



ONLINE GRANT APPLICATION INSTRUCTIONS

Please read this document entirely before starting an application.

Preliminary Steps:

Applicants may require the assistance of other departments within the organization to compile information, including mandatory attachments.

Applicants must select the relevant application link for the grant request:

- **Endowment Application:** The Hearst Foundations only consider Endowment requests in cases where organizations have existing endowments.
- **Program Application (Non-Endowment):** The Hearst Foundations fund Capital, General Support, Program, Research and Scholarship grants.

Applicants must take the Eligibility Quiz:

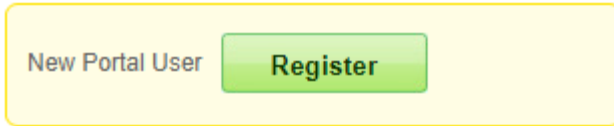
This short series of questions will determine whether an applicant meets minimum funding criteria based on the Hearst Foundations' funding guidelines and funding limitations.

If the Eligibility Quiz indicates that an organization is eligible to apply, the applicant will select **Continue** to create a grant application. For more information on the Hearst Foundations' funding limitations, visit www.hearstfdn.org.

How to Register and Apply:

After completing the Eligibility Quiz, an applicant will log in if a returning user, or create a new account if a first-time user.

New Applicants (First-Time Users)



New applicants must register and complete all fields to create a profile that will include username and password. Upon registering, the applicant will be prompted to log in. After logging in, the applicant will be directed to the application.

Returning Users


If an applicant has created a login in the past, the existing credentials can be used to access the application. All applications must be created from the links on the **How to Apply** page on the Hearst Foundations website. After logging in, the applicant will be directed to the new application.

Login screen:

A light blue rounded rectangle containing a login form. It has two input fields: "Username" and "Password". Below the fields is a green "Login" button and a blue link that says "Can't access your account?".

Important: Note the Username and Password for future access to applications and reports

Steps to Completing the Application:

- 1) **Immediately upon entering the application, an applicant should 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 and work in increments with the ability to return to an application for *three months*.
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** for further instructions, which will be made visible by hovering over  icons with the mouse.
- 3) Applicants should use **Save** and **Continue** to navigate through each tab.
- 4) 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.
- 5) 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.
- 6) If applying in the **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.

- 7) All applicants will need to complete the **Leadership Contact** tab to add the Executive Leadership of the organization. Applicants should follow the instructions provided on the page to identify an existing contact or create a new contact.

The screenshot shows a multi-step application process with five tabs: 1. Application, 2. Leadership Contact (active), 3. Benchmarks, 4. Attachments, and 5. Review & Submit. A green 'Continue' button is located below the tabs. Below the 'Continue' button is a red arrow pointing to a light blue box titled 'Add Contact Information for Organizational Leadership'. Inside this box, there is a section for 'Contact Role Details' with a 'Primary' checkbox, a 'Contact Name' field with a search icon, a 'Role' dropdown menu, an 'Add' button, and a 'Grant portal access' checkbox with a help icon.

The screenshot shows a web browser window titled 'Search Object - Google Chrome' with the URL 'https://test.foundationconnect.org/GrantsManager/Pages/V3/Portal/S...'. Below the browser window is a light blue box titled 'Search Object'. It contains a search input field, a green 'Go!' button, and a green 'New' button. A red arrow points to the 'New' button.

- 8) When adding the details of the **Leadership Contact** of the organization, applicants need to select the most appropriate salutation from the Salutation dropdown menu and provide first and last name, as this information will be used for grant agreement letters if the grant is awarded.

- 9) Applicants must then select a role and check the box indicating **Primary Contact** role, which designates the person as the leadership of the organization. The new contact should then be visible under **Contact List** on the **Leadership Contact** tab. Applicants should confirm that the Primary check box is checked.

The screenshot shows the 'Leadership Contact' tab selected in a five-step navigation bar. Below the navigation bar is a 'Continue' button. The main content area is titled 'Add Contact Information for Organizational Leadership'. Under the 'Contact Role Details' section, there is a 'Primary' checkbox with a red arrow pointing to it. Below this are fields for 'Contact Name' (with a search icon), 'Role' (a dropdown menu), and a 'Grant portal access' checkbox with a help icon. An 'Add' button is located at the bottom left of the form.

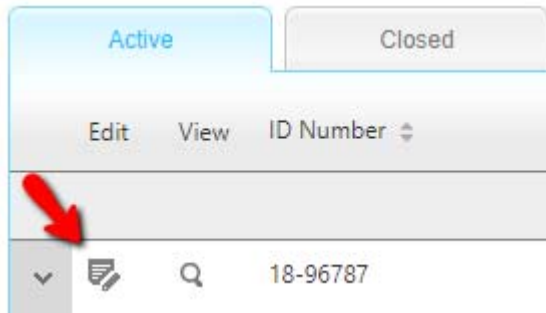
- 10) For Program requests, applicants will need to complete information on the **Benchmarks** tab. Using the **New** button, applicants need to create three specific Benchmarks to share how the organization will measure the success of the requested initiative. Benchmarks should be measurable in number or percentage terms and match the duration of the grant term. Examples are provided on the portal.

The screenshot shows the 'Benchmarks' tab selected in the navigation bar. A red arrow points to the 'Benchmarks' tab, and another red arrow points to a 'New' button. Below the 'New' button is a text instruction: 'Please provide three goals (benchmarks) for the proposed program. The goals should correspond to how your organization will measure the success of the program. Please be specific as these benchmarks will serve as the basis for any required post-grant reporting. To enter each benchmark, click New. Enter your information in the appropriate fields. Save your record. Then repeat for each additional benchmark.' Below the text is a table with columns: 'Description', 'Number Goal', 'Percentage Goal', and 'Action'. A 'Continue' button is located at the bottom left of the form.

- 11) All applicants will need to complete the **Attachments** tab, by attaching the following documents as PDF or Excel attachments:
- a. Most recent Audit (990s are not accepted)
 - b. Organizational Budget for the previous and current fiscal years and explanation of any deficits
 - c. Program Budget (required for all applications, except General Support and Endowment) for the fiscal year in which funds are being requested and prior fiscal year
 - d. List of 10 largest Foundation and Corporation Grants for the previous and current fiscal years, for organization and program (if applicable). Please include funder name and amount
 - e. List of Board Members, names and primary affiliations
 - f. 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).
 - g. Institutional Endowment Report (Endowment applicants only). This is downloaded from the Attachments page. Please complete and re-upload.
- 12) After uploads are completed, applicants should click on **Profile** on the top right side of the page to complete all the required tabs (**Contact Info** and **Organization**). Applicants will need their EIN numbers to complete this section.



- 13) When all of the **Profile** section (the tabs **Contact Info** and **Organization**) has been completed, applicants should click on the **Dashboard** link on the upper right and select the **Active** tab on the **Dashboard** page to identify the open application and click the **Edit** icon on the left to return to the application in process.



- 14) On the **Review & Submit** tab, applicants should review, print and submit the application.



- 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 an applicant has submitted, the Dashboard should reflect the change in the **Status** column, updating to **Submitted**.

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


- ✓ The **Profile** section on the upper right of the screen (includes the tabs **Contact Info** and **Organization**) has been completed.
- ✓ All fields (both required and relevant non-required) have been completed.
- ✓ The **Leadership Contact** tab has been updated with the executive leadership of the applicant's organization.
- ✓ The **Benchmarks** tab has been populated with three Benchmarks/Goals (Does not apply to Endowment applicants).
- ✓ All required attachments have been uploaded (Including the Institutional Endowment Report for Endowment applicants).

After Submission of a Grant Application:

- Upon a successful submission, applicants will receive an email confirmation to the email address provided, and the **Status** 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 **Status** section.

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. 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.
- 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 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 fields to see **Help Text** 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 the Help Text.
- 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.
- Focus on the red: Required fields will display a red bar on the left 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 Leadership Contact visible and Attachments listed.

Support:

The Online Portal has recently been upgraded to improve the user experience of the Hearst Foundations applicants. 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 Safari). 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 **Can't access your account** on the **Login** page. The applicant will be prompted to enter his/her username to receive a temporary password (one-time use only) via email to the email address associated with the username. As soon as the temporary password is received, the applicant should use it to log in the portal and create a new password. The applicant should record this new password for further use.

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.

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