

Instructions to Apply for a Grant

Thank you for your interest in applying for a grant from the Rogers Family Foundation. Please read the following instructions carefully before beginning the application. Note that all of our grantmaking is by invitation only and access to our online application portal is available only to organizations that the Foundation has invited to apply for a grant.

Logging into the Application Portal

The Foundation sends invitations to apply for grants via email. The email includes a link to the online application portal, your username (your email address), and a temporary password. Please follow the link to access the online portal, and enter your username and password in the blue box on the upper right-hand side of the webpage; then click the Login button.

If you cannot remember your password, please click on the light blue 'Can't Access Your Account?' link next to the Login button to reset it. When you enter your email address, our portal sends you an email with a new temporary password.

The homepage of the portal contains a chart with two tabs. The Open Items tab displays the grant application, and the History tab lists past grants submitted through the online system. Please note that you cannot view grants for which you applied PRIOR to the Foundation's transition to an online application system.

The light blue links in the top right-hand corner of the webpage allow you to navigate through the portal. Clicking My Submissions takes you back to the homepage, where you can see the list of open and past items. Clicking Profile takes you to a section with your contact and organizational information as well as your password. Logout logs you out of the application portal.

Updating your Profile

The first step when submitting a grantee report is to update your profile. Please note that this is required for both new and returning grantees. To access your profile, please click on the light blue Profile link in the top right-hand corner of the webpage. The Profile has four tabs – Contact Info, Organization, Change Password, and Personal Settings.

- **TAB 1:** On the Contact Info tab, please click Edit to enter or update your organization's contact information. Once complete, please click Save and proceed to the Organization tab.
- **TAB 2:** On the Organization tab, please click Edit to enter or update all relevant information about your organization, including your mission and vision, organizational history, and core programs and services. Once complete, please click Save.
- **TAB 3:** While the Change Password tab allows you to change your password, we do not recommend using it at this time. When you change your password using this tab, it takes up to 24 hours for the change to take effect. The fastest way to change your password is to click the 'Can't Access Your Account?' link from the homepage.

To return to the homepage, please click on the light blue My Submissions link in the top right-hand corner of the webpage.

Accessing your Application

The Rogers Family Foundation has created the application for your grant, which you can access in the Open Items chart on the homepage. Please click on pencil and paper icon under the Edit column to open the application. The application has five sections: Details, Additional Contacts, Additional Information, Attachments, and Review & Submit. You must save the current page before moving to the next tab, but you can return to any section before submitting the application to the Foundation.

- **TAB 1:** On the Details tab, please enter information about the project for which your organization is requesting funding. The Contact Information section automatically displays the information you entered in your Profile. You must return to the Profile page to make changes to this information.
- **TAB 2:** In the Additional Contacts section, you can enter the names of other individuals who are working on the grant project. The Primary Grant Contact already is listed in the Existing Contact Role list. This person is responsible for submitting the grant application and is the person that the Foundation should contact with questions about the grant application.
- It is possible to add other contact roles including – Executive Director, Principal, Director of Development, Grant Writer, and Fiscal Sponsor Contact. Please enter as many as are relevant to your organization. To enter a new contact role, click on the magnifying glass next to the Contact Name field. Click GO! to see a list of all contacts connected to your organization. To select a person from that list, click on his or her name. If the person you are looking for is not listed, click New, enter the requested information, and then click Save. Once back at the original screen, select the person's role from the Role drop-down list. Please do NOT check the Grant Portal Access box. If someone else from your organization needs access to the application, please contact Dana Wellhausen (see contact information below).
- **TAB 3:** In the Additional Information section, click on the New button under the Other Funders section to enter the names of other organizations funding this project. Please create a separate record for each of your major funders.
- **TAB 4:** In the Attachments section, please upload the requested attachments. Please note that you are NOT required to upload your organization's logo. If you do choose to upload the logo, you are granting the Foundation permission to use it in our newsletter and/or on our website.
- **TAB 5:** The Review & Submit tab gives you an opportunity to review and print your application before submitting it to the Foundation. Click Submit once you are ready to submit the application. Once you submit your application, you can no longer make changes to it unless you contact the Foundation.

Thank you very much! If you have questions, please contact Dana Wellhausen at (510) 899-7908 or dwellhausen@rogersfoundation.org.

