

Houston Endowment_®



GUIDE TO:

UNSOLICITED APPLICATIONS IN GIVINGDATA



TABLE OF CONTENTS

- 4 Accessing the Unsolicited Application
- 11 Completing the Unsolicited Application
- 22 Portal Overview
- Frequently Asked Questions



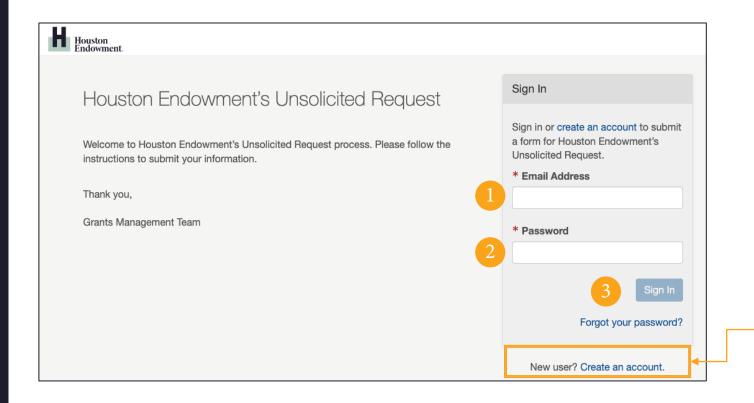
ACCESSING THE UNSOLICITED APPLICATION

Please note: GivingData works best in the Google Chrome web browser.



ACCESSING THE UNSOLICITED APPLICATION

To access Houston Endowment's Unsolicited application form, you will need to visit our web-based portal hosted by GivingData. Type https://houston-portal.givingdata.com/campaign/UnsolicitedRequest into an internet browser window.



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

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

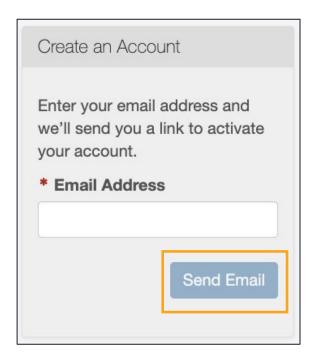
If you do not have an account, you can create one by clicking **Create an account** and following the steps detailed in the following pages.



CREATE AN ACCOUNT

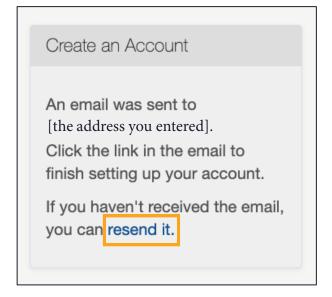
After clicking **Create an account**, you will see a screen asking you to enter your email address.

- Enter your Email Address.
- Click Send Email.



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 **resend it**.



EMAIL: ACTIVATE YOUR ACCOUNT

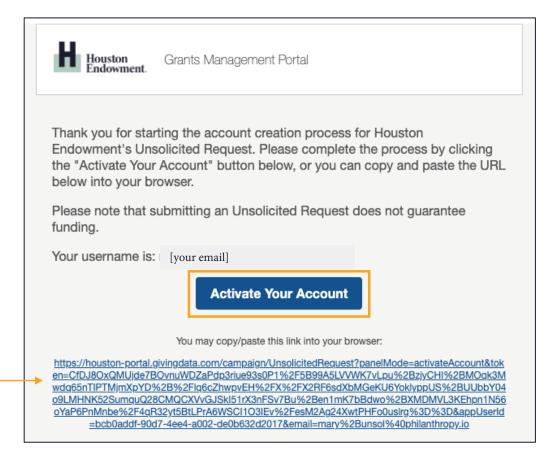


Open the system generated email that was sent to the email address you entered. (A sample email is included here.)

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 you received into a browser.



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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.

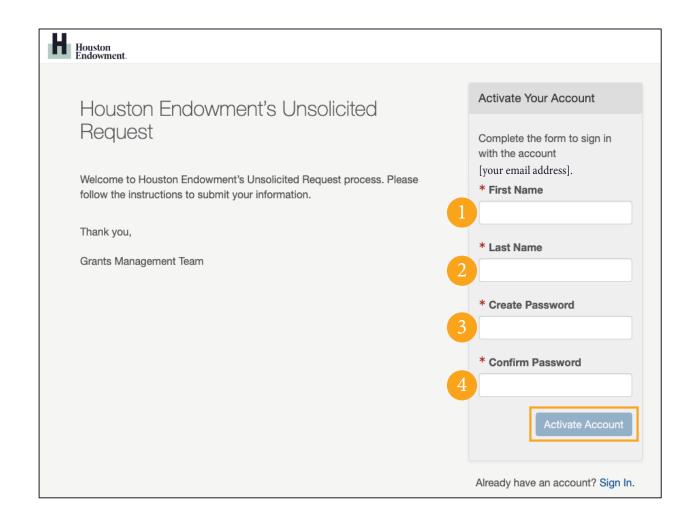
Complete the following fields:

- 1. First Name,
- 2. Last Name,
- 3. Create Password, and
- 4. 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**.

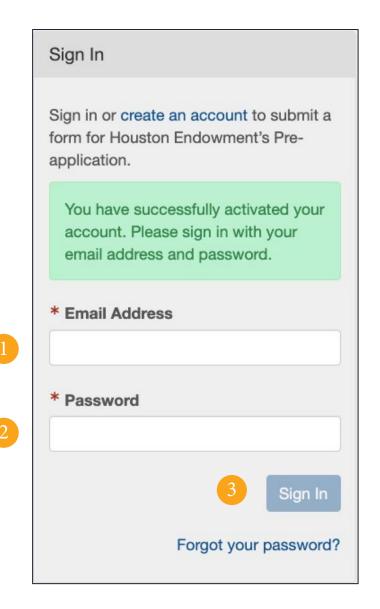




SIGN IN

You will be redirected to a Sign In screen.

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





PORTAL HOME

Upon login, you will see the **Home page**. Click **\(\lambda \)** (Home) at any time to return to this view. Home My Profile Grants Management Portal Houston Endowment. [Name] Houston Endowment's Unsolicited Request -**Notifications** Houston Endowment's Unsolicited Request The Unsolicited Request form 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 align with the foundation's priorities will be invited to complete a full application. You will see the following statuses above your Unsolicited Request: In Progress, Submitted, Received, or Accepted. Please note: Accepted means that foundation staff members have reviewed the 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 unsolicited request, the program team will either invite a full application or notify the applicant that the request has been declined. You will typically receive a decision by email within three months. Unsolicited Requests Start a new Unsolicited Request

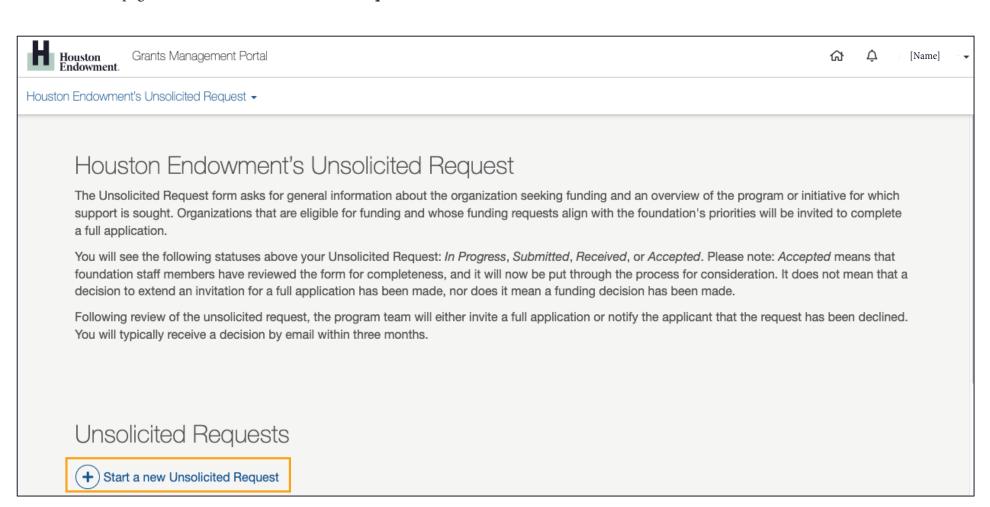


COMPLETING THE UNSOLICITED APPLICATION



START A NEW UNSOLICITED REQUEST

From the Home page, click Start a new Unsolicited Request.



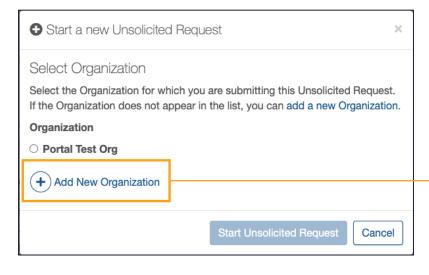


SELECT ORGANIZATION

You will first be asked to select an organization to associate with the Unsolicited Request.

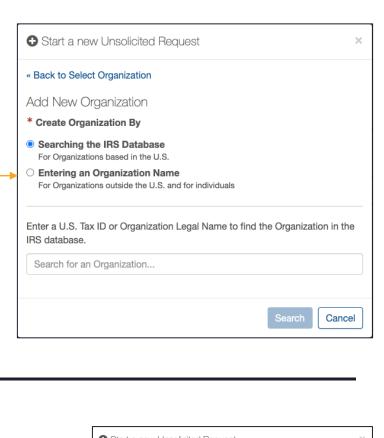
New Users

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**.



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 right). If you do not see the organization you want, follow the instructions to add a new organization.

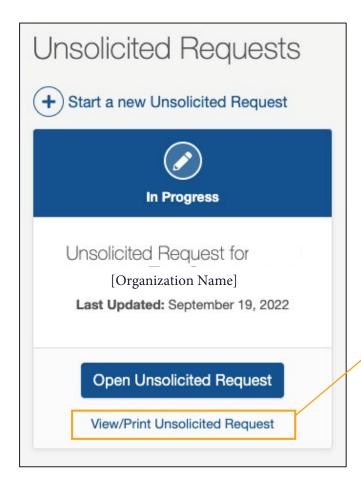


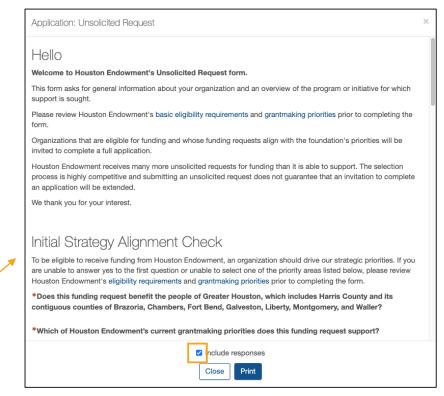




OPEN THE UNSOLICITED REQUEST

After selecting or adding your organization, you will return to the Home page. Select **Open Unsolicited Request** or to view the full form before completing it, select **View/Print Unsolicited Request**.





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



STEP: INTRODUCTION

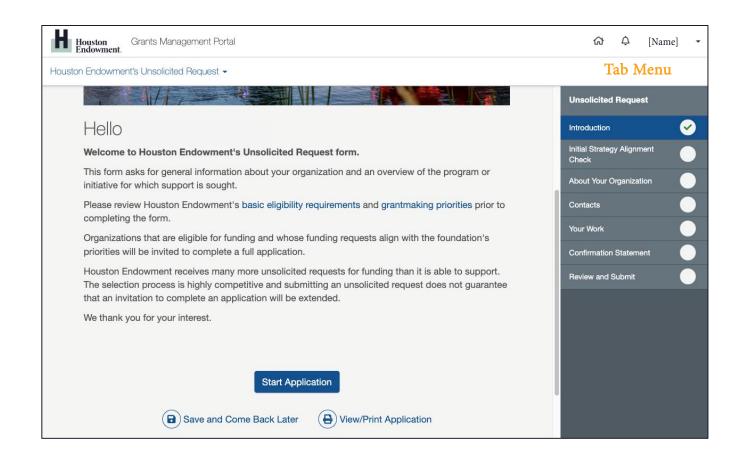
The Unsolicited Request opens with an Introduction. When you are ready to continue, click **Start Application** or select the next step from the tab menu at the right.

You may notice in the tab menu that 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 tab, the white circle will change to a green checkmark.

The portal will save your responses as you enter them.

At the bottom of each page, you have the option to select **Save** and Come Back Later or to View/Print Application.





STEP: INITIAL STRATEGY ALIGNMENT CHECK

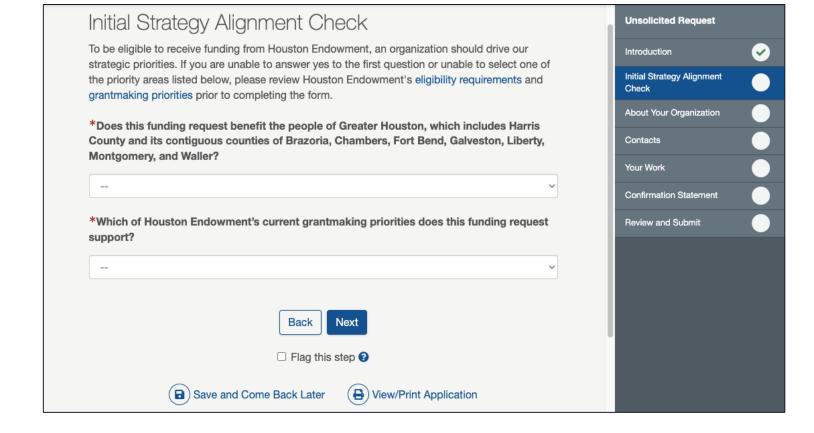
To complete this step, please respond to the alignment questions. See the Portal Overview, starting on page 22, for details on each field type. *Note: Required fields are denoted by a red asterisk.*

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



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 tab from the menu.

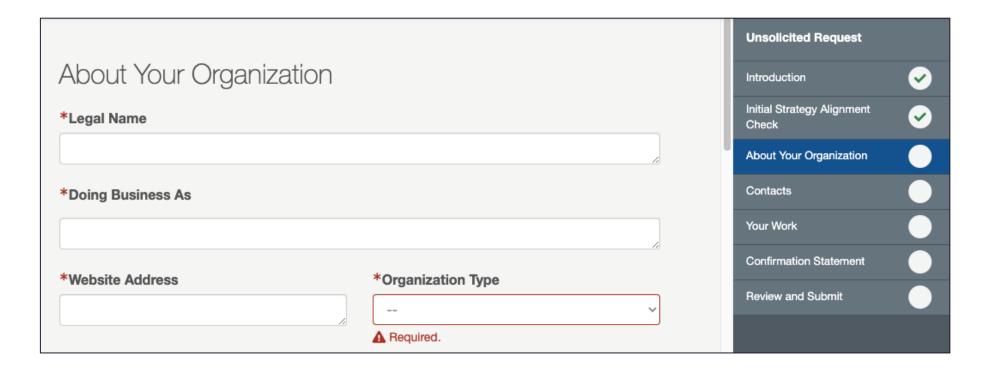






STEP: ABOUT YOUR ORGANIZATION

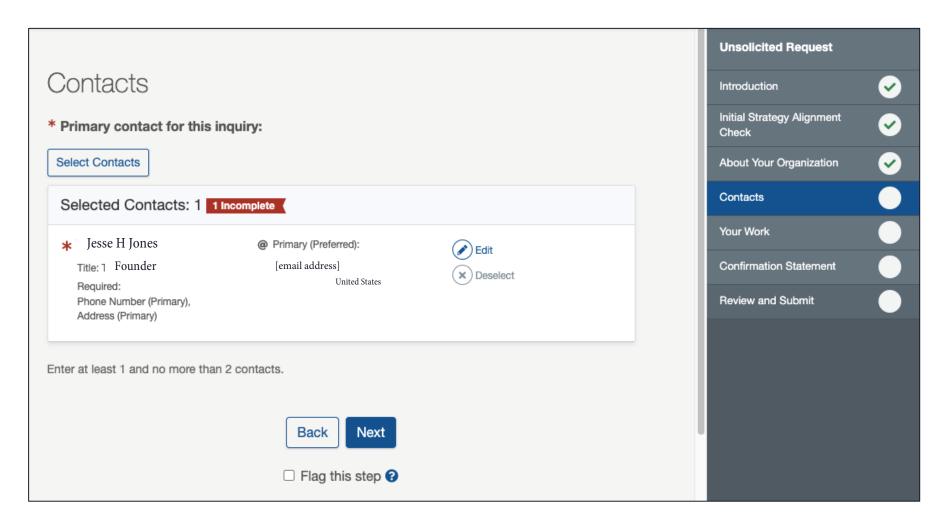
To complete this step, add information about your organization.





STEP: CONTACTS

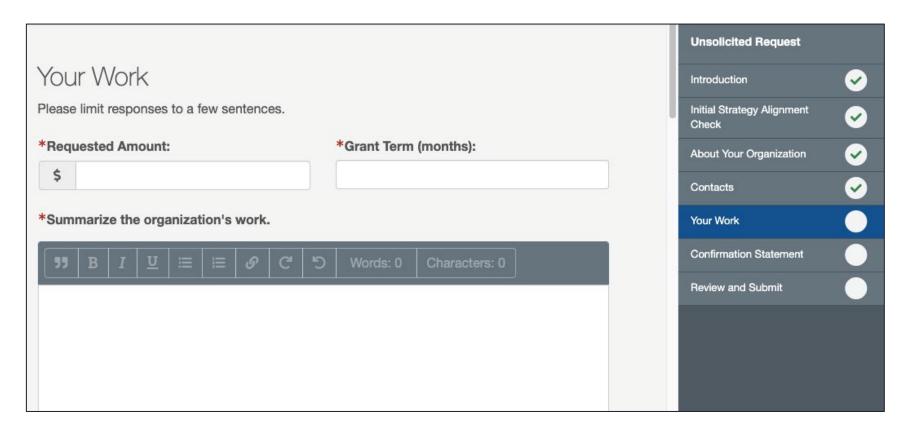
Enter the primary contact(s) for this Unsolicited Request. There should be at least one and not more than two contacts. (See page 30 for details on completing Contact Select fields.)





STEP: YOUR WORK

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



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STEP: CONFIRMATION STATEMENT

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.

Unsolicited Request Confirmation Statement Introduction Initial Strategy Alignment ➋ In order to protect the integrity of the grantmaking process, Houston Endowment Check respectfully requests that applicants and their representatives refrain from contacting About Your Organization board members regarding pending grant requests. It is Houston Endowment's policy that board members refrain from participating in site visits, or otherwise engaging Contacts with applicants or their representatives, regarding pending requests. Applicants with questions are encouraged to contact the Houston Endowment staff for referral to the Your Work appropriate program officer. Confirmation Statement *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 Review and Submit request on behalf of this organization. *Authorized by

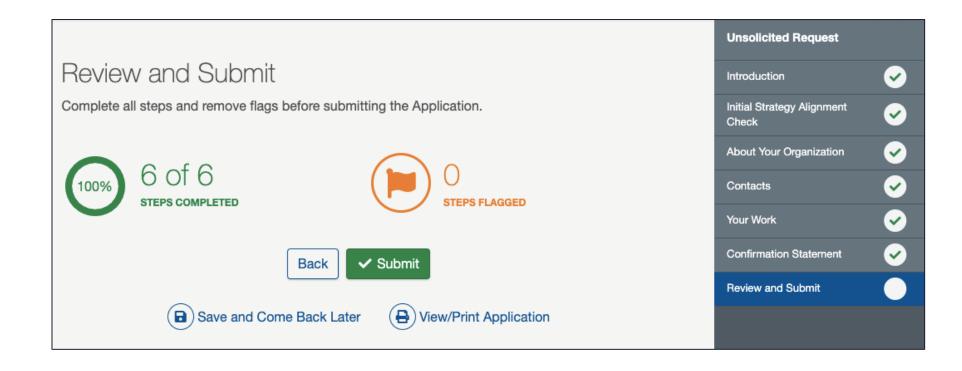


STEP: REVIEW AND SUBMIT

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 **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.



SUCCESSFUL SUBMISSION

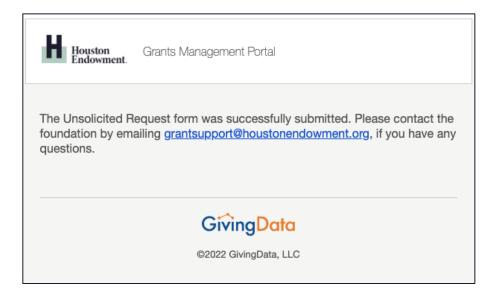


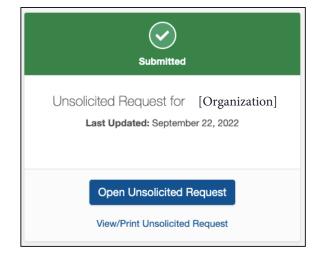


After clicking Submit, a confirmation screen (above) will display.

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

You will also receive a confirmation email (right).





On your portal Home page, you will see a tile for each Unsolicited Request. The icon displays green to indicate that it has been submitted (left). From here you can **View/Print Unsolicited Request** or **Open Unsolicited Request** as read-only.



GRANTS MANAGEMENT PORTAL OVERVIEW

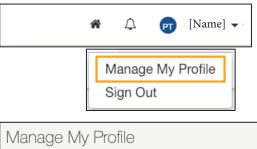


LEGEND OF SYSTEM ICONS

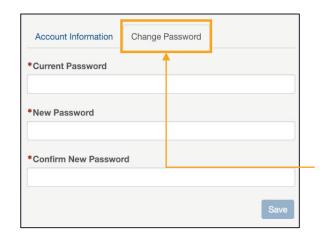
System & Dashboard		Forms	
	Home: clicking on this icon will take you to the home view.	= 1/7	Hamburger Menu drawer: click it to expand and view the tab menu. Click again to hide.
\Diamond	Notifications: clicking on this icon will display a list of notifications (if any).	=	Hamburger Menu: click to expand and view a menu; click again to hide.
	Active Applications.		Incomplete Step.
E 0	Active Grants.		Completed Step.
	Closed Grants.		Flagged Step.
×	Declined Applications.		Pencil: click to edit a field.
	Organization Details.	8	Question mark: click to display a description or instructional text.
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.		Progress Indicator: in a modal (which is like a pop-up widow), this will indicate the number of steps and the current step.	

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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 when you next login.

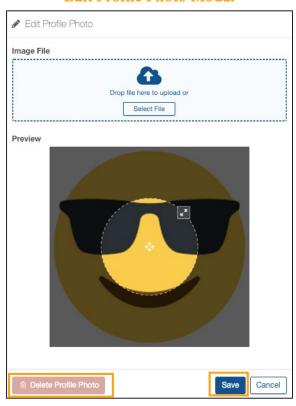
Profile Photo: To add or edit a photo, click **Edit Photo**. An Edit Profile Photo modal (right) will appear.

- 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 **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 8.) Click **Save** to save your changes.

Edit Profile Photo Modal



FORM BASICS

The following are field types you may encounter as part of the 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:

A 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

Each form gives you the option (from the tile and on the form) to View/Print Report. 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**: 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.



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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:

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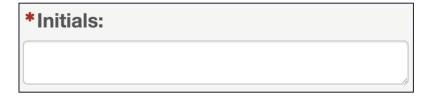
Number format is not valid. Valid format: 123

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.

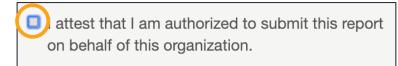
Text

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.)



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.





FIELD TYPE: PARAGRAPH WITH RICH TEXT

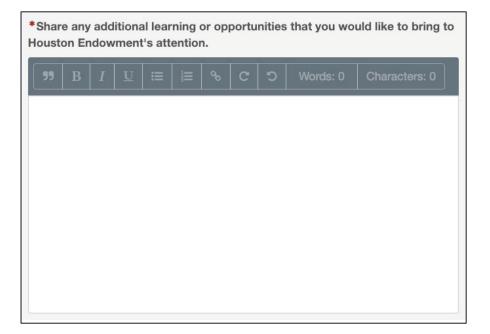
Paragraph with Rich Text

Paragraph fields are provided for prompts that require longer responses.

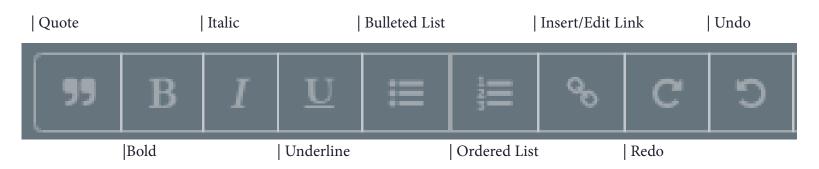
In addition to providing more space for your answer, they also include a grey formatting bar and a live word and character count.

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



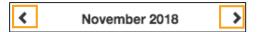


FIELD TYPE: DATE

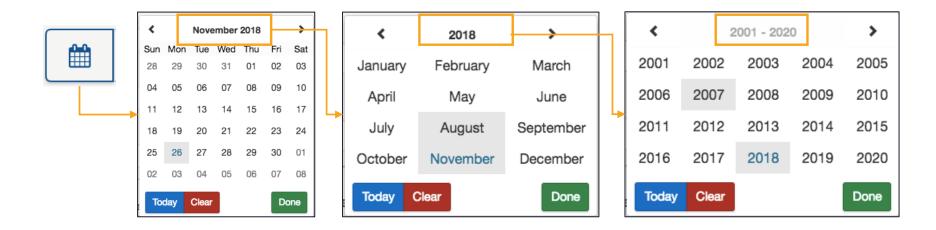
view of the current month.



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've selected the date you want, 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

Forms may prompt you to upload documents. When you see the upload box (right), you can either drag and drop the file into the box or click **Select File** to open a window and browse your computer's files.

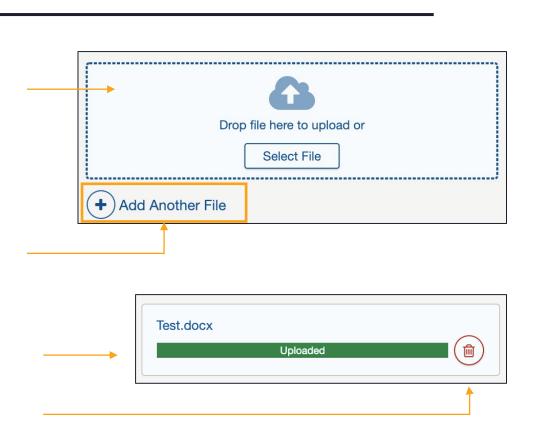
The system accepts documents in the following formats: .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .pdf. Please do not include special characters (i.e., # : % * / (|) > ? +) in your file names.

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, and 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.



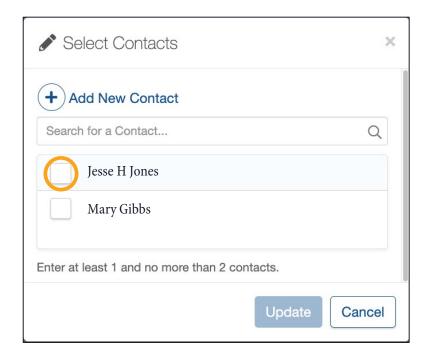


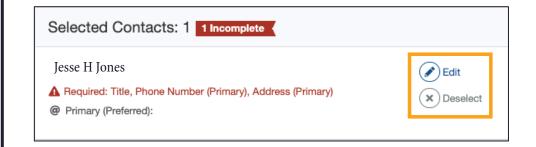
FIELD TYPE: CONTACT SELECT

Contact Select

This type of field includes a list of your organization's contacts that are already in the system. Click **Select Contacts**, then select the appropriate contact by checking the box next to their name. To add new contacts, click **Add New Contact**, complete the required fields, and click **Update**.

Select Contacts





Once you select a contact and click **Update**, it will appear in a box labeled Selected Contacts.

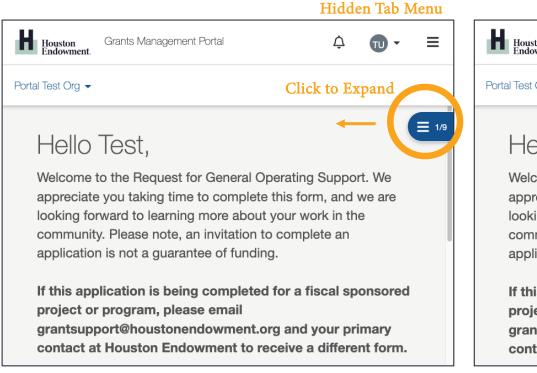
- To remove a contact, click **Deselect**.
- To edit a contact, click **Edit** to complete the contact's information.

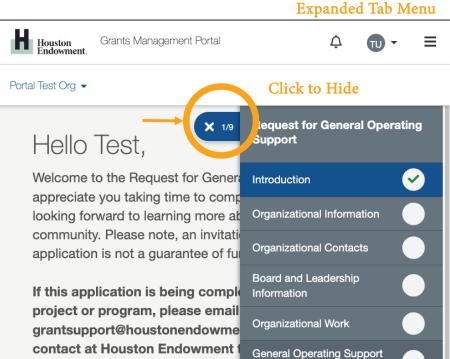
If one or more required fields is missing from a contact's record, you will see an error message like the one shown above indicating the contact record is incomplete. The red text indicates which required fields need to be filled out. The modal that appears when you click Edit is the same form that appears to **Add New Contact**. Enter information in the required fields. Once you have completed all required fields, click **Save**.



MOBILE OR CONDENSED VIEW

If you are accessing the portal 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 tab menu will be hidden, but you can expand or hide them with a few clicks.







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.

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. You can preview the questions for the Unsolicited Request on our website. You can also preview the form and print it once you are in the system by clicking the View/Print text.

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. It is recommended that you paste the text as "plain text." For PC users, click and choose "paste as plain text" or "keep text only." For Mac users, right click and choose "paste and match style."

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 form 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 refer to our website (www.houstonendowment.org), email grantsupport@houstonendowment.org, or call (713) 238-8150.



FORGOT YOUR PASSWORD?



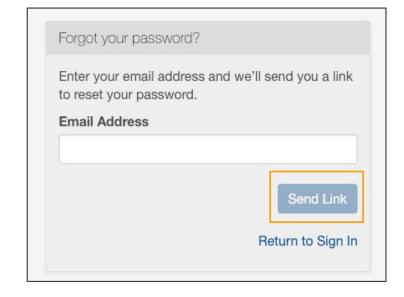
If you forget your password, don't worry. You can easily reset it yourself.

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.





Houston Endowment would like to thank Philanthropy.io for their support in creating this material.