



## Instructions for the Hearst Foundations' Online Grant Application

**NOTE: All applicants should read this document thoroughly BEFORE starting the application process or seeking assistance from the Hearst Foundations staff. It describes the steps necessary to complete the application and addresses potential questions**

### **Preliminary Steps:**

Using the links provided on the "How to Apply" page of the website, all applicants will need to follow the appropriate link from the Hearst Foundations' website to the Hearst Foundations' Online Grant Application.

Depending on the nature of the request, applicants will select either the Endowment or Program Application. All non-endowment requests should select Program. The links take applicants to the portal to begin the **Eligibility Evaluation**. This short series of questions will determine whether an applicant meets minimum funding criteria based on the Hearst Foundations' funding guidelines.

### **How to complete the Application:**

If the Eligibility Evaluation indicates that an organization is eligible to apply, the applicant will be directed to continue to the application portal. The below instructions will help applicants complete the application.

- 1) Using the link for first-time users entitled "Click here to Register," applicants should complete all fields to create a contact profile that includes User Name and Password. Applicants should record this information as it will be required for subsequent entries into the online grant application system.
- 2) When the system asks "Are you sure you want to save," select "OK."
- 3) Upon registering, the applicant will be prompted to log in. After logging in, the applicant will be directed to the application.
- 4) **Immediately upon entering into the application, complete the "Project Title" field and click "Save."** This will create a record of the application in the system and allow applicants to navigate to other parts of the portal with the ability to return to an application for **three months**.

**Note:** The text entered as "Project Title" will be overwritten by internal nomenclature as soon as it is saved, so do not be concerned about the content or wording of your "Project Title" - the important factor is to have created a record in the system.

- 5) Applicants should proceed to review all of the questions before starting to complete the rest of the fields.

- 6) After entering a Project Title and saving it to create a record in the system, and reviewing all of the fields, now applicants should begin to complete the application fields. Please use **Help Text** for further instructions for each field, noted with question marks and visible when hovering over the question marks with the mouse.
- 7) Please save early and often. Saving enables applicants to navigate from page to page using “Next” and “Previous” buttons. Saving also prompts error messages, which will appear in red at the top of the page and provide helpful guidance on where to edit responses.
- 8) Upon saving, the following error message may appear: “We were unable to process your request, please contact the administrator.” If this occurs, please switch to complete the application using a different browser (Chrome, Safari, Internet Explorer etc) or different device. The system has been tested to minimize difficulties in applying. If an applicant runs across issues, he/she should attempt to troubleshoot and create alternatives relevant to his/her device and his/her organization’s security parameters, which are generally the source of the issue, not the application portal.
- 9) When creating the Proposal Narrative, applicants should use the suggested headers for each section, as instructed on the application. Due to the Proposal Narrative field’s small size, 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.
- 10) If applying in our Education category, an applicant will have additional fields to complete relating to the student population and academic statistics. If applying for Culture, Health, or Social Services, applicants should follow directions to skip the Education fields and move to the extreme bottom of the application to complete further information.
- 11) "Contact Role" fields will appear at the extreme bottom of the page upon saving the application. Applicants can click on "New" to add the contact information of the executive leadership of their organizations. This will lead applicants to a new page. Applicants should click on the magnifying glass icon and search by last name. If the key person is not in our system, he/she will need to be added by clicking "New" to the right.
- 12) For Program requests, three Benchmarks/Goals need to be completed at the bottom of the application in the Benchmarks section, using the “New” button. If Benchmarks are not visible, hit Save and then scroll to the bottom of the application page. Benchmarks should be measurable in number or percentage terms and match the duration of your grant term.
- 13) After completing the items at the bottom of the application, save and click “Next” to advance to the attachments page.
- 14) On the attachments page, attach the following documents as PDF, Word or Excel attachments (max attachment size is 5MB):
  - a. Organizational operating budget for the previous and current fiscal years and explanation of any deficits;
  - b. Program budget (if relevant) for the previous and current fiscal years;

- c. List of 10 largest foundation and corporate grants for the previous and current fiscal years, for organization and program (if applicable). Please include funder name and amount;
  - d. Names and primary affiliations of officers and board members;
  - e. Current IRS documentation certifying that the applicant is tax-exempt under Section 501(c)3 of the Internal Revenue Code and not a private foundation under Section 509(a);
  - f. Most recent Audit
  - g. Institutional Endowment Report (Endowment applicants only). This is downloaded from the Attachments page. Please complete and re-upload.
- 15) After uploads are completed, applicants should click on “My Profile” on the top right side of the page to complete all fields in the “My Organization” tab. Applicants will need their EIN numbers to complete this section.
- 16) When all of “My Profile” (the tabs “My Contacts,” “My Password” and “My Organization”) is completed, applicants should return to the “Dashboard” and select “Request” (not “Report”) and choose “Edit” under Actions to return to the application in process.
- 17) Once all fields are reviewed for completion and accuracy, click save and proceed to page two to confirm all attachments have been properly uploaded.
- 18) Submissions can be made from the Attachments page (second page), where the “Submit” button is found.
- 19) While not all fields are required for submission, they are required for our review process, so please complete this in full except where noted. If unable to submit, check the top of the page to read if error messages are listed in red.
- 20) The system has been tested to minimize difficulties in applying. If an applicant runs across issues, he/she should attempt to troubleshoot/create alternatives. If an applicant is unable to solve a problem, he/she can email [support.ny@hearstfdn.org](mailto:support.ny@hearstfdn.org) if located East of the Mississippi River and [support.sf@hearstfdn.org](mailto:support.sf@hearstfdn.org) if located West of the Mississippi River.

**Submission Checklist: Applicants are ready to submit when...**

- ✓ The My Profile section on the top, right of the screen (includes the tabs “My Contact,” “My Password,” and “My Organization”) has been completed
- ✓ All fields (both required and relevant non-required) have been completed
- ✓ Leadership Contacts have been created on the bottom of page one under Contact Roles
- ✓ Three Benchmarks/Goals (for Program applicants) have been created at the bottom of page one
- ✓ All required attachments have been uploaded (including the Institutional Endowment Report for Endowment Applicants)

### **Final Steps and Follow-up:**

- If the above checklist items are completed, click the "Submit" button on the Attachments page and a confirmation page will appear. Please look for any error messages in red. Applicants will receive an email confirmation to the email address provided in "My Contact."
- Further updates regarding the status of an application will be via email and will be posted on the portal under Dashboards Requests (login required).

### **To have the most efficient application experience possible, applicants should:**

- Use these directions throughout the process.
- Complete the "Project Title" field immediately upon entering the application and click "Save." This will create a request in system and enable applicants to return to complete the application for three months.
- 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 of the application page - "Previous" and "Next" - to advance in the application. Applicants must save the application for these buttons to appear.
- Hover (using the mouse without clicking) over the question marks next to data fields to see help text on the requested information.
- Complete every field with the most relevant answer.
- Enter numbers only in fields requesting a dollar amount. Please do not include any non-numeric characters.
- Note character limits. The suggested length is stated in the help text.
- Compose, spell check, and save any lengthy answers in a word processing program and then copy and paste them into the application field.
- Focus on the red: Required fields will display a red bar on the left side of the input field. Error messages will be displayed in red on the top of the page upon saving information.
- Use the "Preview" button to review the application before submission. The Preview page will display input answers and blank fields for incomplete answers. When complete, the preview page should be entirely populated.

- If the primary contact information from an organization should change, please log in to update the information so Hearst Foundations' records remain current.