



Login to Complete an Invited Application

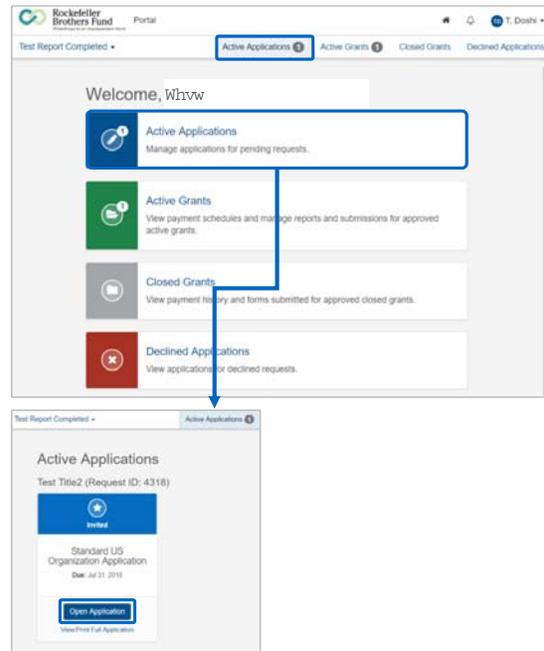
1 You will receive an email invitation to submit an application from mail@givingdata.com. *Note:* Contact your Program staff if another person at your organization should have portal access.

Sign in to the Portal: <https://rbf-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.

The **Active Applications** page will open. This page will display: **New, In-Progress, Invited,** and **Submitted** applications.

To open an invited application, find the relevant application, and click **Open Application**.



2 Helpful Tips for Completing your Application:

- Use the **Table of Contents** menu to navigate to different sections of the application.
- 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.
- Use **plain text** if you are copying and pasting text from another document, as all formatting may get lost in the online application.
- The RBF 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 the application to the RBF.
- You do not need to complete the application in one sitting. Click **Save and Come Back Later** to close. Click **View/Print Full Application** to print the full application.
- Once you **submit** your application to the RBF, the application cannot be edited. Your program contact will be in touch with any questions or follow-up information that is needed.
- A decision is usually made within three months. Please follow-up with your Program contact with questions on the status of your application.
- If you have any technical questions on completing the application, please contact the RBF at grantsmgmt@rbf.org.

Standard US Organization Application	
Introduction	<input checked="" type="checkbox"/>
Organization Overview	<input checked="" type="checkbox"/>
Key Contacts	<input checked="" type="checkbox"/>
Your Grant Request	<input checked="" type="checkbox"/>
Advocacy	<input type="checkbox"/>
Diversity Information	<input type="checkbox"/>
Documents	<input type="checkbox"/>
Review and Submit	<input type="checkbox"/>
<input type="button" value="Save and Come Back Later"/>	
<input type="button" value="View/Print Full Application"/>	



Overview of Standard Application Sections: Organization Overview and Key Contacts

3 The **Organization Overview** section asks for core information about your organization including: Mission Statement, Year of Establishment, Current Institutional Budget, and Funding Sources.

4 The **Key Contacts** section lets the RBF know who should be the contacts at your organization for different components of the proposal review, and, if the request is approved, grant relationship.

Key contacts include **Head of Organization**, **Project Director**, **Finance Contact**, and **Administrative Contact**.

Click in the **Select Contacts** 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 Contact** box on the left. Click on the **contact name** to edit the contact information.

5 If the contact does not appear under the **Select Contacts** 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**.



Overview of Standard Application Sections: Key Contacts, Continued

6 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.

Select **Yes** or **No** for **Preferred**.

Click **Save**.

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*.

7 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**.

Select **Yes** or **No** for **Preferred**.

Click **Save**.

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*.

8 The new contact will now appear under the **Select Contacts** dropdown.

Assign the contact to the relevant contact title.



Overview of Standard Application Sections: Grant Request and Diversity Information

9 The **Your Grant Request** section asks for you to provide some overview information about your specific grant request

Required fields (marked with an asterisk) include, **Project Title**, **Requested Amount**, **Other Sources of Support**, and a **Brief Summary of the Project**.

You will also be able to upload your proposal narrative. Refer to the [Documents section \(Steps 12&13\) on page 5](#) for more information on how to select and upload a file.

Your Grant Request

Please use this page to tell us about your grant request. There are a few lines to complete, and then you will be able to upload a proposal narrative.

Overview

*Project Title

*Requested Amount
\$

Request Narrative

Below, please upload a Word or PDF document providing your funding request narrative. The narrative should include:

- Description of the proposed work, including methods by which the work is to be carried out.
- Desired/expected outcomes of the project
- Background and research that led to the development of the proposal
- Please also be sure to include any specific details or points of focus your contact at the Fund may have provided to you.

There is no minimum or maximum length requirement for the narrative; however, the RBF has found that 3 to 10 pages is an adequate range. Please be concise.

*Narrative


 Drop file here to upload or

10 The RBF is committed to the values of diversity, equity, and inclusion. The questions in the **Diversity Information** section are designed to help the RBF understand how your organization and your request reflect those values.

To learn more about the RBF's commitment to diversity, please see the [RBF's Diversity Statement and related report](#).

Complete all required fields under the **Programmatic Work and Your Organization** and **Racial/Ethnic and Gender Composition of Board Staff** sections.

Diversity Information

The Rockefeller Brothers Fund is committed to the values of diversity, equity, and inclusion in its grantmaking. The questions below are designed to help us better understand how our grantees reflect on and address diversity, equity, and inclusion.

To learn more about the Rockefeller Brothers Fund's commitment to diversity, please see the [Fund's Diversity Statement and related report](#).

Programmatic Work and Your Organization

*Do you address diversity in your mission statement?

*Does the work supported by this grant engage diverse perspectives in the community or field in which you work?

Strategies your organization will use to engage diverse perspectives

*Partner with and/or engage with underrepresented groups

If yes, please tell us how or give a brief example

*Convene underrepresented groups

If yes, please tell us how or give a brief example

Racial/Ethnic and Gender Composition of Board and Staff

Please complete the following tables on the racial, ethnic, and gender diversity of your organization's board and staff by entering the number of individuals.

Use the space below the tables to provide any additional information that would support your results.

Racial/Ethnic Background

*Race/Ethnicity

*Board	*Management	*Administrative
<input type="text"/>	<input type="text"/>	<input type="text"/>

Race/Ethnicity

Board	Management	Administrative
<input type="text"/>	<input type="text"/>	<input type="text"/>

Race/Ethnicity

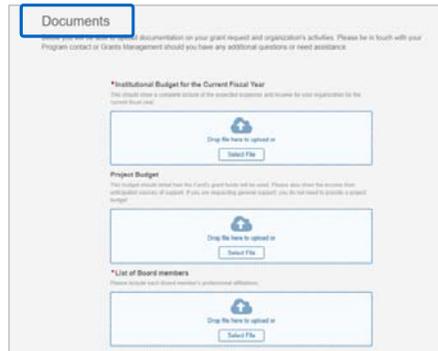
Board	Management	Administrative
<input type="text"/>	<input type="text"/>	<input type="text"/>

Race/Ethnicity



Overview of Standard Application Sections: Documents, and Review and Submit

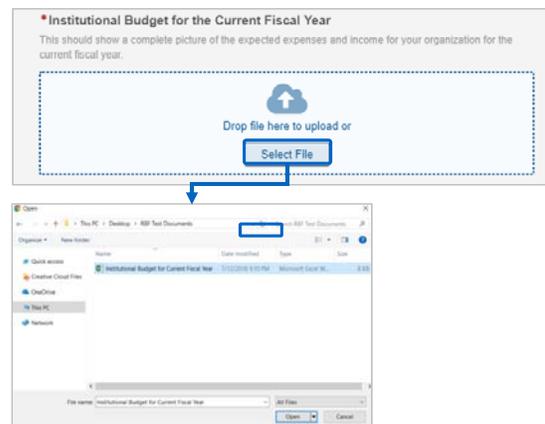
11 Attachments can be uploaded in the **Documents** section. (Follow the same steps noted here to upload the **Request Narrative** in the **Grant Request** section described above on page 4.)



12 To upload a document, scroll to a relevant section, 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.



13 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.

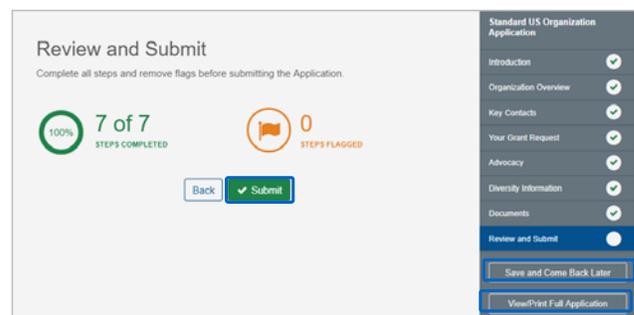
Click the **Trash Can icon** to delete the document, if you want to replace it with another document.



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.

14 *Click* **Review and Submit** to review the application 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 application and all steps have been completed and all flags have been removed, *click* **Submit**.

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





RBF Application Types: Overview of Sections and Requirements

Sections and requirements for ALL Application types include:

- **Organization Overview** - This section asks for core information about your organization including: Mission statement, year of establishment, current institutional budget, and funding sources.
- **Key Contacts** - Let us know who should be our contacts at your organization for different components of the proposal review and, if the request is approved, grant relationship.
- **Request Information** - Here you can provide overview information about your specific grant request, including other sources of funding, and you will be able to upload your proposal narrative. The narrative should include:
 - A description of the proposed work, including methods by which the work is to be carried out
 - Desired/expected outcomes of the project
 - Background and research that led to the development of the proposal
 - Bios of key project staff, noting roles on the project
 - Any specific details or points of focus your Program contact at the RBF may have provided to you
There is no minimum or maximum length requirement for the narrative; however, the RBF has found 3 to 10 pages to be an adequate range.
- **Diversity Information** - The RBF is committed to the values of diversity, equity, and inclusion. The questions in this section are designed to help us understand how your organization, and this request, reflect those values.
- **Documents** - There are a few documents that we ask you to provide, such as your Institutional Budget and a Project Budget (if you are seeking project support). This page guides you through the required documents, and provides a space for you to upload them into your application.

Additional sections and requirements for Sponsored Project Applications include:

- **Sponsoring Organization Overview** – This should reflect on the Sponsoring Organization, who will serve as the grantee for the grant
- **Request Information** - The proposal narrative should reflect on both the sponsoring organization and project, and in addition to the points above, should include:
 - Describe the relationship between the sponsoring organization and project
 - Any specific details or points of focus your Program contact at the RBF may have provided
- **Sponsored Project Relationship** - This section includes several questions related to the managerial control and financial oversight of the project.
- Please note that a **Project Budget** is a required document for Sponsored Projects. The Sponsoring Organization is also required to submit a copy of their **Institutional Budget**.

Additional sections and requirements for “with Advocacy Questions” Applications include:

- **Advocacy** - If requested by your Program contact, please complete this section to tell us more about your advocacy and lobbying activities

Note: If you do not complete a “with Advocacy” Application, your program contact may request that you complete a **Supplemental Advocacy Information** form through the Portal.

ALL International Applications include:

- **Tax Status** – Here you will be guided through several required documents needed for the RBF to understand your organization's tax status and registration. Returning grantees to the RBF only need to submit this documentation if changes have occurred in your statutes or registration.
- Additional documents required for international applications include: **Wire Transfer Form** and **Public Support Form**.