How to Apply in the New Dodge Grants Portal
Contents

Login Page .................................................................................................................................................. 3
Create Application ..................................................................................................................................... 6
Edit Existing Application .......................................................................................................................... 9
Application ................................................................................................................................................ 10
  Application Instructions .......................................................................................................................... 11
  Application Team .................................................................................................................................. 12
Organization Details .................................................................................................................................. 21
Organization Contacts .............................................................................................................................. 22
Financial Information ............................................................................................................................... 26
Funding Sources ......................................................................................................................................... 29
Request Overview ....................................................................................................................................... 32
Narrative ................................................................................................................................................... 33
Geographic Communities .......................................................................................................................... 36
ArtsEd Dashboard ...................................................................................................................................... 39
DataArts ...................................................................................................................................................... 40
Attachments .............................................................................................................................................. 41
  Detailed organization budgets for the last completed fiscal year and the current fiscal year ................... 41
  Projected upcoming fiscal year organization budget ................................................................................ 41
  If applying for a specific project, attach a budget for that project .......................................................... 41
  Most recent audited financial statement and 990 ..................................................................................... 41
  List of trustees ....................................................................................................................................... 41
  Copy of void check ................................................................................................................................. 41
  Other supporting files ............................................................................................................................ 41
  Photos that are representative of your work .......................................................................................... 41
Review / Submit ......................................................................................................................................... 46
Login Page

Login to the Dodge Foundation Grants Portal (https://grdodge.force.com) with your username and password. Click “Sign in”. If you are a new user, click “New User?” and follow the steps in the user registration guide.
Click “2019 Dodge Streamlined Grant Application”
Create Application

Click “Create Application”
If this is your first application, proceed to page 11. If you are returning to an existing application that you wish to edit, click “Go To Dashboard”. Please note that if you click on “Continue”, you will have the opportunity to start a new application.
Once on Grantee Dashboard, click “Applications” on left-hand menu
Edit Existing Application

Click the “Edit” icon of the application you are looking to edit.
This page is left intentionally blank
If you are starting a new application, review the information in the ‘Application Instructions’ tab, then enter the Name of your Proposal. Click on “Save & Next”.

Note: the “Clear Changes” button is not active.
If you have more than one person working on your application, you may add team members here by clicking either “Invite new Members” (if the contact has not yet been entered into a prior application) or “Search/Add Members” (if contact was entered on a prior application). If you have no further team members, click “Next”. 
If you are adding a team member who already is registered, clicked “Search/Add Members” (see previous image), search the existing contacts name and role in the fields in the image below and then click “Save”.

![Screen capture of the application interface](image-url)
If you are adding a new team member, complete these fields, then click “Save”.

You can now continue to add as many team members as needed to assist you on your application. Each new team member will need to follow the steps noted on pages 16-19.
You will now see the new team member added on your application as pending approval on the “Application Team” tab, until the new team member completes the registration process noted on pages 16-19.
The new team member will then receive this email message and should follow the instructions in the email to confirm their email address, by clicking on the link “Clicking Here”.

Hello (First Name),

You have been invited by (Name of Organization) collaborate on their application to Geraldine R Dodge Foundation. Before you can get started, please complete your registration process by clicking here*

Thanks,
Geraldine R Dodge Foundation

* If that link doesn’t work, copy and paste the following into your browser’s URL bar:
https://prododge.force.com/FOM_Portal_CommunitySignUpConfirm?id=e65A0000000a1Ma&code=G22568.7439115102
The new team member can now set their username and password, by entering a username and a password, and an entry to confirm their password below; and then should click “Register.”
Next, the new team member will see this message, and within a few minutes can login at the Dodge Grants Portal.
The new team member can now enter their username and password and click “Sign in”.
You will now see the new team members added on your application on the “Application Team” tab. On this page, you can Delete, Edit or View each record once added, (see teal arrow). After you have added all team members for this application, click, “Next”.
Organization Details

Complete all the fields on this page, then click either “Save” to save the content entered or “Save & Next” to save the content and proceed to the next tab.

Note: the “Clear Changes”, button is not active.
Organization Contacts

Add the contact information for your Board Chair, Executive Leadership and Primary Contact for this application.

Click “+New” to add each contact.
Complete the organization contact’s fields on the form, then click “Save”.

![Grant Application Form]

- Role
- Prefix
- First Name
- Middle Initial
- Last Name
- Suffix
- Title

Example: Development Manager
Continuation of Organization Contact form

Office Phone

Office Phone Extension

Cell Phone

Email

Purpose of Contact

Available
- Grant letter addressee
- Missing reports/receipts contact
- Request contact for questions
- Site visit arranger contact
- Other

Chosen

If you chose “Other” as the Purpose of Contact, please share the purpose here.

Would you like to receive emails?
(Emails from the Dodge Foundation about other information, not related to your application, i.e., blog, technical assistance, events, etc.)

--None--

Would you like us to share your email address with others?

--None--

[Save] [Cancel]
Now, you should see the contacts. Once all contacts are added, click “Next”.

![Image of a webpage with a table of contacts]
Financial Information

Enter the financial information for your organization’s last, current and next fiscal years. Click “+New” to add each fiscal year.
Complete the fields on the financial information form for each fiscal year, then click “Save”.

[Image of the financial information form with highlighted fields]

- **Year of Record**
- **Fiscal Year**
- **Revenue Total** (If next fiscal year, enter the Revenue Budget)
- **Expense Total** (If next fiscal year, enter the Expense Budget)
- **Net Assets**
- **Financial Data Source**
- **Year End Close**

Correct format: 12/31
Now, you should see the fiscal year information. Once all three fiscal years are added, click “Next”.

2019 Dodge Streamlined Grant Application

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Year of Record</th>
<th>Revenue Total</th>
<th>Expense Total</th>
<th>Net Assets</th>
<th>Source</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>Prior Year</td>
<td>$48,000</td>
<td>$40,000</td>
<td>$10,000</td>
<td>Audited Statement or 990</td>
<td>Delete</td>
</tr>
<tr>
<td>2019</td>
<td>Current Year</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$20,000</td>
<td>Unaudited Financials</td>
<td>Delete</td>
</tr>
<tr>
<td>2020</td>
<td>Next Year</td>
<td>$45,000</td>
<td>$42,000</td>
<td>$15,000</td>
<td>Projected</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Showing 1 to 3 of 3 Entries

Next
Funding Sources

Add up to five of your organization’s top funding sources

Click “+New” to add a funding source.
Complete the fields on the Funding Sources form for each funding source, then click “Save”.
Now, you should see the funding sources. Once you have completed adding funding sources, click “Next”.
Complete the fields on the Request Overview form, as applicable for your organization’s request, then click “Save”.

Note: the “Clear Changes” button is not active.
Complete the fields on the Narrative form, as applicable for your organization’s request, then click “Save”.

Note: the “Clear Changes”, button is not active.
Continuation of Narrative Form

3. List the top three anticipated outcomes you hope to achieve over the coming year and how you will know if you have achieved them. (Suggested 500-word count)

4. Have you experienced any significant achievements or setbacks we should know about related to your organizational issues? Please highlight any needs. (Suggested 500-word count)
Continuation of Narrative Form

5. What are your organization’s internal Diversity, Inclusion and Equity goals? (Suggested 500-word count)

6. Is there anything else you would like us to know? (Suggested 500-word count)
Add up to five geographic communities that your organization serves.
Click, “+New” to add a geographic community.
Complete the fields on the Geographic Communities form, then click “Save”.
Now, you should see the geographic communities. Once you have completed adding geographic communities, click “Next”.
If your organization is applying for our Education program area, complete the ArtsEd Data Dashboard. By clicking on the link below to access, then click “Save & Next”. You may complete this ArtsEd Data Dashboard separately, outside of your grant application. If you are applying for another program area, click “Save & Next” to skip to the next tab.

Note: the “Clear Changes” button is not active.
If your organization is applying for our Arts program area, complete the DataArts profile. By clicking on the link, “DataArts” noted below, then click “Save & Next”. You may complete the DataArts Profile separately outside of your grant application. If you are applying for another program area, click “Save & Next” to skip to the next tab.

Note: the “Clear Changes” button is not active.
Attachments

Add each of the attachments listed to your application, by clicking, “Choose File” then click “Upload”. When you have completed uploading all documents, click “Save”. Go back to the top of the page, then click “Review/Submit”.

Note: the “Clear Changes” button is not active.

The following types of attachments are requested on the application:

- Detailed organization budgets for the last completed fiscal year and the current fiscal year
- Projected upcoming fiscal year organization budget
- If applying for a specific project, attach a budget for that project
- Most recent audited financial statement and 990
- List of trustees
- Copy of void check
- Other supporting files
- Photos that are representative of your work
Screen captures of relevant attachment sections for the application

---

**1. Detailed organizational budgets (expenses and income) for the last completed fiscal year and the current fiscal year.**

If you have it, please also include your projected upcoming fiscal year budget. We prefer a side by side comparison of the fiscal year budgets in a single document, but you may attach multiple documents if necessary. If your organization is a chapter of a national association or part of a university, please provide financial information that relates to your specific operations.

You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to select your file then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**2. Projected Upcoming Fiscal Year Organizational Budget**

You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to select your file then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Continuation of screen captures of relevant attachment sections for the application

3. If applying for a specific project, attach a budget for that project. You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to select your file then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Choose file  Upload

No file chosen

4. Most Recent Audited Financial Statement and 990. You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to browse and select your file, then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Choose file  Upload

No file chosen
Continuation of screen captures of relevant attachment sections for the application

5. List of Trustees
   You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to select your file then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Choose file  
Upload

No file chosen

6. Copy of Voided Check
   You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to select your file then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Choose file  
Upload

No file chosen
Continuation of screen captures of relevant attachment sections for the application

7. Other supporting files (optional)
You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to select your file then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Attachment Description (Optional)

[Choose File] [Upload] [No file chosen]

8. Up to five photos that are representative of your work.
You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click 'Choose File' to select your file then click on 'Upload'. Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next file upload section.

- Please be sure to include any applicable photo credits.
- If possible, please put the name of your organization in the title of the photo.
- Please make sure Dodge has permission to publish the photo on our website or in any Dodge publications.
- Suggested file types: .jpg, .jpeg, .gif, .png, .pdf

<table>
<thead>
<tr>
<th>Attachment #</th>
<th>File Name</th>
<th>Attachment Description (Optional)</th>
<th>Created Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Attachments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Attachment Description (Optional)

[Choose File] [Upload] [No file chosen]

Save [Clear Changes]
If you have not uploaded all required attachments and completed all required fields in the application, you will see a warning message with the required fields and attachments that need to be completed prior to clicking “Review/Submit”.

Please provide the following attachments. Scroll down the entire length of the page to ensure you are aware of all necessary attachments.

1. Detailed organizational budgets (expenses and income) for the last completed fiscal year and the current fiscal year.
2. This is a required field. 4. Most Recent Audited Financial Statement and 990.

Please provide financial information that relates to your specific operations.

You may upload more than one file in this section. Each file can only be uploaded one at a time. To upload additional files, click “Choose File” to select your file then click on “Upload.” Repeat this step for each additional file. When you are done uploading files in this section, proceed to the next section.
You can now review and print out a copy of your application for your records. Application printouts do not include submitted attachments. When you have completed your review, click “Submit”.
Questions?

Please email the Dodge Foundation grants management team

questions@grdodge.org