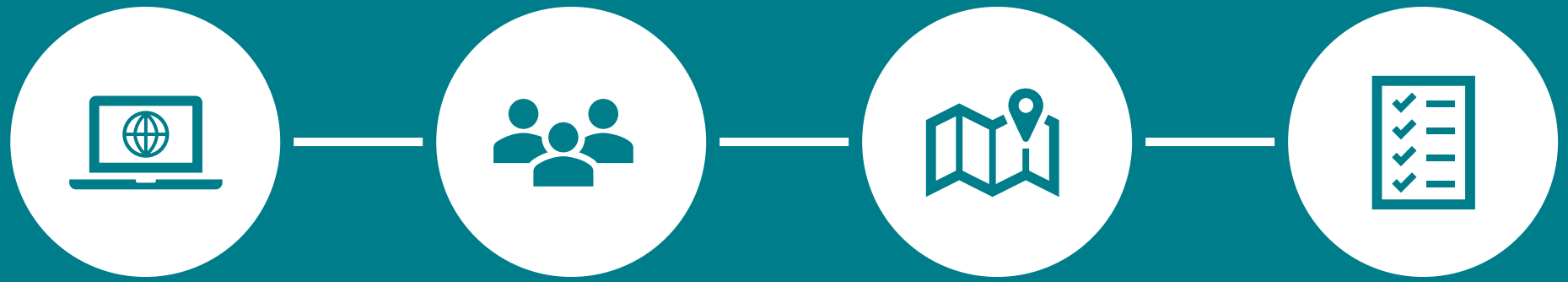
O'Neill Foundation

William J. & Dorothy K.

Fluxx "How-To" Guide
For Grant Applicants

AGENDA



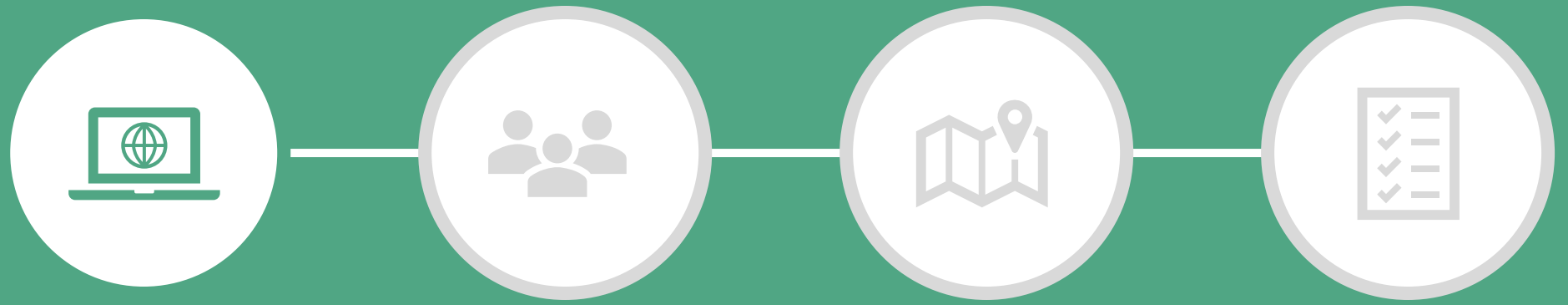
Logging In

Creating Profiles

How to use the Portal

The Grant Application

AGENDA



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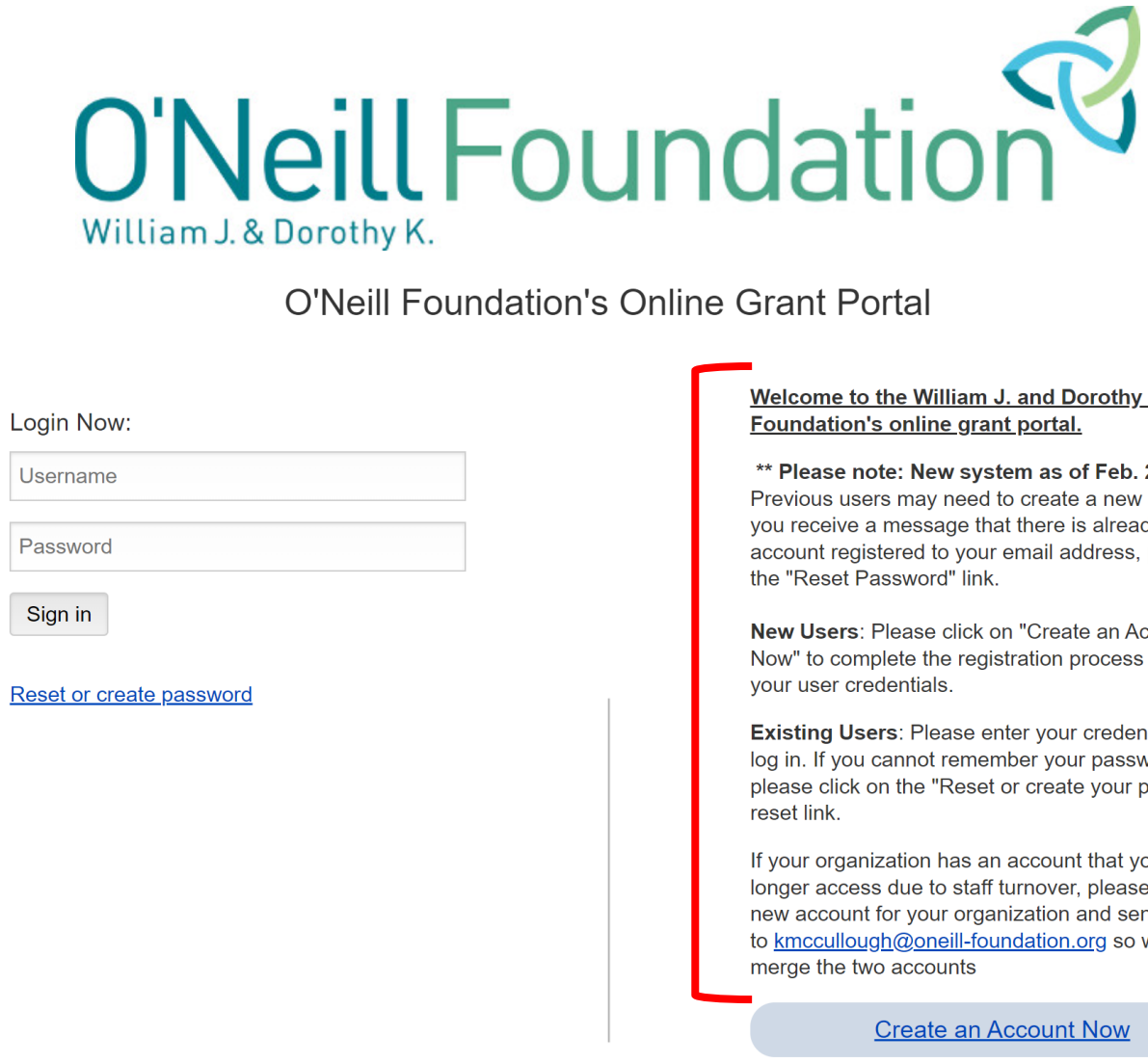
LOGGING IN

Follow the instructions listed within the grantee portal.

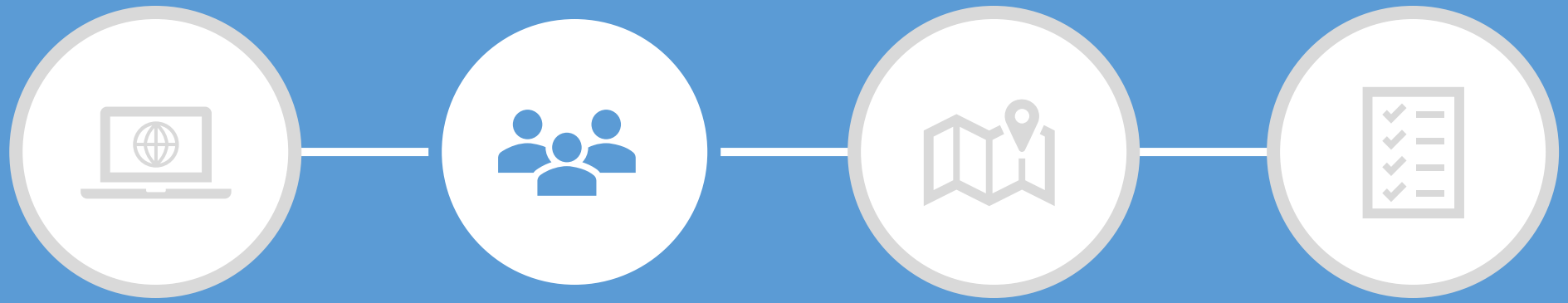
First, you'll need to decide if you're a New User or Existing User.

For Existing Users:



For New Users:

AGENDA



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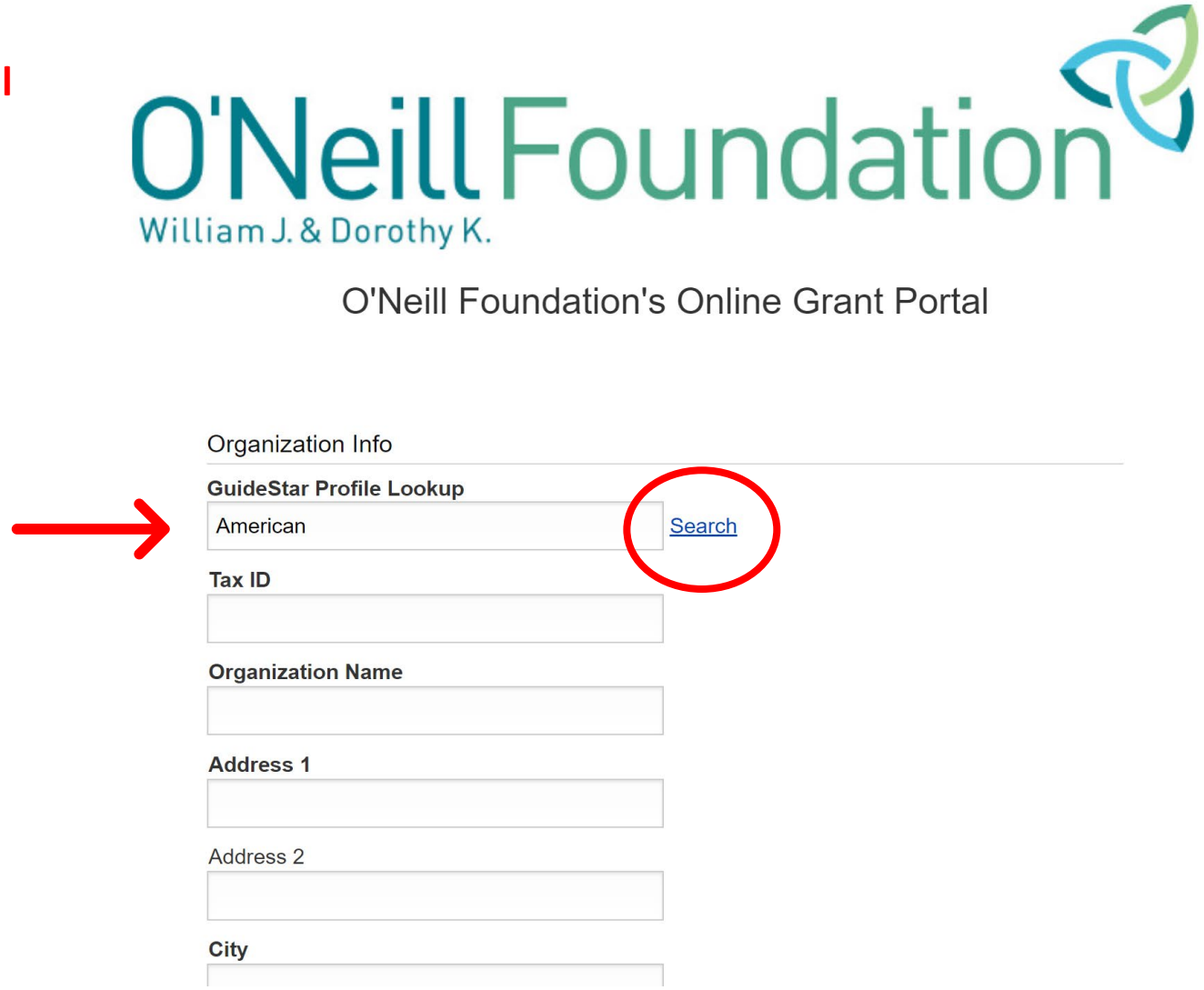
CREATING PROFILES

Enter your Organizational Info.

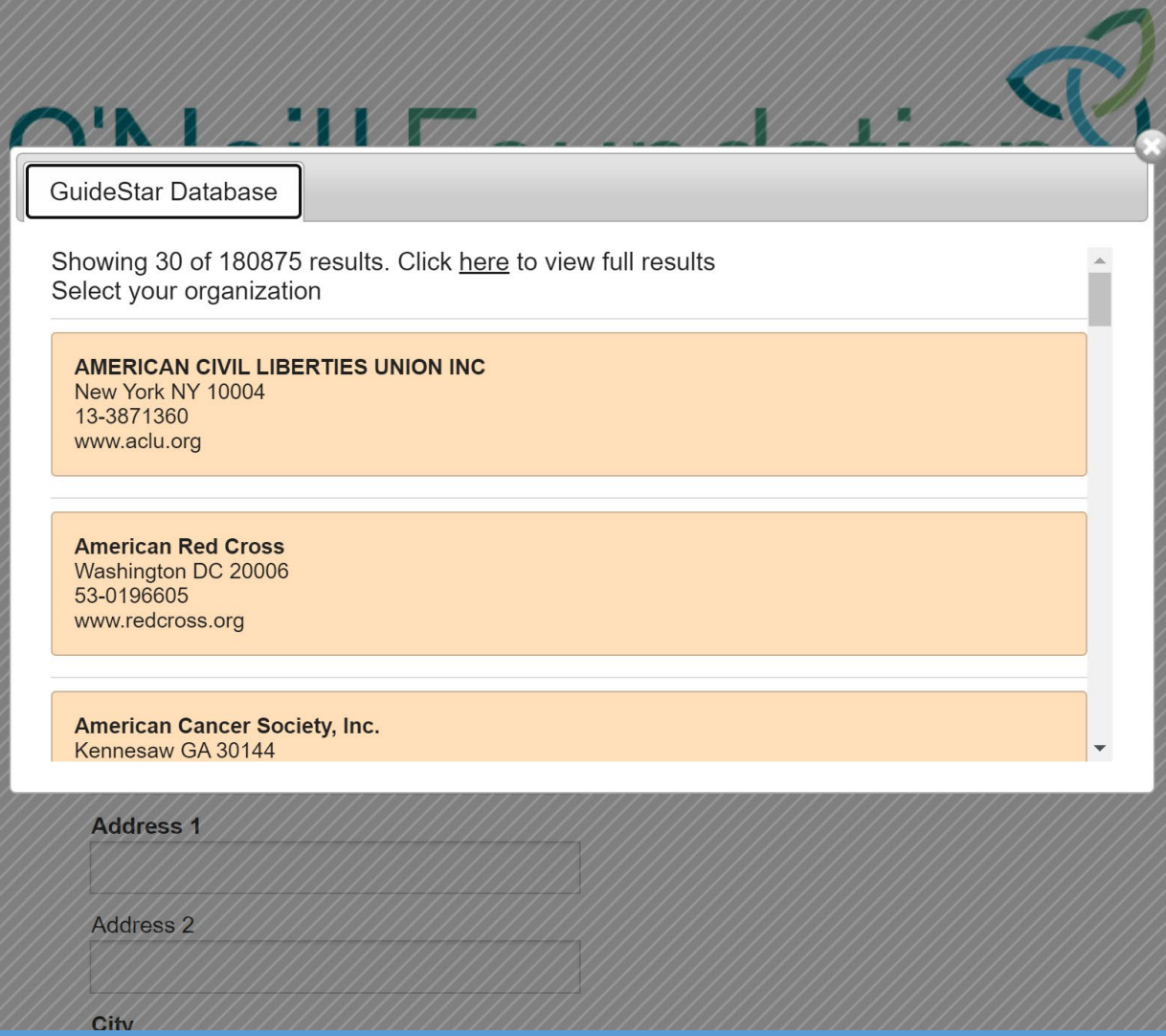
Everything in bold is required.



Enter your organization's name and click "Search" to look for your organization in the "GuideStar Profile Lookup".

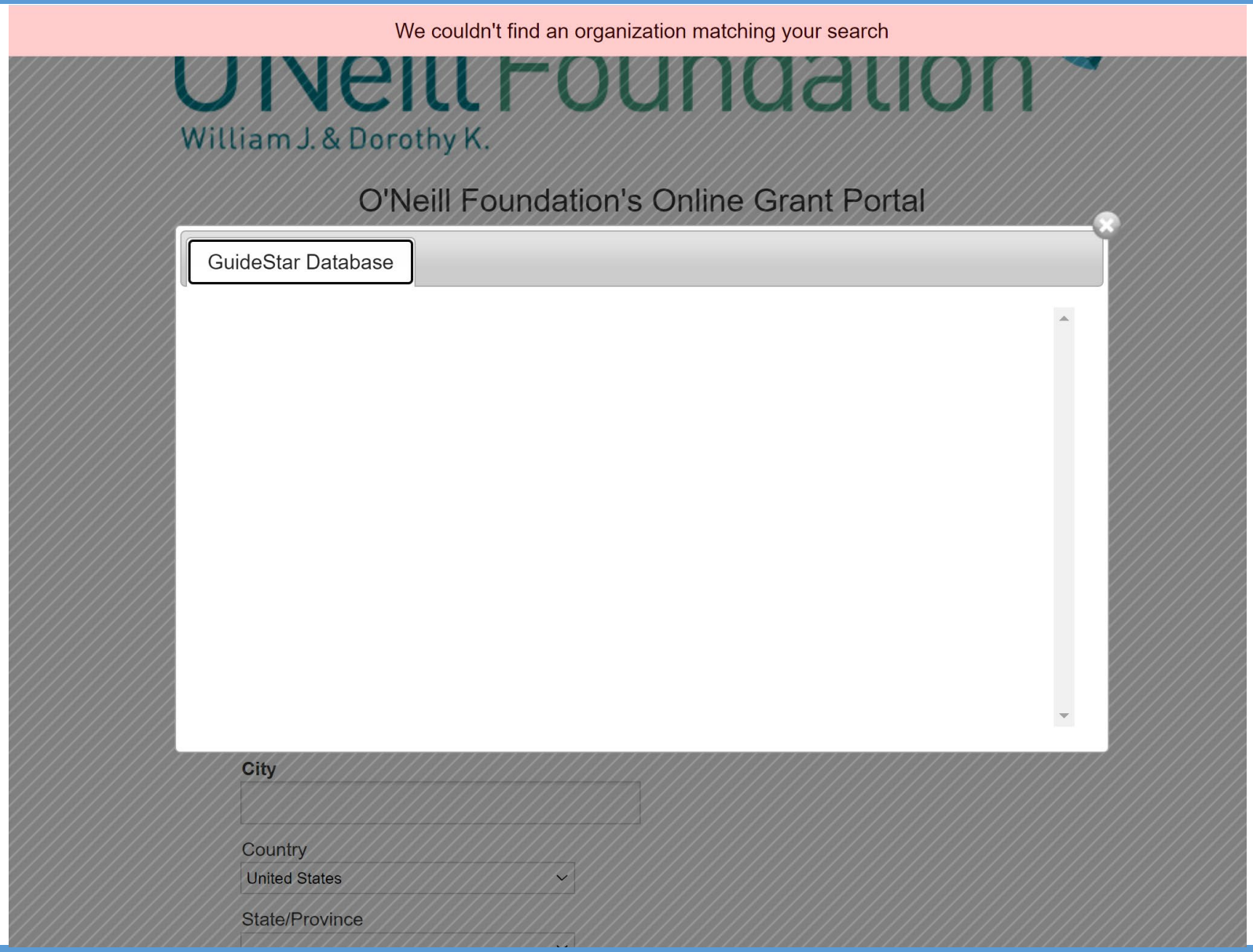
CREATING PROFILES

If the system finds your organization or the first word in your organization's name, you can select your organization from the list and the information will automatically populate on your record.



CREATING PROFILES

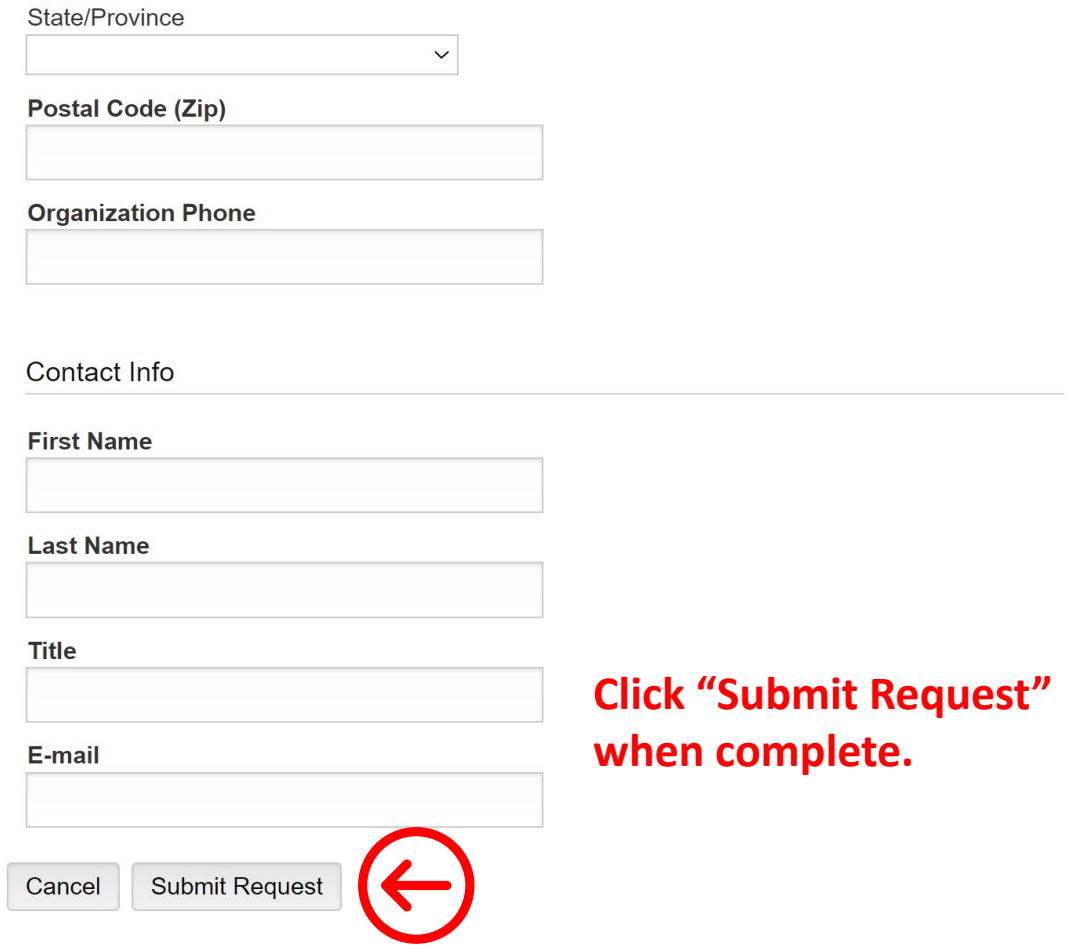
If the system is unable to find an organization matching your search, you will receive a prompt.



CREATING PROFILES

Enter your Contact Information.

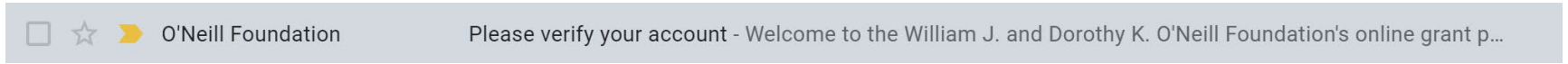
Everything in bold is required.



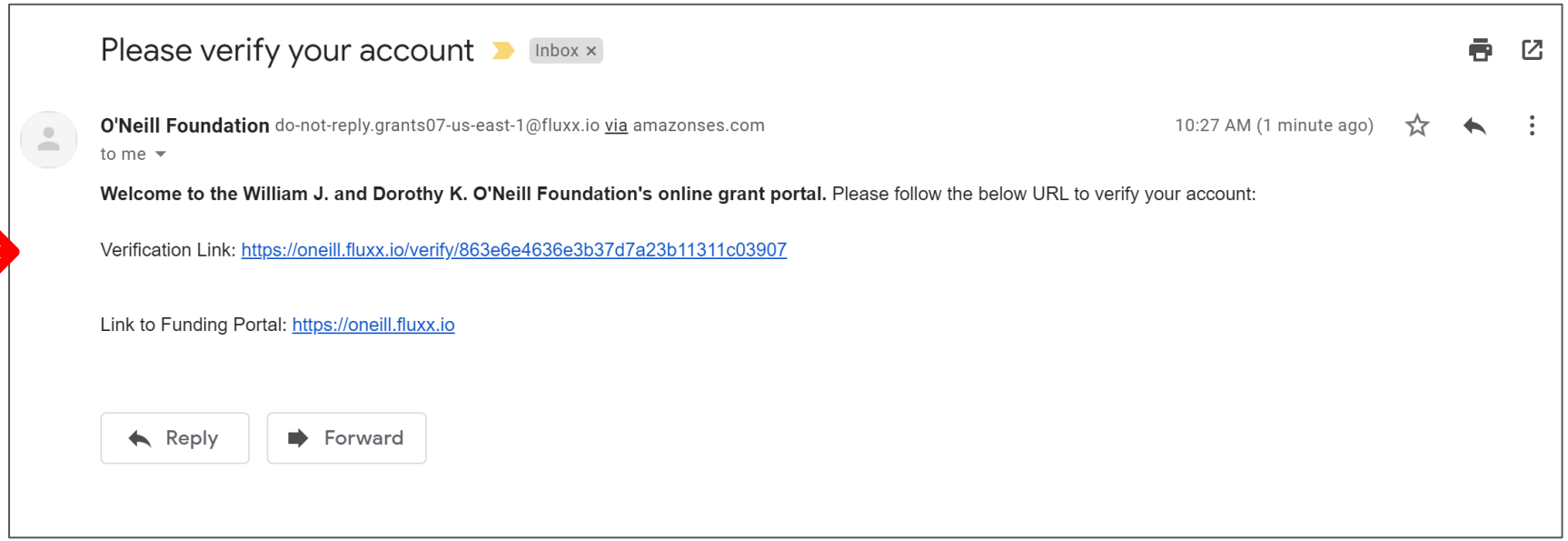
Click “Submit Request” when complete.

CREATING PROFILES

You will receive an automatically generated email to verify your account.



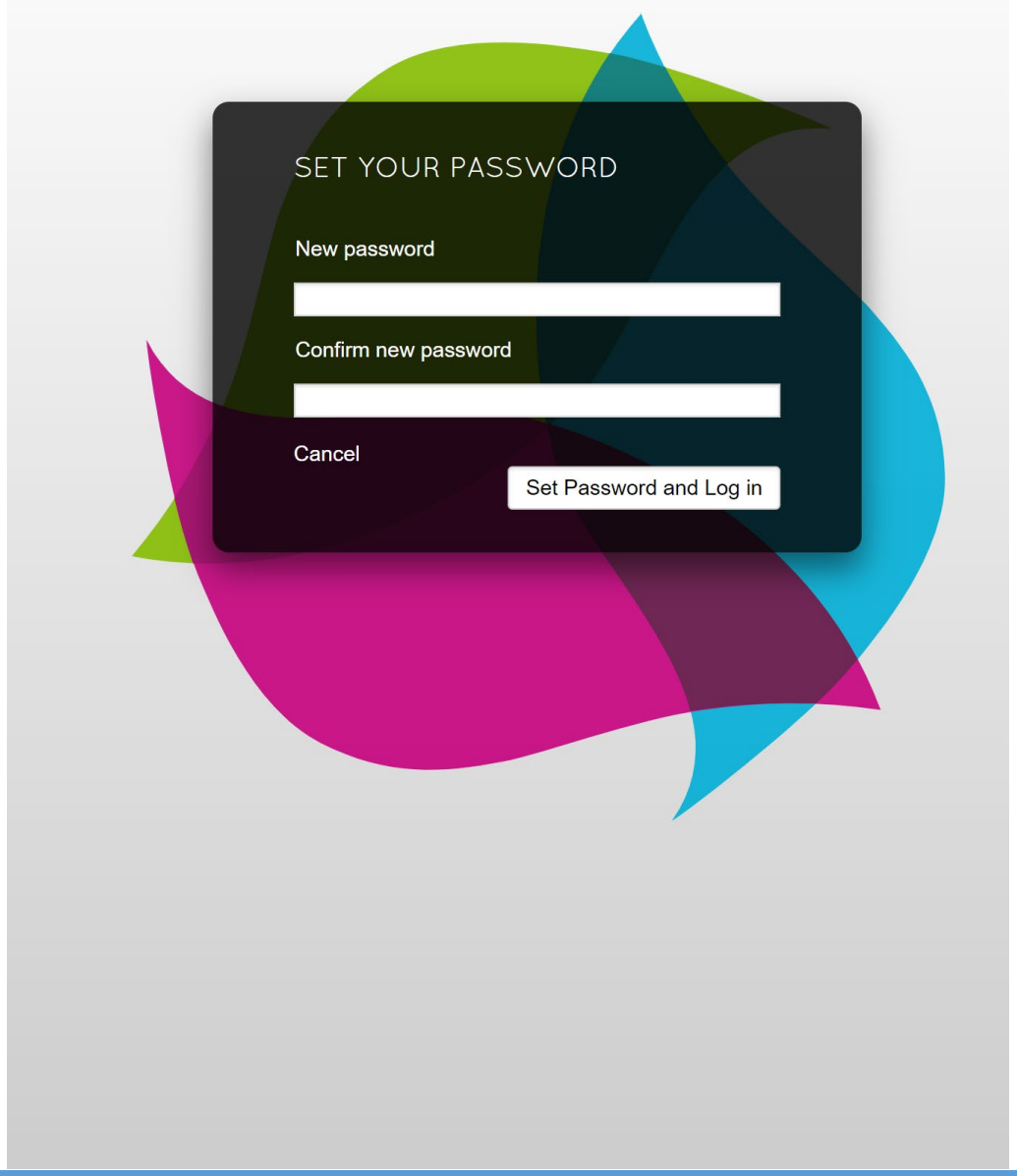
Click on the URL to verify your account.



CREATING PROFILES

You will be asked to create a new password.

The password must be at least 8 characters in length and requires at least one number (0-9).



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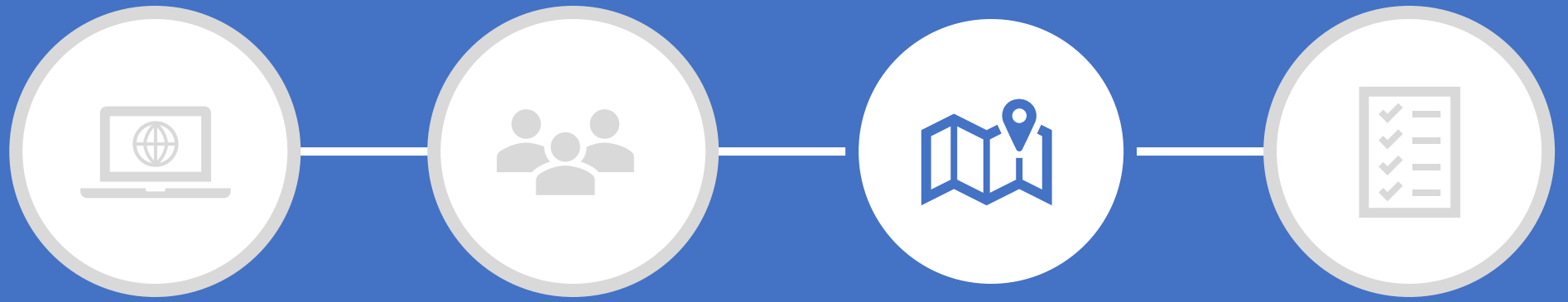

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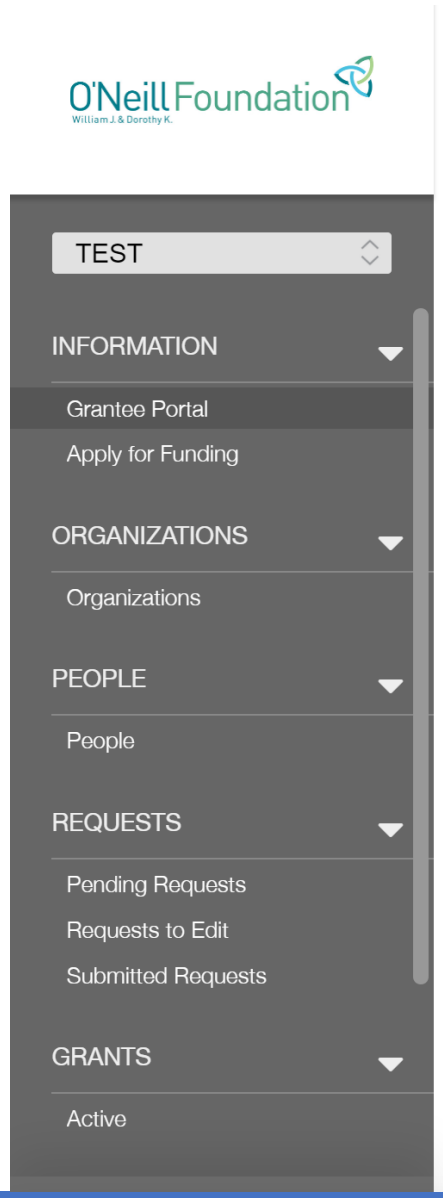
HOW TO USE THE PORTAL



Welcome to the O'Neill Foundation Grantee Portal!

From this page, you can…

- **Submit a proposal for funding**
- **Upload your signed grant agreement**
- **Review your current grants and report due dates**
- **Submit reports and other follow-up forms**
- **Monitor grant payments**

HOW TO USE THE PORTAL

The icons on the left-hand side are called "cards". When you click on the link beneath each card, you are accessing the following:

REQUESTS

- Pending Requests

  Once you have submitted a proposal, you can find a read-only version here.

- Request to Edit

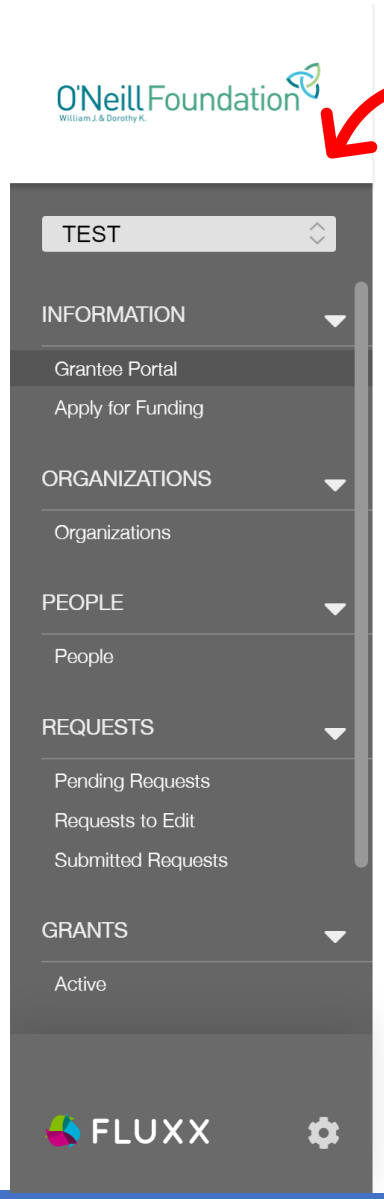
  If you have been invited to submit a proposal to one of our grantmaking programs, the application is available via this link.

  Additionally, if O'Neill Foundation staff have any questions about your proposal or would like a revision, you will receive an email alert to log in. You can find the proposal here, available for editing.

- Submitted

  Once you have submitted your proposal, the proposal appears in the Submitted Requests link.

HOW TO USE THE PORTAL



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- Submitted

  Once you have submitted your proposal, the proposal appears in the Submitted Requests link.

GRANTS

- Active

  After we have received the countersigned agreement, you can find a read-only version here via this link.

- Closed

  When the grant is complete and all payments made and reports approved, you can find the closed grants here.

GRANTEE REPORTS

- Reports Due

  Reports (to be submitted) for all active grants appear here until you have submitted them. You will receive reminders as the due date approaches.

- Submitted Reports

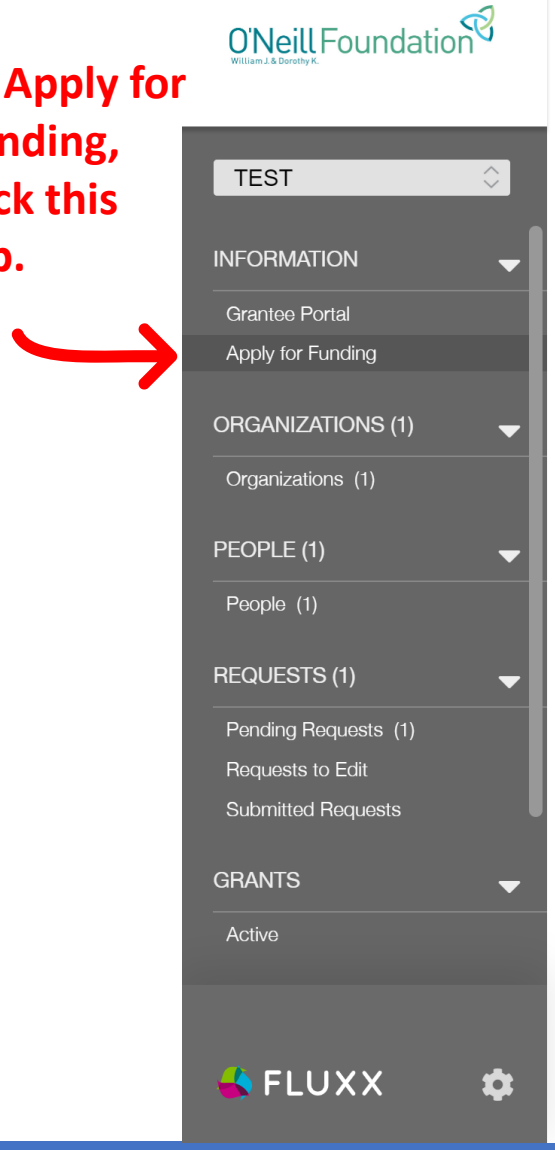
  Once you have submitted a report, you can find a read-only version here.

ADDITIONAL NOTES:

When done editing, always "Save" your request using the button at the top before returning to the main page. This ensures you can return to continue editing. Only click the "Submit" button when the page is complete. Once you submit, you will no longer be able to edit..

HOW TO USE THE PORTAL

To Apply for Funding, click this tab.



APPLY FOR FUNDING

The following information outlines our eligibility requirements – the same information that is listed on our website:

To apply for a grant, applicants should:

- Be either a tax-exempt 501(c)(3) organization or sponsored by an eligible fiscal agent.
- Serve families AND meet our eligibility requirements in one of our target communities.

For past grantee partners, you will not be eligible to re-apply until all of the following terms are met:

- Your grant term has officially ended
- Your organization received a grant close-out notification email.

For example, if you received a grant in Cycle 1 2021, your organization is not eligible to apply until Cycle 2 of 2022. If you received a grant in Cycle 2 2020, you will be eligible to apply as early as Cycle 1 of 2022, provided you have met our other eligibility requirements.

Geographic Focus

Open to New AND Past Grantees*

HI, FL, TX & VT: The Foundation will accept proposals from new applicants and past grantees* in the Big Island, HI; Greater Orlando, FL; Harris, Montgomery and Waller counties; TX; and Bennington and Rutland counties, VT.

Open to Past Grantees* / Closed to New Grantees

MD, OH, DC, & NY: The Foundation will only accept proposals from past grantees* in Anne Arundel County and Baltimore City, MD; Cuyahoga County, OH; Washington, DC (proper); and New York City, NY.

**A past grantee is defined as an organization that has received a Responsive grant dating back to 2013, the year the Foundation shifted its funding priority to strengthening families. Some past grantees may have received a grant from one of the Foundation's other grantmaking programs; however, they must have received a prior grant through our Responsive Grantmaking program to be eligible to apply to the Responsive Grantmaking Program.*

Grant Focus

Applicants must serve families, with preference given to applications with whole-family approaches that strive to meet the needs of the entire family unit.

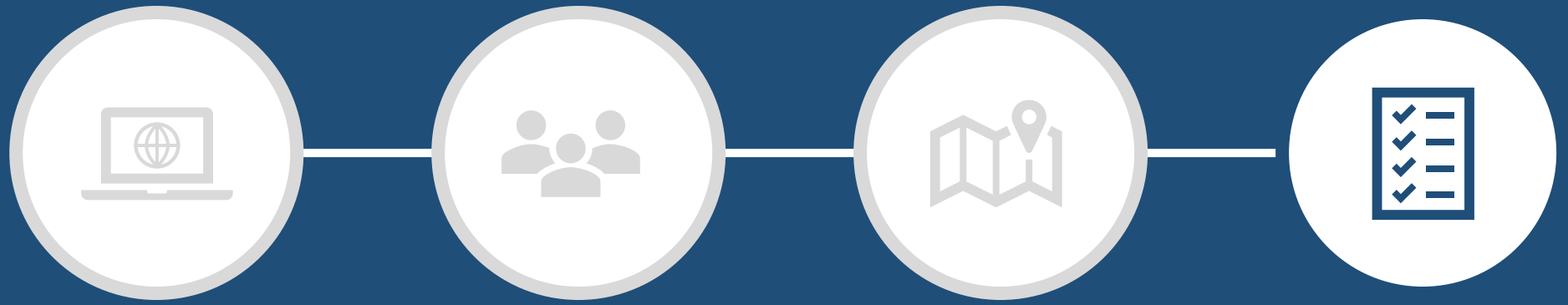
(NEW as of 2021) Given the prolonged public health and economic crises facing our communities, the Foundation also expects to prioritize organizations that help families meet basic needs.

Please contact our Grants Manager at kmccullough@oneill-foundation.org should need any technical assistance.

Apply for Responsive Grant

Click this button to access the Responsive grant application.

AGENDA



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THE GRANT APPLICATION

At the top of your Grant Application, you can access:

1. **Application Tips,**
2. **Responsive Grantmaking Program Information, and**
3. **A Table of Contents to navigate the grant application.**

The Grant Application begins with an eligibility quiz, accessible in the "Eligibility" section.

You will start here.

TEST
General Operating Support

ID: R-202203-09338
Program Lead:

Amount Recommended:

1 ▸ Application Tips

2 ▸ Responsive Grantmaking Program Information

3 ▾ Table of Contents

Funding Request Description
Organization Background and Proposal Narrative
Organization Budget/Financial Information
Documents

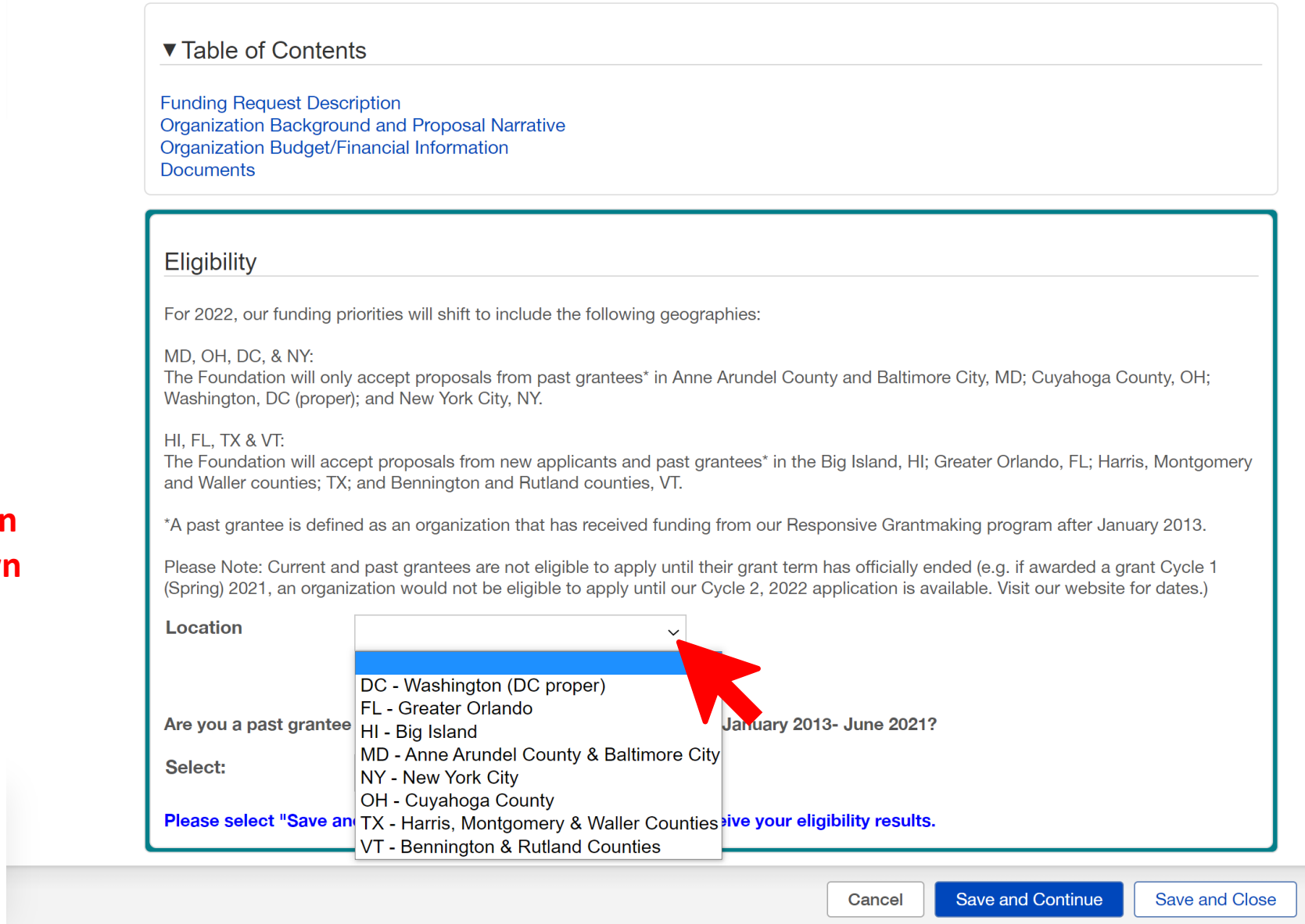
Eligibility

For 2022, our funding priorities will shift to include the following geographies:

MD, OH, DC, & NY:
The Foundation will only accept proposals from past grantees* in Anne Arundel County and Baltimore City, MD; Cuyahoga County, OH;

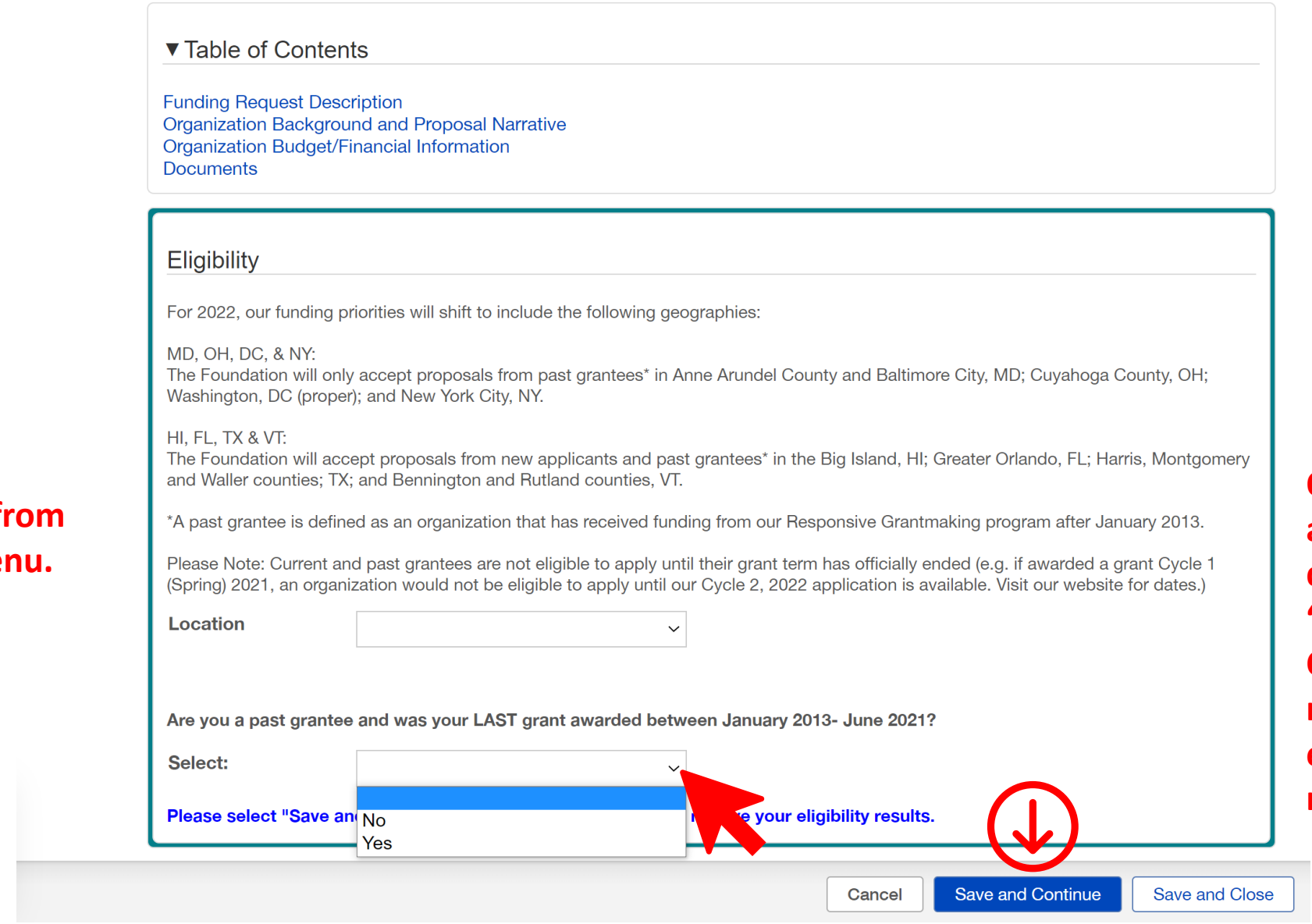
THE GRANT APPLICATION

Select your Location from the drop-down menu.



THE GRANT APPLICATION

Select a response from the drop-down menu.

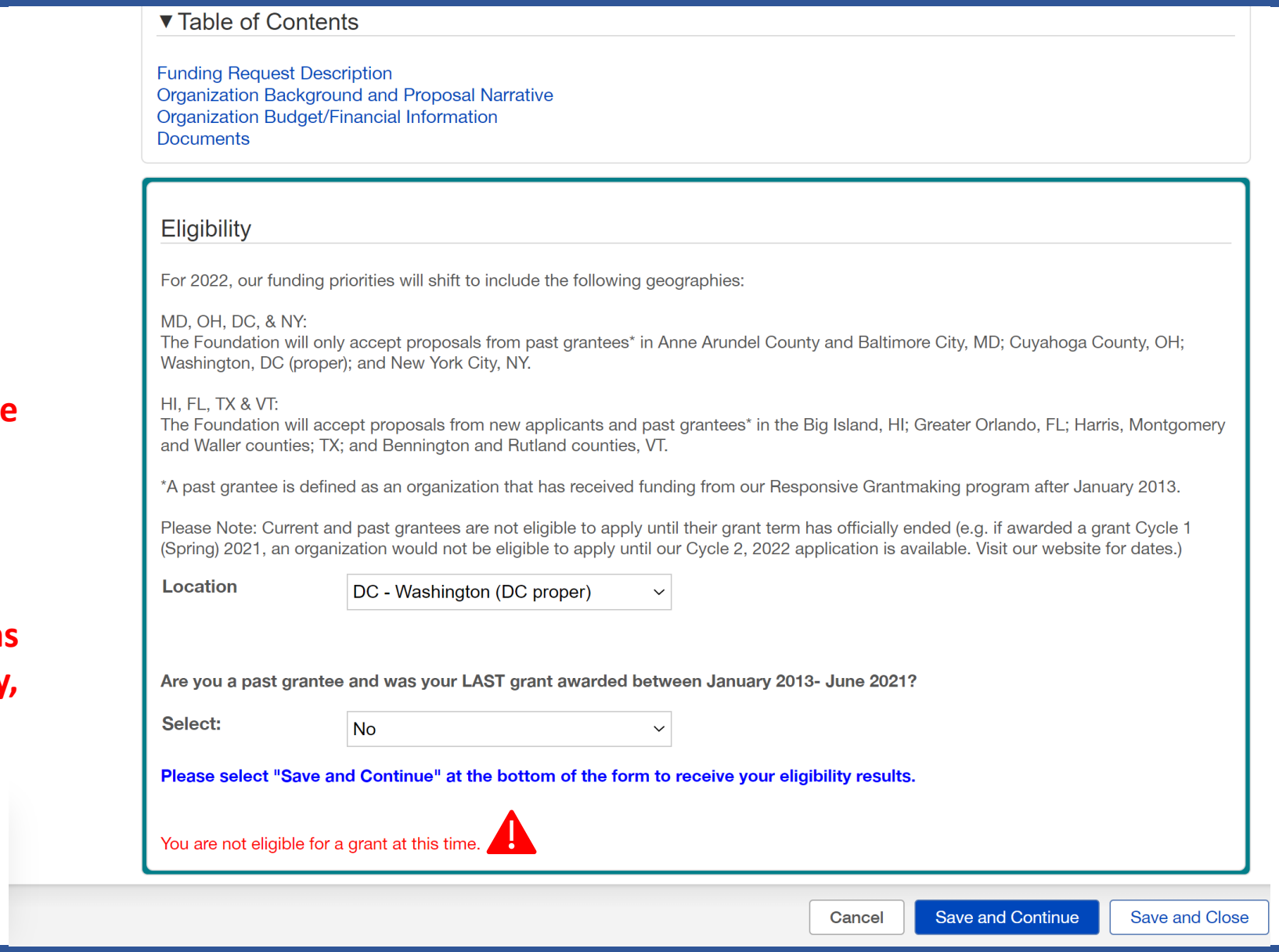


Once you've answered both questions, click "Save and Continue" to receive your eligibility results.

THE GRANT APPLICATION

If you are not eligible to apply for a grant, you will receive a message.

If you have questions about your eligibility, please contact Kara McCullough.

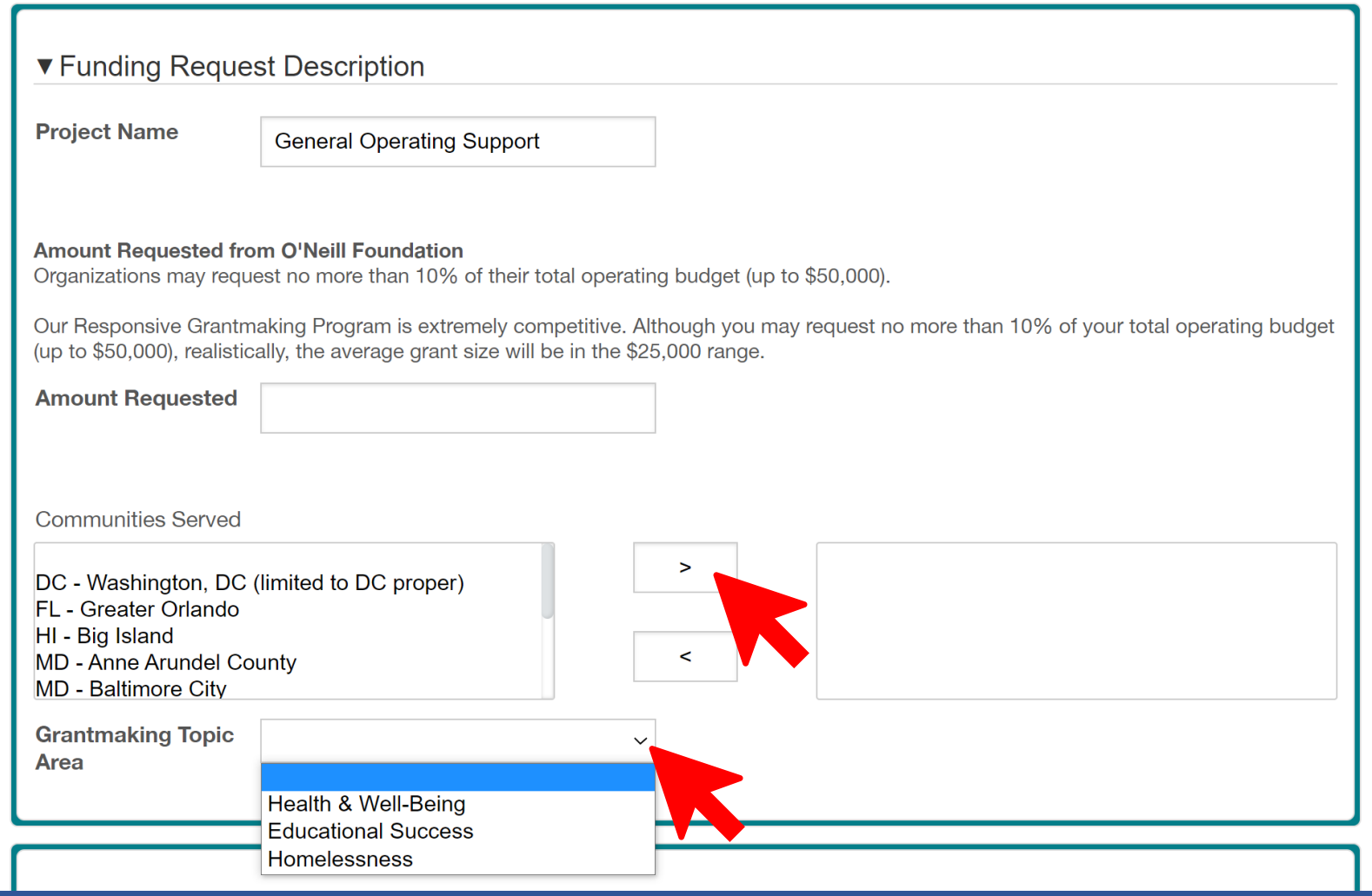


THE GRANT APPLICATION

Next, you'll be asked to complete a Funding Request Description.

Provide a Project Name, if not General Operating Support.

Enter the Amount requested.



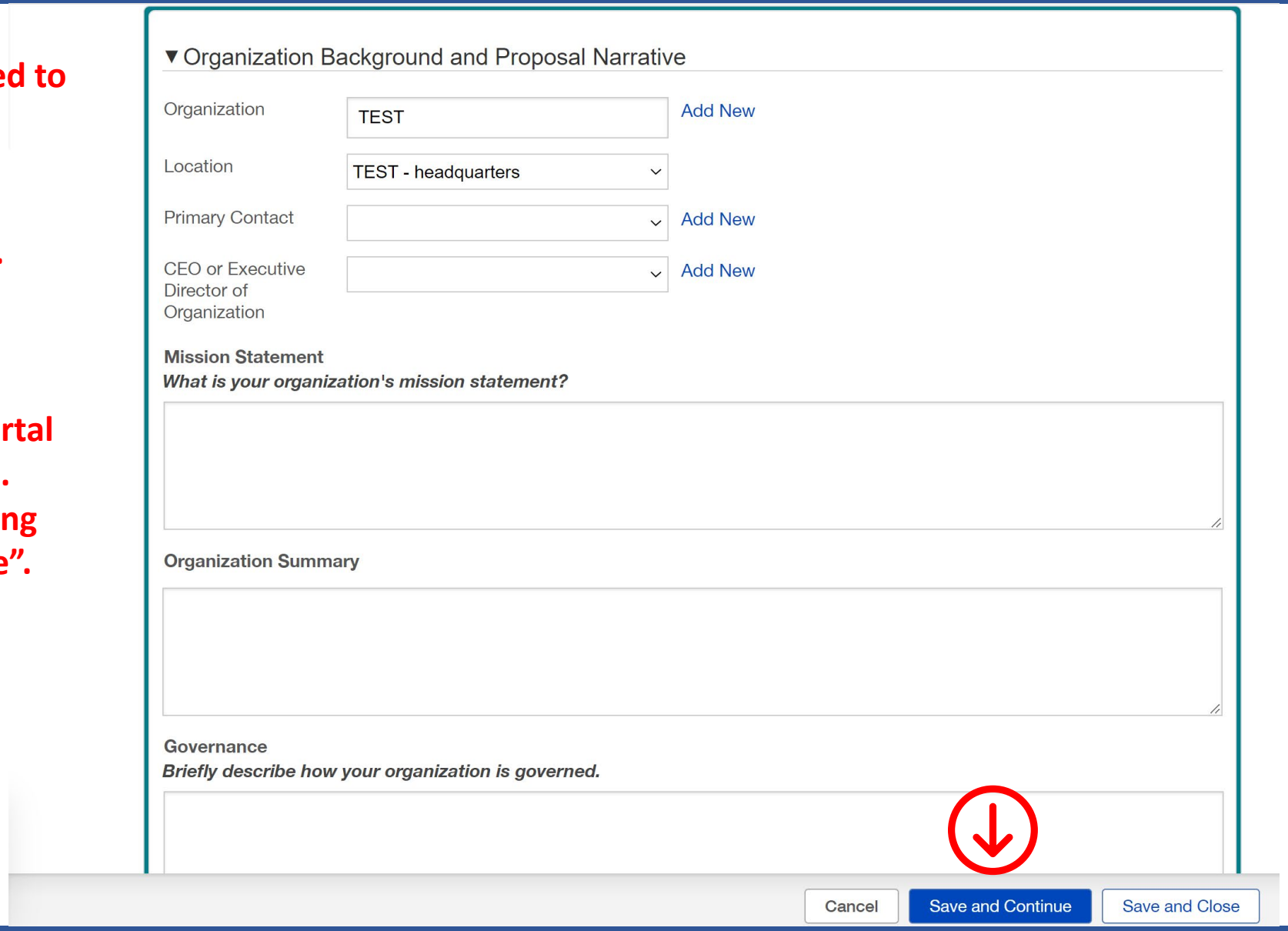
Select your Communities Served by moving them into the appropriate column.

Select your Grantmaking Topic Area from the drop-down menu.

THE GRANT APPLICATION

Next, you'll be asked to complete an Organization Background and Proposal Narrative.

Remember: The portal does not auto-save. Save often by clicking "Save and Continue".



THE GRANT APPLICATION

REMEMBER

The portal does not auto-save.

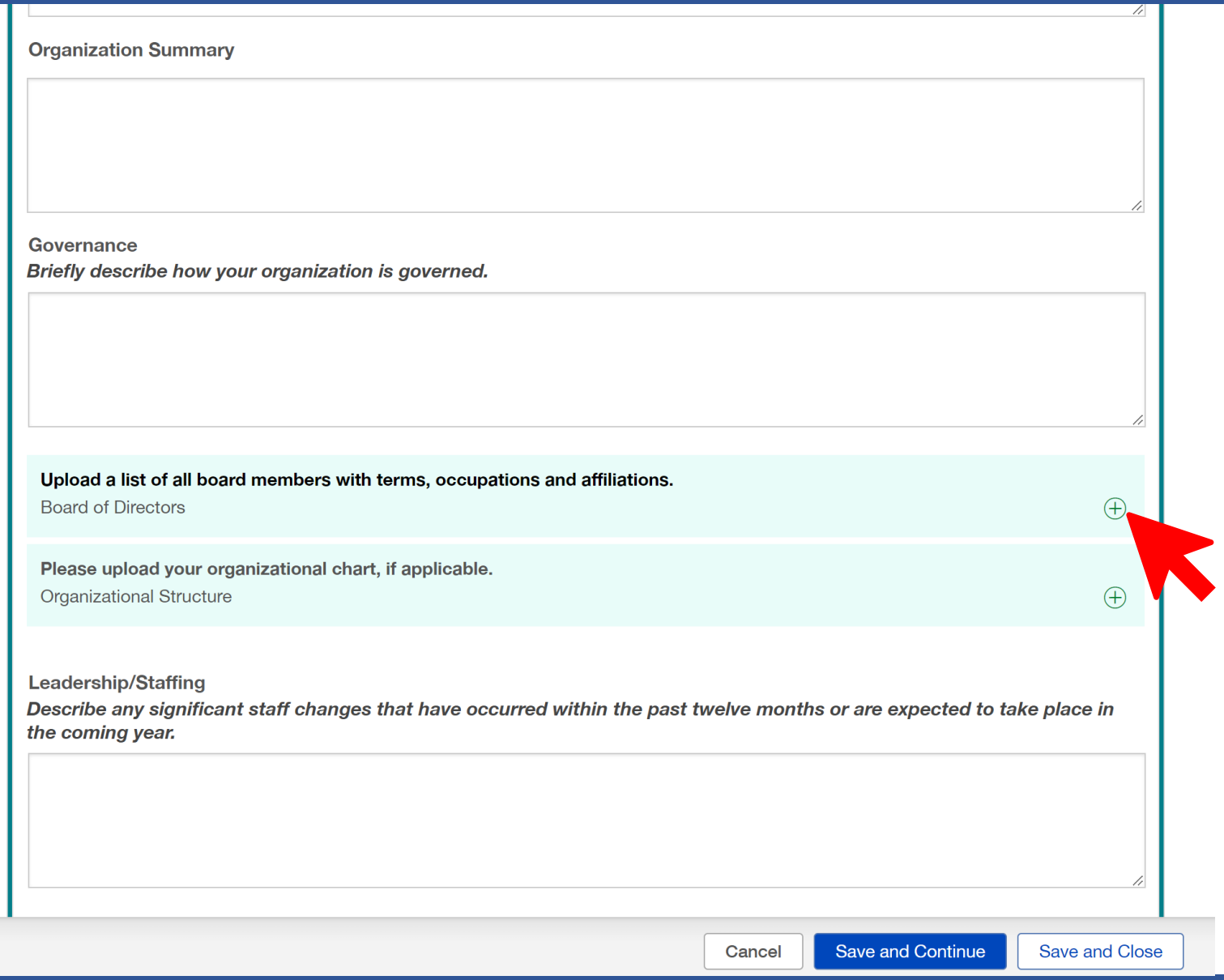
Save often by clicking

“Save and Continue”.

THE GRANT APPLICATION

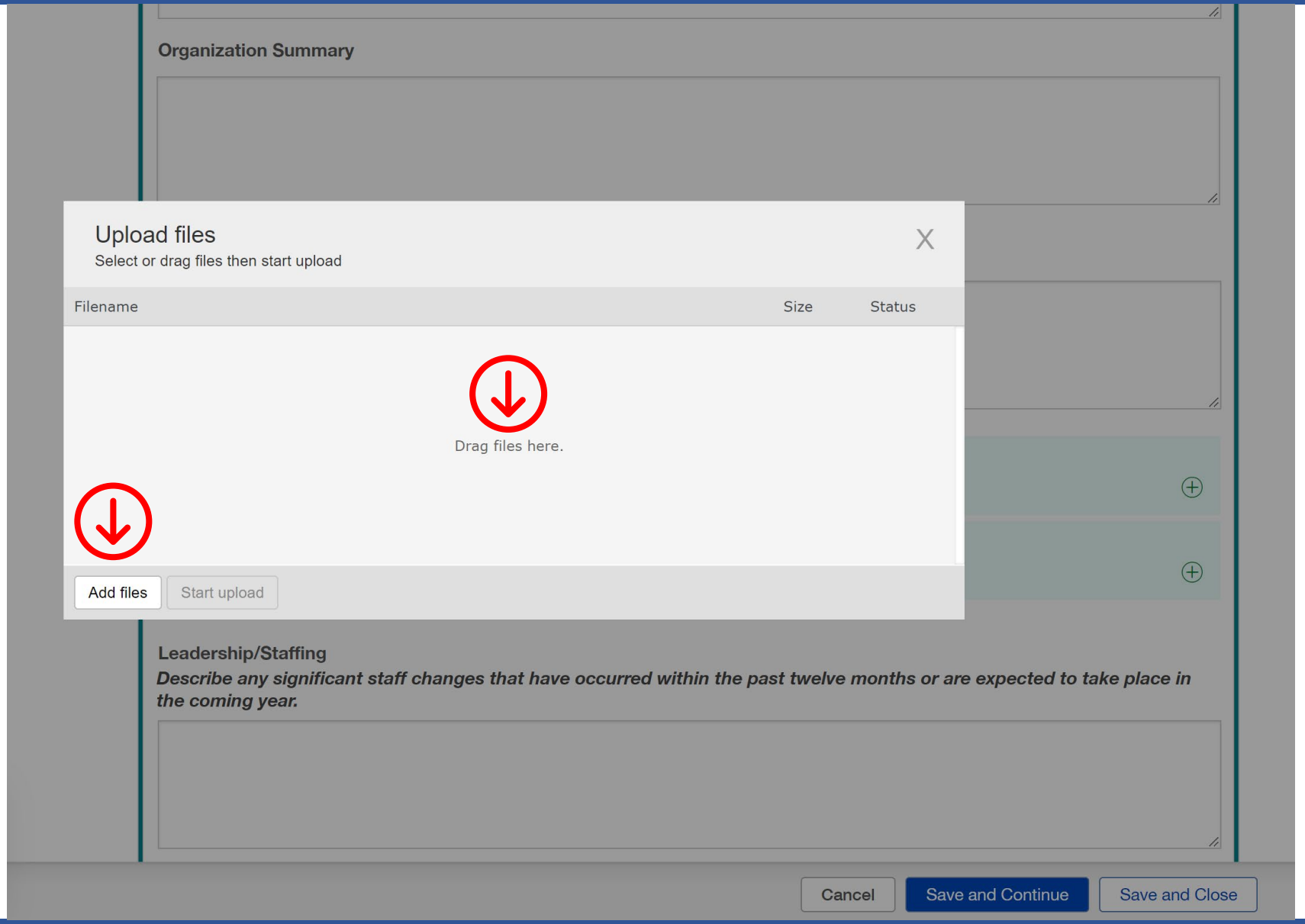
To upload documents, click the + icon.

PDF attachments are preferred. If you would like to attach multiple documents for one answer, please combine the documents into one pdf before uploading.



THE GRANT APPLICATION

Click “Add files” to select or drag the files to start your upload.



THE GRANT APPLICATION

Select your response from the drop-down menu.

Upload a list of all board members with terms, occupations and affiliations.
Board of Directors ⊕

Please upload your organizational chart, if applicable.
Organizational Structure ⊕

Leadership/Staffing
Describe any significant staff changes that have occurred within the past twelve months or are expected to take place in the coming year.

Does your organization currently collect demographic data for board and/or staff?

No
Yes

Board & Senior Leadership Demographics
The following demographic questions around Board and Senior Leadership are optional and are to gather more data about the organizations we fund. Your answers will not impact our funding decisions.

% of Board: African-American/Black

% of Board: Native American/Alaska Native

Cancel | Save and Continue | Save and Close

THE GRANT APPLICATION

Participant Voice- Check all the ways in which you include the voice of families in your organizational structure and service delivery.

Our constituents regularly provide input into design/
Our constituents serve as staff
Our constituents serve on advisory boards, councils
Our constituents serve on the Board

>

<

Community Alignment

Describe your organization's primary collaborations and partnerships with other organizations and community initiatives focused on achieving better outcomes for families.

Evaluation

How does your organization currently collect and use data to measure impact and make programmatic/organizational decisions? What client management system do you use?

Total number of clients served

Enter the percentage of clients served in each category.

% of Total Served: African-

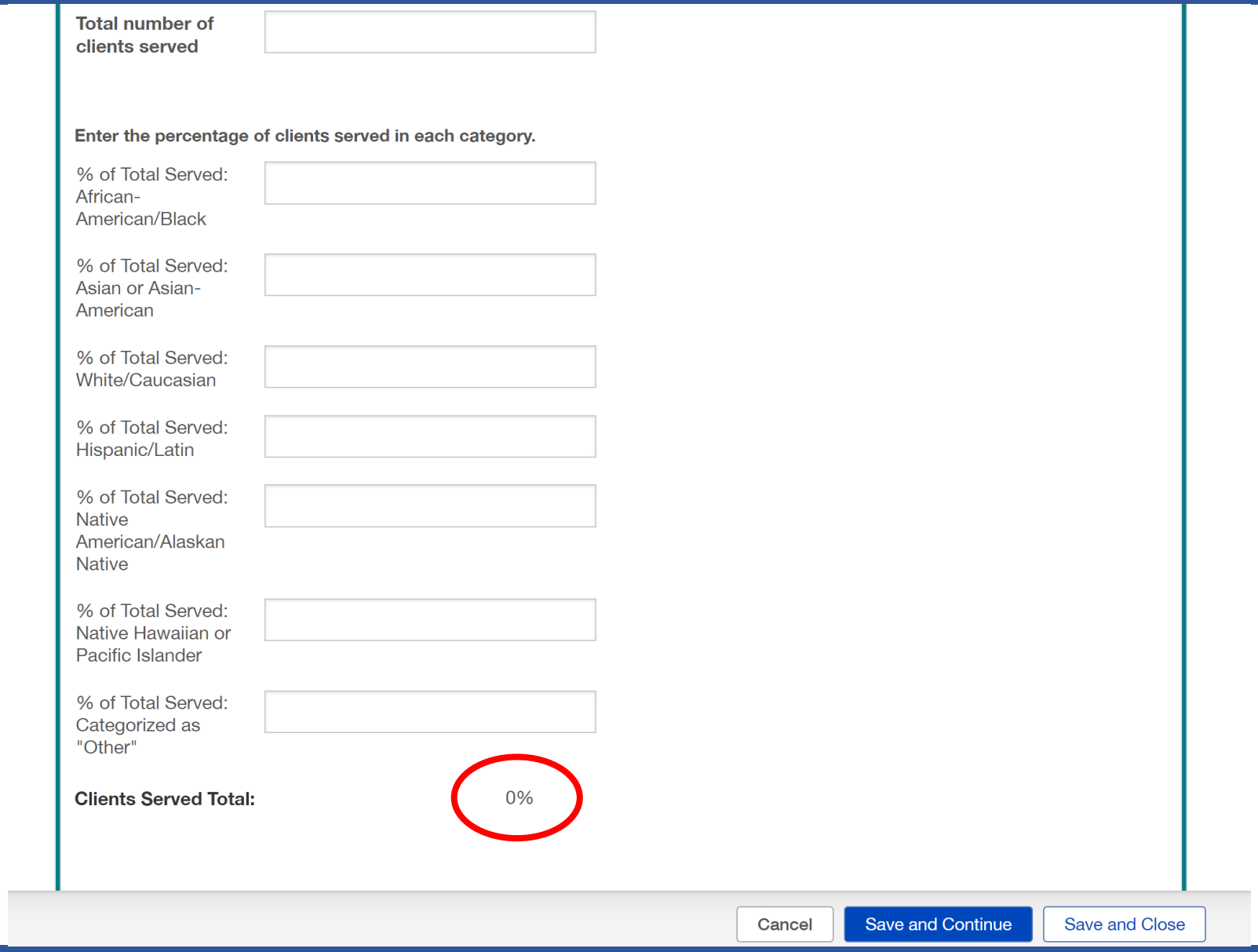
Cancel | Save and Continue | Save and Close

Select all the ways in which you include the voice of families by moving them into the appropriate column.

THE GRANT APPLICATION

Make sure that your Total Clients Served equals 100%.

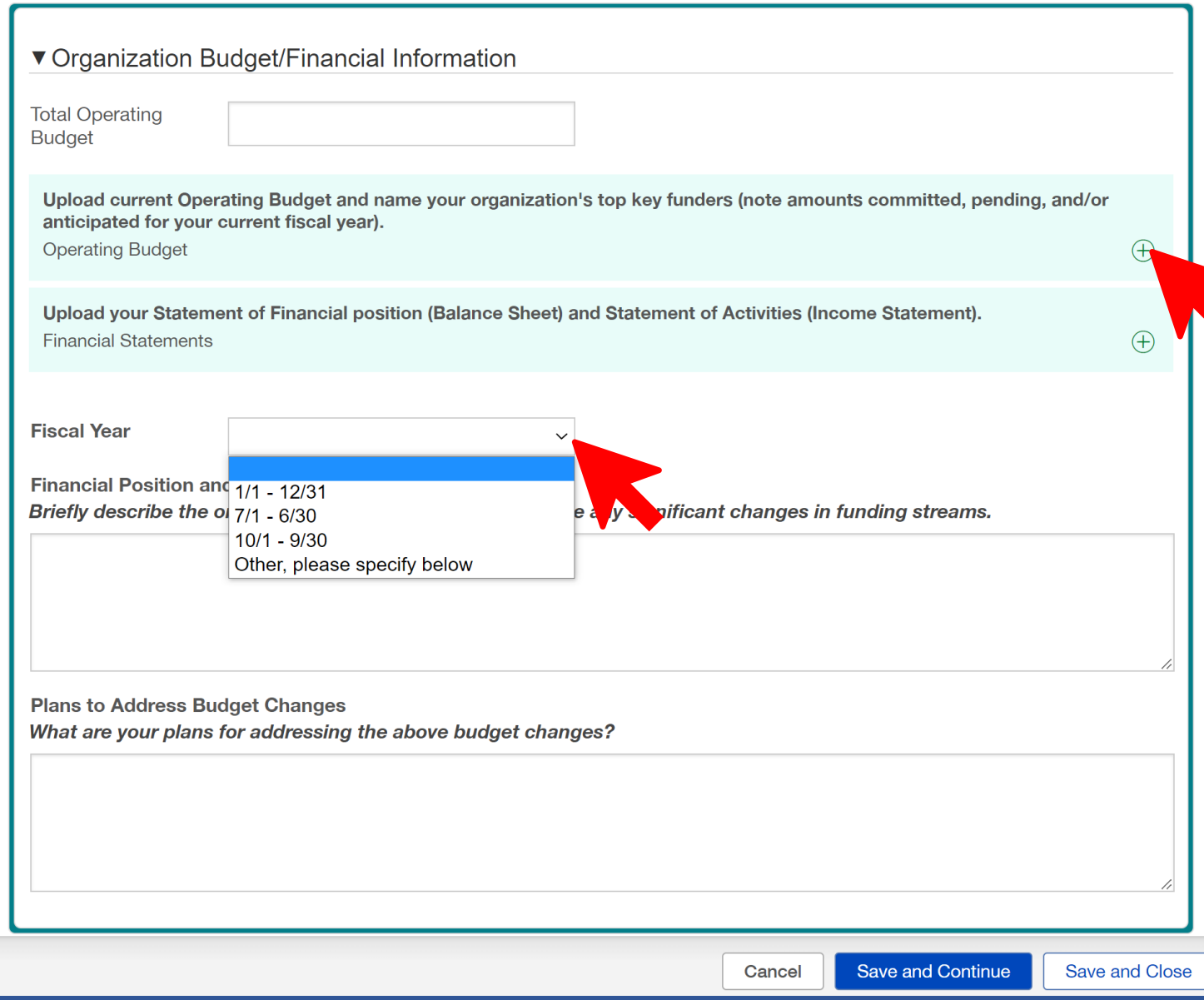
An application cannot be submitted without a 100% Clients Served Total.



THE GRANT APPLICATION

Next, you'll be asked to complete the Organization Budget / Financial Information.

Select your Fiscal Year from the drop-down menu.

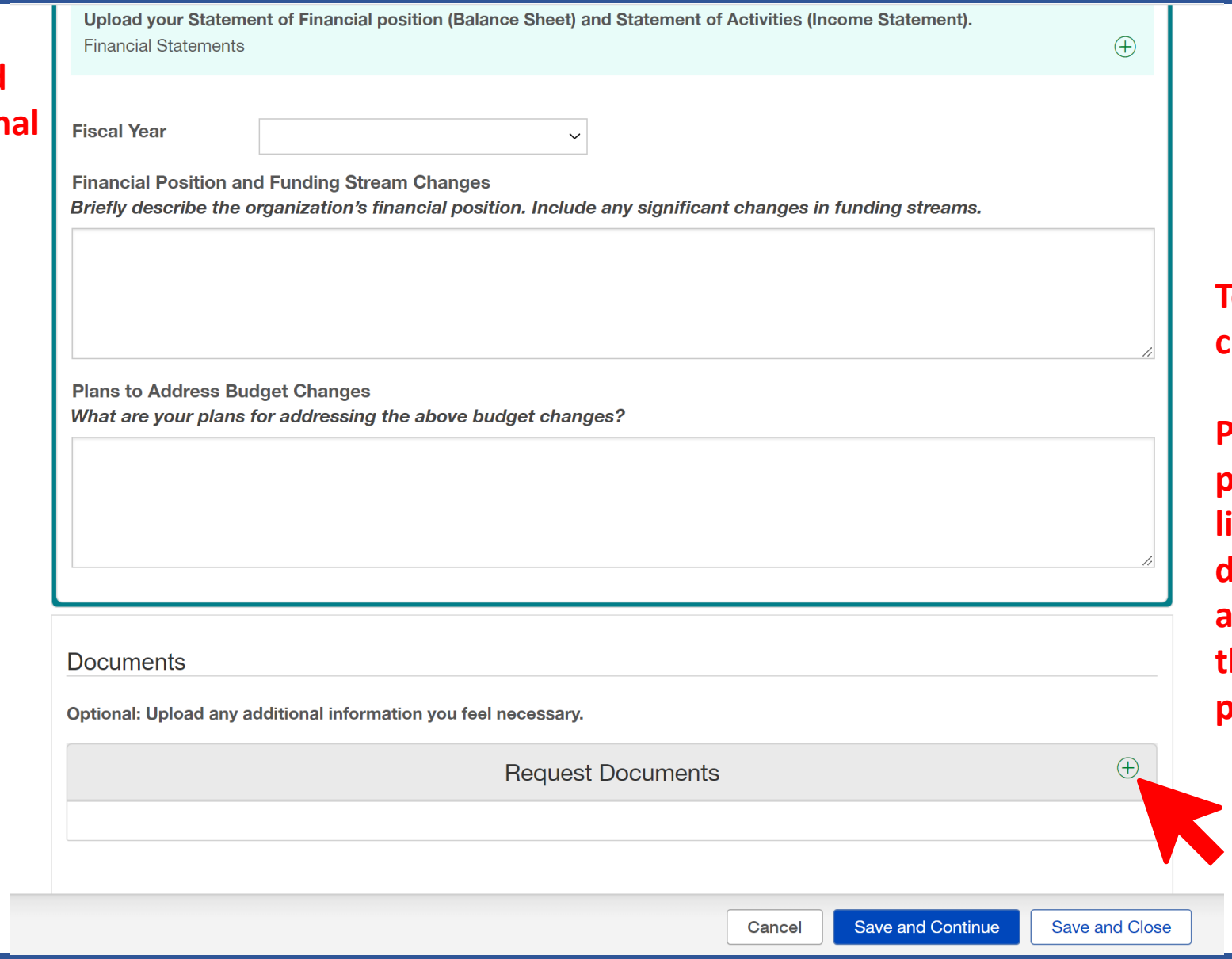


To upload documents, click the + icon.

PDF attachments are preferred. If you would like to attach multiple documents for one answer, please combine the documents into one pdf before uploading.

THE GRANT APPLICATION

Finally, you'll be asked to submit any additional information.
This field is optional.



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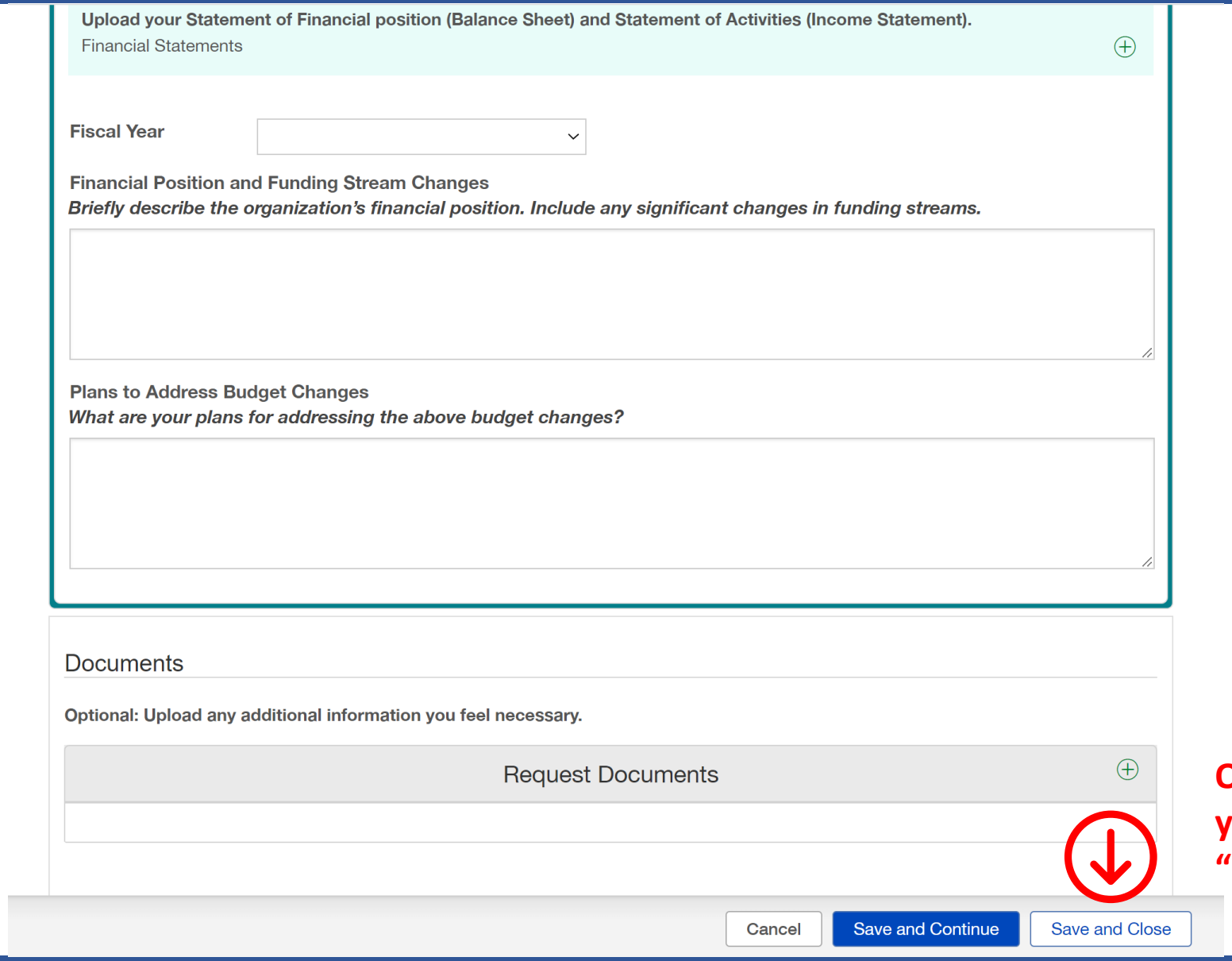
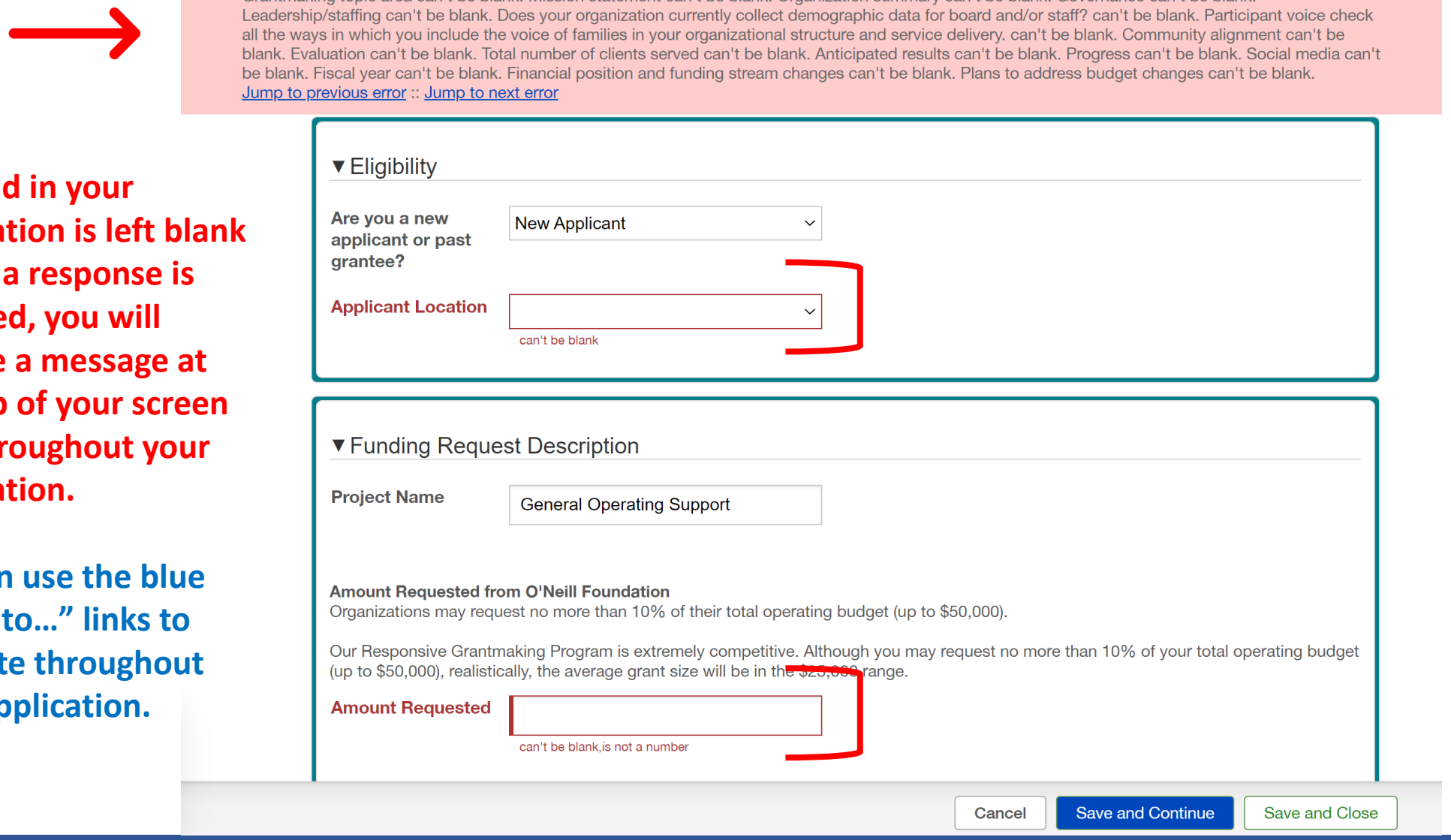


Once you've completed your application, click "Save and Close".

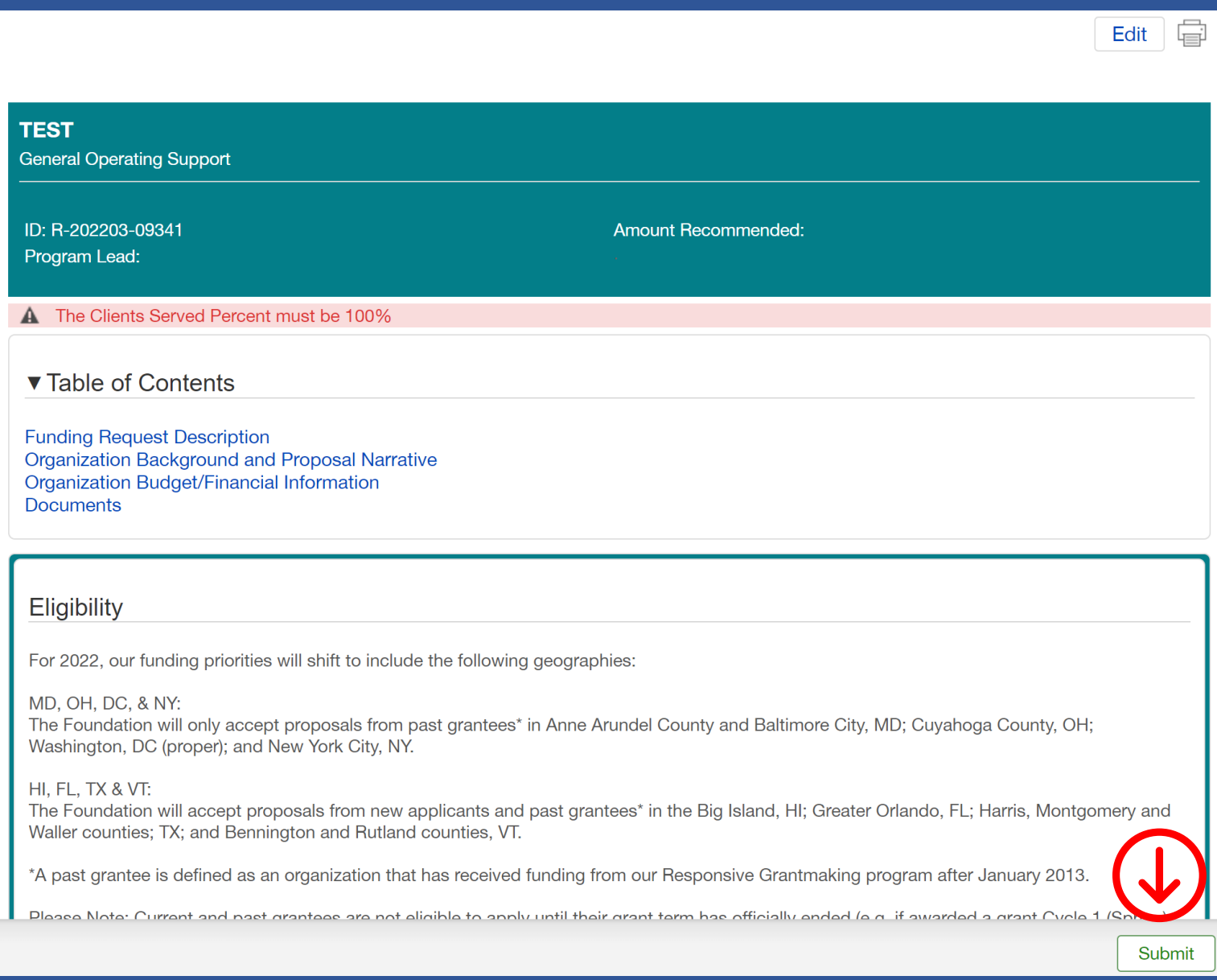
THE GRANT APPLICATION



If a field in your application is left blank where a response is required, you will receive a message at the top of your screen and throughout your application.

You can use the blue "Jump to…" links to navigate throughout your application.

THE GRANT APPLICATION



Once your application is ready to submit, you can make edits and/or print your application using the buttons located in the top right corner.

To submit, click "Submit".