

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 new 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 for instructions.)

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

HOUSTON
ENDOWMENT

Grantee Portal

Dear [Name],

You are invited to apply for funding from Houston Endowment via the Houston Endowment's new grant management system.

Please access the invited-application form at houston-portal.givingdata.com, or by clicking the blue "Open Application" button below. If you have not ~~access already~~ you will need to register by entering an email and creating a password. After registering, login to access the full application. Once the application is submitted, we will begin a full review of your request. Please know a complete application does not guarantee funding.

As this is a pilot, we would appreciate your feedback very much. We value your input and respect your time. Houston Endowment hopes to provide a platform that not only utilizes your time well, but also provides the opportunity to describe fully the work you wish to accomplish. Please share your thoughts on this [anonymous survey](#).

Should you have any questions about the online submission process, please see our guide (include a link to the guide) or contact us at grantsupport@houstonendowment.org.

Please do not reply to this email, as it is an automatic message.

If you have not activated your account, this invitation will expire in 30 days.

Sincerely,


Houston Endowment

Your username is: [your email address]

Open Application

You may copy/paste this link into your browser:

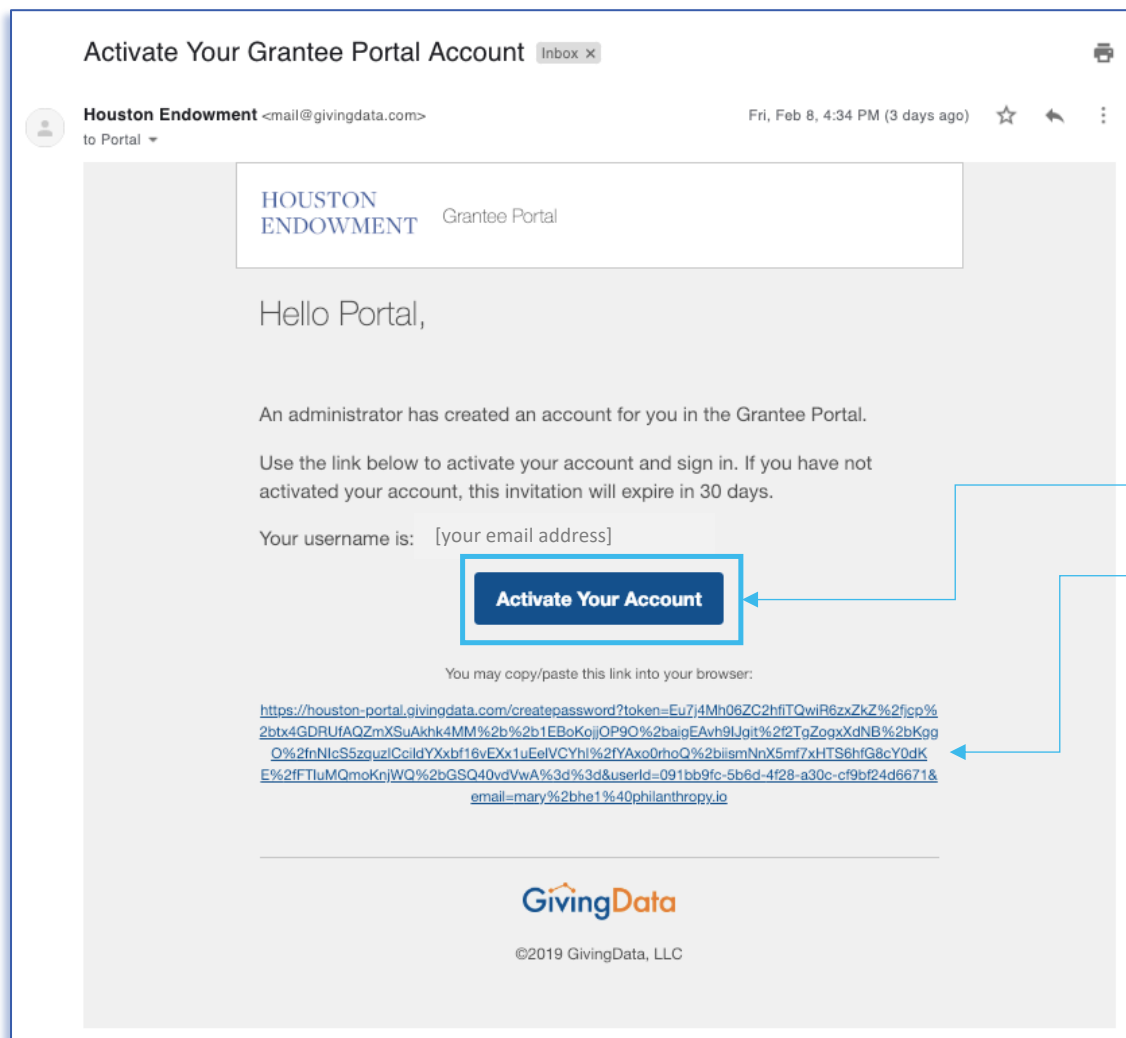
<https://houston-portal.givingdata.com/createpassword?token=2hXT0YOLMwt1%2fk8kCv%2biYQ2SPpCKEFHRUY23bCMGSeqizP0ga4lgH59lllqYTW54o2EPA0%2fm02lk1lErY0ME9keROYJ16NnZvxZyP%2bMvWV%2bNHJCEMsWQNovRecBibCvJkqgWh9L6gEiEanZ5e6fprky864oVWQG7ocT9u9VY3QyzwLcYt eIZAmDkMhnumwqa12xSCg%3d%3d&userId=091bb9fc-5b6d-4f28-a30c-cf9bf24d6671&email=mary%2bhe1%40philanthropy.io&applicationId=18&intakeEntryId=268>



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

Account Activation Email



You may receive an email inviting you to activate your grantee portal account.

From the email, you can click the **Activate Your Account** button to go directly to the link.

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.)

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

Create a Password

When you visit the URL included in the email, you will be prompted to create a password, as depicted in the image below.

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

Before creating a password, please note 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.

The screenshot shows the 'HOUSTON ENDOWMENT Grantee Portal' interface. The main heading is 'Create Password'. Below it, a text prompt says 'Create a password to sign in with the account [your email address]'. There are three numbered steps indicated by blue circles with white numbers: 1. A text input field for the 'Password'. 2. A text input field for the 'Confirm Password'. 3. A blue 'Save' button. The form is set against a light gray background with a subtle border.

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.

The screenshot shows the 'HOUSTON ENDOWMENT Grantee Portal' sign-in interface. It features a central 'Sign In' form with two input fields: 'Email Address' and 'Password'. A blue circle with the number '1' points to the 'Email Address' field, and a blue circle with the number '2' points to the 'Password' field. A blue circle with the number '3' points to the 'Sign In' button. Below the button is a link that says 'Forgot your password?'. At the bottom of the page, there is a footer with the 'GivingData' logo, the text '©2019 GivingData, LLC v4.3.10.1', and a 'Privacy Notice' link with an external icon. A blue line from the text 'Bookmark this page to return to the Grantee Portal in the future.' points to the footer area.

HOUSTON
ENDOWMENT Grantee Portal

Sign In

Email Address

Password

Sign In

Forgot your password?

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

GivingData

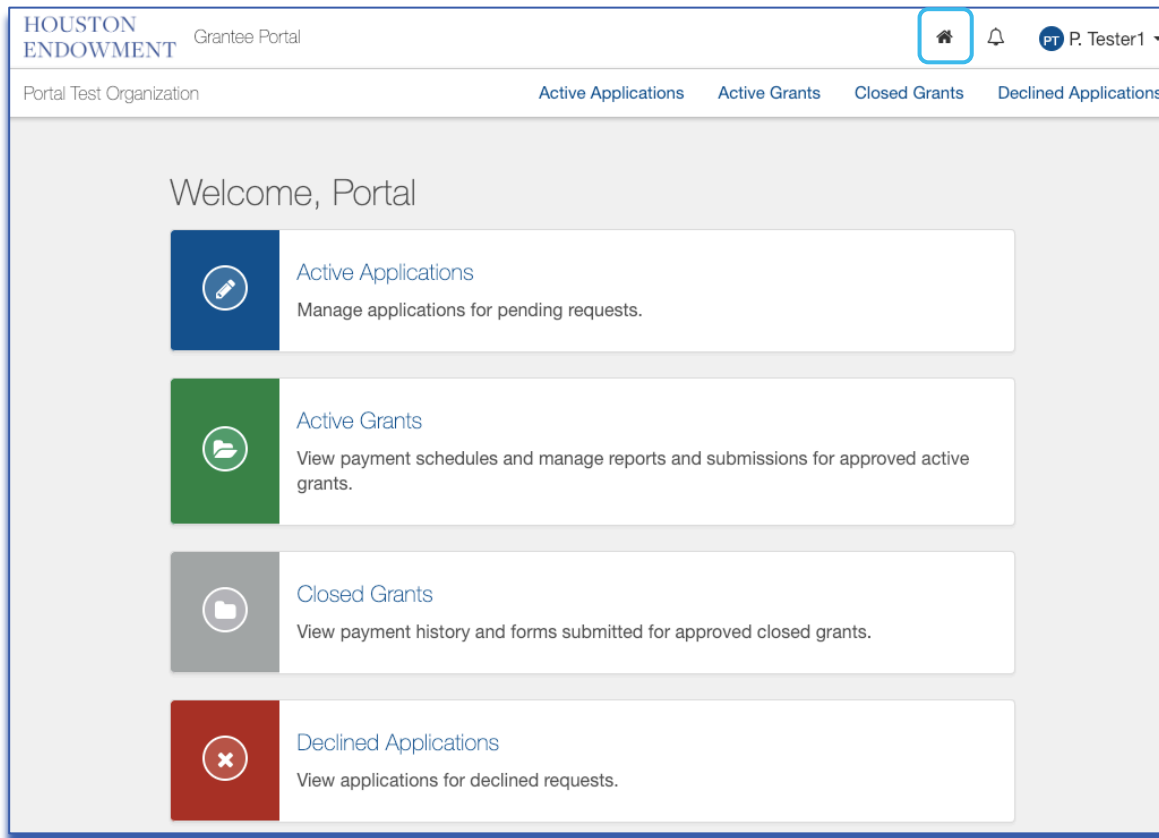
©2019 GivingData, LLC v4.3.10.1

Privacy Notice

Grantee Portal Home

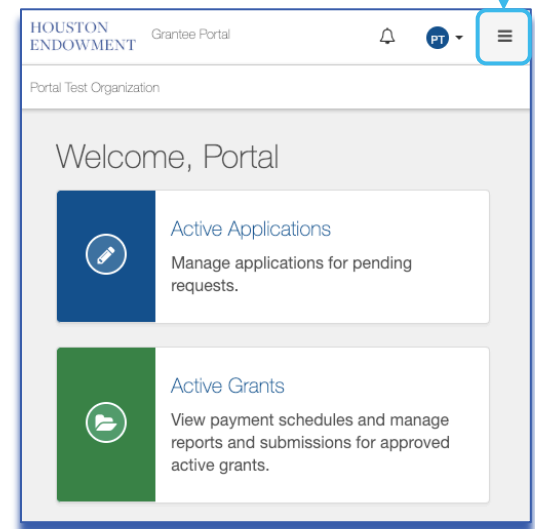
Upon login, you will see the **Home page**. Click  (Home) at any time to return to this view.

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.



GRANTEE PORTAL OVERVIEW



Grantee Portal Home

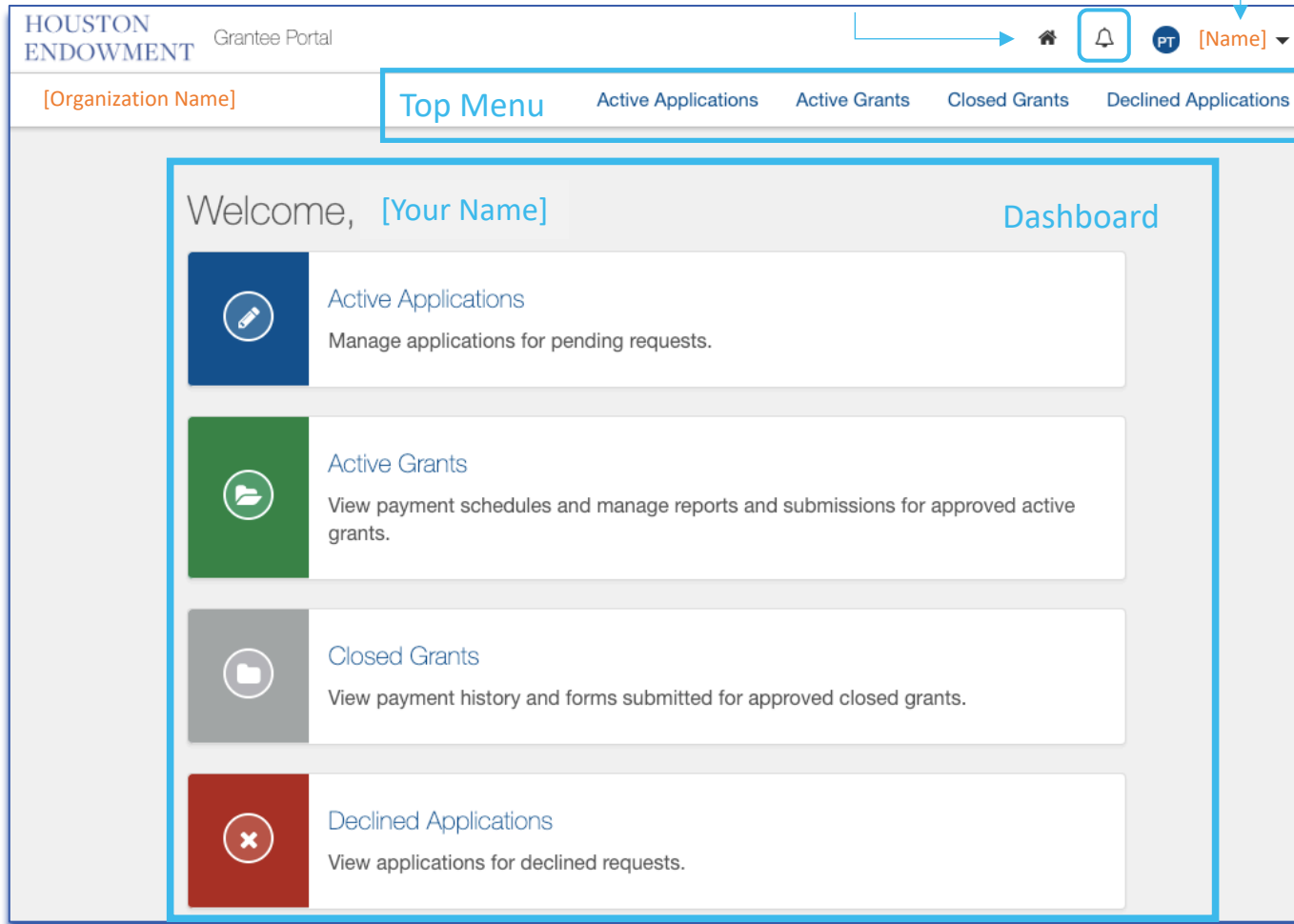
Upon log in, you will first see the **Home page**. You can access everything you need from this page. The key areas of the Home page are highlighted below. Click  (Home) and to return to this view.

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 browser views**. Click on it to expand or collapse. It includes the Top Menu options plus Home.



Home





Active Applications

Active Grants

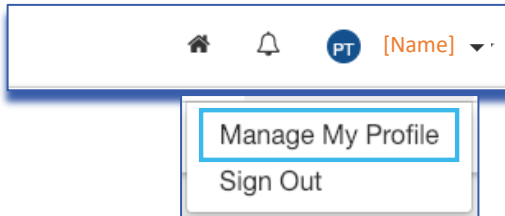
Closed Grants

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 (which is like a pop-up widow), this will indicate how many steps and which step you are on.
<div> <div>All changes saved</div> <p>You may notice activity in the lower left corner of the window. GivingData will notify you as it is auto-saving or confirm that all of your changes have been saved. If they system is not auto-saving, it will indicate that as well so you know to save your work as you go.</p> </div>			

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.

The image shows the 'Manage My Profile' page with the 'Account Information' tab selected. It features a 'Profile Photo' section with a circular placeholder containing 'PT' and an 'Edit Photo' button. Below this is a text field for 'Username/Email' containing 'mary+he1@philanthropy.io' and a 'Save' button.

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.

The image shows the 'Manage My Profile' page with the 'Change Password' tab selected. It features three password input fields labeled '*Current Password', '*New Password', and '*Confirm New Password', followed by a 'Save' button.

Photo Modal Window

The image shows the 'Edit Profile Photo' modal window. It has a title bar 'Edit Profile Photo' and a section 'Image File' with a dashed box for dropping a file and a 'Select File' button. Below is a 'Preview' section showing a circular profile picture of a yellow smiley face wearing sunglasses. At the bottom, there are three buttons: 'Delete Profile Photo' (highlighted with a red border), 'Save' (highlighted with a blue border), and 'Cancel'.

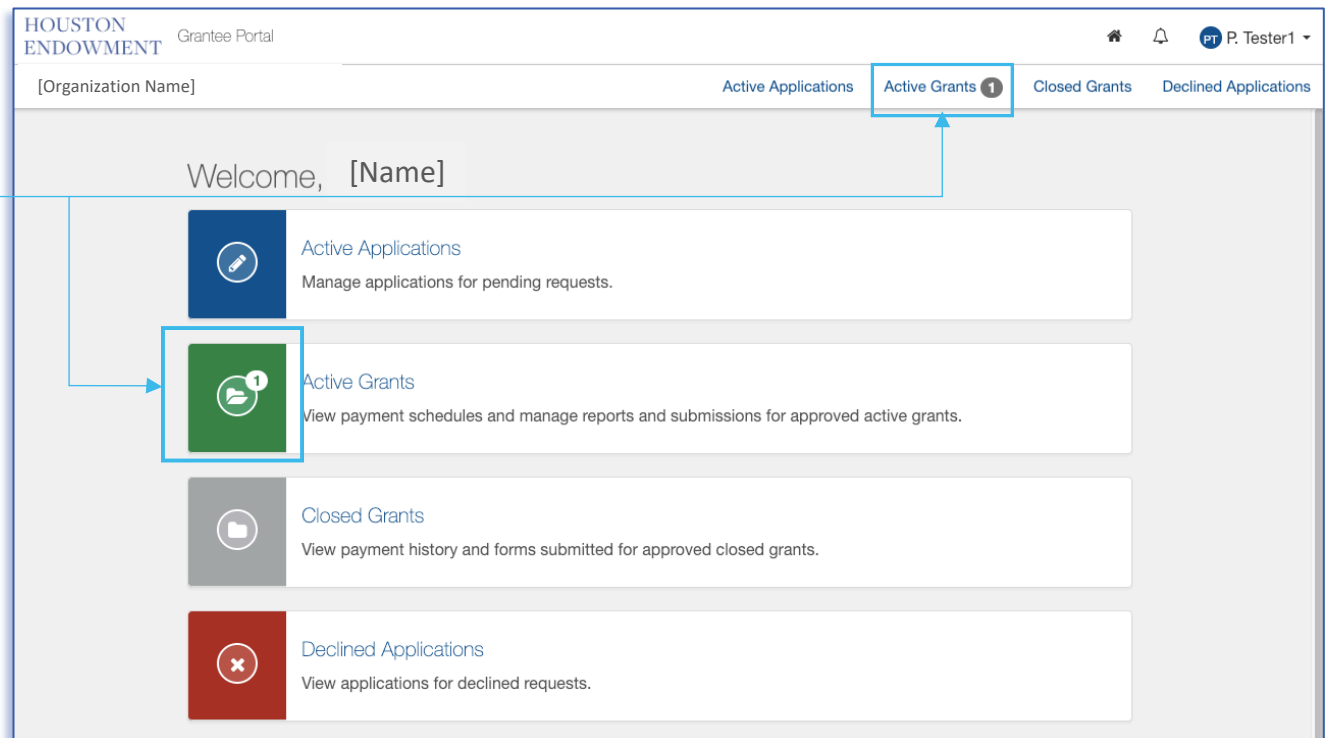
Navigation

Use the menus (Top, Dashboard, and Hamburger) to navigate throughout the portal. Each menu displays the same 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 and on the icon on the Dashboard to indicate there is one (1) Active Grant.

This can help you focus in on where you might need to review information or complete forms.



« 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 application 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:

- 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.**

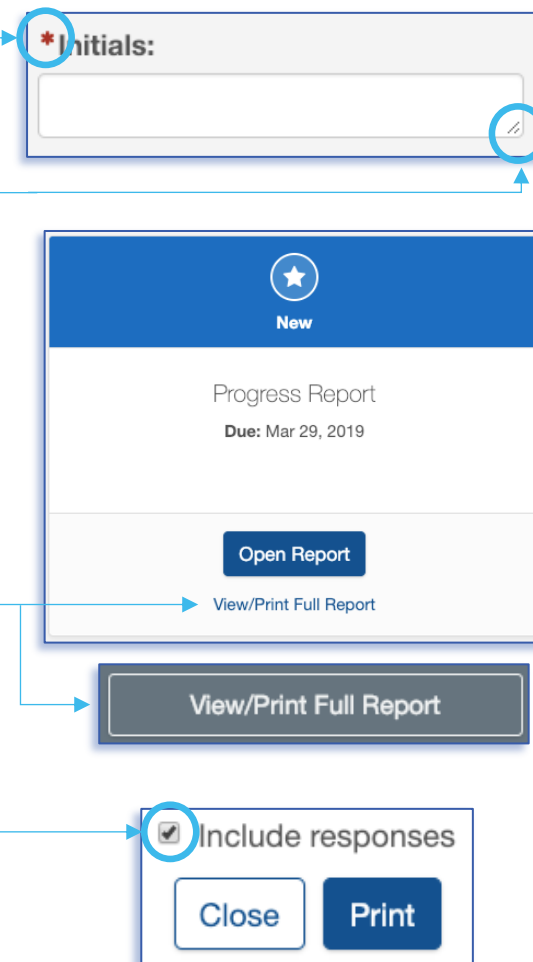
Field Expansion

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.



The diagram illustrates the form components and actions:

- Initials Field:** A text input field labeled ***Initials:** with a red asterisk indicating it is required. A diagonal line in the bottom right corner indicates it can be expanded. A blue circle highlights the asterisk, and another blue circle highlights the expansion handle.
- Form Tile:** A blue header with a star icon and the word **New**. The main content area displays **Progress Report** and **Due: Mar 29, 2019**. A blue button labeled **Open Report** is at the bottom. A blue arrow points from the **Open Report** button to the **View/Print Full Report** modal.
- View/Print Full Report Modal:** A grey modal with the title **View/Print Full Report**. It contains a checkbox labeled **Include responses** (checked) and two buttons: **Close** and **Print**. A blue circle highlights the checkbox, and a blue arrow points from the **Include responses** checkbox to the **Include responses** label.

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.

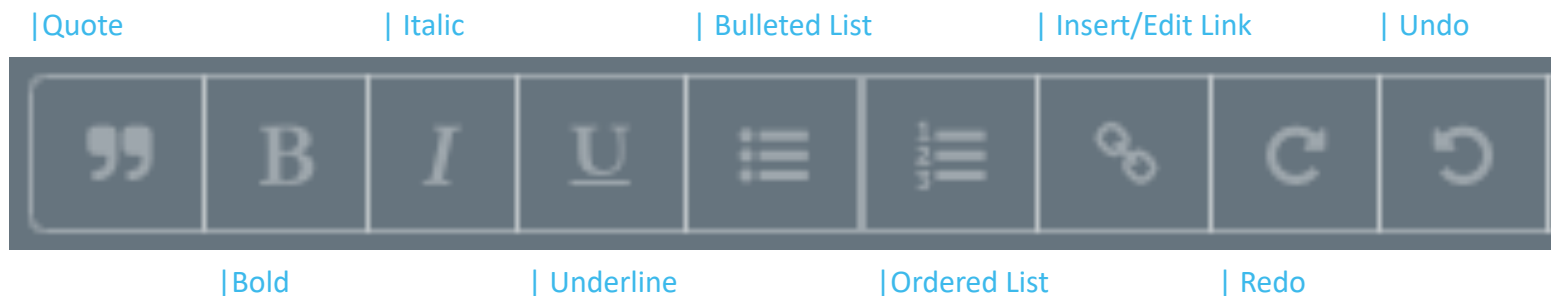
The grey box labeled **Words** provides a live count of your words.

***Share any additional learning or opportunities that you would like to bring to Houston Endowment's attention.**


” B I U ☰ ☷ 🔗 ↺ ↻

Words: 0 Characters: 0

Formatting bar symbols



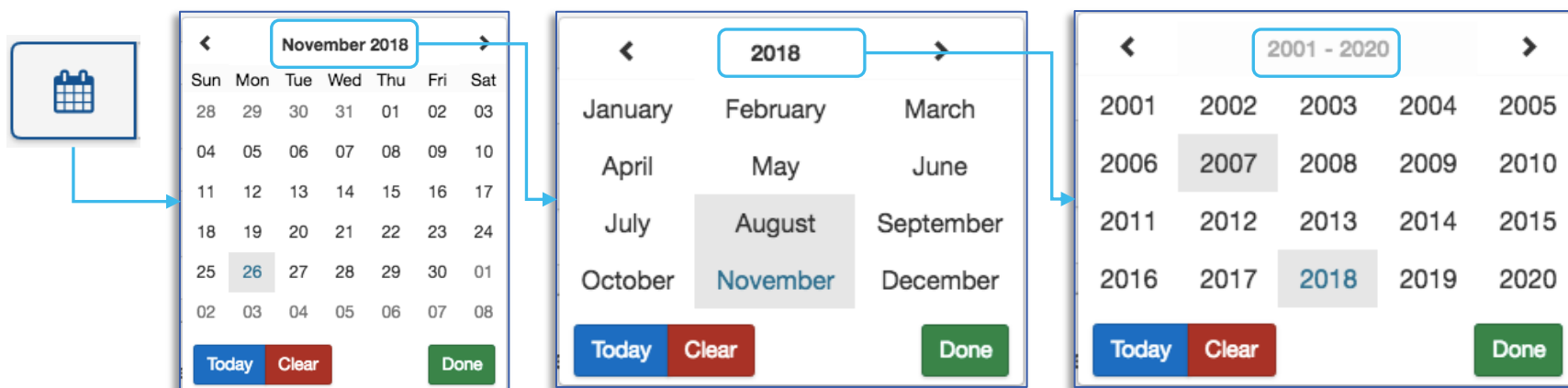
Field Type: Date

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 X 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.

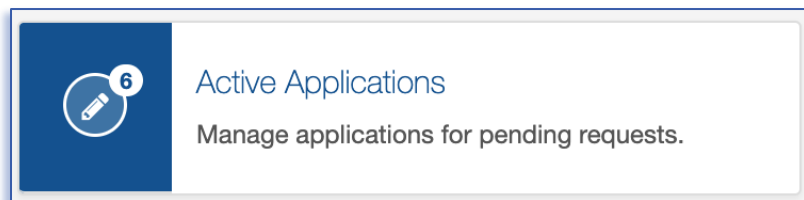
The modal that appears is the same form that will appear should you click **Add New Contact**. Enter information in the required fields and use the buttons (**Back**, **Next**, and **Save**) to navigate through the modal. Once you have completed all required fields, click **Save**.

APPLICATIONS OVERVIEW



Accessing Applications

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

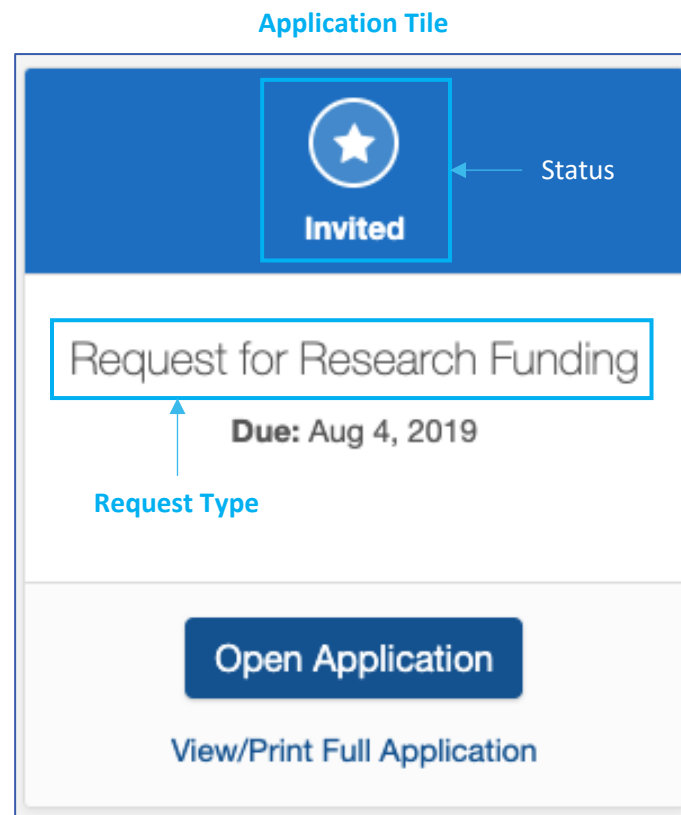


This will take you to a page that displays your application(s).

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:

- The **Status** of the application (Invited, In Progress, or Submitted).
- The **Request Type** (Request for...).
- The **Due Date**.
- The ability to 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 **six application types**. You will be assigned an application type by your program officer that is inline with the type of funding for which you are being invited to apply. The application types are:

1. Request for Capacity Building
2. Request for Capital Improvements
3. Request for General Operating Support
4. Request for Project Support
5. Request for Public Policy & Engagement
6. 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 has one or more questions/fields for you to complete.

The application card is a vertical rectangle. At the top is a blue header with a white star icon and the word 'Invited'. Below this is a white section with the text 'Request for Research Funding' and 'Due: Aug 4, 2019'. At the bottom is a grey section with a blue 'Open Application' button and a link 'View/Print Full Application'.

The steps menu is a vertical list of 12 items. The first item, 'Request for Research Funding', is highlighted with a blue border and a blue arrow pointing to it from the application card. The other items are in a grey box. Each item has a status icon on the right: a green checkmark for 'Checklist' and 'Upload Additional Documents', and a white circle for the others.

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

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.
- **Management & Board Contact Information:** Add contact information for each requested role.
- **Board Information:** Respond to questions regarding your board and its engagement.
- **Organization Budget and Funding:** 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"/>
Management & Board Contact Information	<input type="checkbox"/>
Board Information	<input type="checkbox"/>
Organization Budget and Funding	<input type="checkbox"/>
Project Budget and Funding	<input type="checkbox"/>
Project Overview	<input type="checkbox"/>
Request for Research 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 at the right on a computer 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

PT

[Your Organization]




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

Management & Board Contact Information

Board Information

Organization Budget and Funding

Project Budget and 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

Organizations completing an invited application for funding from Houston Endowment will be asked to provide the following information as part of the application process. Please ensure you have the most current version of all of the information requested below.

Contact & Board Information:

- Name, title, phone number and email for the organization's CEO/executive director
- Name, title, phone number and email for primary contact for the review of the request
- List of the current governing board (with current position/organization affiliation)
- Number of board meetings per year
- Average board meeting attendance rate for the past year
- Board member term limits
- Whether or not a board-approved Conflict of Interest Policy exists for your organization
- Any members of your board who are related to your organization's CEO/Executive Director
- Board's performance goals and how those goals are developed and reviewed
- 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)

Start Application

Application Type →

Application Steps

Request for Research Funding

Checklist ☒

General Organization Information ☐

Your Work ☐

Management & Board Contact Information ☐

Board Information ☐

Organization Budget and Funding ☐

Project Budget and Funding ☐

Project Overview ☐

Request for Research 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 **make use of or see what information we have on file** for your organization. **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 **update/correct** what we have on file by **typing directly into the text field**.

Current Value on Record

Portal Test Org

Use This Response



General Organization Information

*Legal Name

*Doing Business As

*Tax ID (EIN)

Current Value on Record

Portal Test Org

Use This Response

Request for Research Funding

Checklist

✓

General Organization Information

○

Your Work

○

Management & Board Contact Information

○

Board Information

○

Organization Budget and Funding

○

Project Budget and Funding

○

Project Overview

○

Request for Research Funding

○

Upload Additional Documents

✓

Confirmation Statement

○

Review and Submit


○

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.

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.



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

○

Management & Board Contact Information

○

Board Information

○

Organization Budget and Funding

○

Project Budget and Funding

○

Project Overview

○

Request for Research Funding

○

Upload Additional Documents

✓

Step: Management & Board Contact Information

Included in All Application Types

Please **add contact information** for your **organization’s CEO/executive director, primary contact for this request, governing board’s primary contact, and all members of your governing board.**

If you would like to include information about non-governing advisory boards or honorary/emeritus board members, please do so by including an attachment in the “Other Documents” field on the Upload Additional Documents page. When **adding board members, include the person's board position in the title field and any board committee memberships in the department field.**

Please note: contacts require full name, title, email, and phone. If your organization does not disclose board contact information, please enter the phone number and email address of your organization for the board members' phone and email.

Management & Board Contact Information

Contacts require full name, title, email, and phone. If your organization does not disclose board contact information, please enter the phone number and email address of your organization for the board members' phone and email.

*** CEO/Executive Director**

+

Add New Contact

Portal Tester1

Portal Tester2

Enter 1 contact.

Request for Research Funding

Checklist

General Organization Information

Your Work

Management & Board Contact Information

Board Information

Organization Budget and Funding

Project Budget and Funding

Project Overview

Request for Research Funding

When you click on each field, you will see a dropdown menu of contacts we already have 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 them to our system. For more information on completing this type of field, see page 19.

Step: Board Information

Included in All Application Types

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

Board Information

*How many times a year does your board meet?

*What was average board meeting attendance rate during the last fiscal year?

0.00 %

*What is the maximum number of years a member may serve consecutively?

*Specify any members of your board who are related to your organization's CEO/Executive Director.

*Does your organization have a board-approved Conflict of Interest policy?











-- ▾

*What total amount did your board members contribute in the last fiscal year?

*What percentage of your board members made a cash contribution in the last fiscal year?

0.00 %

Does your organization have any of the following committees?

Request for Research Funding	
Checklist	
General Organization Information	
Your Work	
Management & Board Contact Information	
Board Information	
Organization Budget and Funding	
Project Budget and Funding	
Project Overview	
Request for Research Funding	
Upload Additional Documents	

Included in All Application Types

Please enter summary information about your organization's budget for **the most recently completed fiscal year**. Houston Endowment asks all organizations to provide information about the sources of support for their general operating budgets. **Please itemize your total sources of support for your most recently completed fiscal year under the Notable Sources of Revenue Tab.**

Please provide a clear description of each source along with the amount granted.

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

Prepared by Philanthropy.io | June 2019

Step: Project Budget and Funding

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

This step asks you to enter **amounts related to your budget and funding at the project level**. Please provide information about significant committed or pending sources of support for the project, including government grants, foundation grants, United Way allocations, earned income, investment income, proceeds from special events, and individual contributions.

If you have many small donations, provide an approximate count and aggregate amount for committed support and a separate line item for pending support (e.g., 10 donors - \$5,000).

Include significant individual contributions and proceeds from special events. Follow the same guidelines for small donations in aggregating small amounts from special events (e.g., 10 donors/events - \$5,000).

Use this format to add at least one and no more than five years of funding information for the project.

The screenshot shows a web form titled "Project Budget and Funding". At the top, there is a "Project Year" field with a dropdown menu showing "1". Below this is a tabbed interface with three tabs: "Budget Summary" (selected), "Notable Sources of Revenue", and "Notable Expenses". The "Budget Summary" tab contains three input fields labeled "* Revenue", "* Expenses", and "* Requested Amount". Below these fields are three dots indicating a carousel of years. At the bottom of the form, there is a button labeled "+ Add Another Project Year" with a callout box pointing to it. The callout box contains the text: "Enter at least 1 and no more than 5 years. You have 1 currently added." To the right of the form, there is a sidebar titled "Request for Research Funding" with a checklist of items: "Checklist" (checked), "General Organization Information", "Your Work", "Management & Board Contact Information", "Board Information", "Organization Budget and Funding", "Project Budget and Funding" (selected), "Project Overview", "Request for Research Funding", and "Upload Additional Documents" (checked). At the bottom right of the form, there are three summary lines: "Total Revenue: \$0.00", "Total Expenses: \$0.00", and "Total Requested Amount: \$0.00".

*** Project Budget and Funding**

✓ * Project Year: 1

Budget Summary | Notable Sources of Revenue | Notable Expenses

Budget Summary

* Revenue * Expenses * Requested Amount

+ Add Another Project Year

Enter at least 1 and no more than 5 years.
You have 1 currently added.

Total Revenue: \$0.00
Total Expenses: \$0.00
Total Requested Amount: \$0.00

Request for Research Funding


- Checklist ✓
- General Organization Information
- Your Work
- Management & Board Contact Information
- Board Information
- Organization Budget and Funding
- Project Budget and Funding**
- Project Overview
- Request for Research Funding
- Upload Additional Documents ✓

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 limit longer responses to 8-10 sentences.

If you have a **project budget**, use the **upload button** to attach it to your application.



Project Overview

Please limit responses to 8-10 sentences.

***Project Title**

***How many months of support are you requesting?**
You may request up to 36 months of support


***Describe the project.**

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

Step: Request for ...

*Included in the Following Application Types:
Capacity Building, Capital Improvements,
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 **limit longer responses to 8-10 sentences**.



Request for Research Funding

Please limit responses 8-10 sentences.

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

“ B I U ☰ ☷ 🔗 ↺

Words: 0 Characters: 0

Request for Research Funding	
Checklist	<input checked="" type="checkbox"/>
General Organization Information	<input type="checkbox"/>
Your Work	<input type="checkbox"/>
Management & Board Contact Information	<input type="checkbox"/>
Board Information	<input type="checkbox"/>
Organization Budget and Funding	<input type="checkbox"/>
Project Budget and Funding	<input type="checkbox"/>
Project Overview	<input type="checkbox"/>
Request for Research Funding	<input checked="" 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 whether or not you include additional documents.

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

An additional Upload button will appear.

Upload Additional Documents

Other Documents

Drop file here to upload or

Select File

+ Add Another File

Back

Next

☐ Flag this step ?

Request for Research Funding

Checklist

General Organization Information

Your Work

Management & Board Contact Information

Board Information

Organization Budget and Funding

Project Budget and Funding

Project Overview

Request for Research Funding

Upload Additional Documents

Confirmation Statement

Review and Submit

+ Add Another File

Drop file here to upload or

Select File

Step: Confirmation Statement

Included in All Application Types

After you complete all previous steps, you will 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

☐ 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.

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.

***Authorized by**

☐ Flag this step ?

Request for Research Funding

Checklist	✓
General Organization Information	○
Your Work	○
Management & Board Contact Information	○
Board Information	○
Organization Budget and Funding	○
Project Budget and Funding	○
Project Overview	○
Request for Research 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 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%

11 of 11

STEPS COMPLETED

0

STEPS FLAGGED

Back

Submit


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Privacy Notice

All changes saved

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

Successful Submission

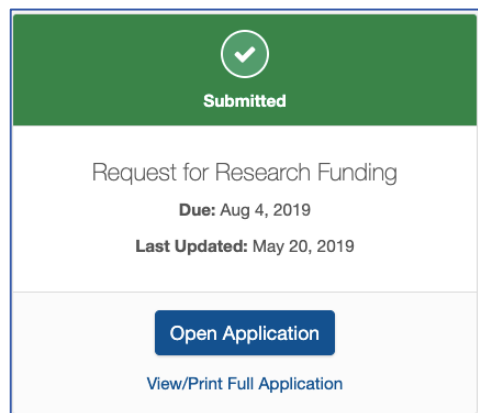
 The form has been successfully submitted.

[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 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



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?

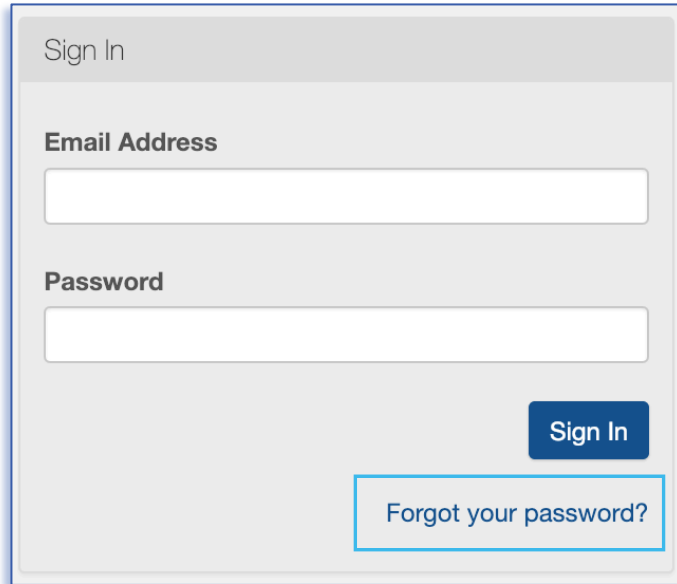
No. You may log in and out as often as you like. Answers autosave as you work. (Text in the lower left of the screen will indicate when the system is saving your responses and when your changes are saved.)

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.

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?

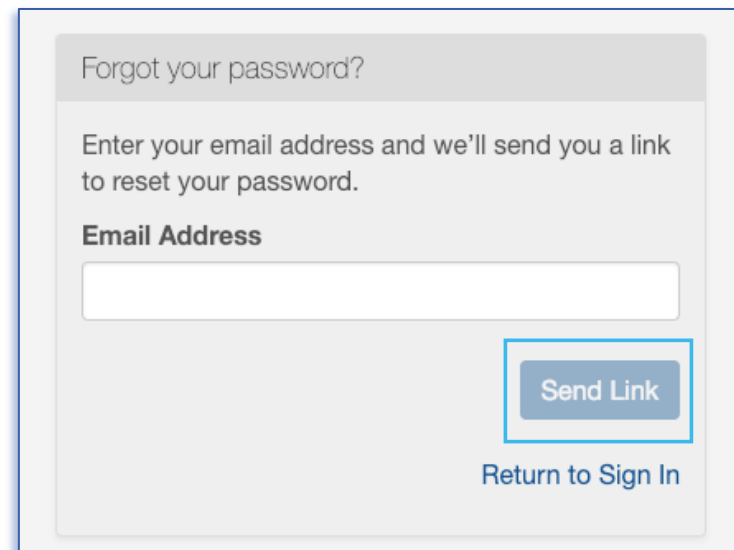
If you forget your password, don't worry. You can easily reset it yourself.

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