

GivingData Overview Video Transcript

ROSE CHRISTIANSEN:

Hello. My name is Rose Christiansen and I'm the Grants Administrator for the Weitz Family Foundation. In this video, I will be walking you through how to navigate our grant application system, giving data so that you can see how to successfully submit an application. If at the end of this tutorial, you still have questions, or if you run into any issues while you're submitting your application, please do not hesitate to reach out to me via email at Rose@WeitzFamilyFoundation.org. You can also find a Giving Data guide on our website that includes frequently asked questions for you to reference as well. So with that, let's go ahead and get started. To access the grant application, you will start by going to the Opportunities page on our website. There you will find links to both our beloved community and capacity-building applications. For more information on the applications themselves, you can watch the other video on our tutorial page where my colleagues will walk you through them in depth.

Once you've selected the one that you wish to apply for, it will take you to this landing page on our Giving Data site. I've selected the Beloved Community Grant for this demonstration, but know that the process is the same for both. On this page, you have the option to either sign in or create a new account. If you've submitted an application using the Giving Data site before, then you can go ahead and log in to your account and continue to the application. If you are new to the role but know that your organization already has an account, please reach out to me via email and I will help you gain access. However, if your organization has never applied for a grant using the Giving Data system before, then you will need to create a new account. You can do so by clicking Create an Account underneath the sign-in box. When you do, it will send a verification email to you. So, make sure you have access to the email account that you would like to use when setting up your login. Once you've created your account, it will take you back to this login page where you can sign in and start the application.

After you've signed in, you should see the option to start a new application. Go ahead and click the plus sign. This is where you'll need to select your organization. If you've applied in the past, you should see your organization listed here. If you are a new organization, you will need to add your organization by clicking the plus sign. Here, you will need to search for your organization using your tax ID number. I'm going to use the foundations as an example. Once your organization comes up, go ahead and select it and click start. It should take you to this page here. Well, now you will see that you have an application in progress. It should say "new" at the top. Then, click Open and it'll take you to the introduction page. Before you

start your application, I highly recommend that you read this page thoroughly as it has important information and dates. On this page, I'd like to highlight a few different things. At the bottom of your screen, you'll see two options. One is to save and come back later.

The other is to view and print your application. Both of these links will show up on each section of your application, so you will have the opportunity to save your work and come back later at every stage of the application. One thing to be aware of, however, is that if you select the option to view and print your application before you've completed it, there might be some questions missing when you view it. This is because some of the questions automatically appear based on your responses, and won't show up until you've answered them. On the right side of the screen is where you will see each section that needs to be completed before you can submit your application. Note that you do not have to complete the application in this order. You can move back and forth between each section until you are done. You'll know that you've completed a section when a checkmark appears next to the heading. Once you see checkmarks next to each section, you will be able to review and submit. And that's how you submit an application.

Congratulations. Once you submit, you should receive a confirmation email letting you know that your application has been received. Finally, I'd like to point out that if you need to update your email address associated with your account or change your password at any time, you can do so by clicking your name in the top right corner and selecting Manage My Profile. Like I said at the beginning, feel free to reach out if you run into any issues or have questions about navigating the portal. Again, my email address is Rose@WeitzFamilyFoundation.org. I also recommend that you check out the Important Dates section on our website... where you can find opportunities to attend virtual sessions and ask questions about the application process. Thank you so much for watching this tutorial and have a great rest of your day.