

TLLF'S PORTAL TOOLKIT

A guide to navigating our system
& managing your grant request

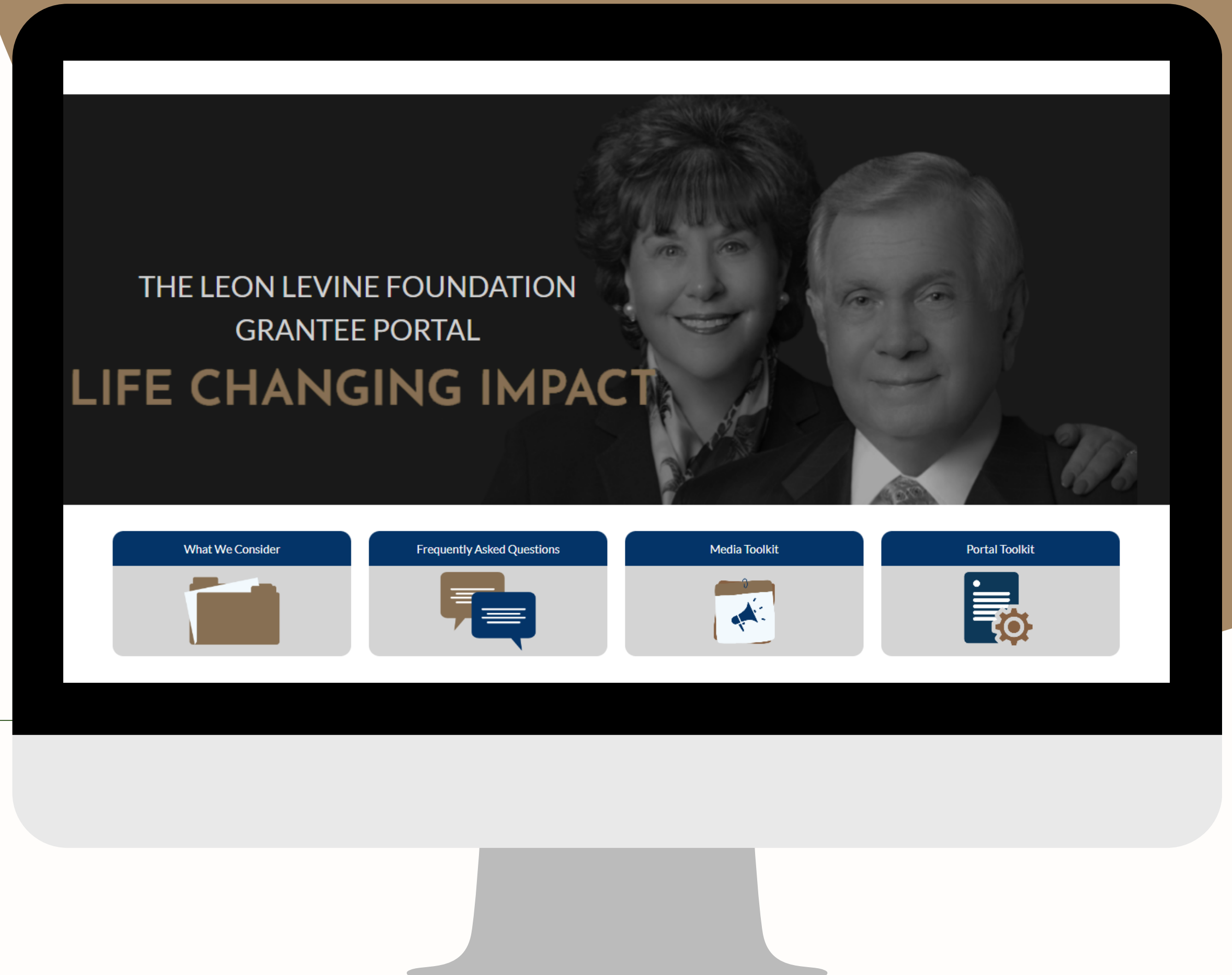




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HOW TO APPLY

I am a...

NEW GRANTEE

Which of these scenarios best apply to you?

I AM INQUIRING ABOUT BEING A GRANTEE

1



Verify you meet all of the Foundation's eligibility requirements.

2



Take the brief eligibility quiz.

[TAKE QUIZ](#)

3



Register as a user in our grantee portal.

[TAKE THE QUIZ TO REGISTER](#)

4



Submit Letter of Inquiry (LOI).

5



The Foundation will contact you within ~60 days if you are invited to apply for a grant.

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.*

- Click on the "New Grantee" block.
- Select "I Am Inquiring."
- Scroll down to the numbered application steps and select "Take the Quiz to Register."



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.

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

Yes

NEXT

Congratulations!

You have met the qualifications to submit an LOI for The Leon Levine Foundation.

Please choose 'Login' if you have an existing username/password.

LOGIN

Please choose 'Register' to setup a new account.

REGISTER

Once you gain access to the portal, please click the button 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".

The Leon Levine Foundation

The Leon Levine Foundation Demo Portal

Can't find your organization?

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

Please provide the following information on the organization seeking funding.

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

After saving, you will be directed back to the registration page. Please type your newly created organization into the text box and select it when it appears.

SAVE

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.

Your user information should appear in this field, along with any other organization contacts registered in our system.

The screenshot shows the 'The Leon Levine Foundation' portal. The top navigation bar includes 'HOME', 'MY ORGANIZATION' (circled in brown), and 'REQUESTS'. The 'Contacts' section contains instructional text and a table of existing contacts. An 'Add' button is circled in blue at the bottom of the table. A brown arrow points from the handwritten text to the 'Add' button.

Contacts

The table below lists out all contacts associated with your organization. To add a contact to your organization click on the 'Add' button below the table. You may choose to edit your contacts by selecting the 'Edit' button beside the contact you wish to update. We do require you to add/indicate one contact that is authorized to sign a Grant Agreement. You can do this by checking the box for "Sign Grant Agreement".

You have the ability to manage if a contact gets access to the portal. Portal access is indicated by checking the box for portal access on the edit screen. Portal access means that the contact is set up with a user and is connected to your organization in the portal. They will have access to all LOIs, requests, reports and payments, both historically and in the future. You may also remove access to the portal for your contacts. To do this, you would uncheck the portal access box on the edit screen. Removing access means that the contact is still in your organization but they will no longer have login access to the portal.

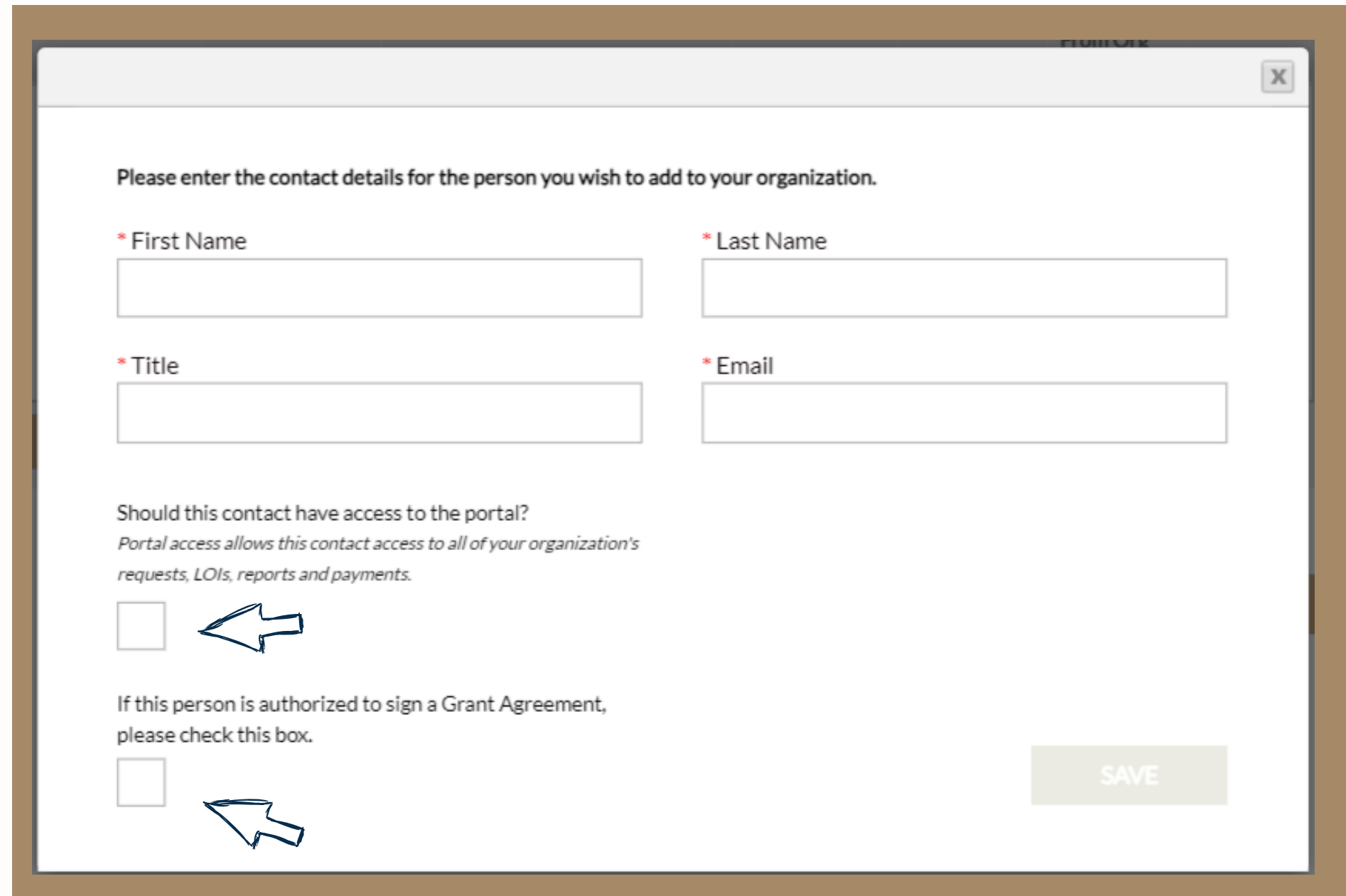
Indicating that a contact is no longer with your organization is also done on the edit screen. Simply select "Yes" to remove this person from your organization. **Please Note:** Once the update is complete, a notification is sent to our internal staff who will remove this contact from your organization. Until that is done, the contact will still appear on the list of contacts for your organization.

Name	Title	Email	Portal Access	Sign Grant Agreement	Remove From Org
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
Raga Kunda	Test	ragaakunda@gmail.com	Yes	No	EDIT

Add

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

- Once you click “Add” as indicated on page 6 of the toolkit, this pop-up 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.



Please enter the contact details for the person you wish 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 organization's requests, LOIs, reports and payments.

☐ 

If this person is authorized to sign a Grant Agreement, please check this box.

☐ 

SAVE

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 screenshot displays the user interface of The Leon Levine Foundation portal. At the top, a navigation bar includes the logo, 'HOME', 'MY ORGANIZATION', 'REQUESTS' (circled in brown), 'REPORTS', and 'Test User'. Below the navigation bar, a message states: 'The submission of a request does not guarantee future funding. Upon submission of your request, 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 record under the "Requests" tab.' In the center, a 'START AN LOI' button is highlighted with a blue arrow pointing from the circled 'REQUESTS' tab. Below the button, the word 'LOIs' is circled in brown. To the right of this, a handwritten note in blue cursive reads: 'Pre-existing LOIs will be displayed here.' At the bottom, there are tabs for 'OPEN' and 'CLOSED', and a section header for 'REQUESTS'.

Submitting an LOI, step #2:

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

INSTRUCTIONS:

- o 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.
- o *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.



Start a New 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.

The screenshot shows the 'Attachments' step of the LOI application. At the top, a progress bar has three stages: 'Inquiry Details' (completed), 'Attachments' (current), and 'Review and Submit' (pending). Below the progress bar, the 'Attachments' section contains instructions: 'Select a file for the required box and click the corresponding "Upload" button. A green check mark will appear if the attachment was successfully uploaded. Files will be renamed to the corresponding sub header of the file box. Other relevant attachments are optional but may be uploaded if you choose.' Below the instructions is a table with three columns: '#', 'File Name', and 'Upload Date'. The table is currently empty. Below the table, there are three upload sections: 1. '* Detailed Organization Budget (Current Fiscal Year)' with a text input, an upload icon, and an 'Upload' button. 2. 'Other Attachment(s)' with a text input, an upload icon, and an 'Upload' button. 3. 'Annual Report' with a text input, an upload icon, and an 'Upload' button. At the bottom of the form, there are two buttons: 'PREVIOUS' on the left and 'SAVE & NEXT' on the right.

The screenshot shows the 'Review and Submit' step of the LOI application. At the top, a progress bar has three stages: 'Inquiry Details' (completed), 'Attachments' (completed), and 'Review and Submit' (current). Below the progress bar, the 'Review and Submit' section contains the text: 'After you have completed all sections click on the button below to review and submit.' Below this text is a large orange button labeled 'Preview & Submit', which is circled with a blue hand-drawn line.

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).

look for the green check mark to confirm your upload.

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.

THE LEON LEVINE FOUNDATION

HOME

MY ORGANIZATION

REQUESTS

REPORTS & PAYMENTS

TLLF Portal Us

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.

Portal Toolkit

REPORTS

REQUESTED

COMPLETED

	Grantee Report ↑	Grantee Report Type	Request Name	Status	Due Date	Submission Date
1	GR-000009397	Grant Agreement	The Leon Levine Foundation Demo Portal - Test Request	Scheduled	4/1/2024	

Your organization's report(s)
will appear here

12

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.*

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.
Payment Schedule:	If there is a match or challenge component to your grant, see terms and conditions listed in section 10 of this agreement. 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: - Grantee shall exclusively use the awarded funds consistent with the Terms of Grant stated above. - Payment(s) of the grant will be scheduled upon receipt of a signed copy of this Grant Agreement. - TLLF reserves the right to discontinue, modify or withhold any payment(s) under this grant award or to require a total or partial refund of any grant funds if, in TLLF's sole discretion, such action is necessary: (a) because Grantee has not fully complied with the terms and conditions of this grant; (b) to protect the purpose and objectives of the grant or any other charitable activities of TLLF; or (c) to comply with the requirements of any law or regulation applicable to you, TLLF, or this grant.	

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

THE LEON LEVINE FOUNDATION

By: 

Tom Lawrence
President

11/16/2023
Date

The Leon Levine Foundation Demo Portal

By: 

D Beaty
Senior Grants Management Associate

04/02/2024
Date

REVIEW & SUBMIT

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.

REQUESTED COMPLETED

	Grantee Report	Grantee Report T...	Request Name	Status
1	GR-000009397	Grant Agreement	The Leon Levine Foundation Demo Portal - Test Request	Submitted

MY ORGANIZATION REQUESTS REPORTS & PAYMENTS

button in the top right corner to view the file in a new tab or download it. The file viewer may take a few seconds to load.

THE LEON LEVINE FOUNDATION

The Leon Levine Foundation Demo Portal - Grant Agreement FY 2024

quest Name: The Leon Levine Foundation Demo Portal - Test Request

al Amount and Terms of Grant: \$4,000,000.00

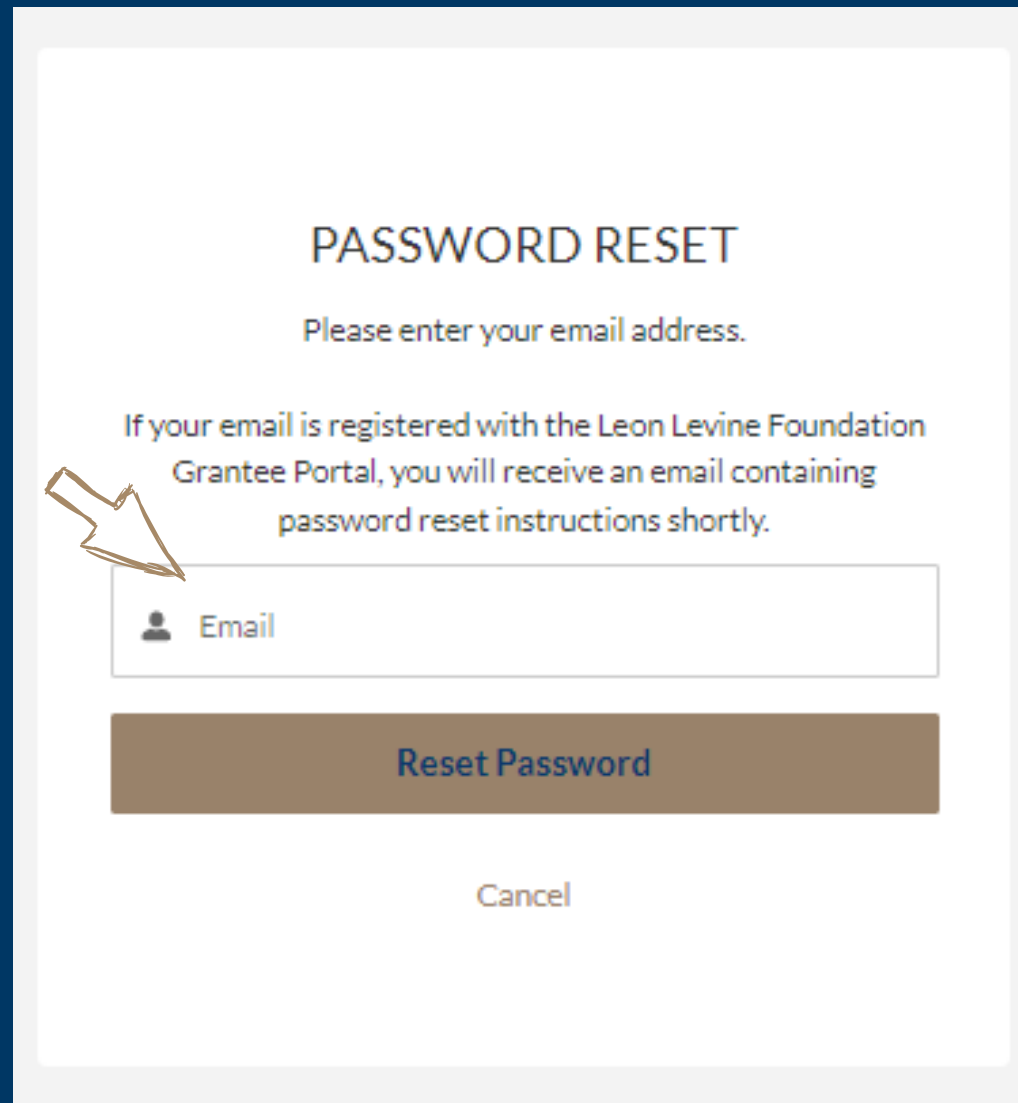
to be paid in four equal annual installments (\$1M/year) beginning in March 2024. The first payment is contingent upon securing 500 new donors.

If there is a match or challenge component to your grant, see terms and conditions listed in section 10 of this agreement.

ment Schedule: On or before the following date(s):

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

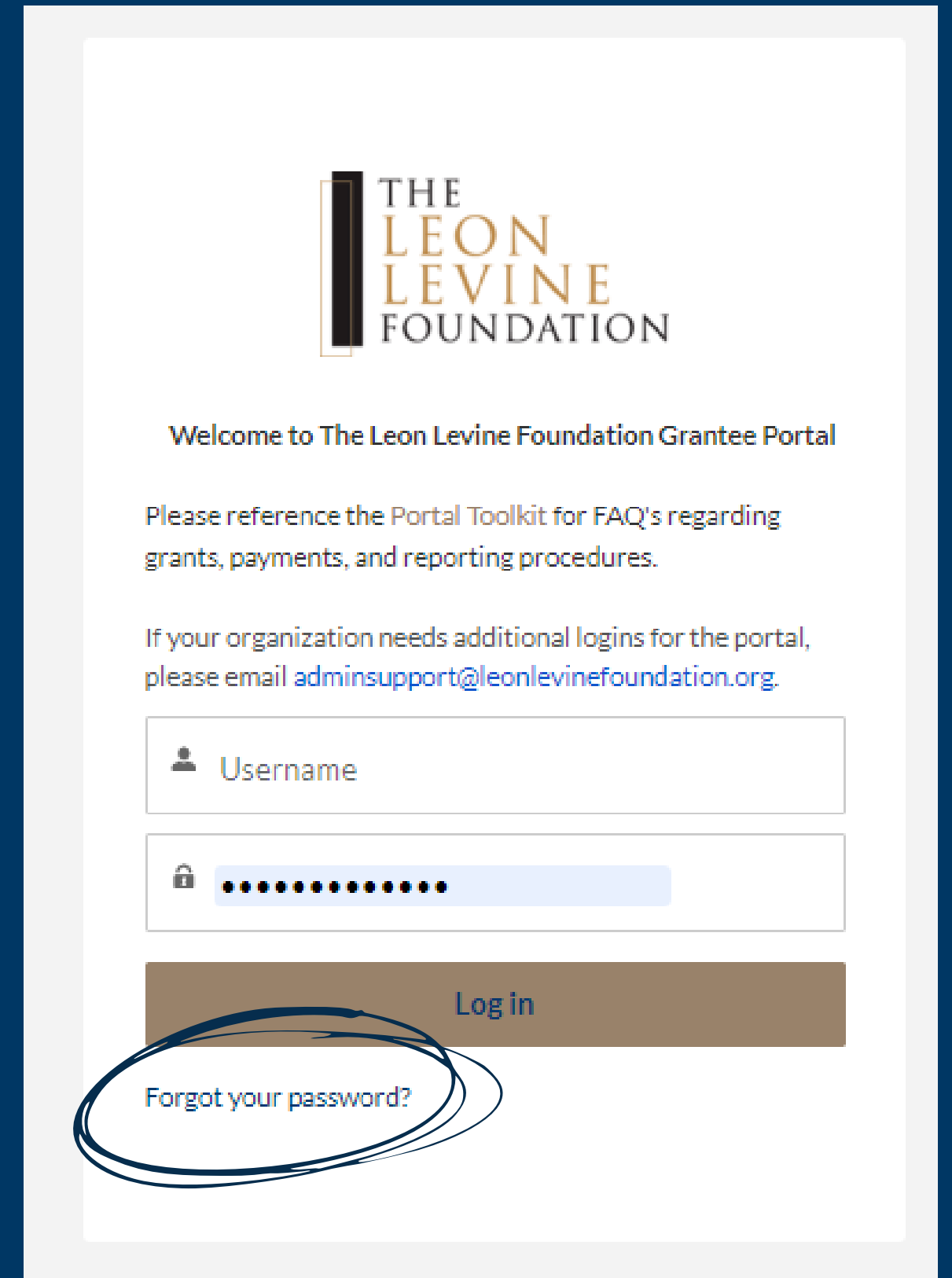
Please enter your email address.

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



THE LEON LEVINE FOUNDATION

Welcome to The Leon Levine Foundation Grantee Portal

Please reference the Portal Toolkit for FAQ's regarding grants, payments, and reporting procedures.

If your organization needs additional logins for the portal, please email adminsupport@leonlevinefoundation.org.

 Username



Login

Forgot your password?

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.

Hi Test,

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

 THE LEON LEVINE FOUNDATION

Change Your Password

Enter a new password for grantsupport@leonlevinefoundation.org. Make sure to include at least:

- ☐ 8 characters
- ☐ 1 uppercase letter
- ☐ 1 lowercase letter
- ☐ 1 number
- ☐ 1 special character ⓘ

* New Password

* Confirm New Password

Change Password

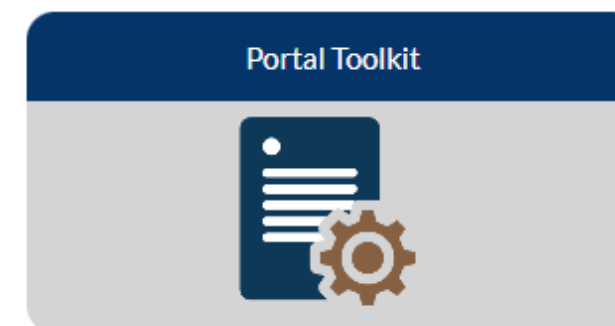
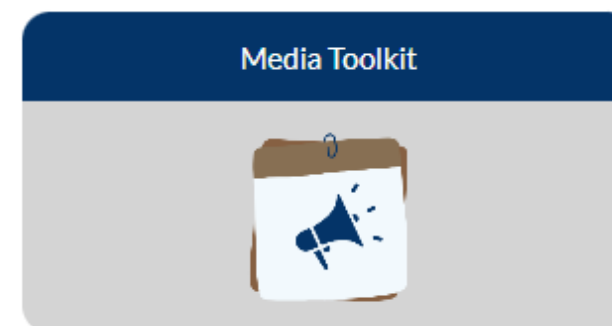
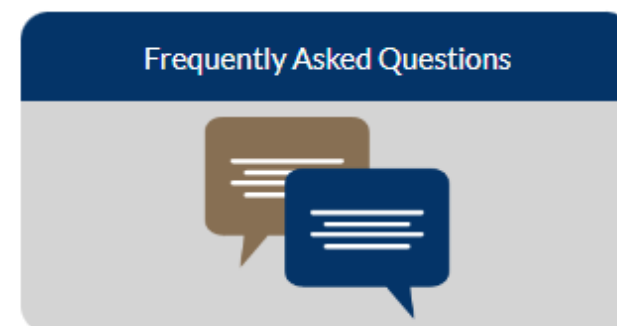
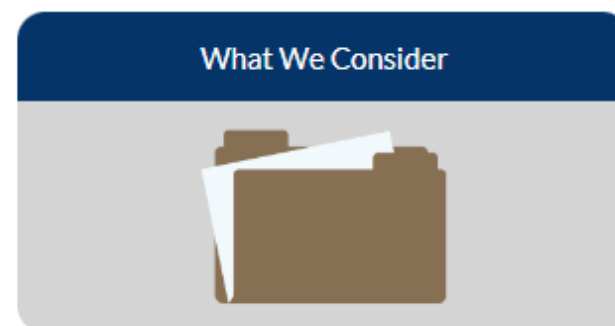
Password was last changed on 5/1/2023 10:52 AM.

Resources for you:

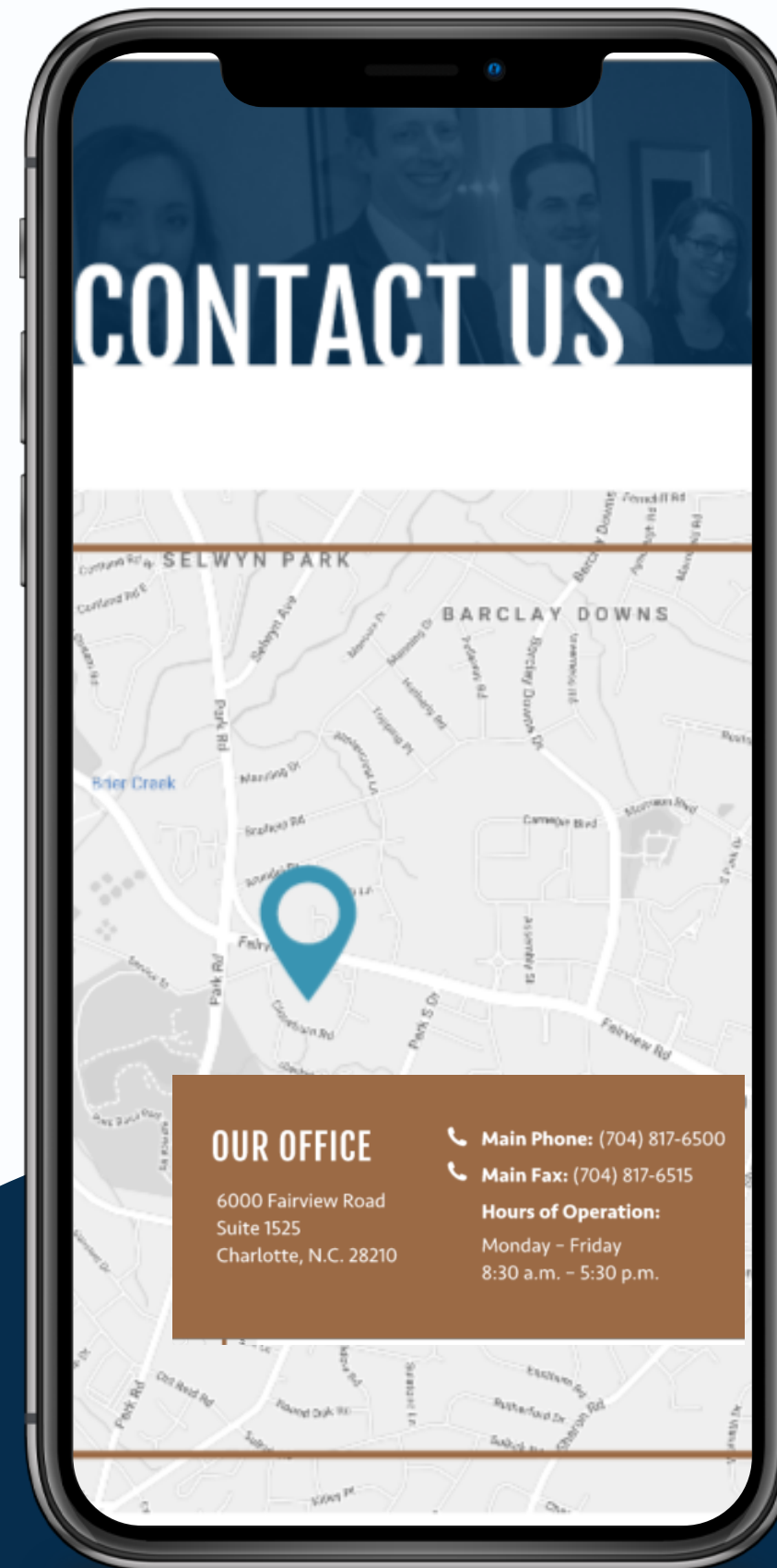


*Be sure to check out
these resources which we've
designed with you in mind!*

RESOURCES



How to
reach us:



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

Useful Links:

- [TLLF Website](#)
- ["How To Apply" Page](#)
- [Grantee Portal](#)
- [Media Toolkit](#)
- [FAQs](#)