HEARSTfoundations

APPLICATION INSTRUCTIONS

Please read this document entirely before starting an application.

Application Tips and Best Practices:

➢ Please use these instructions throughout the process. They are best viewed on screens, not on paper, so that applicants can zoom in on screenshots (and save paper!). Please review the instructions in full before beginning the application.

➢ Please use **Chrome** or **Firefox** as the browser to complete the application.

➢ Complete the **Project Title** field immediately upon entering the application and click **Save**. This will create a request in the system and enable applicants to return to complete the application for **three months**. Please do not edit this field once it has been populated with the internal nomenclature.

➢ Bookmark the Dashboard page to return directly to the application portal: https://hearstfoundations.force.com/grants/

➢ Review the application in its entirety before starting to complete the fields. This will help applicants strategize how best to proceed.

➢ Work in intervals. The **Save** button is provided such that applicants do not need to complete the application in one sitting.

➢ Avoid using browser navigation buttons as they will exit applicants from the application and grant applications will be lost. Please use the navigation buttons at the top and bottom of the application page to advance in the application. Applicants may need to save the application for these buttons to appear.

➢ Be sure to read **Help Text** that appears below each header for guidance on the requested information.

➢ Enter numbers only in fields requesting a dollar amount or fiscal year. Please do not include any non-numeric characters. Please review Help Text for clarity on what is needed in a specific field.

➢ Note character limits. The suggested length is stated in Help Text. **Please disregard the character count calculators that appear under text fields.**

➢ Compose, spell check, and save any lengthy answers in a word processing program, such as Word, and then copy and paste them into the application fields and **save**.

➢ Focus on the red: Required fields will display a red asterisk on the right side of the field. Error messages will be displayed in red on the top of the page upon saving.

➢ Review the application thoroughly on the "Review/Submit" tab before submission. This page will display input answers and blank fields for incomplete answers. When complete, the preview page should be entirely populated, as well as Benchmarks and Primary Contact visible and Attachments listed.

Applicants begin the application process by selecting the relevant application link from the Hearst Foundation's website's "How to Apply" page (https://www.hearstfdn.org/applying-reporting/how-to-apply):

➢ **Endowment Application:** The Hearst Foundations only consider Endowment requests in cases where organizations have existing Hearst endowments.

➢ **Program Application** (all non-endowment requests): The Hearst Foundations fund Capital, General Support, Program, Research and Scholarship grants.

Eligibility Quiz:

Upon clicking the relevant application link, the applicant will begin the Eligibility Quiz. This is a short series of questions that will determine whether an applicant meets minimum funding criteria based on the Hearst Foundations' funding guidelines and funding limitations.

If the Eligibility Quiz indicates that an organization is eligible to apply, the applicant will select **Continue**->**Next**-> **Continue** to create a new grant application.

For more information on the Hearst Foundations' funding limitations, please visit
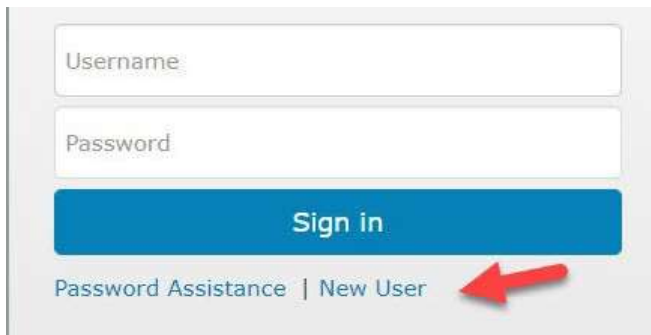https://www.hearstfdn.org/funding-limitations

How to Register:

After completing the Eligibility Quiz, an applicant will log in. If the applicant has not yet registered for the new Hearst Foundations portal, please register before proceeding. (For users of the previous Hearst Foundations portal, see instructions on page 5.)

New Users (No account on any Hearst Foundations portal)

New users of the portal must select New User on the login page to register and complete all fields in Steps 1-3, using the help text that appears to the right of the text fields. An email will be sent upon clicking Register on Step 3.

Applicants should check both their email inbox and SPAM folders for the activation email to complete the registration process. The email will come from **noreply@salesforce.com; on behalf of Hearst Foundations (support.ny@hearstfdn.org)**. After logging in, the applicant will be directed to the application.
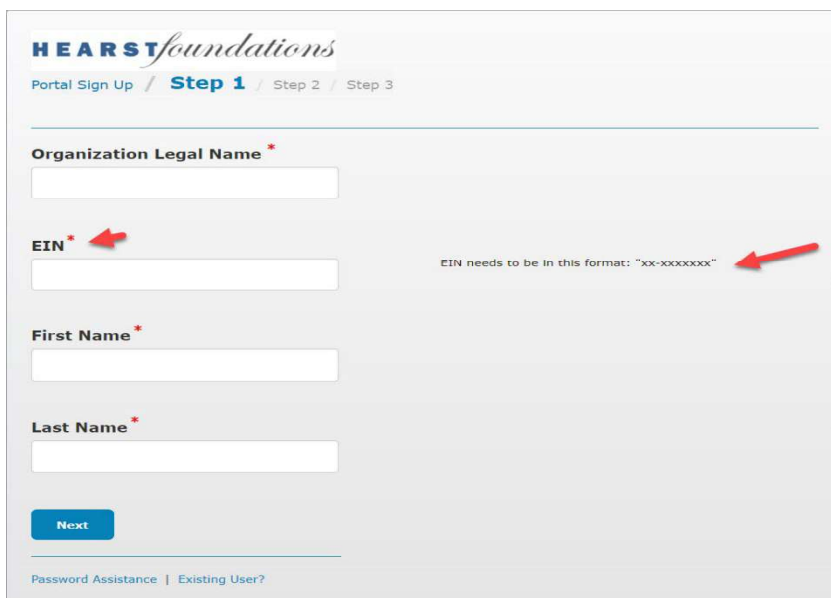
HEARST *foundations*

Portal Sign Up / Step 1 / Step 2 / **Step 3**

Username *

Username must not include an @ symbol. Please do not use an email address.

Password *

Password must include at least 8 characters with 1 special character ($, !. % etc), 1 upper case character and 1 lower case character. Please keep a record of your username and password.

Confirm Password *

Register or go back a step

Password Assistance | Existing User?

After registering, a new user will receive the email below.

Dear :

Thank you for registering for the Hearst Foundations' Application and Reporting Portal.

Before you can get started, please confirm your email address by either clicking the link below or copying and pasting the link in your browser.

https://hearstfoundations.force.com/grants/FGM_Portal__CommunitySignupConfirm?id=a0N1H00001Ejl5z&code=94075.81477749628

Sincerely,

The Hearst Foundations

Returning Users (Users with a prior portal account with the Hearst Foundations)

For applicants who have already activated their new portal accounts on the portal they can login with the new username and password.

For those applicants whose login information was created on the previous version of the portal (before October 2020), and who have **not** yet activated new accounts on the new portal, please follow the below steps to set up a new portal account **before** beginning the Eligibility Quiz and application process.
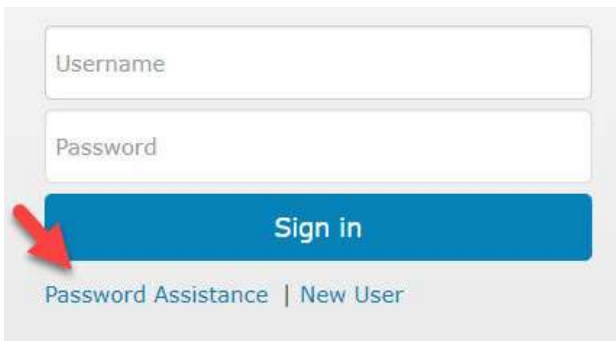
Step 1:

Contact the Hearst Foundations. If an organization is based **East of the Mississippi River**, please email **support.ny@hearstfdn.org** and if an organization is based **West of the Mississippi River**, please contact **support.sf@hearstfdn.org** for set up. The Hearst Foundations' staff will create a new account and an email will be sent to the registered email address to complete the process.

Step 2:

Upon receipt of the email (check SPAM folders if not received immediately), the applicant must **click the link to verify** the email address and follow the remaining steps to activate the account. The email will be from **noreply@salesforce.com; on behalf of Hearst Foundations (support.ny@hearstfdn.org)**.

Once the applicant has verified the email address and confirmed the new username, he/she can set up a password. Click the **Password Assistance** link to complete this process.

Please use the instructional video for password setup on the Hearst Foundations' website under "How to Apply" for further assistance:
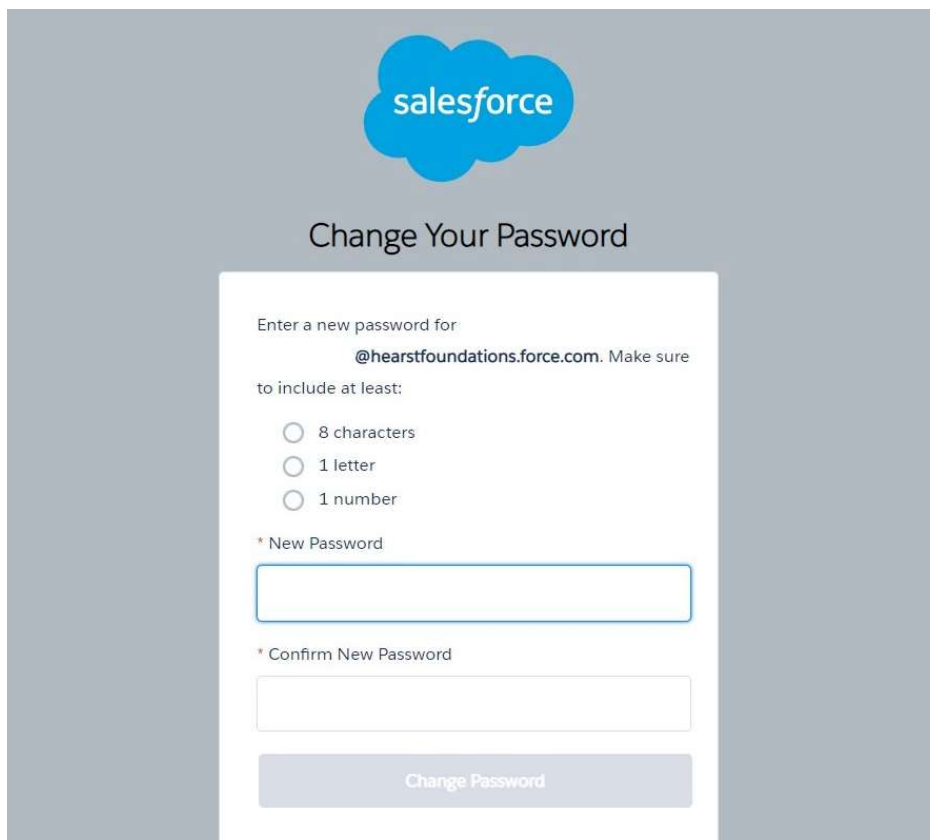
Step 3:

To set the new password, the applicant will need to provide the new username.

If you are having difficulty logging in, please confirm that you entered the correct user name and password for the new Hearst Foundations Portal (launched October 2020). Passwords are case sensitive. If you are a returning user and have not created new login information for the new portal, you will need to create new login information by contacting support.sf@hearstfdn.org, if your organization is located west of the Mississippi River or support.ny@hearstfdn.org, if your organization is located east of the Mississippi River. If you have already established your account on the new portal and your login details are not working, please request a password reset by entering your user name below. If you already requested a password reset and were directed to this page after clicking the link in your email, your reset link may have expired or has already been used. Please reset your password again and copy and paste the reset link into your browser.

| Username | **Continue** |

Step 4:

The new password must contain eight characters, with at least one letter and at least one number. **Please note the new Username and Password** for future access to applications and reports.

salesforce

Change Your Password

Enter a new password for
_____@hearstfoundations.force.com. Make sure to include at least:

○ 8 characters
○ 1 letter
○ 1 number

* New Password

* Confirm New Password

Change Password

> **Important:** Before beginning an application, please note the new Username and Password for future access to applications and reports.

Steps to Completing the Application:

To assist in the application process, we have created a short instructional video to orient you. The link is found on the Hearst Foundations' website's "How to Apply" page.

1) **Immediately upon entering the application, an applicant should complete the Project Title field and click Save at the bottom of the page.** This will create a record of the application in the system and allow applicants to navigate to other parts of the portal and work in increments with the ability to return to an application for ***three months***.

   There may be other errors for required fields that may be listed when the application is saved, but please proceed.

   Please Note: The text entered as **Project Title** will be overwritten by internal nomenclature as soon as it is saved. Applicants should not attempt to edit this title.

2) Applicants should use **Help Text** that appears directly under each field name for further instructions.

3) Applicants should use the **Save & Next buttons** to navigate through each tab.

4) Please follow the character counts that are included in the help text and disregard the character count calculator under the text fields (they are inaccurate and will cause issues when submitting the request).

5) **APPLICATION TAB**: When creating the **Proposal Narrative**, applicants should use the suggested headers for each section, as instructed on the application. We suggest writing and editing the narrative in a word processing program, such as Word, and copying and pasting into the field once finalized. The character count, including spaces, is 18,000. **Please ignore the character count calculator that appears under the text field**.

6) **FINANCIALS TAB**: All applicants should complete all fields under the Financials sections. If a field is not relevant, applicants should enter 0. If the applicant seeks to clarify any aspect of the financials, the applicant should provide this information in the Notes on Financials field.

Under Revenue Sources, please be sure to delete -0-and enter the correct percentage that will total 100%, i.e., if Tuition/Fees is 66%, delete the zero, otherwise it will show as 066.

7) **EDUCATION TAB**: If you are a K-12 school or an institution of higher education, please complete the additional fields relating to the student population and academic statistics.

8) **BENCHMARKS TAB**: For Program applications, applicants will need to complete information on the **Benchmarks** tab.

Using the **New** button on the right side, applicants need to create **three** specific Benchmarks to share how the organization will measure the success of the requested initiative.

Benchmarks should be measurable in number or percentage terms and match the duration of the grant term. Examples are provided on the portal.
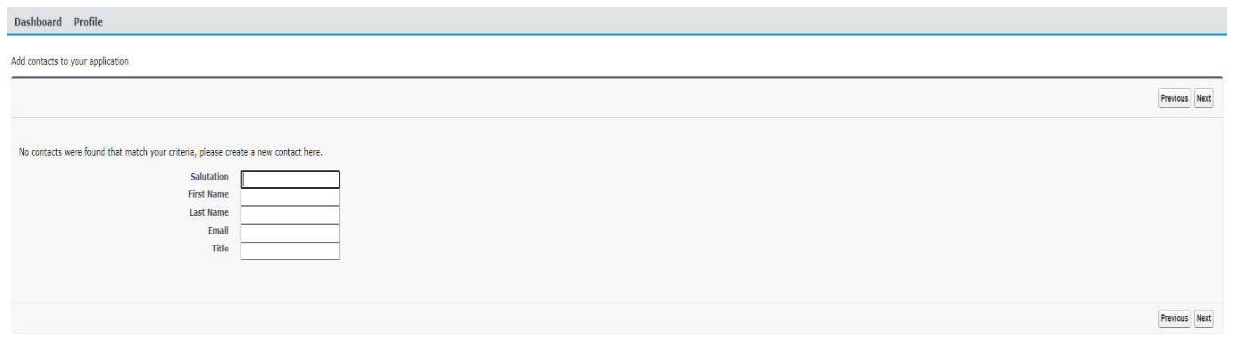
9) **PRIMARY CONTACT TAB:** All applicants will need to complete the **Primary Contact** tab to add the Executive Leadership of the organization. Applicants should follow the instructions provided on the page to identify an existing contact (already in the system) or create a new contact.


10) When adding the details of the **Primary Contact (Leadership)** of the organization, applicants need to select or type the most appropriate salutation from the Salutation dropdown menu. Please provide first and last name, title and email as this information will be used for grant agreement letters, if the grant is awarded. Please do not leave any of these fields blank.

After creating the new contact or selecting an existing contact, exit out of tab and return to application tab.

NOTE: The person added will NOT be listed on the page afterward. However, if the Success! Message below is visible, it has been confirmed.
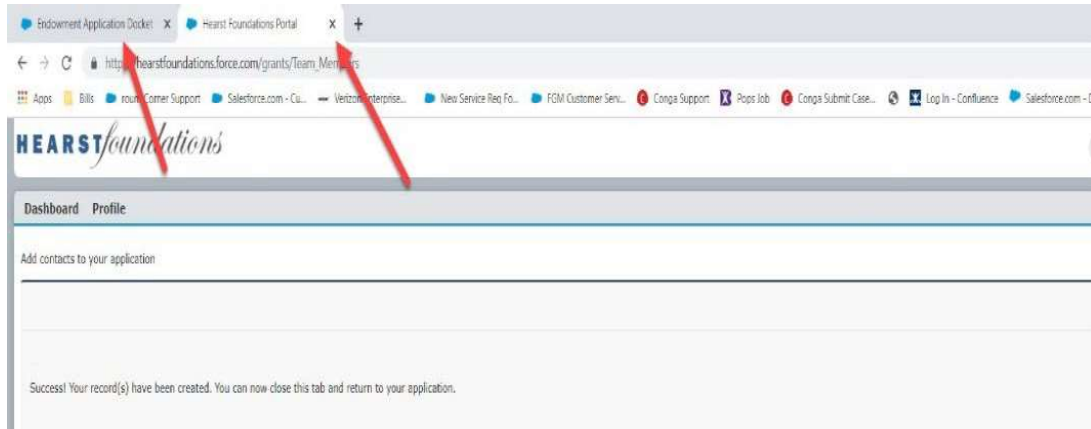
11) **ATTACHMENTS TAB:** All applicants will need to complete the **Attachments** tab by attaching the following documents as PDF or Excel attachments. **Please do not include an Attachment Description**:
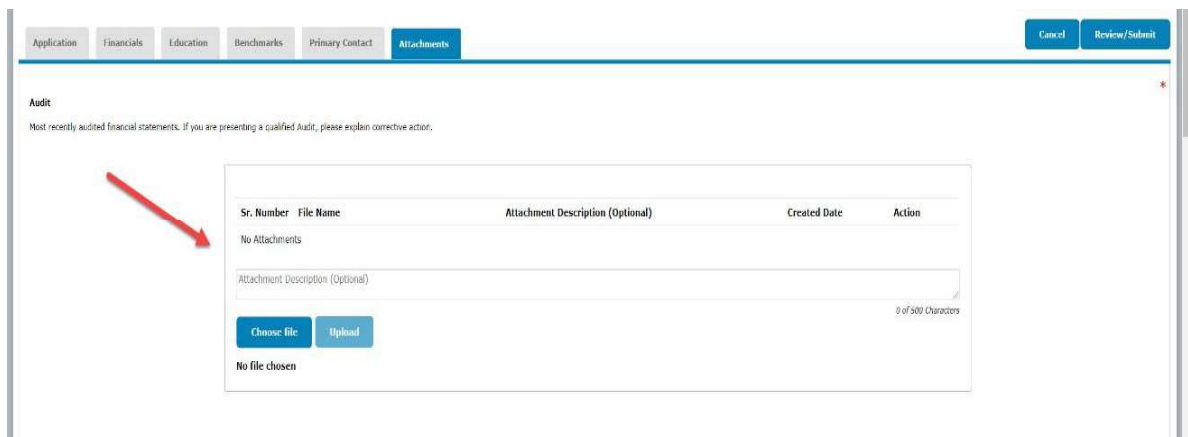
1) Most recent Audit (**990s** are <u>not accepted</u>)

2) Organizational Budget for the current and projected fiscal years and explanation of any deficits

3) Program Budget (required for all applications, except General Support and Endowment) for the fiscal year(s) in which funds are being requested and prior fiscal year (if applicable)

4) List of 10 largest foundation and corporate grants for the current and prior two fiscal years, for organization and program (if applicable). Please include the dollar amount.

5) List of Board Members, names and primary affiliations

6) Current IRS documentation certifying that the applicant is tax-exempt under Section 501(c)3 of the Internal Revenue Code and classified as a 509(a)(1) or 509(a)(2).

7) Institutional Endowment Report (Endowment applicants only). This is downloaded from the Attachments page. Please complete and re-upload.

12) **PROFILE:** After uploads are completed, applicants should click on **Profile** on the top left side of the page to complete all the required tabs (**Contact** and **Organization**). Applicants will need their EIN numbers to complete this section.

13) When the **Profile** section (the tabs **Contact** and **Organization**) has been completed, applicants should click on the **Dashboard** link on the upper left side and select the **Open Items** tab on the **Dashboard** page.

Then, click the **Edit** icon on the left side to return to the application.
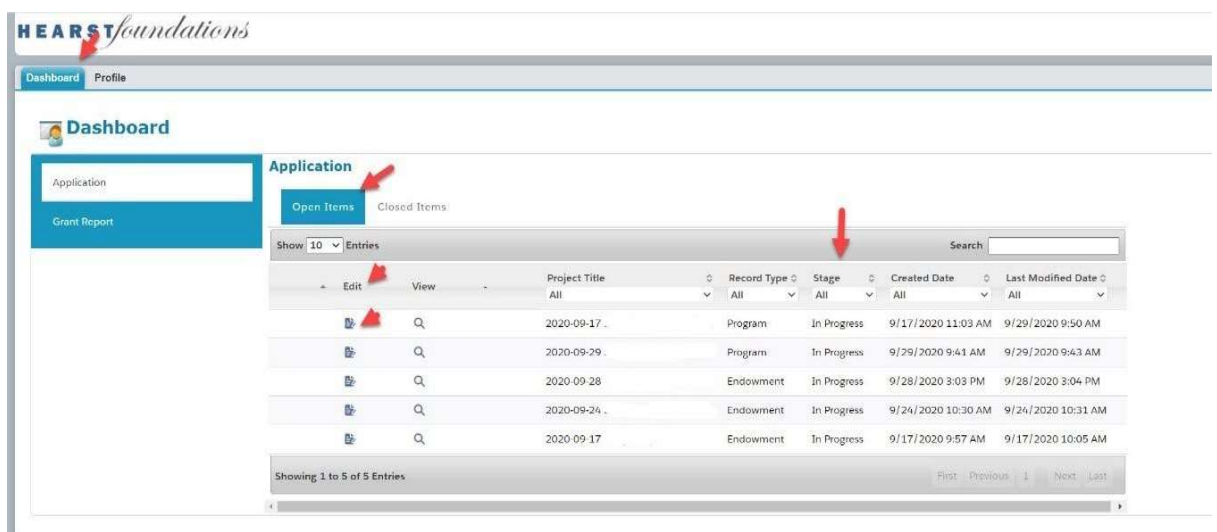
14) **APPLICATION SUBMISSION**: Click the Review/Submit button to complete the application.

From the **Review/Submit** page, applicants can return to application, print and submit the application. An error message will appear at the top of the page if the application is submitted and information is missing. The tab and specific error will be listed so applicants can return to the field(s) to make updates.

15) While not all fields are required for submission, they are required for the review process, so applicants should complete all sections in full except where noted.

If unable to submit, applicants should check the top of the page where any **errors or incomplete fields** will be listed in a red bar. Applicants should complete the missing sections or attach missing items to proceed.

16) Once the application is submitted, the **Dashboard** should reflect the change in the **Stage** column, updating to **Submitted** and a confirmation email will be sent to the email address provided.

✓ The **Profile** section on the upper left of the screen (includes the tabs **Contact** and **Organization**) has been completed.

✓ All fields (both required and relevant non-required) have been completed.

✓ The **Primary Contact** tab has been updated with the executive leadership of the applicant's organization, including email address.

✓ The **Benchmarks** tab has been populated with three Benchmarks/Goals (<u>Does not apply to Endowment applicants.</u>)

✓ All required attachments have been uploaded (including the Institutional Endowment Report for Endowment applicants).

After Submission of the Grant Application:

➢ Upon a successful submission, applicants will receive an email confirmation to the email address provided, and the **Stage** column on the **Dashboard** will update to **Submitted.**

➢ Further updates regarding the status of an application will be via email and will be posted on the portal on the **Dashboard** (login required) in the **Stage** section.

Support:

The Online Portal has recently been changed due to the retirement of the former version of the portal. It has also been extensively tested to identify and eliminate issues. If an applicant runs across issues, he/she should attempt to troubleshoot and try alternative devices or browsers (for example, the most recent versions of Chrome or Firefox are recommended for use).

If applicants are having difficulties applying or require troubleshooting, please email support.ny@hearstfdn.org if located East of the Mississippi River and support.sf@hearstfdn.org if located West of the Mississippi River.

If an applicant forgot his/her **password**, he/she should click on **Password Assistance** on the **Login** page. The applicant will be prompted to enter his/her username to reset a password. As soon as you receive the email, click on the link or cut and paste it into a browser so you can create a new password. The applicant should record this new password for further use.

Please use instructional video on the "**How to Apply**" page on the Hearst Foundations' website (https://www.hearstfdn.org/applying-reporting/how-to-apply) for more password set-up assistance.

If an applicant forgot his/her **username**, please email support.ny@hearstfdn.org if located East of the Mississippi River and support.sf@hearstfdn.org if located West of the Mississippi River.