# TLLF'S PORTAL TOOLKIT

### THE LEON LEVINE FOUNDATION GRANTEE PORTAL





A guide to navigating our system & managing your grant request



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#1 #2



# First things first:

If you are a new prospective grantee, you will need to register your organization in our system. Begin by navigating to the Grantmaking tab of our website. Select the "How To Apply" option.\*

Note: If TLLF contacted your organization and invited a proposal (vs. you submitting an LOI), your application will already be available in the portal, and you can use the login details provided by admin support to enter the portal.

 Click on the "New Grantee" block. Select "I Am Inquiring." • Scroll down to the numbered application steps and select "Take the Quiz to Register." Taking our eligibility quiz

- Click through the quiz questions and respond accordingly.
- If you successfully meet our eligibility requirements, you'll see this "Congratulations" window.
- Select "Register" to continue setting up your account.

* 1. Is your organization Yes
You have met the qua
Please choose 'Login' if ye existing username/pas
LOGIN
Once butto



tion recognized by the IRS as a public charity under Section 501(c)(3)?

### NEXT

### Congratulations!

alifications to submit an LOI for The Leon Levine Foundation.

you have an Please choose 'Register' to setup a new account. REGISTER e you gain access to the portal, please click the ton on the home page that says 'Start an LOI'.



### ORGANIZATION INFORMATION

\* Please search for the organization seeking funding by typing the name, EIN, or address of the organization into the box below then clicking the magnifying glass on the right to view more information. If you cannot find your organization, you may add it by clicking "Can't find your organization".

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The Leon Levine Foundation

The Leon Levine Foundation Demo Portal

Can't find your organization?

Organization Name	* EIN	
	E ##-#######	
Street Address		
City	* County	
City	* County select	
City State	* County select * Zip Code	•

Q

- will be your username.

## Setting up your account:

• Search for your organization by name; it should be available for you to select if it's already registered in our system. (If you haven't registered yet, choose "Can't find your organization?" and complete the fields in the pop-up window.)

• Fill in the requested contact information.

• Look for an automated email that will be sent to your registered email address. Your email address

• Use the link provided to set your password and finish the registration process. You will then be redirected to the portal's main page.

Creating contact roles for an existing organization, step #1:

- Log in to the portal and click on the "My Organization" tab.
- Scroll down to the "Contact" section and read the blurb provided. Click "Add" to continue.



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Cor	ntacts						
	The table below lists You may choose to e that is authorized to	out all contacts asso dit your contacts by s sign a Grant Agreeme	ciated with your organization. To add a cor electing the 'Edit' button beside the conta ent. You can do this by checking the box fo	itact to your organi: ct you wish to upda r "Sign Grant Agree	zation click on the te. We do require ment".	'Add' button belo you to add/indicat	w the table. te <u>one</u> contact
	You have the ability to Portal access means reports and payment portal access box on portal.	to manage if a contact that the contact is se ts, both historically ar the edit screen. Remo	t gets access to the portal. Portal access is t up with a user and is connected to your o nd in the future. You may also remove acce oving access means that the contact is still	indicated by checki rganization in the p ss to the portal for y in your organizatio	ng the box for port ortal. They will hav your contacts. To d n but they will no l	tal access on the e ve access to all LO do this, you would longer have login a	dit screen. Is, requests, uncheck the access to the
	Indicating that a con organization. Please Until that is done, th	tact is no longer with Note: Once the upda e contact will still app	your organization is also done on the edit te is complete, a notification is sent to our pear on the list of contacts for your organiz	screen. Simply selec internal staff who v ation.	t "Yes" to remove vill remove this co	this person from ntact from your or	your ganization.
	Name ‡	Title ‡	Email ‡	Portal Access	Sign Grant Agreement	Remove From Org	
7	D Beaty	Senior Grants Management Associate	dianna@gmail.com	Yes	Yes		EDIT
	Rachel Rankin	Owner	rarankin92@gmail.com	Yes	No		EDIT
	Test User	Admin Support	team+test@valuestreamconsulting.c	Yes	Yes		EDIT
	Ragae Kunda	Test	ragaakunda@email.com	Yes	No		EDIT
	Add	)					

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MY ORGANIZATION	REQUESTS	

## Creating contact roles for an existing organization, step #2:

- Once you click "Add" as indicated on page 6 of the toolkit, this popup window will appear.
- Complete the fields as indicated. Be sure to check one or both of the boxes shown to give the contact portal access and authorization for grant agreements.

		2
Please enter the contact details for the person you w	vish to add to your organization.	
* First Name	* Last Name	
* Title	* Email	
Should this contact have access to the portal? Portal access allows this contact access to all of your organiz. requests, LOIs, reports and payments.	ation's	
If this person is authorized to sign a Grant Agreemer please check this box.	ıt,	

## Submitting an LOI, step #1:

Begin by selecting the "Requests" tab on the portal and clicking the "Start an LOI" button. NOTE: You will receive an error message if you already have an LOI in process. Look under the "Requests" tab (and LOI subheader) below to find any pre-existing LOI requests.

THE LEON LEVINE Foundation	HOME	MY ORGANIZATION		RE	QUESTS	
The submission of a reques will also be available by cli	st does not guarantee future funding. U cking on the submitted record under th	pon submission of your r e "Requests" tab.	equest, you will be g	iven the oppo	ortunity to dov	w
			START AN LOI	K		
			LOIs	Pre	:-exist	
OPEN CLOSED						



## Submitting an LOI, step #2:

Once redirected to this page, click the "Start a New LOI" button.

### **INSTRUCTIONS:**

The submission of a Letter of Inquiry (LOI) does not guarantee future funding. Upon submission of your LOI, you will be given the opportunity to download and/or print a PDF copy. After submission, the PDF copy will also be available by clicking on the submitted LOI under the "Requests" tab.
 \*Designates a required field.

o Please ensure to submit the LOI once it is complete. LOIs not completed within 45 days of initiation will be withdrawn and deleted due to inactivity.

The submission of a Letter of Inquiry (LOI) does not guarantee future funding. If you have already started an LOI, please navigate to the "Requests" tab above. The started LOI will be listed under the "OPEN" tab of the LOI sub header. Upon submission of your LOI, you will be given the opportunity to download and/or print a PDF copy. After submission, the PDF copy will also be available by clicking on the submitted LOI.



### Submitting an LOI, step #3:

Progress through the LOI application, saving your information as you go (do not leave the page idle without saving your work). When ready, review the information, and then click submit.

Inquiry Details	Attachments	Review and Submit	
0	0		
Attachments			
Select a file for the required box and click the co uploaded. Files will be renamed to the correspon	rresponding "Upload" button. A green check mark will nding sub header of the file box. Other relevant attachr	appear if the attachment was successfully nents are optional but may be uploaded if you	Inquiry Details
choose. # ÷ File Name ÷	Upload	Date ÷	0
			After you
* Detailed Organization Budget (Current Fiscal )	Year) Other Attachment(s)	E Upload	
Annual Report	Upload		
PREVIOUS		SAVE & NEXT	



# **Uploading files:**

- Select the button that looks like a filing box.
- Locate the document you wish to upload.
- Click the upload button.
- Look for a green check mark to appear beside your document(s), which signals that you have successfully uploaded your file(s).

Request Detail	Narrative	Trends	Attachments	Submit		
0	-0	-0				
	Provide * Design	copies of the following attachme nates a required attachment.	ents:			
#   File Name			Upload Date 🗧			
Select a file for each requir uploaded. Files will be rena * Most Recent Audited Fin:	red box and click the corresponding when named to the corresponding when nancial Statement	Note box thy ader of the file box. Provide copies	the fili here and e upload outton. mark will appear if the attachment wa	ng a as successfully Provide copies of the follo	wing attachments:	
* Most Recent IRS Form 99	90	Upload # =	File Name 🗘		Upload Date 0	
		1	Most Recent Audited Fina Foundation Demo Portal.d	ncial Statement - The Leon Li ocx	evine 05/03/2023	VIEW
			Your a should a	locument ppear her	) e.	
e green m you	n check r uploa	Select a f uploaded • Most R © Goo	ile for each required box and click t d. Files will be renamed to the corre ecent Audited Financial Statement	he corresponding "Upload" button sponding sub header of the file box	. A green check mark will appear if the at . Provide copies of the following attachm Development Plan	tachment was successfully ents: Uplo

look for th mark to confi

## Submitting a grant agreement:

Once TLLF communicates the Board's decision to award funds, log in to the portal and click the "Reports" & Payments" tab. Select the appropriate request to get started.

LEVINE     HOME     MY ORGANIZATION     REQUESTS       FOUNDATION	LEON LEVINE Foundation	HOME	MY ORGANIZATION	REQUESTS
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- Grant Agreement An agreement between The Leon Levine Foundation (TLLF) and the nonprofit partner detailing uses for funds. Once an award decision has been made, the agreement will be available below, shown as "Requested". Review and electronically sign the agreement by the designated due date. You may download a copy for your records by clicking into a "Submitted" agreement. Click below to view the Portal Toolkit for detailed instructions on submitting this agreement.
- Interim Report For multiyear requests, used as a check-in.

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# Virtually signing your grant agreement:

Once you've opened your grant agreement, read through the document. Scroll to the bottom to electronically sign it. You can do this by clicking anywhere in the designated box and dragging the mouse to create your signature. When you're ready, click the "Review & Submit" button.

> \* Note: If you need to erase your signature and start over, double click anywhere in the box.

Payment S This gran to Grante 1. Grante 2. Payme

Grantee's agreement to the terms and conditions set forth in this agreement must be made by a duly authorized o should execute a copy of this letter and submit one such executed copy to TLLF.

Tom Law

President

Senior Gr

The Leon Levis By: D Beaty

The Leon Levine Foundation Demo Portal - Grant Agreement FY 2024					
Request Name:	The Leon Levine Foundation Demo Portal - Test Request				
Total Amount and Terms of Grant:	\$4,000,000 to be paid in four equal annual installments (\$1M/year) beginning in March 2024. The first payment is contingent upon securing 500 new donors.				
	If there is a match or challenge component to your grant, see terms and conditions listed in section 10 of this agreement.				
Payment Schedule:	On or before the following date(s): \$1,000,000 - March 2026 \$1,000,000 - March 2027				
This grant is awarded by The Leon Levine Foundation ("TLLF") to The Leon Levine Foundation Demo Portal ("Grantee") subject to Grantee's acceptance of the following terms and conditions:					
1. Grantee shall exclusively use the a	awarded funds consistent with the Terms of Grant stated above.				
2. Payment(s) of the grant will be scl	heduled upon receipt of a signed copy of this Grant Agreement.				
<ol> <li>TLLF reserves the right to discont refund of any grant funds if, in TLLF terms and conditions of this grant; (b or (c) to comply with the requirement</li> </ol>	inue, modify or withhold any payment(s) under this grant award or to require a total or partial F's sole discretion, such action is necessary: (a) because Grantee has not fully complied with the b) to protect the purpose and objectives of the grant or any other charitable activities of TLLF; its of any law or regulation applicable to you, TLLF, or this grant.				

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	04/02/2024 Date	15
ants Management Associate	REVIEW & SUBA	TIM

# Downloading your signed grant agreement:

If you'd like to download a copy of the signed grant agreement for your records:

- Navigate to the portal's "Reports & Payments" tab.
- Select the "Completed" tab and click on the appropriate document.
- Once it opens in the portal, click the "Pop-out" button in the top right corner.
- The signed agreement will appear as a PDF in a new tab in your web browser; from here, you can print or save the document as you would any other.

REQUES		ED
	Grantee Report ↓	$\sim$
1	GR-000009397	



## Resetting your password:

- Navigate to the portal log-in page or simply copy and paste the following URL: https://theleonlevinefoundation.my.site.com/s/login/
- Select "Forgot your password?"
- Provide your email address as indicated and continue following the prompts.

### PASSWORD RESET

Please enter your email address.

If your email is registered with the Leon Levine Foundation Grantee Portal, you will receive an email containing password reset instructions shortly.

💄 Email

**Reset Password** 

Cancel



## Finalizing your password reset:

You will receive the following email and can click the link - as shown below - to navigate to the password reset webpage.



Your name will appear here.

Please set a new password for The Leon Levine Foundation Grantee Portal.

If you did not request a password reset, please contact adminsupport@leonlevinefoundation.org.

Thank you, The Leon Levine Foundation 6000 Fairview Rd. Suite 1525 Charlotte, NC 28210



### Change Your Password

grantsu	upport@leonlevinefoundation.org. Make sure to
include	e at least:
0	8 characters
0	1 uppercase letter
0	1 lowercase letter
0	1 number
0	1 special character 🕕
- New I	Password
* Confi	rm New Password
* Confi	rm New Password
* Confi	rm New Password Change Password

## Resources for you:

### THE LEON LEVINE FOUNDATION GRANTEE PORTAL CREATING LIFE CHANGING IMPACT

Be sure to check out these resources which we've designed with you in mind!

RESOURCES





### **Portal Toolkit**



# How to reach us:



Got questions? If you need help navigating the system, email us at: <u>adminsupport@leonlevinefoundation.org</u>

## Useful Links:

- <u>TLLF Website</u>
- <u>"How To Apply" Page</u>
- Grantee Portal
- <u>Media Toolkit</u>
- <u>FAQs</u>

### THE LEON LEVINE Foundation