EDYTH BUSH
CHARITABLE FOUNDATION

Instructions for our Online Grant Application

Please review the following directions to use Edyth Bush Charitable Foundation's online application system and to complete your work in an orderly manner. Keep these directions on hand as you complete your application for the first time. You may find it helpful to view and print a sample application form from our website's Grantee Toolbox.

Working with colleagues to complete the application:

In many cases more than one person may need to access the application in order to complete it. As only one account can be created per application you will need to share your login information with any colleague with whom you may need to collaborate.

If someone else from your organization signs up with a different account username and password, they will not be able to access the in-process application. It will only create a blank account.

Step 1: Access the Application Form

After you have entered your account name and password, press next. You must enter your organization's Federal Tax EIN to launch the application. You may begin completing the Organization Information, Contact Information, Proposal Information, and attaching required documents.

On the top of the page are some links:

Edyth Bush Charitable Foundation Grant Request Application

Contact Us   Edyth Bush Charitable Foundation

Account: your name here

✳ Required before final submission   Page **1** 2 3 4 5   Review My Application   Printer Friendly Version   Email Draft

"*Required before final submit" All items denoted with a red asterisk are required fields. You will not be permitted to submit your application without completing these fields. If you attempt to do so you will see a red arrow pointing to an incomplete field and the "submit" button will not be available – it will say "Update" instead. You do not need to complete these fields in order to proceed to the next page, however. You can return to any page at any time and complete previously incomplete work at some point in the future.

"Page Numbers" allow you to move back and forth from one page to another. Click the page

number you wish to return to or to go back to the previous page. The browser Back button will take you back to the My Account page.

"Review My Application" gives you the option to review what you have completed at any time. You may be asked to review the completed application with our Program Officer before submitting it to the Edyth Bush Charitable Foundation. Use the "**Email Draft"** link to do so.

"Printer Friendly Version" allows you to see and print the application in a friendly all-at-once view.

"Exit" will immediately exit the application and return you to the Foundation's website. It will NOT save your work first, so you must ensure that anything you want saved is retained first. Click "**Save and Finish Later**" at the <u>bottom of the form</u> to do so.

Step 2: Saving the Application and Finishing Later

You have the option of saving your work and submitting the required forms at a later time. Press "Save and Finish Later" at the bottom of the form you are working on, in order to exit the form and keep the information you have entered. You are encouraged to do this from time to time to ensure that your ongoing work is saved and protected from inadvertent loss. If you want to continue working, press the "Next" button.

If you decide to use the "Save and Finish Later" option, you may access the incomplete application at a future time. In order to access an in-process application you must use the link in the My Account section of the Edyth Bush Charitable Foundation website. Your in-process application form will be retained there for you.

Step 3: Access Uploading Attachments from Your Computer

For your application to be considered complete you will need to submit as attachments the following:

<u>Program Budget:</u> A detailed budget of the project or need, showing how the requested funds from this Foundation would be spent. (three columns usually are effective: Line Item, Total Project, and Foundation Funds.)

<u>IRS Determination Letter:</u> A copy of the most recent letter of exemption from the Internal Revenue Service demonstrating that you are an organization exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Service.

<u>IRS Form 990:</u> Latest annual IRS Form 990.

<u>Audit:</u> Balance Sheet and detailed Income Statement (as audited by the organization's Certified Public Accountant, if such audits are made.)

Management Financials: Provide the most recent quarterly or monthly management financial statement, if the annual statement is more than three months old. This recent information should include a balance sheet and year-to-date income statement.

Board Member List: The names, occupations, and affiliations of each of the Board of Directors of the Trustees responsible for the management of the organization.

Other: You may attach up to two additional documents.

To upload an attachment to the application form, click on the arrow by the field Title to view all attachments. Select by name to upload. Click the Browse button to find the attachment on your computer that corresponds with the attachment that you wish to upload and press Open. Once selected, it will show in File Name in the application screen. Press Upload. You may attach more than one file with the same Title. Management Financials may have several separate spreadsheets or documents attached with different file names.

Note: The maximum size for all attachments combined is 25MB. Please note that files with certain extension (such as "exe", "com", "vbs", "xlsx", or "bat") cannot be uploaded.

The above information will complete our basic requirements. However, every grant request is unique and reviewed individually. The Program Officer will contact you if additional information is needed for the review and consideration of your request.

Step 4: Reviewing and Submitting your Application

When you have finished uploading all the required attachments, press Review and Submit. You will have the ability to review your application one last time before submitting it to the Edyth Bush Charitable Foundation.

After you have reviewed the application and are satisfied with the content and have completed all required attachments, press Submit. You will receive an email confirming receipt by the Foundation.

Step 5: Let's Begin

Once the Foundation determines an interest in accepting a grant request from your organization, you will receive instructions from the Program Officer on how to access the appropriate online application form.