

Assistance: For technical support, please contact Foundation staff at 202-483-8294 or email apply@meyerfdn.org or during business hours (9:00 a.m. – 5:00 p.m. EST).

Helpful Navigation Tips for Logging In and Completing an Interest Form, Proposal or Grant Report

SETTING UP YOUR ACCOUNT AND LOGGING IN

- Bookmark the URL to the Portal to easily access the site: <https://meyer-portal.givingdata.com/>
- Be sure to add mail@givingdata.com to your email “safe list” to receive communication from the Portal. If you do not receive an email you are expecting, please check your spam folder before contacting the Foundation.
- Please note that the preferred browser for GivingData is **Google Chrome, Firefox or Safari**, however, it works across all browsers.
- Your account password must be at least **6 characters** and must contain at least one **number** and **both upper and lower case letters**.

COMPLETING AN INTEREST FORM, PROPOSAL OR GRANT REPORT/REQUIREMENT

- Use the **Table of Contents** menu to navigate to different sections of the interest form, proposal or grant report.
- All fields marked with a **red asterisk** are required. For returning grantees, some fields may be pre-populated from previous requests. Please review and update this information, as needed.
- When entering text in a field, you can choose to use the information stored in the system. *Click Use this Response* to populate information in a field.
- Use **plain text** if you are copying and pasting text from another document, as all formatting may get lost in the online form.
- After making a selection from a **dropdown menu**, you will need to click into another field or click anywhere on the form in order for the dropdown to close.
- Use the **Comments icon** at the top of each section to communicate your comments or questions with Foundation staff.
- The Foundation appreciates **concise responses** in all open-ended text boxes.
- Your work on any page **auto-saves (every 30 seconds)** when you enter information into the form and when you navigate to another page.
- *Click Next* at the bottom of each page to move to the next page in the application. *Click Back* to return to the previous page.
- As you complete all fields/documents in each section, the Table of Contents menu will include a **green checkmark** in that section.
- At the bottom of each page, you can *click* on the checkbox next to **Flag this step** to keep track of pages you want to revisit later. If this box is checked, the section will appear with an **orange flag** in the Table of Contents menu. All flags must be removed before submitting. *Note:* All flags are only visible to the applicant/grantee and will not notify the Foundation.
- All **attachments** should be in Word (.docx), Portable Document Format (.pdf), or Excel (.xlsx). Please note that files with certain extensions (such as “exe”, “com”, “vbs”, or “bat”) cannot be uploaded.
- You do not need to complete the form in one sitting. *Click Save and Come Back Later* to close. *Click View/Print Full Application* to print the full form.
- Once you **submit** to the Foundation, the form cannot be further edited. Please follow-up with your Program contact with questions on the status of your submission. **Please note that your proposal submission does not guarantee funding.**

Register to Activate Your Account and Log in

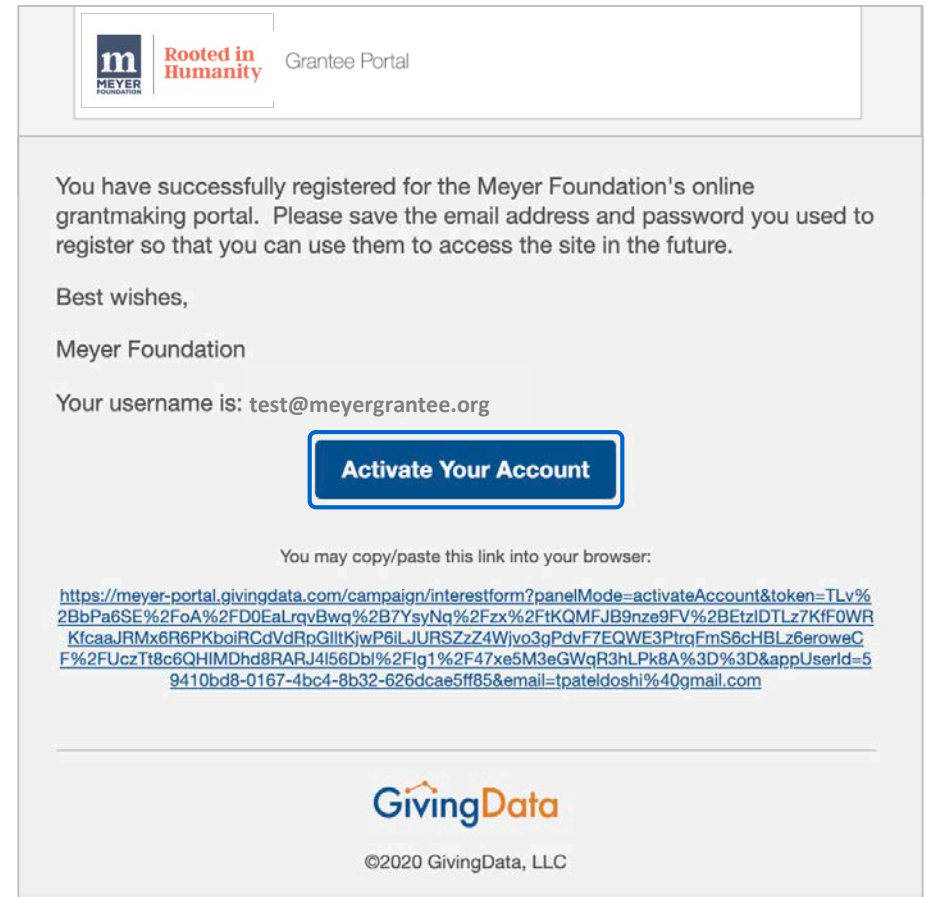
- Welcome to the Meyer Foundation's **Grantee Portal**. When you sign up for a new account you will get a registration email from mail@givingdata.com.

Note: Be sure to add mail@givingdata.com to your email "safe list." If you do not receive the email link, please check your spam folder before contacting the Foundation.

Click on the **Activate Your Account** link in the registration email to open the Portal. This link is specific to your email address. If other members of your organization need access to the portal, please contact the Foundation.

Please note that the preferred browser for GivingData is Google Chrome, Firefox or Safari, however, it works across all browsers.

Assistance: For technical support, please contact Foundation staff at apply@meierfdn.org or call 202-483-8294 during business hours (9:00 a.m. – 5:00 p.m. EST).



You have successfully registered for the Meyer Foundation's online grantmaking portal. Please save the email address and password you used to register so that you can use them to access the site in the future.

Best wishes,

Meyer Foundation

Your username is: test@meiergrantee.org

Activate Your Account

You may copy/paste this link into your browser:

<https://meyer-portal.givingdata.com/campaign/interestform?panelMode=activateAccount&token=TLv%2BbPa6SE%2FoA%2FD0EaLrqvBwq%2B7YsyNq%2Fzx%2FtKQMFJB9nze9FV%2BEtzIDTLz7Kf0WRKfcaaJRMx6R6PKboiRCdVdRpGlltKjwP6iLJURSzzZ4Wjvo3gPdvF7EQWE3PtrqFmS6cHBLz6eroweCF%2FUczTt8c6QHIMDhd8RARJ4i56DbI%2F1g1%2F47xe5M3eGWqR3hLPk8A%3D%3D&appUserId=59410bd8-0167-4bc4-8b32-626dcae5ff85&email=tpateldoshi%40gmail.com>

GivingData

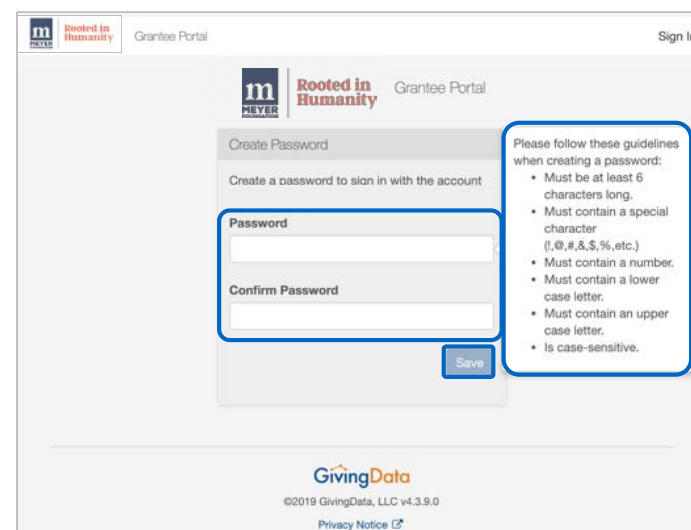
©2020 GivingData, LLC

- Create a **Password** for your account, and enter it a second time to confirm it.

Your password must be at least **6 characters** and must contain at least one **number** and **both upper and lower case letters**.

Click **Save**.

Please save this password in a secure place for future use.



Create Password

Create a password to sign in with the account

Password

Confirm Password

Save

Please follow these guidelines when creating a password:

- Must be at least 6 characters long.
- Must contain a special character (!, @, #, \$, %, etc.)
- Must contain a number.
- Must contain a lower case letter.
- Must contain an upper case letter.
- Is case-sensitive.

GivingData

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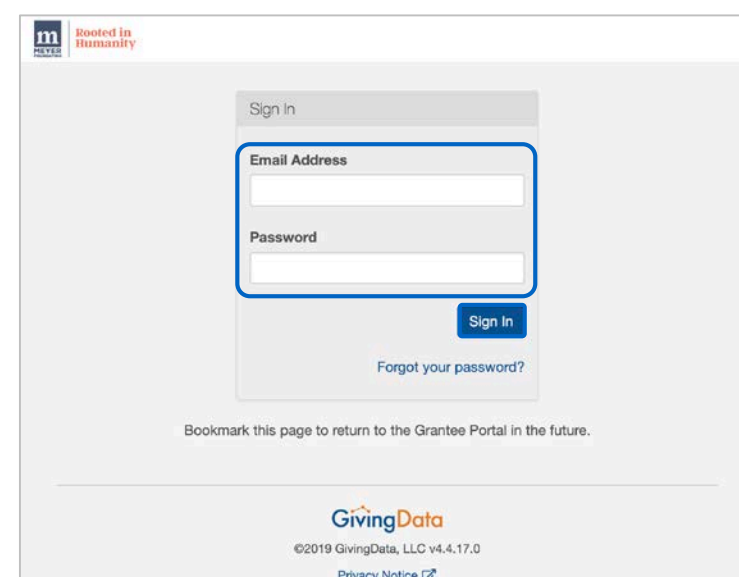
[Privacy Notice](#)

- A new window to sign in will open.

Enter your **Email Address** and the **Password** you just created, and click **Sign In**.

Tip: Bookmark the URL to the Portal to easily access the site:

<https://meyer-portal.givingdata.com/>



Sign In

Email Address

Password

Sign In

[Forgot your password?](#)

Bookmark this page to return to the Grantee Portal in the future.

GivingData

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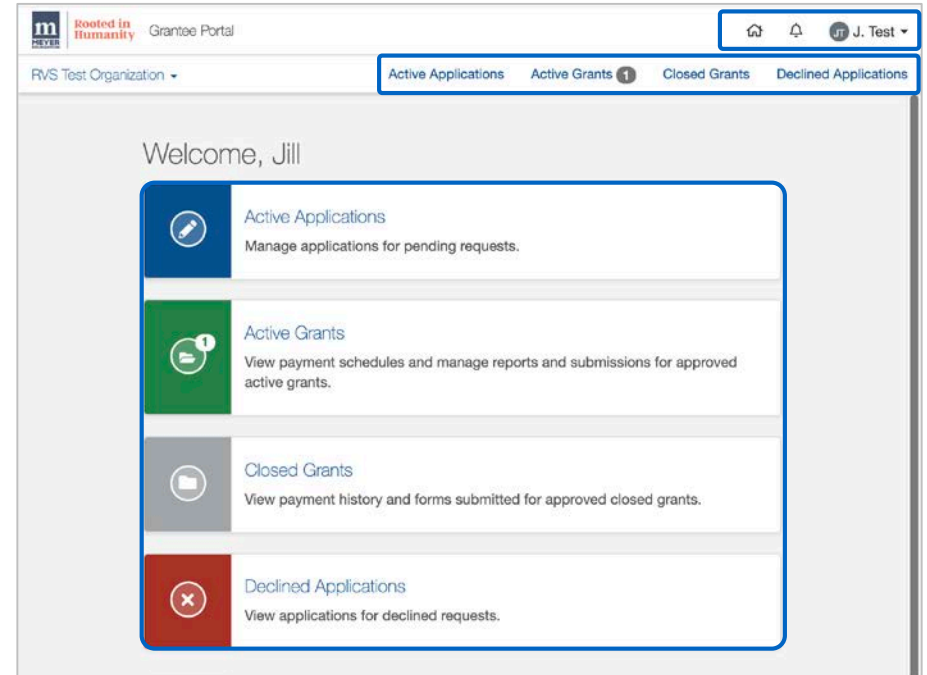
[Privacy Notice](#)

Portal Features

4 You will be directed to the **Portal Welcome** homepage.

In the top navigation bar, you will see the **Home** icon, which will bring you to this page when on any other page in the system; the **Notifications bell** icon, which will show notifications about portal activity; and your **name**, where you can manage your profile or sign out. You will also see the menu of applications and grants directly underneath.

The homepage includes links to the following: **Active Applications**, where you can manage applications for pending requests; and **Active Grants**, where you can view payments and submit requirements for approved grants.

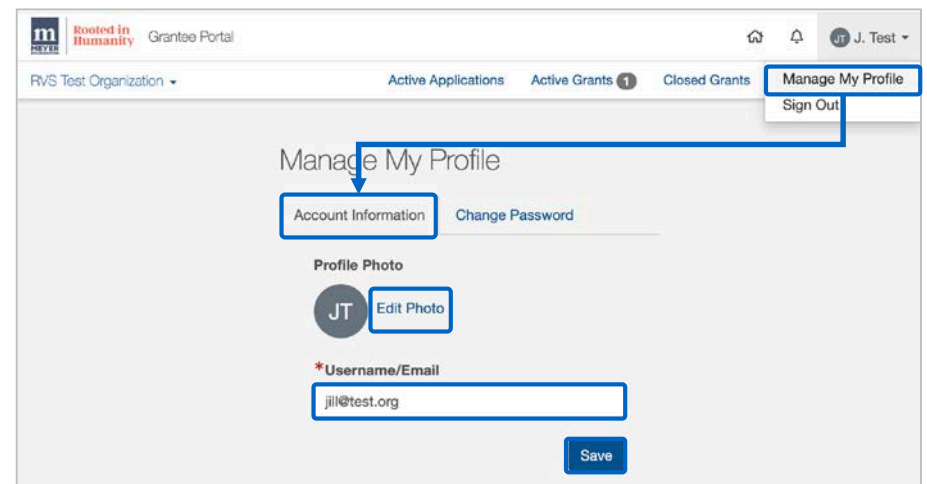


5 In the upper right corner of the homepage, you will see your name. *Click* on your name, and *choose Manage My Profile* from the dropdown to open your profile page.

Under the **Account Information** tab, you can edit your **Username/Email** by typing into the text box.

Click Edit Photo to upload an optional photo to your account.

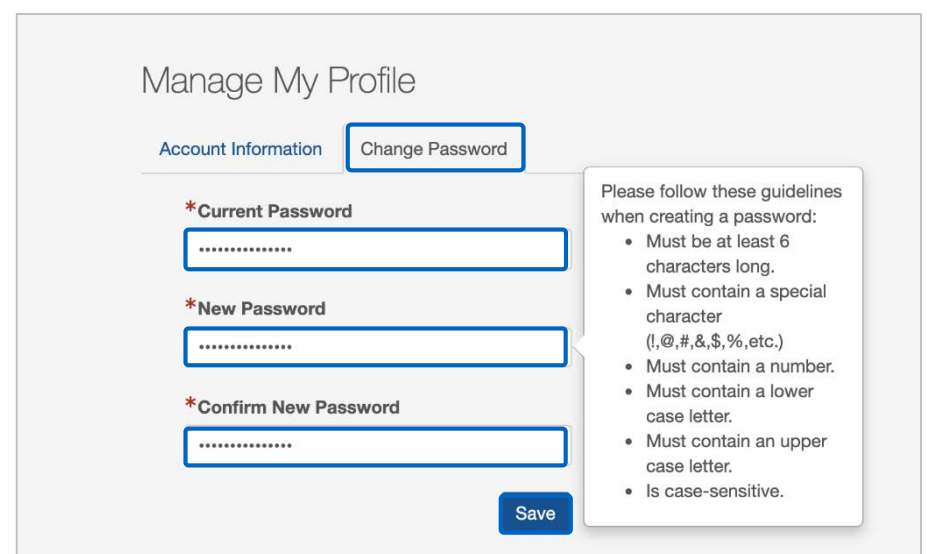
Click Save.



6 *Click* on the **Change Password** tab to change your password. *Enter* your **Current Password**. *Create* a **New Password**, and *enter* it a second time to confirm.

Your **New Password** must be at least **6 characters** and must contain at least one **number** and **both upper and lower case letters**.

Click Save.



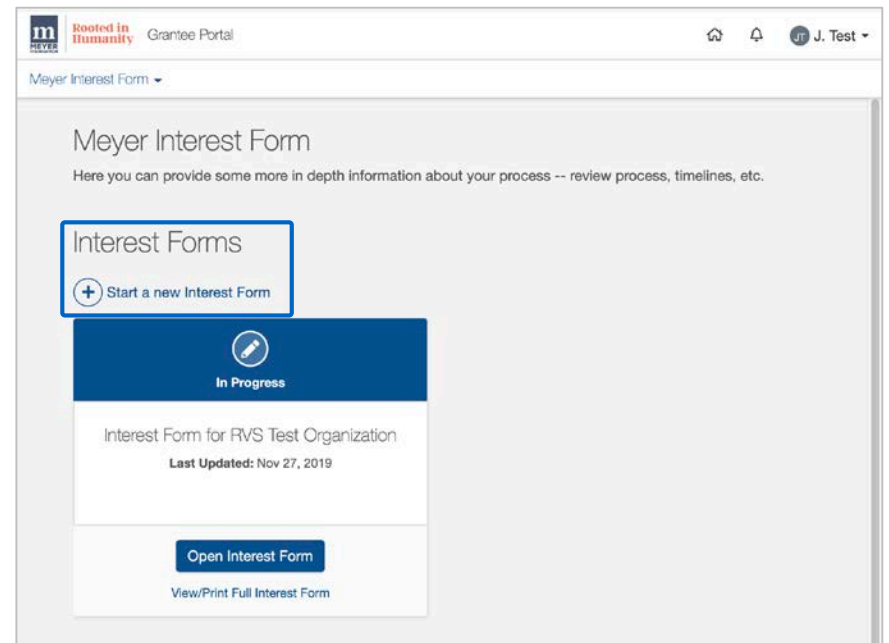
Log in or Create an Account to Complete an Interest Form

1 A [link](#) to submit an **Interest Form** is available on the Meyer Foundation's website and applicants can apply on a rolling basis. *Note:* Meyer staff will respond to an Interest Form submission within 30 days with a decision on whether to invite a full proposal.

Note: Refer to the **Logging Into Your Account** guide for instructions on how to create an account in order to submit an Interest Form.

You will be directed to the Meyer Interest Form page. This page will display: **In-Progress** and **Submitted** Interest Forms, if applicable.

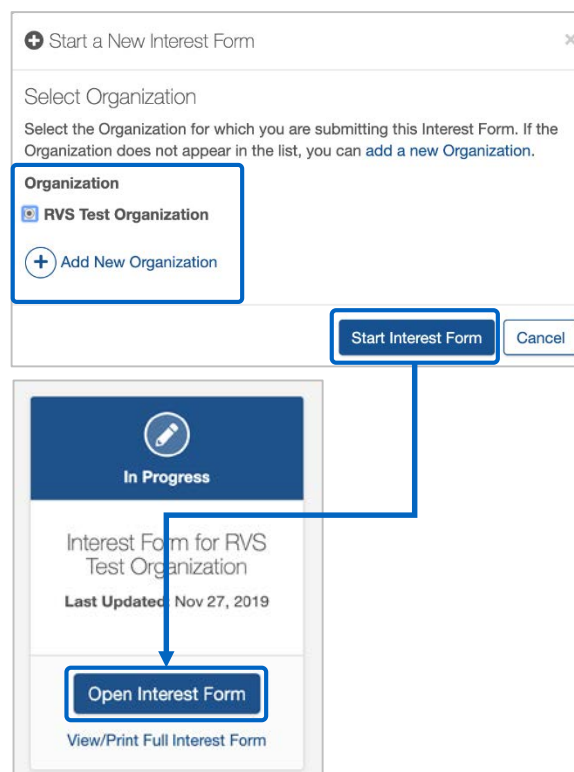
Click on the **Start a New Interest Form** link.



2 Select the organization for which you are submitting the Interest Form and *click* on the **Start Interest Form** button.

Note: If the organization does not appear in the list, click on the **Add New Organization** plus sign (+) icon.

Once you select the organization, you will be directed back to the Interest Form page. Click on the **Open Interest form** button to complete the Interest Form.

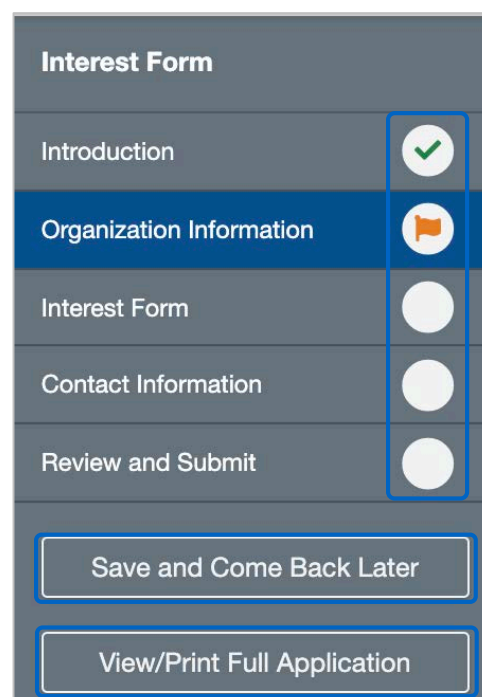


3 You will be directed to the **Introduction** page for starting an Interest Form.

Use the **Table of Contents** menu along the right side of the screen to navigate to different sections of the Interest Form.

You do not need to complete the Interest Form in one sitting. Click **Save and Come Back Later** to close. Click **View/Print Full Application** to print the full Interest Form.

Note: Refer to the **Helpful Navigations Tips** guide for additional guidance on navigating the Table of Contents menu, section pages, and completing your Interest Form.



Interest Form Sections: Organization Information and Interest Form

4 The **Organization Information** section asks for core information about your organization.

Organization Information

Please tell us about your organization.

***Legal Name**

Name Org is Known By (if different)

Federal Tax Identification Number

The **Interest Form** section asks for you to provide an introduction to your work.

5

Interest Form

Please tell us a little about your work.

***Tell us about how the proposed work advances racial equity through systems change?**

Meyer supports work focused on housing, education, and economic well-being in the Greater Washington Region. Please respond in 100 to 400 words.

” B I U ≡ ≡ ≡ ↺ ↻

Words: 0

Characters: 0

***Where will the work take place?**

- ☐ District of Columbia
- ☐ Maryland
- ☐ National
- ☐ Virginia
- ☐ National
- ☐ Washington Metropolitan Region

Select at least 1 and no more than 8.

Selected Items

Nothing Selected

***Toward which Meyer Foundation goal(s) is your work primarily focused?**

- ☐ Education
- ☐ Economic Well Being
- ☐ Housing

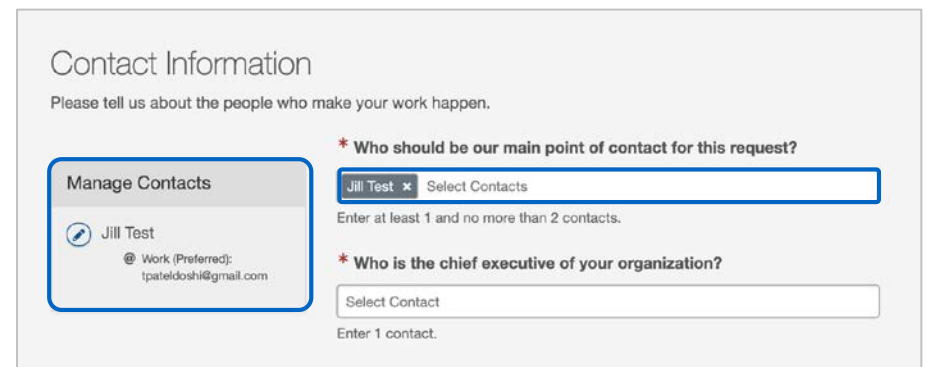
Interest Form Sections: Contact Information

6 The **Contact Information** section lets the Foundation know who should be the contacts at your organization for different components of the Interest Form review.

Key contacts include the **Request Contact** and **Organization Chief Executive**.

Click in the **Select Contact** dropdown box under each contact title to select existing contacts assigned to the Interest Form. *Note:* You must enter one contact for each contact type.

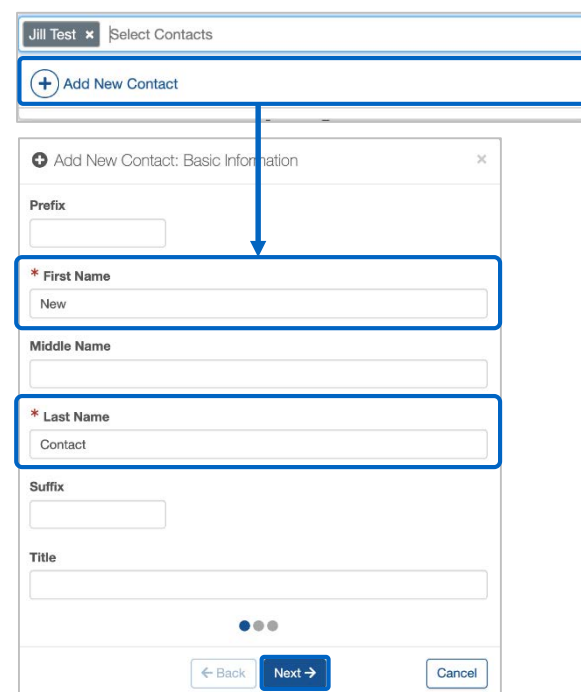
Once all contacts have been selected, they will also appear under the **Manage Contacts** box on the left. Click on the **gray pencil icon** next to the **contact name** to edit the contact information.



7 If the contact does not appear under the **Select Contact** dropdown box, click on **Add New Contact**.

The **Add New Contact: Basic Information** window will open. Enter information in each field. *Note:* **First Name** and **Last Name** are required.

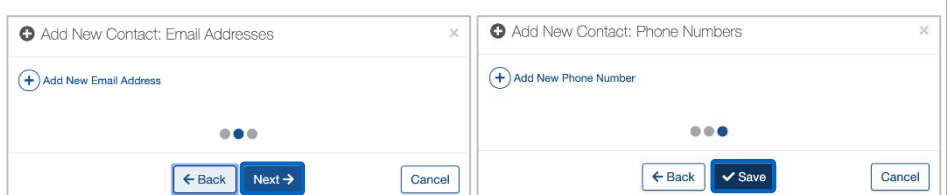
Click **Next**.



8 The **Add New Contact: Email Addresses** window will open. Click **Next**.

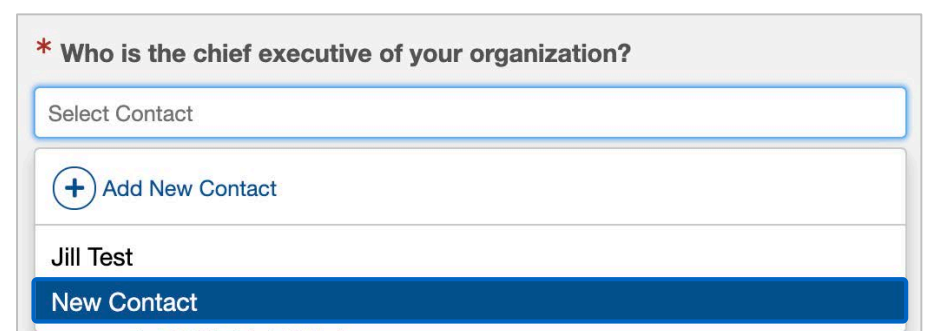
The **Add New Contact: Phone Numbers** window will appear next. Click **Save**.

Note: These sections are not required.



9 The new contact will now appear under the **Select Contact** dropdown.

Assign the contact to the relevant contact title.

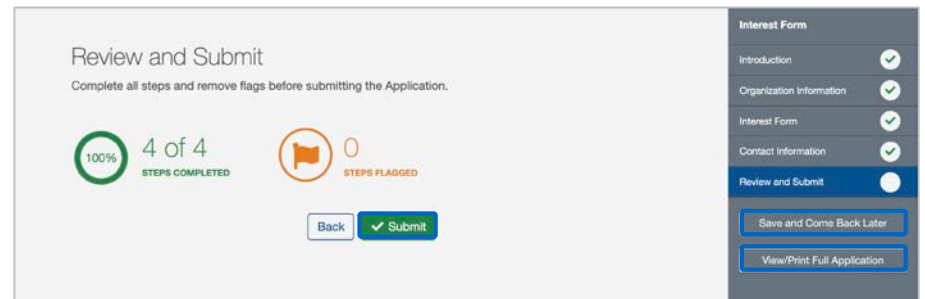


Interest Form Sections: Review and Submit

10 Click **Review and Submit** to review the Interest Form in its entirety. You can also *click View/Print Full Application* if you would like to print a copy.

If you are satisfied with the Interest Form and all steps have been completed and all flags have been removed, *click Submit*.

Note: The Interest Form will now appear as **Submitted** under the **Interest Forms** page and can no longer be edited.



Review and Submit

Complete all steps and remove flags before submitting the Application.

100% 4 of 4 STEPS COMPLETED 0 STEPS FLAGGED

Back Submit

Interest Form

- Introduction ✓
- Organization Information ✓
- Interest Form ✓
- Contact Information ✓
- Review and Submit

Save and Come Back Later

View/Print Full Application

Log in to Complete an Invited Proposal

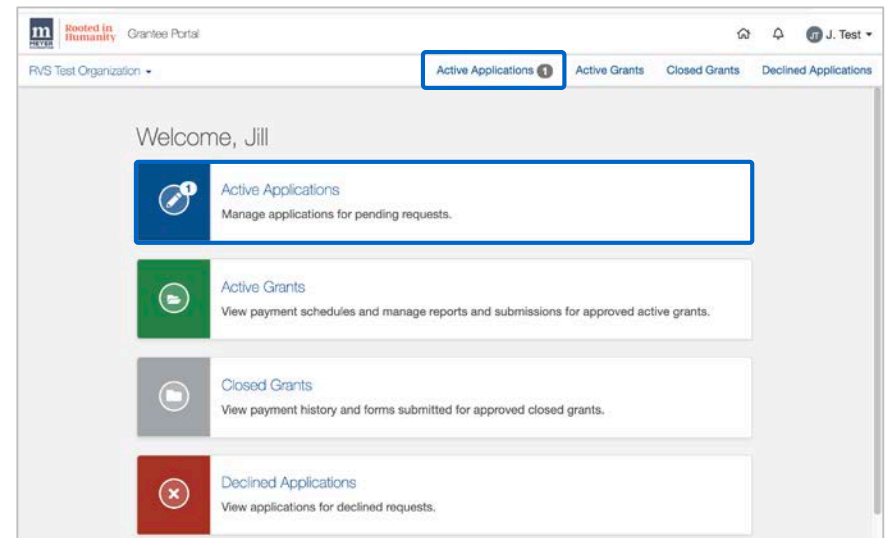
- 1 You will receive an email invitation to submit a proposal from mail@givingdata.com.

Note: Contact the Foundation if another person at your organization should have portal access.

Sign in to the **Portal**: <https://meyer-portal.givingdata.com/>.

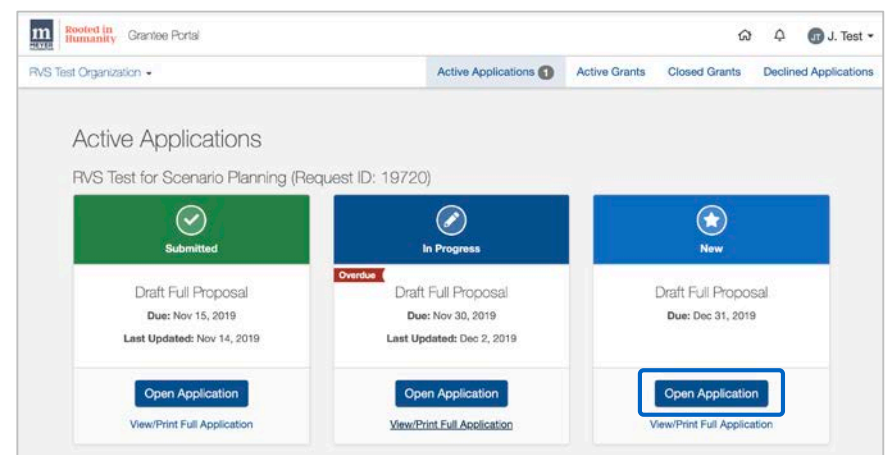
Note: Refer to the **Setting Up Your Account** guide for instructions on how to log in to the Portal.

You will be directed to the Portal homepage. *Click* on **Active Applications** on the homepage.



- 2 The **Active Applications** page will open. This page will display: **New (Invited)**, **In Progress**, and **Submitted** proposals.

To open a new proposal, find the relevant proposal, and *click* **Open Application**.

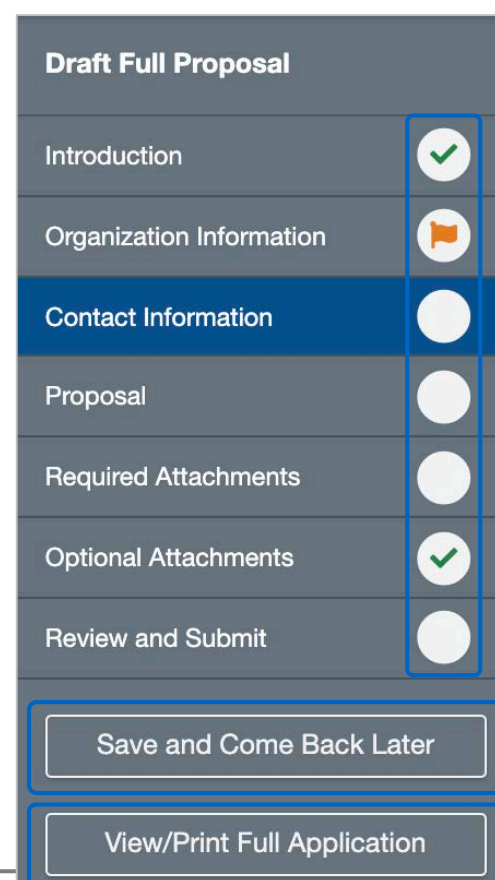


- 3 You will be directed to the **Introduction** page for starting a proposal.

Use the **Table of Contents** menu along the right side of the screen to navigate to different sections of the proposal.

You do not need to complete the proposal in one sitting. *Click* **Save and Come Back Later** to close. *Click* **View/Print Full Application** to print the full proposal.

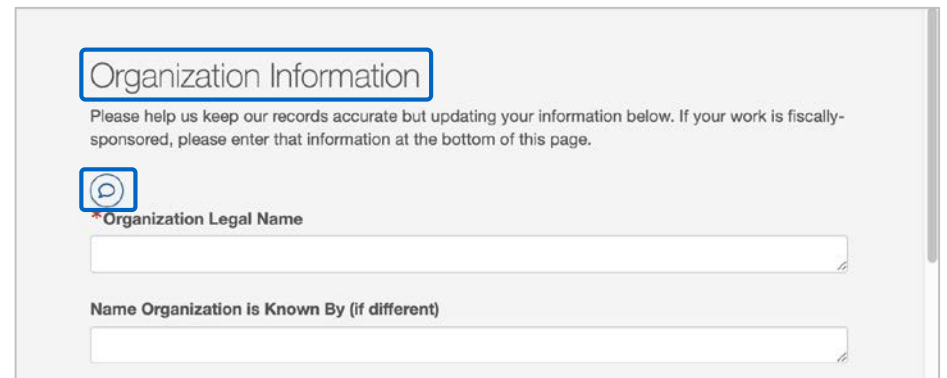
Note: Refer to the **Helpful Navigations Tips** guide for additional guidance on navigating the Table of Contents menu, section pages, and completing your proposal.



Full Proposal Sections: Organization Information and Contact Information

4 The **Organization Information** section asks for core information about your organization.

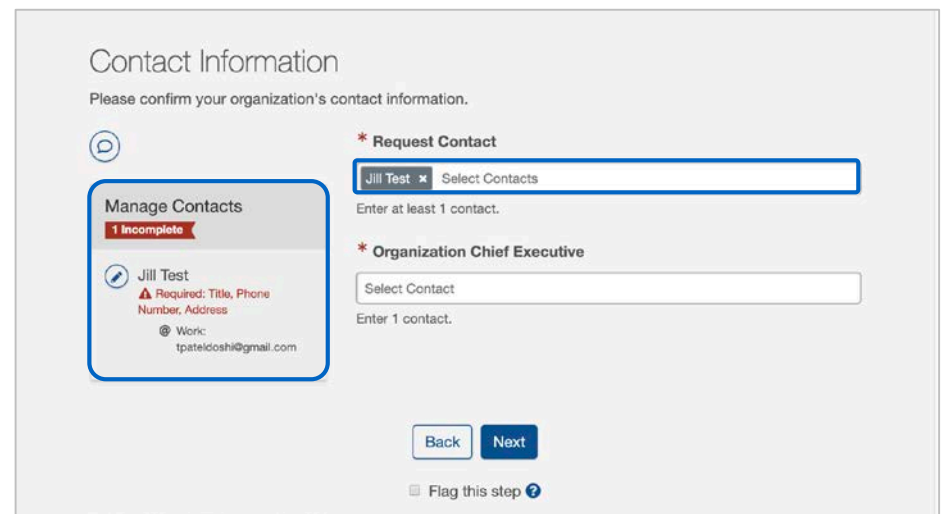
Note: Use the **Comments icon** at the top of each section to ask questions and communicate directly with Foundation staff.



5 Key contacts include the **Request Contact** and **Organization Chief Executive**.

Click in the **Select Contact** dropdown box under each contact title to select existing contacts assigned to the organization. *Note:* You must enter one contact for each contact type.

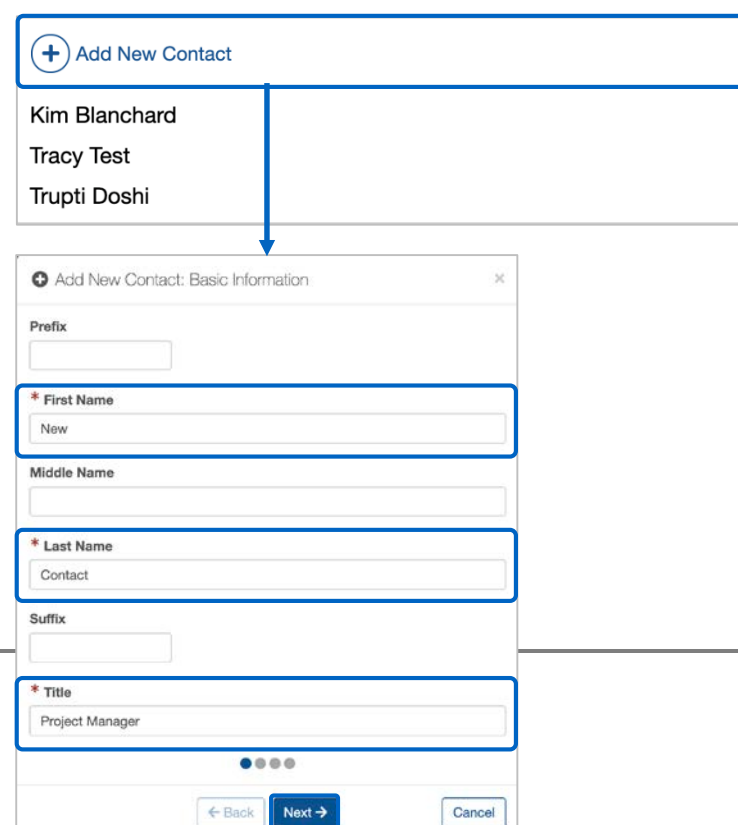
Once all contacts have been selected, they will also appear under the **Manage Contacts** box on the left. An alert will appear if any information is incomplete. *Click* on the **gray pencil icon** next to the **contact name** to edit the contact information.



If the contact does not appear under the **Select Contact** dropdown box, *click* on **Add New Contact**.

6 The **Add New Contact: Basic Information** window will open. Enter information in each field. *Note:* **First Name**, **Last Name**, and **Title** are required.

Click Next.



Full Proposal Sections: Contact Information, Continued

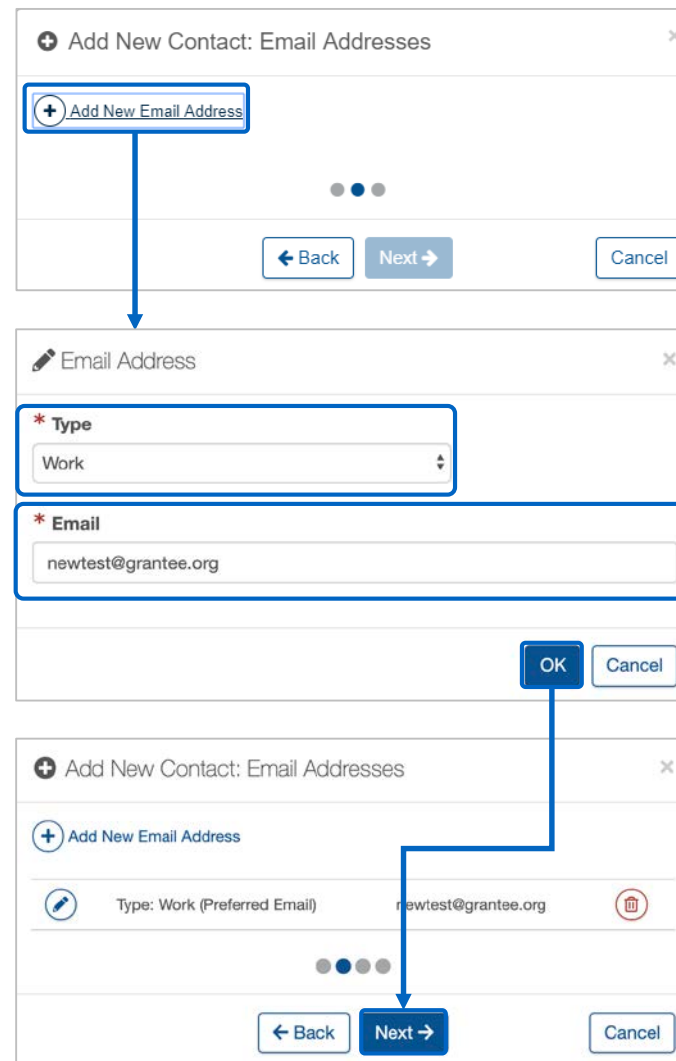
7 The **Add New Contact: Email Addresses** window will open.

Click on the **Add New Email Address plus sign (+) icon**.

Select the **Type** from the dropdown, and enter the **Email** address.

Click **OK**.

Click the **Add New Email Address plus sign (+) icon** again if you need to add additional email addresses or edit. If all information is complete, click **Next**.



The screenshot shows the 'Add New Contact: Email Addresses' window. It has a title bar with a plus icon and a close icon. Below the title bar is a button labeled '+ Add New Email Address'. Below that is a progress indicator with three dots, the second of which is filled. At the bottom are buttons for 'Back', 'Next', and 'Cancel'. An arrow points from the '+ Add New Email Address' button to a second window titled 'Email Address'. This window has a title bar with a close icon. It contains a dropdown menu for 'Type' with 'Work' selected, and a text input field for 'Email' containing 'newtest@grantee.org'. There are 'OK' and 'Cancel' buttons at the bottom right. An arrow points from the 'OK' button to a third window titled 'Add New Contact: Email Addresses'. This window shows the 'Add New Email Address' button again, and below it, a list of email addresses. The first entry is 'Type: Work (Preferred Email)' with the email 'newtest@grantee.org'. There is a trash icon to the right of the email. At the bottom are 'Back', 'Next', and 'Cancel' buttons. An arrow points from the 'Next' button to the next section.

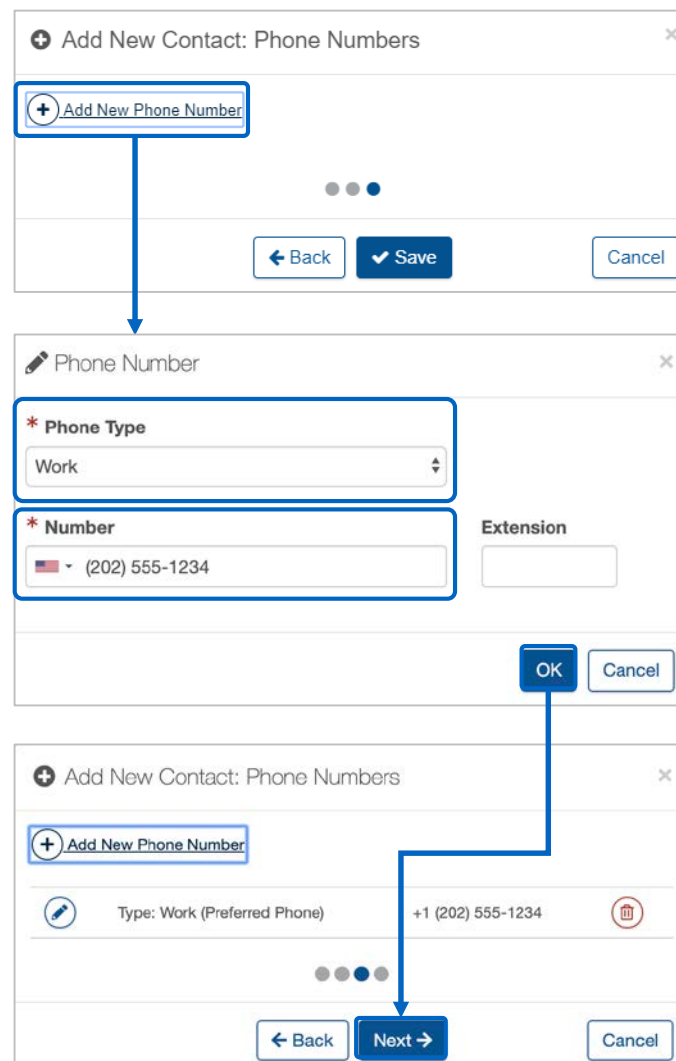
8 The **Add New Contact: Phone Numbers** window will show next.

Click on the **Add New Phone Number plus sign (+) icon**.

Select the **Phone Type** from the dropdown, and enter the phone **Number**.

Click **OK**.

Click the **Add New Phone Number plus sign (+) icon** again if you need to add additional phone numbers or edit. If all information is complete, click **Save**.



The screenshot shows the 'Add New Contact: Phone Numbers' window. It has a title bar with a plus icon and a close icon. Below the title bar is a button labeled '+ Add New Phone Number'. Below that is a progress indicator with three dots, the second of which is filled. At the bottom are buttons for 'Back', 'Save', and 'Cancel'. An arrow points from the '+ Add New Phone Number' button to a second window titled 'Phone Number'. This window has a title bar with a close icon. It contains a dropdown menu for 'Phone Type' with 'Work' selected, and a text input field for 'Number' containing '+1 (202) 555-1234'. There is an 'Extension' field to the right of the 'Number' field. There are 'OK' and 'Cancel' buttons at the bottom right. An arrow points from the 'OK' button to a third window titled 'Add New Contact: Phone Numbers'. This window shows the '+ Add New Phone Number' button again, and below it, a list of phone numbers. The first entry is 'Type: Work (Preferred Phone)' with the number '+1 (202) 555-1234'. There is a trash icon to the right of the number. At the bottom are 'Back', 'Next', and 'Cancel' buttons. An arrow points from the 'Next' button to the next section.

Full Proposal Sections: Contact Information, Continued

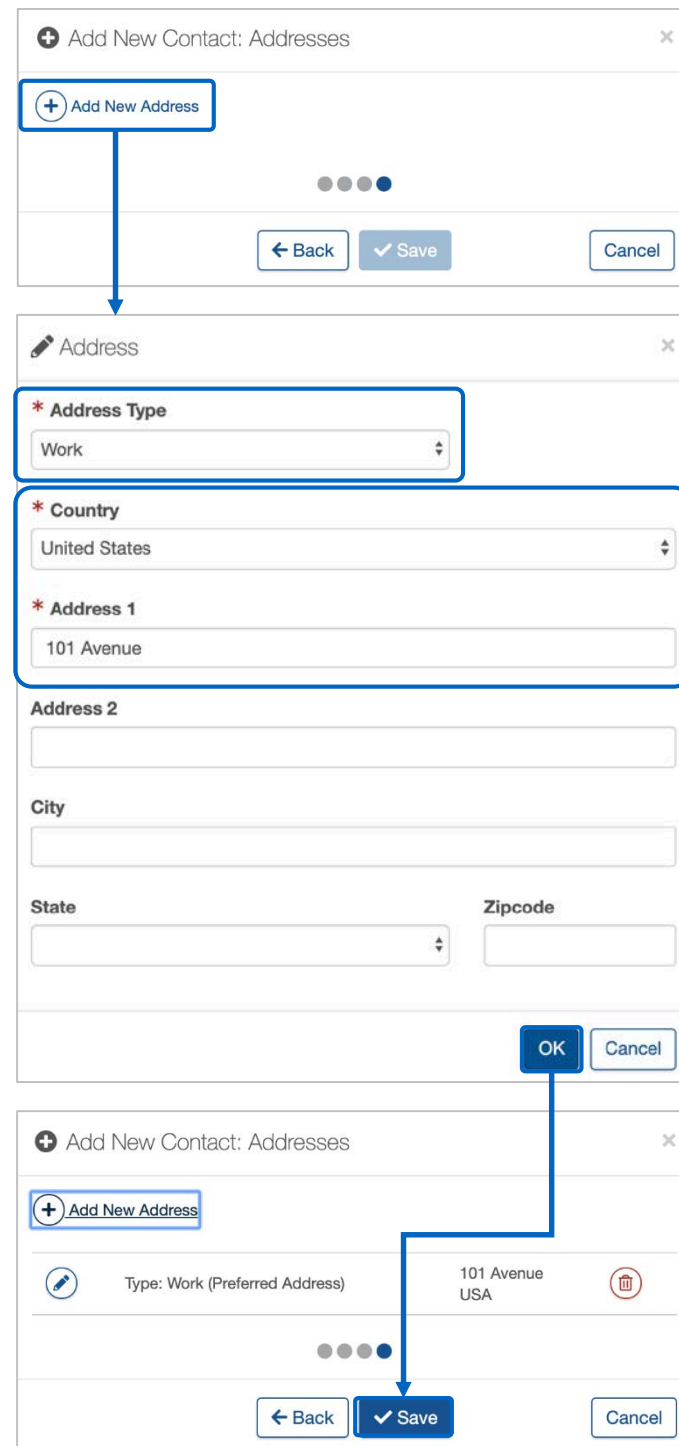
9 The **Add New Contact: Addresses** window will open.

Click on the **Add New Address plus sign (+) icon**.

Select the **Type** from the dropdown, and enter the address information. *Note: **Country** and **Address 1** are required.*

Click **OK**.

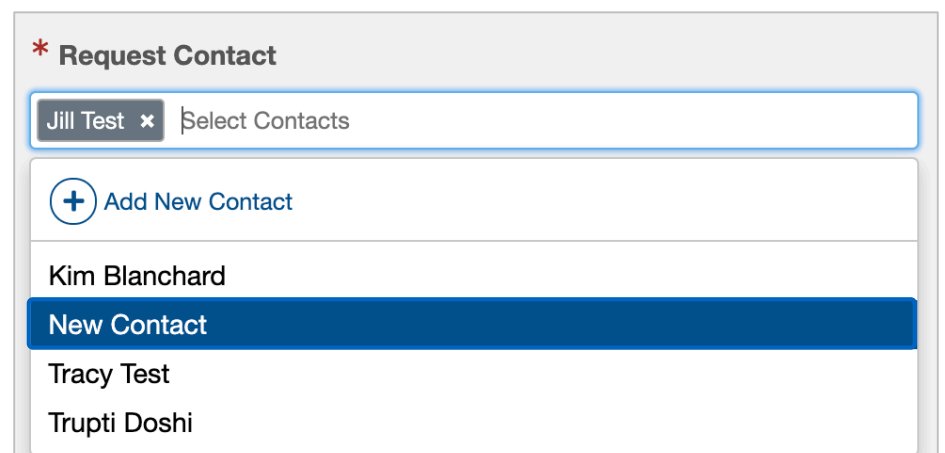
Click the **Add New Address plus sign (+) icon** again if you need to add additional addresses or edit. If all information is complete, *click **Next***.



The screenshot shows the 'Add New Contact: Addresses' window. At the top, there is a '+ Add New Address' button. Below it, there are four dots indicating a sequence of steps, with the fourth dot being filled. At the bottom, there are 'Back', 'Save', and 'Cancel' buttons. The 'Address' form is shown below, with fields for 'Address Type' (set to 'Work'), 'Country' (set to 'United States'), 'Address 1' (set to '101 Avenue'), 'Address 2', 'City', 'State', and 'Zipcode'. There are 'OK' and 'Cancel' buttons at the bottom of the form. A blue arrow points from the 'Add New Address' button in the top window to the 'Add New Address' button in the bottom window. Another blue arrow points from the 'OK' button in the top window to the 'Save' button in the bottom window.

10 The new contact will now appear under the **Select Contact** dropdown.

Assign the contact to the relevant contact title.



The screenshot shows the 'Request Contact' dropdown menu. At the top, there is a search bar with 'Jill Test' and a 'Select Contacts' button. Below the search bar, there is a '+ Add New Contact' button. Below that, there is a list of contacts: 'Kim Blanchard', 'New Contact' (highlighted in blue), 'Tracy Test', and 'Trupti Doshi'.

Full Proposal Sections: Proposal

- 11 The **Proposal** section asks for you to provide more detailed information to help the Foundation better understand your work and determine its alignment with the Foundation's strategy and priorities.

Proposal



*Requested Amount

\$

*Proposed length of grant term (in months)

*Type of Support

Please select one.

☐ General Operating Support

☐ Program/Project Support

Select 1 item.

Selected Items

Nothing Selected

*Who are the people and communities your organization or project works with and for?

WHY ARE WE ASKING? We want to understand who your organization works with and the profile of the individuals and communities most adversely affected in the priority area. WHAT ARE WE LOOKING FOR? A detailed profile of the individuals and communities that is clear and accurate, and not solely deficit based. Please include information on the demographics of the individuals and communities, some of their shared life experiences, their strengths and their concerns. We recommend responding in 100-300 words.



Words: 0

Characters: 0

Full Proposal Sections: Required and Optional Attachments, and Review and Submit

- 12** Attachments can be uploaded under the **Required Attachments** and **Optional Attachments** sections of the proposal.

Required documents (marked with an asterisk) may include: **Organization Budget** and **Most Recent Audit**.

Note: Under the **Optional Attachments** section, you have the option to attach an **existing proposal** that you feel adequately addresses the questions of the Foundation's proposal (no longer than 12 pages).

Required Attachments



*Organization Budget

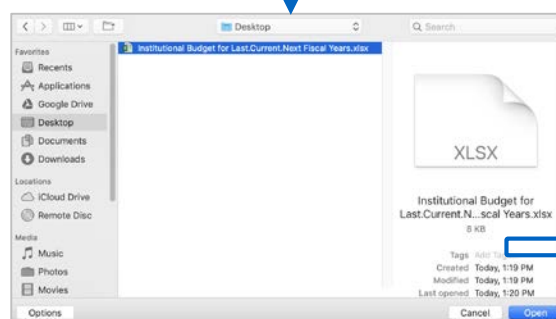
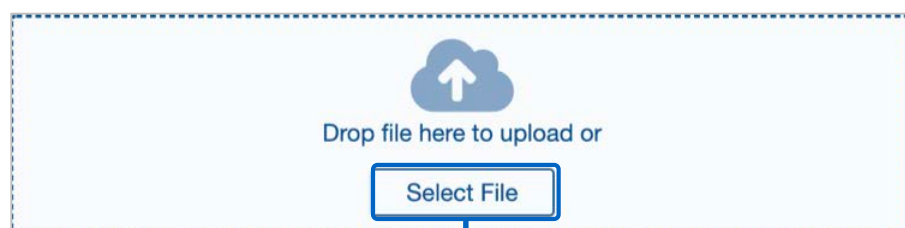
Please attach your organization's budget for the current fiscal year. If your work is fiscally-sponsored, please attach a budget for the sponsored work.



- 13** To upload a document, scroll to a the relevant document and *click* **Select File**. Browse and select the appropriate file from your computer, and *click* **Open**.

All attachments should be in Word (.docx), Portable Document Format (.pdf), or Excel (.xlsx). Please note that files with certain extensions (such as "exe", "com", "vbs", or "bat") cannot be uploaded.

Note: You may also drag and drop files to this window. You may only upload one document at a time.

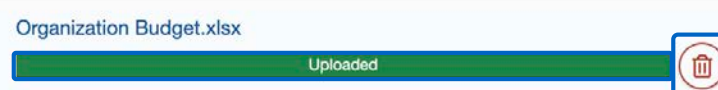


- 14** An upload progress bar will display to show if your attachments are uploaded properly. When the upload is complete, the status displays as **Uploaded**. The uploaded document will appear with the document file name in blue text above the status bar.

Click the **Trash Can icon** to delete the document.

*Organization Budget

Please attach your organization's budget for the current fiscal year. If your work is fiscally-sponsored, please attach a budget for the sponsored work.



Note: Several factors may cause an upload delay or difficulty: 1) larger files; 2) slower internet connection speed; 3) the file type may not be an acceptable format; and 4) your web browser may be an older version, or you are not using Google Chrome or Firefox.

- 15** *Click* **Review and Submit** to review the proposal in its entirety. You can also *click* **View/Print Full Application** if you would like to print a copy.

If you are satisfied with the proposal and all steps have been completed and all flags have been removed, *click* **Submit**.

Note: The proposal will now appear as **Submitted** under the **Active Applications** page and can no longer be edited.

Review and Submit

Complete all steps and remove flags before submitting the Application.



Back Submit

Draft Full Proposal

- Introduction ☒
- Organization Information ☒
- Contact Information ☒
- Proposal ☒
- Required Attachments ☒
- Optional Attachments ☒
- Review and Submit ☐

Save and Come Back Later

View/Print Full Application