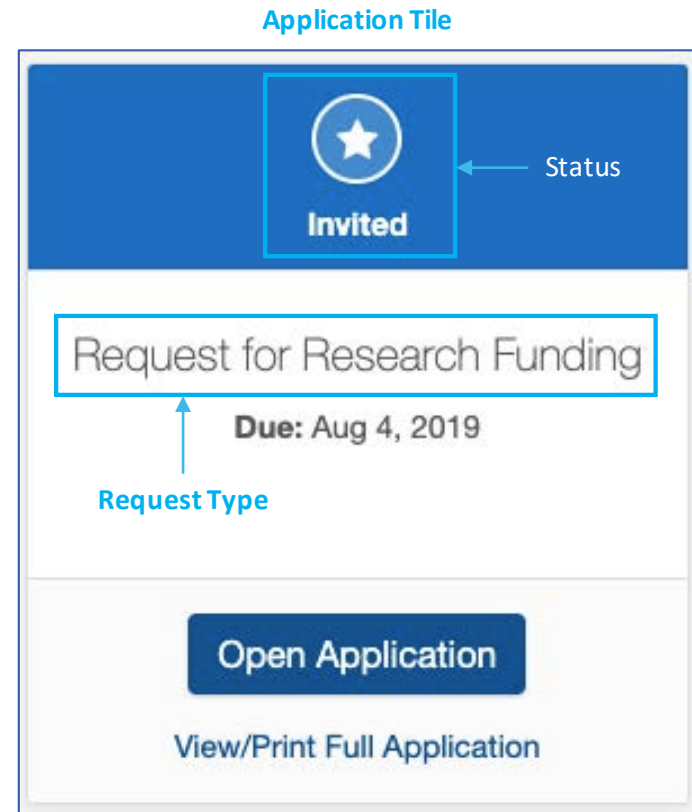


This will take you to a page that displays your application(s).

Each **application** will have its own **tile**. The **Open Application** button will take you to the application form. There are a few things to note about the tile. It displays:

- **Status** of the application (Invited, In Progress, or Submitted).
- **Request Type** (Request for...).
- **Due Date**.
- View/Print the full application. To view the full application, click **View/Print Full Application**. A modal will appear and you will have the option to view (with or without your responses) or print it.

Once you have located the application you want to work on, click **Open Application**.



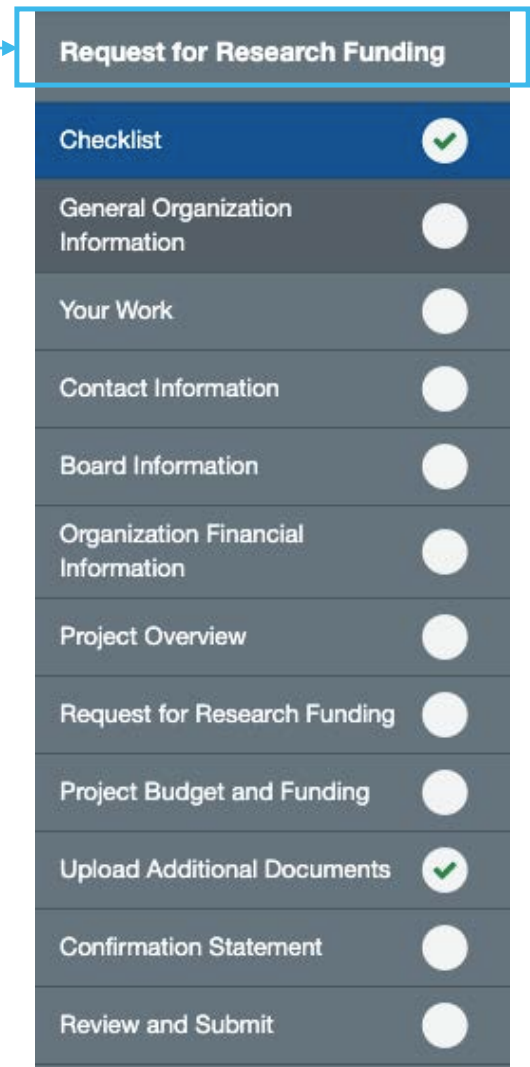
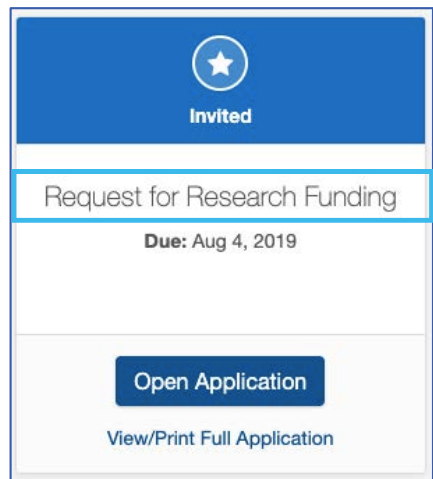
Overview: Application Types

Houston Endowment uses **seven application types**. You will be assigned an application type by your program officer that is in line with the type of funding for which you are being invited to apply. The application types are:

1. Direct Charitable Activity
2. Request for Capacity Building
3. Request for Capital Improvements
4. Request for General Operating Support
5. Request for Project Support
6. Request for Public Policy & Engagement
7. Request for Research Funding

The **application type** displays on the application card and at the top of the steps menu.

Each form type includes several steps for you to complete. Applications have between 10 and 12 steps. (An example of the steps are shown at the right side of this page.) Each step after the Checklist has one or more questions/fields for you to complete.



Overview: Steps

This is a high-level overview of the steps you may encounter as part of your application. *Please note that the steps vary for different application types. The steps included in the application you have been assigned will appear on the right side of the application.*

- **Checklist:** A brief introduction and list of items you will be asked for as part of your application.
- **General Organization Information:** Enter information about your organization, including contact information and Tax ID in this step.
- **Your Work:** Enter details about your organization's work and the areas it serves.
- **Contact Information:** Add contact information for each requested role.
- **Board Information:** Respond to questions regarding your board and its engagement.
- **Organization Financial Information:** Add organization level information about your finances.
- **Project Budget and Funding:** If you are applying for a project, you will be asked for project specific financial information.
- **Project Overview:** Add information specific to your project.
- **Request for...:** Enter information specific to your request.
- **Upload Additional Documents:** Upload documents to support your application.
- **Confirmation Statement:** Verify the information you are submitting and confirm that you are authorized to submit the application.
- **Review and Submit:** Review your progress and, once all items are complete, submit.

Request for Research Funding	
Checklist	<input checked="" type="checkbox"/>
General Organization Information	<input type="checkbox"/>
Your Work	<input type="checkbox"/>
Contact Information	<input type="checkbox"/>
Board Information	<input type="checkbox"/>
Organization Financial Information	<input type="checkbox"/>
Project Overview	<input type="checkbox"/>
Request for Research Funding	<input type="checkbox"/>
Project Budget and Funding	<input type="checkbox"/>
Upload Additional Documents	<input checked="" type="checkbox"/>
Confirmation Statement	<input type="checkbox"/>
Review and Submit	<input type="checkbox"/>

Mobile or Condensed View

If you are working on a mobile device or a condensed web browser, applications will display differently. The steps that display on the right side on an expanded view will be hidden in a blue hamburger/drawer menu. **Click on the blue icon**, and a **menu will slide out** from the right side of the screen. **Click it again to hide it.**



The blue icon also displays which step out of the total steps you are currently viewing. In the example included here (left), it is the first step of twelve (1/12).

HOUSTON ENDOWMENT Grantee Portal

[Your Organization]

1/12

Hello, [Your Name]

Before you begin:

All entries marked with * are required.

Organizations completing an invited application for funding from Houston Endowment will be asked to provide the following information as part of

1/12 Request for Research Funding

- Checklist
- General Organization Information
- Your Work
- Contact Information
- Board Information
- Organization Financial Information
- Project Overview
- Request for Research Funding

Step: Checklist

Included in All Application Types

Applications open with a Checklist step. This step tells you what you will need to successfully complete the application.

✔ Note that the Checklist step has a green check mark. This is always the case because there is no action for you to complete on this step. As you complete the required fields on other steps, check marks will appear in the corresponding circle (or, if you flag the step, an orange flag will display). All steps must display a green check mark before you can submit an application.

Sample Checklist

Before you begin:

All entries marked with * are required.

Organizations completing an application for funding from Houston Endowment will be asked to provide the following information.

Contact & Board Information:

- Name, title, phone number, and email for the organization's CEO/executive director.
- Name, title, phone number, and email for the primary contact for the review of the request.
- List of your governing board members.
- List your organization's board chair.
- Number of board meetings per year.
- Average board meeting attendance rate for the past year.
- Board member term limits.
- Any members of your board who are related to your organization's CEO/executive director.
- Whether or not a board-approved Conflict of Interest Policy exists for your organization.
- Total cash amount the board contributed to the organization in the last fiscal year.
- Percentage of the board who contributed.
- List of board committees, if applicable.

Documents for Upload:

- Most recently filed IRS Form 990 tax return.
- Most recently audited financial statements (if not available, a copy of your unaudited financial statements for the most recently completed fiscal year).
- Current fiscal year's operating budget.
- Project-specific budget for each year of support requested (excluding General Operating Support requests).

Application Type →

Application Steps

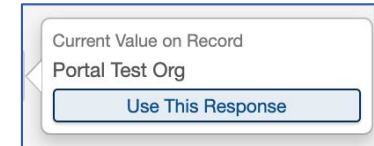
Request for Research Funding	
Checklist	✔
General Organization Information	○
Your Work	○
Contact Information	○
Board Information	○
Organization Financial Information	○
Project Overview	○
Request for Research Funding	○
Project Budget and Funding	○
Upload Additional Documents	✔
Confirmation Statement	○
Review and Submit	○

Step: General Organization Information

Included in All Application Types

In the **General Organization Information** step, enter your organization's name, Tax ID, website, legal and mailing addresses, and contact information.

This step allows you to view and edit your organization's information. Hover over the field to see the current value we have on record. You can choose to Use This Response by clicking the button or change the information by typing directly into the text field.

A screenshot of a web application interface. On the left, there is a large image of a colorful, illuminated car at a night event. Below the image is the title 'General Organization Information'. The form contains three text input fields: '* Legal Name', '* Doing Business As', and '* Tax ID (EIN)'. A tooltip box is positioned over the 'Legal Name' field, showing 'Current Value on Record Portal Test Org' and a 'Use This Response' button. On the right side of the form, there is a vertical sidebar titled 'Request for Research Funding' containing a checklist of items with progress indicators: Checklist (checked), General Organization Information (selected), Your Work, Contact Information, Board Information, Organization Financial Information, Project Overview, Request for Research Funding, Project Budget and Funding, Upload Additional Documents (checked), Confirmation Statement, and Review and Submit. At the bottom of the sidebar are two buttons: 'Save and Come Back Later' and 'View/Print Full Application'.

Step: Your Work

Included in All Application Types

In the **Your Work** step, you will answer questions about your organization's vision, mission, goals, and work. Please check the boxes next to the areas that will be served by the work outlined in this application. You may also see the **Use This Response** option that displays on the upper right-hand side of some fields. Choose this to use values already on file in our database.

In the paragraph with rich text fields, you can use the formatting tools to format your response. Please note that your responses should be limited to 8-10 sentences.

Tip: GivingData works best when you type directly into the fields. If you are copying and pasting content, we recommend that you right click and select Paste Plain Text or Paste and Match Formatting when pasting into GivingData. Please be aware that formatting may not copy when pasting into GivingData.

Your Work

Please limit long responses to 8-10 sentences.

Describe the organization's mission.

” B I U ☰ ☷ 🔗 ↶ ↷ Words: 0 Characters: 0

Request for Research Funding

- Checklist
- General Organization Information
- Your Work**
- Contact Information
- Board Information
- Organization Financial Information
- Project Overview
- Request for Research Funding
- Project Budget and Funding
- Upload Additional Documents
- Confirmation Statement

Step: Contact Information

Included in All Application Types

Please add **contact information** for your **organization's CEO/executive director** and the **primary contact** for this request.

When you click on each field, you will see a drop-down menu of contacts already on file for your organization. Select the appropriate contact for each role or, if they are not included in the dropdown menu, select **Add New Contact** to add the contact to our system. For more information on completing this type of field, see page 20.

Please note: contacts require full name, title, email, and phone.

Contact Information
Contacts require full name, title, email, and phone.

*** CEO/executive director:**
Select Contacts
Enter at least 1 contact.

*** Primary Contact for Request**
List the contact assigned to the current proposal.
Select Contact
Enter 1 contact.

Flag this step ?

Request for Research Funding

- Checklist
- General Organization Information
- Your Work
- Contact Information**
- Board Information
- Organization Financial Information
- Project Overview
- Request for Research Funding
- Project Budget and Funding
- Upload Additional Documents
- Confirmation Statement
- Review and Submit

Step: Board Information

Included in All Application Types

This step asks you about your board: participation, term limits, contributions, relationships, conflict-of-interest policy, and committees.

Board Information

***Please create a bulleted list of your organization's governing board.**
Enter only first and last names.

” B I U ☰ ☷ 🔗 ↺ ↻ Words: 0 Characters: 0

***Who is your organization's board chair?**

***How many times a year does your board meet?**

Request for Research Funding	
Checklist	✓
General Organization Information	○
Your Work	○
Contact Information	○
Board Information	○
Organization Financial Information	○
Project Overview	○
Request for Research Funding	○
Project Budget and Funding	○
Upload Additional Documents	✓
Confirmation Statement	○
Review and Submit	○

Step: Organization Financial Information

Included in All Application Types

This step asks you to enter **amounts related to your financials at the organization level**. Please enter summary information about your organization's **most recently completed fiscal year** and respond to all prompts. You may also enter up to two more years of financial information for budgeted amounts.

Note that for each Fiscal Year entry there are **three tabs to be completed: Budget Summary, Notable Sources of Revenue, and Notable Expenses**.



Add Another Year

To add an additional year, click the blue **Add Another Year** text and an additional module will appear.

Request for Research Funding	
Checklist	<input checked="" type="checkbox"/>
General Organization Information	<input type="checkbox"/>
Your Work	<input type="checkbox"/>
Contact Information	<input type="checkbox"/>
Board Information	<input type="checkbox"/>
Organization Financial Information	<input type="checkbox"/>
Project Overview	<input type="checkbox"/>
Request for Research Funding	<input type="checkbox"/>
Project Budget and Funding	<input type="checkbox"/>
Upload Additional Documents	<input checked="" type="checkbox"/>
Confirmation Statement	<input type="checkbox"/>
Review and Submit	<input type="checkbox"/>

Step: Project Budget and Funding

Included in the Following Application Types:
All EXCEPT General Operating Support

This step asks you to enter annual **amounts** for the project budget: **Budget Summary, Revenues, and Expenses**. Enter budget details for each year of the project for which you are asking for support. The module will step you through the **three tabs** for each year of funding (at least one year of budget information is required).

Click here to add additional funding information for the project, up to three years.

The screenshot shows a web form titled '* Project Budget and Funding'. At the top, there is a 'Project Year:' dropdown menu. Below it are three tabs: 'Budget Summary' (selected), 'Notable Sources of Revenue', and 'Notable Expenses'. The 'Budget Summary' section contains three input fields: '* Revenue', '* Expenses', and '* Requested Amount', each with a '\$' symbol and a text box. Below these fields are three dots and a button labeled 'Notable Sources of Revenue →'. At the bottom left, there is a button '+ Add Another Project Year' with a plus icon. Below this button, it says 'Enter at least 1 and no more than 3 years.' and 'You have 1 currently added.' At the bottom right, there are three lines of text: 'Total Revenue: \$0.00', 'Total Expenses: \$0.00', and 'Total Requested Amount: \$0.00'. On the right side of the form, there is a vertical sidebar titled 'Request for Research Funding' with a checklist of items: 'Checklist' (checked), 'General Organization Information', 'Your Work', 'Contact Information', 'Board Information', 'Organization Financial Information', 'Project Overview', 'Request for Research Funding', 'Project Budget and Funding' (highlighted in blue), 'Upload Additional Documents' (checked), 'Confirmation Statement', and 'Review and Submit'.

Step: Project Overview

Included in the Following Application Types:
Public Policy & Engagement
Research Funding

This step asks you to respond to **questions about the proposed project**. Please complete all required questions and try to limit longer responses to 8-10 sentences.

If you have a detailed **project budget, upload it** where prompted to attach it to your application.

Project Overview
Please limit responses to 8-10 sentences.

*** Project Title**

*** How many years of support are you requesting?**
You may request up to three years of support.

*** Total Requested Amount:**
\$

*** Describe the project.**

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Link, Unlink, Undo, Redo, Words: 0, Characters: 0

Request for Research Funding

- Checklist
- General Organization Information
- Your Work
- Contact Information
- Board Information
- Organization Financial Information
- Project Overview**
- Request for Research Funding
- Project Budget and Funding
- Upload Additional Documents
- Confirmation Statement
- Review and Submit

Step: Request for ...

Included in the Following Application Types:
Capacity Building, Capital Improvement,
General Operating Support, and Project Support

This step asks you to respond to **questions specific to the type of request** for which you are applying. Please complete all required questions and try to **limit longer responses to 8-10 sentences**.

Request for Research Funding

***What specific research question(s) do you seek to answer?**

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), List (≡), Link (🔗), Unlink (🔗), Undo (↶), Redo (↷), Words: 0, Characters: 0

***What data will you use or collect?**

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), List (≡), Link (🔗), Unlink (🔗), Undo (↶), Redo (↷), Words: 0, Characters: 0

Request for Research Funding	
Checklist	<input checked="" type="checkbox"/>
General Organization Information	<input type="checkbox"/>
Your Work	<input type="checkbox"/>
Contact Information	<input type="checkbox"/>
Board Information	<input type="checkbox"/>
Organization Financial Information	<input type="checkbox"/>
Project Overview	<input type="checkbox"/>
Request for Research Funding	<input type="checkbox"/>
Project Budget and Funding	<input type="checkbox"/>
Upload Additional Documents	<input checked="" type="checkbox"/>
Confirmation Statement	<input type="checkbox"/>
Review and Submit	<input type="checkbox"/>

Step: Upload Additional Documents

Included in All Application Types

If you have additional files that you want to submit with your application, you can upload them in this step.

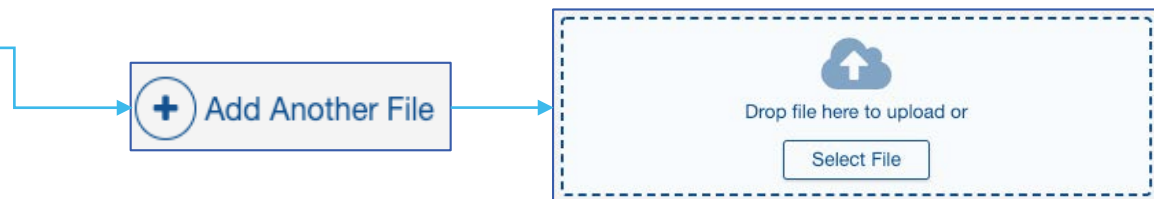
This is an optional step. You are not required to add additional documents, so this step will display as complete with a green check mark, whether or not you include additional documents.

Request for Research Funding

Checklist	✓
General Organization Information	○
Your Work	○
Contact Information	○
Board Information	○
Organization Financial Information	○
Project Overview	○
Request for Research Funding	○
Project Budget and Funding	○
Upload Additional Documents	✓
Confirmation Statement	○
Review and Submit	○

Remember, if you need to add more than one attachment, click **Add Another File**.

An additional Upload button will appear.



Step: Confirmation Statement

Included in All Application Types

After you complete all previous steps, you will be asked to verify the information entered.

Read the statement carefully. If you agree **click the check box**. Then, add your initials to the **Authorized by** text field and click **Next**.

Not done? Return to a previous step or revisit a flagged step by using the **Back** button or clicking on the step from the menu on the right side of the page.

Confirmation Statement

In order to protect the integrity of the grantmaking process, Houston Endowment respectfully requests that applicants and their representatives refrain from contacting board members regarding pending grant requests. It is Houston Endowment's policy that board members refrain from participating in site visits, or otherwise engaging with applicants or their representatives, regarding pending requests. Applicants with questions are encouraged to contact the Houston Endowment staff for referral to the appropriate program officer.

The organizational, programmatic, and financial information being submitted in the application is true and accurate to the best of my knowledge. I am authorized to submit this request on behalf of this organization.

*** Authorized by**

Request for Research Funding	
Checklist	✓
General Organization Information	○
Your Work	○
Contact Information	○
Board Information	○
Organization Financial Information	○
Project Overview	○
Request for Research Funding	○
Project Budget and Funding	○
Upload Additional Documents	✓
Confirmation Statement	○
Review and Submit	○

Final Step: Review and Submit

Included in All Application Types

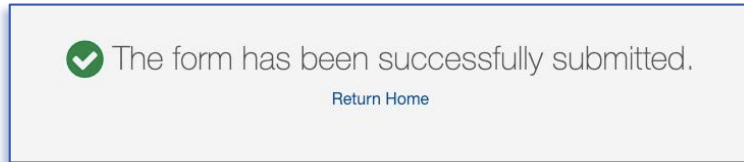
Review and Submit displays the **percent and number of steps completed** and the number of **flagged steps**.

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.

The screenshot shows a 'Review and Submit' screen. At the top, it says 'Review and Submit' and 'Complete all steps and remove flags before submitting the Application.' Below this, there are two circular progress indicators: a green one showing '100%' and '11 of 11 STEPS COMPLETED', and an orange one showing '0 STEPS FLAGGED'. In the center, there are two buttons: a 'Back' button and a green 'Submit' button with a checkmark, which is highlighted with a blue border. At the bottom, there is the 'GivingData' logo, the text '©2019 GivingData, LLC v4.4.1.0', and a 'Privacy Notice' link. A small grey box in the bottom left corner says 'All changes saved'.

Successful Submission



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 the Applications section, you will see a tile for each 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.

If you need to make any changes to the application, contact grantsupport@houstonendowment.org or call (713) 238-8150.

FREQUENTLY ASKED QUESTIONS



What kinds of documents can I attach in GD?

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 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?

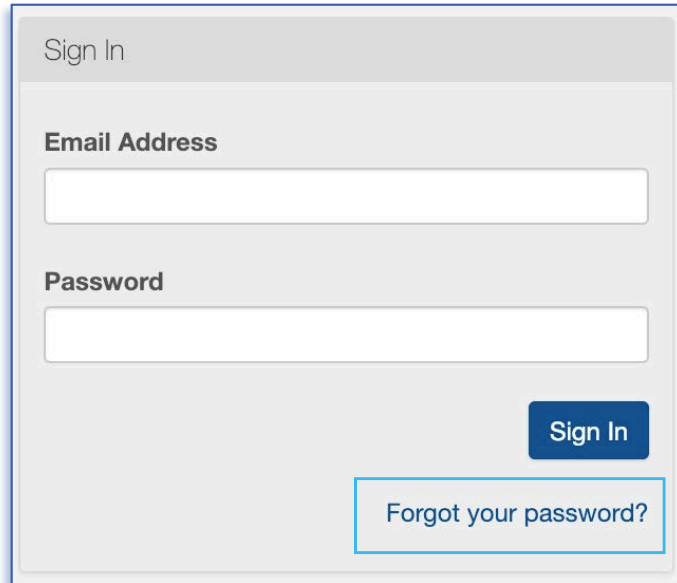
No. You may log in and out as often as you like. Answers autosave as you work. (Text in the lower left of the screen will indicate when the system is saving your responses and when your changes are saved.)

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.

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?

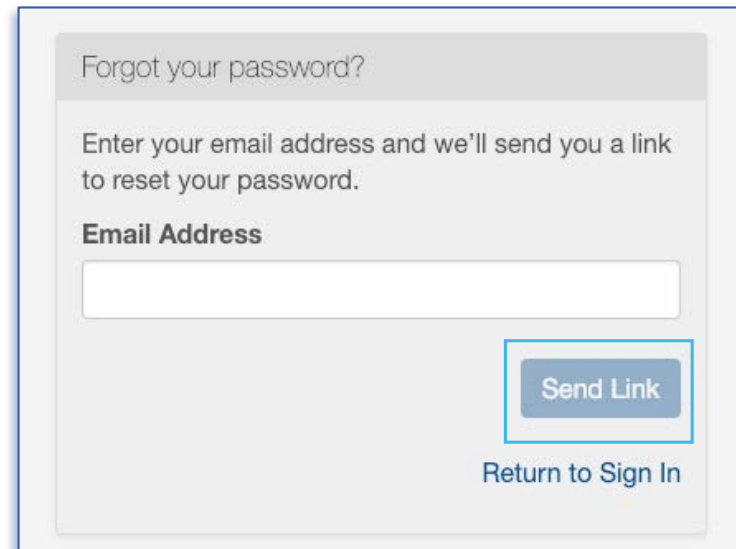
If you forget your password, don't worry. You can easily reset it yourself.

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](#)