

# FREY FOUNDATION

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## **SMARTSIMPLE APPLICANT USER GUIDE** **VERSION 1.3**

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## WELCOME

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Welcome to Frey Foundation's new grant portal. We accept requests from charitable or tax-exempt organizations that impact one or more of the Frey Foundation's program areas, geographic focus areas, and meet our funding guidelines highlighted on our website <https://freyfdn.org/guidelines>.

The Frey Foundation was founded in 1974 by Edward and Frances Frey, out of a deep love of community and their commitment to philanthropy. Since that time, two generations of Frey Family have come along to continue their legacy, working to enhance the lives of children and families, protect natural resources, promote the arts, and build community.

It is our mission to invest collaboratively in West Michigan to create a better place to live by strengthening its communities, protecting its natural environment, enhancing the arts, and transforming the lives of individuals and families.

We encourage creativity while expecting excellence and accountability in ourselves and others.

## INTRODUCTION

The Frey Foundation strives to make the grant process as open and clear as possible. This user guide will assist you with the grant application process from account registration to completing an application, providing a report, and closing out a completed project.

For reference, the grant portal can be accessed at [freyfdn.smartsimple.com](https://freyfdn.smartsimple.com).

## CONTACT INFORMATION

Need help accessing your account or application? Our staff is here to help. You can reach our team Monday–Friday from 8:30 A.M.–5:00 P.M. at 616-451-0303 or via email at [contact@freyfdn.org](mailto:contact@freyfdn.org).

## REGISTRATION

1. Click the “Register” button if you are a new user. If you are a returning user, please proceed to the [Login](#) section.

FREY FOUNDATION

Login

Email

Password

Login

Forgot Password?

New to the System?

Register

Welcome to the Frey Foundation Grants Management System

The Frey Foundation strives to make the grant inquiry and application process as open and clear as possible. We appreciate your time and interest in learning about the Frey Foundation. If, upon reviewing our [grant guidelines](#), you believe your project may be a fit with our funding priorities, we invite you to submit an inquiry so that we can begin working with you to see if our collective priorities align

2. You will then need to indicate whether your organization is a current, 501(c)(3) organization or if your organization is considered an otherwise tax exempt organization.

### Registration Options

**i**

- If your organization is new to the Frey Foundation and has not previously submitted an application or received funding, please select from the options below to create an organization profile.
- If an organization profile has been created and you need to add a new user, please contact your system administrator or email us at [contact@freyfdn.org](mailto:contact@freyfdn.org).

**501 (c)(3) Organization**  
Is your organization currently registered with the Internal Revenue Service as a 501(c)(3) nonprofit organization?

**Other Tax Exempt Organization**  
Is your organization a governmental unit or other tax exempt entity not registered with the Internal Revenue Service?

**Proceed to Step 3**

**Proceed to Step 4**

**3. If you selected 501(c)(3) organization:**

- a.** Follow the instructions on the screen. Please enter either the employment identification number *OR* the organization name *OR* address in the form provided. Our system will run a search in the IRS database to help complete your profile.

Organization Search

**i** Enter one of the following criteria below to search for your organization.

- **EIN** - Do not include spaces or dashes, example: "123456789"
- **Name** - Keyword search is sufficient, example: "Waco" instead of "The Waco Foundation"
- **State** - Use the two letter abbreviation, example: "NY" instead of "New York"

EIN

Name

Address

City

State

Organizations

**i** Instructions:  
• Click on the row to select the organization.

#	EIN	Organization's Legal Name	Address	City	State	Zip
1.	207254961	W BOYD & EMILY MONTAGUE FREY SMITHKING CHARITABLE FOUNDATION	C/O ELLEN RINEY 8456 LOFTEN COVE	CORDOVA	TN	38018-0000
2.	237094777	FREY FOUNDATION	40 PEARL ST NW STE 1100	GRAND RAPIDS	MI	49503-3028 <input type="button" value="Copy"/>
3.	800591744	FREY FOUNDATION	2865 MARS HILL RD NW	ACWORTH	GA	30101-4538

- b.** Once the correct organization is located, click the correct organization displayed to open the Organization Information page.

Organization Information

**i** Instructions  
Required fields are marked with an asterisk "\*".

\* Organization's Legal Name  
FREY FOUNDATION

\* Address  
40 PEARL ST NW STE 1100

Address 2

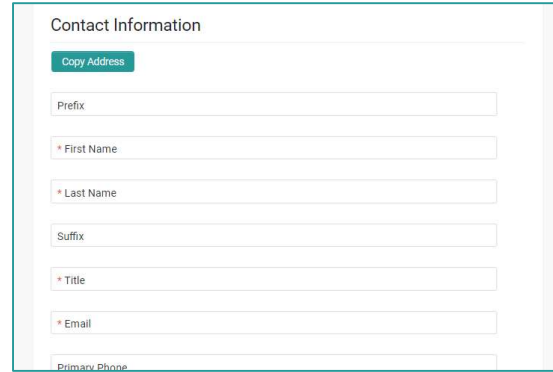
\* City  
GRAND RAPIDS

\* Country  
United States

\* Zip  
49503-3028

\* EIN  
237094777

- c. Complete the Organization and Contact Information and click the “Submit” button to create a profile in the system. **Proceed to Step 5.**



Contact Information

Copy Address

Prefix

\* First Name

\* Last Name

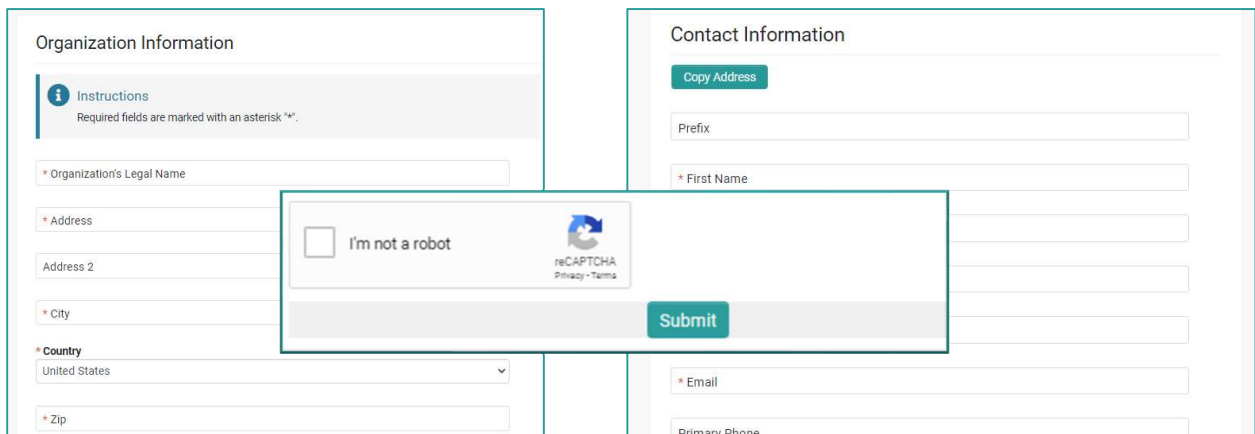
Suffix

\* Title

\* Email

Primary Phone

4. If you selected **Other Tax Exempt Organization**, complete the Organization and Contact Information and click the Submit button to create a profile in the system.



Organization Information

Instructions  
Required fields are marked with an asterisk \*.

\* Organization's Legal Name

\* Address

Address 2

\* City

\* Country  
United States

\* Zip

Contact Information

Copy Address

Prefix

\* First Name

\* Last Name

Suffix

\* Title

\* Email

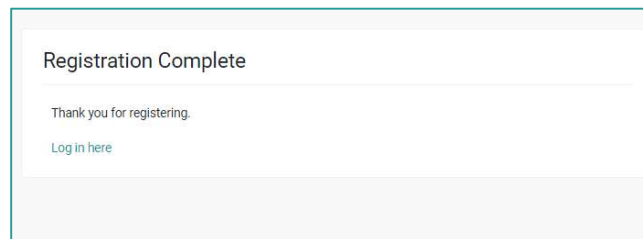
Primary Phone

I'm not a robot

reCAPTCHA  
Privacy - Terms

Submit

5. Once the registration process is complete, the message to the right will be displayed and an email will be sent to you with instructions on how to set your password. After your password is set, you can login to begin an application for funding. If additional people will be working on your application, you can [add them to your Organization Profile](#).



Registration Complete

Thank you for registering.

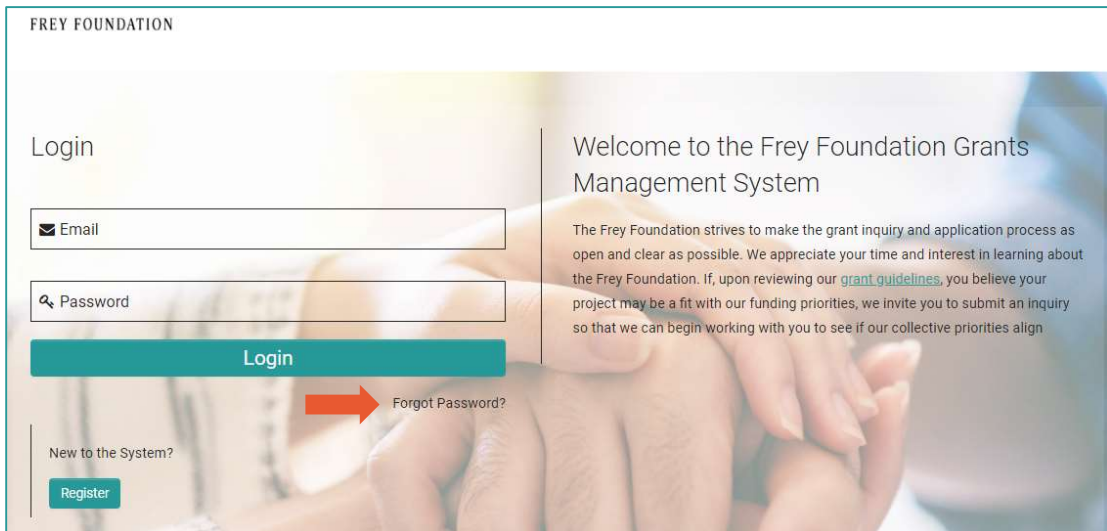
[Log in here](#)

## LOGIN

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1. Please enter the email address and password you used when registering. If you are a new registrant or someone else has already added you to the organization profile, an automated email was sent to the email address provided during registration with a link to set your password.

Note: If you are unable to remember your password, please select “Forgot Password” and follow the instructions on the screen. A link to reset your password will be emailed to you.

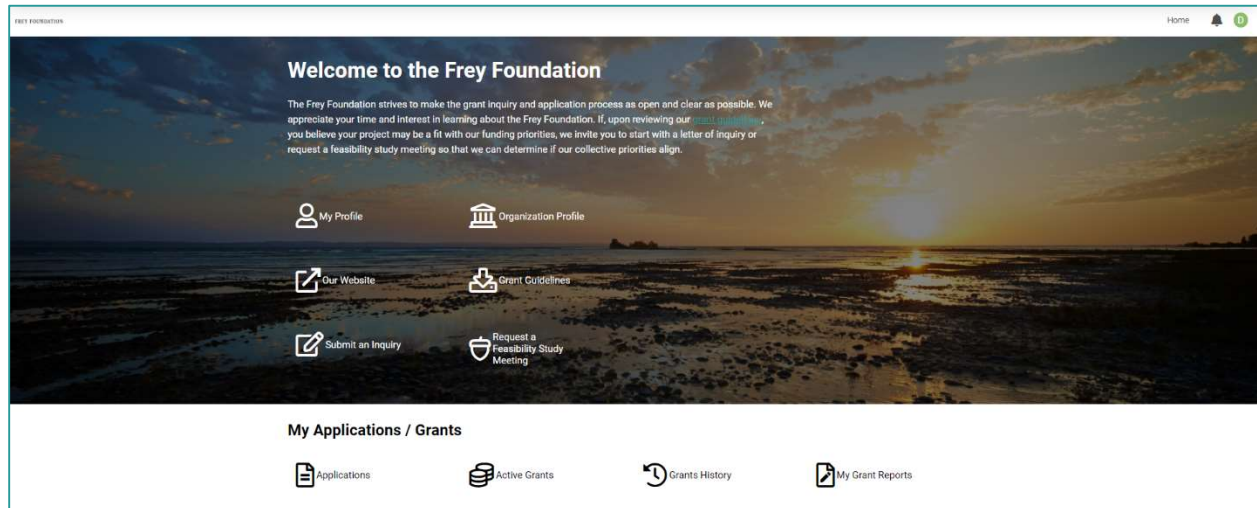


The screenshot shows the login interface for the Frey Foundation Grants Management System. At the top left, it says "FREY FOUNDATION". The main heading is "Login". Below this are two input fields: "Email" with an envelope icon and "Password" with a magnifying glass icon. A teal "Login" button is positioned below the password field. To the right of the input fields is a "Forgot Password?" link with a red arrow pointing to it. Below the "Login" button is a "New to the System?" section with a teal "Register" button. On the right side of the page, there is a welcome message: "Welcome to the Frey Foundation Grants Management System" followed by a paragraph of text: "The Frey Foundation strives to make the grant inquiry and application process as open and clear as possible. We appreciate your time and interest in learning about the Frey Foundation. If, upon reviewing our [grant guidelines](#), you believe your project may be a fit with our funding priorities, we invite you to submit an inquiry so that we can begin working with you to see if our collective priorities align". The background of the page features a blurred image of hands being held together.

## APPLICANT PORTAL

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This is your applicant portal. Here, you will be able to access and update your individual and organization profile, submit inquiries, review invitations to apply for full applications, and review previous requests. Full descriptions of the features are described in this guide.



### SHORTCUTS

#### My Profile

You can view and edit your individual profile here.

#### Organization Profile

You can view and edit your organization's profile here. This is also where you can [add additional organization contacts](#).

#### Our Website

Access the [Frey Foundation website](#) here.

#### Grant Guidelines

Please review our [grant guidelines](#) prior to submitting an inquiry.

#### Submit an Inquiry

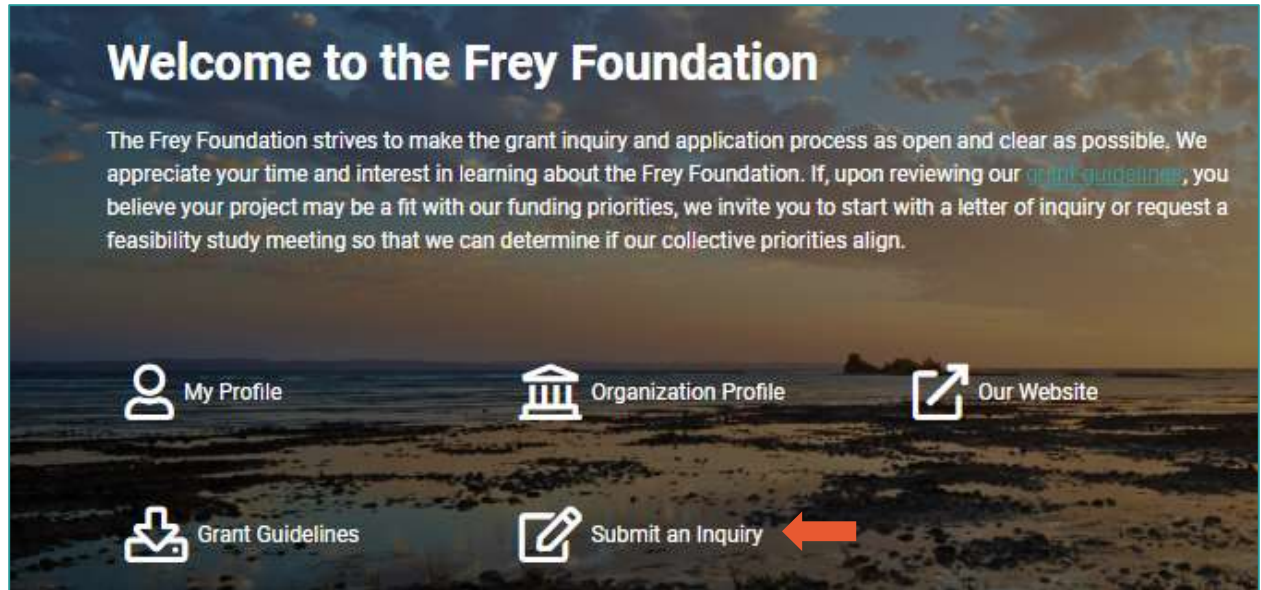
To apply for a grant from the Frey Foundation, you must submit a Letter of Inquiry (LOI). This is also where you may invite Frey Foundation to participate in a Feasibility Study.



## APPLICATIONS

### FEASIBILITY STUDY

1. Select “Submit an Inquiry” from the applicant portal homepage.



2. Click on “Click here to apply” next to the Feasibility Study

#	Funding Opportunity Name	Fiscal Year	Opportunity Guidelines	
1	Letter of Inquiry	2020	<a href="#">Grant-Guidelines.pdf</a>	<a href="#">Click here to apply</a>
2	Feasibility Study Meeting Request	2020		<a href="#">Click here to apply</a>

3. Click “Save draft” to auto-populate your organization information.

Address: 123 Main Street  
City: Grand Rapids  
State:  
Zip Code: 49503  
Country: United States  
Phone:  
Extension:  
Fax:

[Save Draft](#)   [Submit](#)   [NEXT >](#)

4. Review that the information in the Organization tab is correct

5. Select the Application tab and complete all required information

236 - Test Company

\* Organization:

Application ID: 29

ORGANIZATION REQUEST

Organization Name: Test Company Bandy

6. Click "Submit"

ORGANIZATION REQUEST

Project Summary

\* Executive Summary

Please briefly describe the problem you are trying to address, ideally 500 words or less. Please enter N/A if you don't have an executive summary

0 words typed

If there are other materials you would like considered, please upload them here.

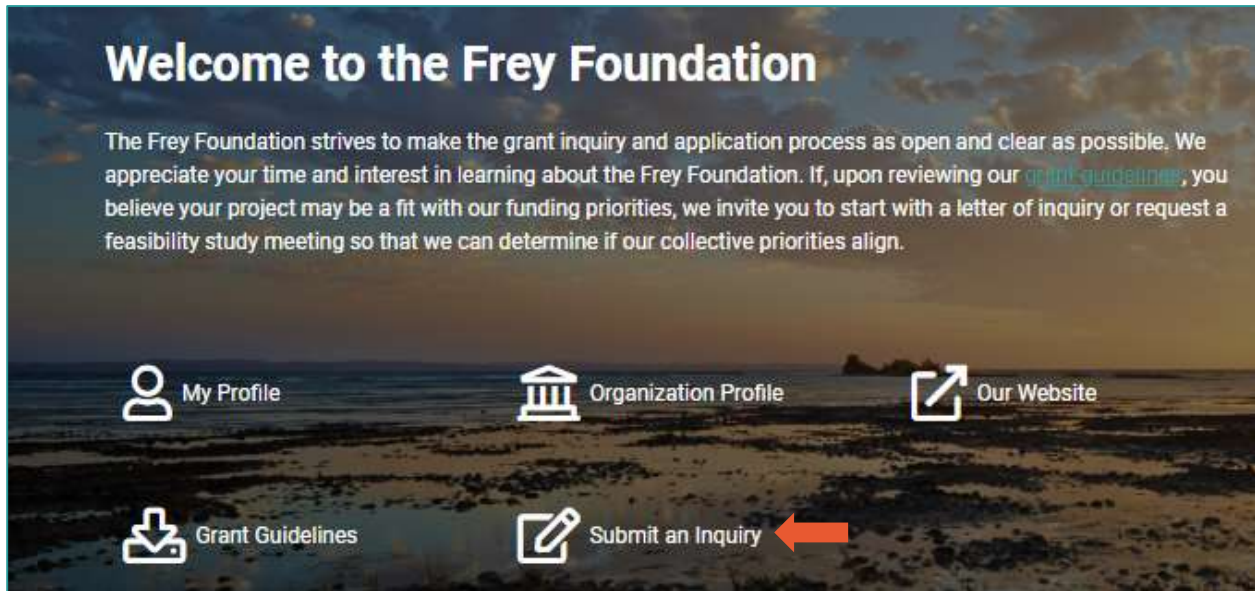
Who is conducting the study?

← BACK

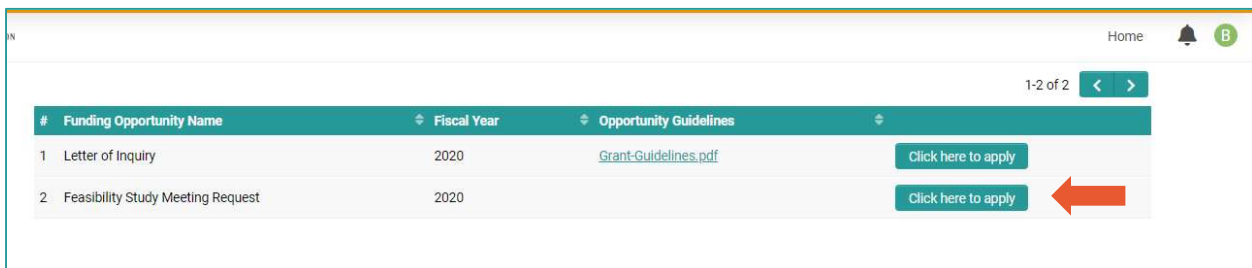
Save Draft Submit

## LETTERS OF INQUIRY (LOI)

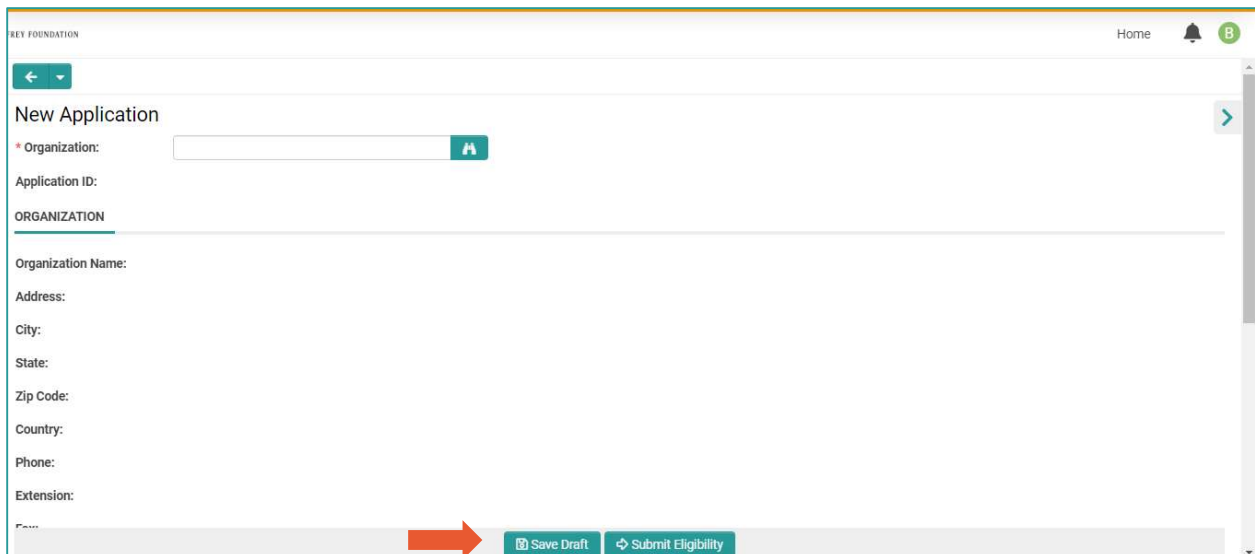
1. Select “Submit an Inquiry” from the applicant portal.



2. Click on “Click here to apply” from the Letter of Inquiry row.



3. Click “Save draft” to auto-populate your organization information.



4. Complete the Eligibility questionnaire listed below your organization information.
  - a. You will not be able to fill out the LOI unless your organization and project meet the requirements outlined in the system.

FREE FOUNDATION Home

[←](#)

## New Application >

ORGANIZATION

▼ Eligibility

\* Does your organization have a current tax exempt status (Government, School, Church, or Public Charity) or do you have a fiscal sponsor with tax exempt status?

Yes  
 No

\* Does your project serve communities primarily in broader West/Northern Michigan region, Charlevoix county, Emmet county, Kent county, and/or state of Michigan?

Yes  
 No

\* Have you or do you intend to pursue a variety of funding sources for the proposed program or project?

Yes  
 No

[Save Draft](#) [Submit Eligibility](#)

5. Complete the Request tab which appears after submitting your eligibility.

FREE FOUNDATION Home

[←](#)

## 235 - Test Company Randy

ORGANIZATION **REQUEST**

▼ Project Summary

\* Project Title:

\* Project Budget:

\* Request Amount:  ?

Project Budget Upload:

[Download the budget worksheet here](#) ?

\* Type of Support:  
Please select the primary type of support.

\* Please select the Frey Foundation program area for which your project best aligns.

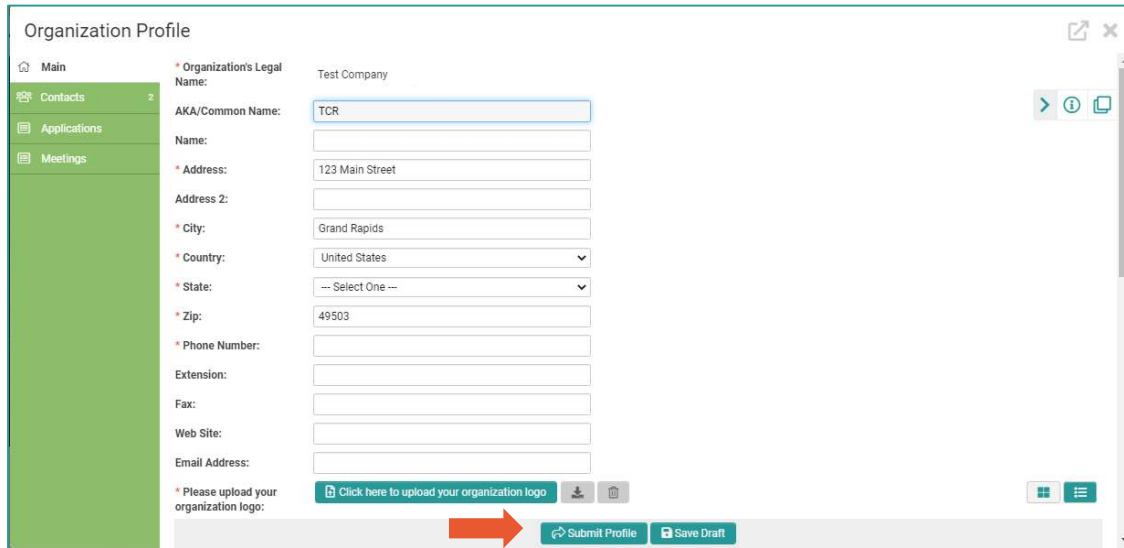
Community does your project primarily serve?

[Save Draft](#) [Submit LOI](#)

- a. Download the budget template and upload the completed template into the Project Budget Upload question. This will auto-populate the information in the Budget tab.
- b. Remember to “Save Draft” frequently and before closing your browser.
- c. Click “Submit”

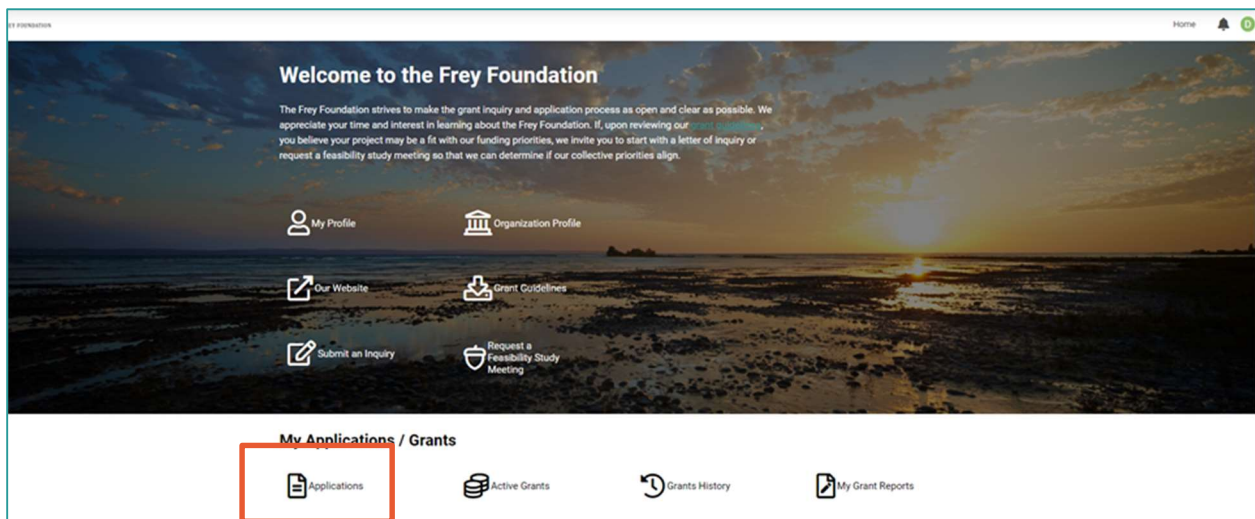
## FULL GRANT APPLICATION

1. Once your LOI has been reviewed and you have been invited to submit a full application, return to the applicant portal.
2. Review your organization profile and make sure all required fields have been completed. Click “Submit Profile.”

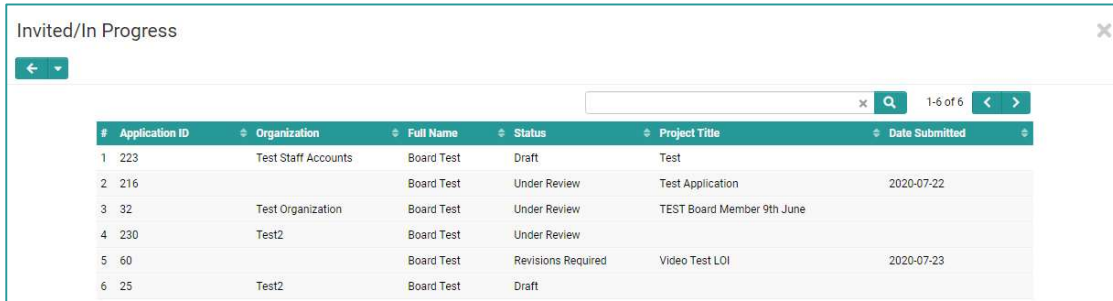


The screenshot shows the "Organization Profile" form. On the left is a navigation menu with "Main", "Contacts", "Applications", and "Meetings". The form fields include: Organization's Legal Name (Test Company), AKA/Common Name (TCR), Name, Address (123 Main Street), Address 2, City (Grand Rapids), Country (United States), State (--- Select One ---), Zip (49503), Phone Number, Extension, Fax, Web Site, and Email Address. A red arrow points to the "Submit Profile" button at the bottom right.

3. From the applicant portal, click “Applications” to view available applications.



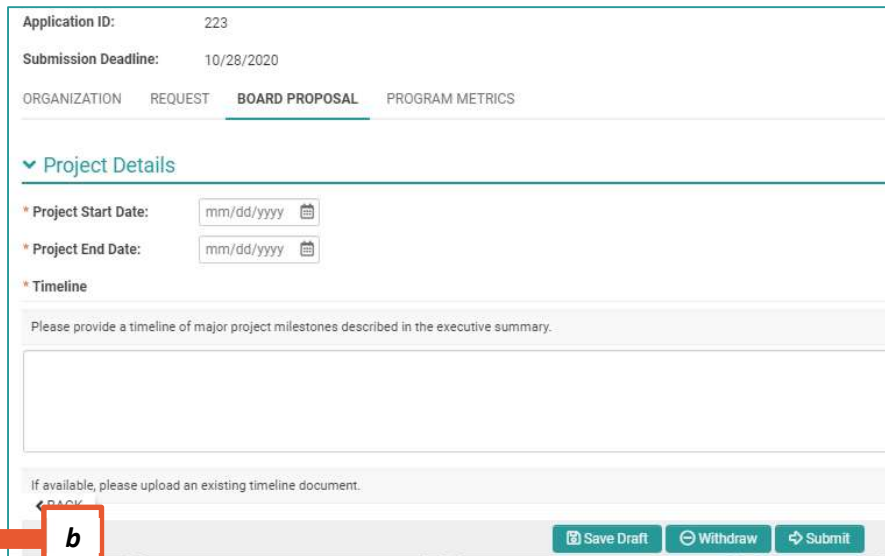
4. Click on the desired application. This application will appear in “Draft” status.



The screenshot shows a table titled "Invited/In Progress" with a search bar and pagination controls. The table contains the following data:

#	Application ID	Organization	Full Name	Status	Project Title	Date Submitted
1	223	Test Staff Accounts	Board Test	Draft	Test	
2	216		Board Test	Under Review	Test Application	2020-07-22
3	32	Test Organization	Board Test	Under Review	TEST Board Member 9th June	
4	230	Test2	Board Test	Under Review		
5	60		Board Test	Revisions Required	Video Test LOI	2020-07-23
6	25	Test2	Board Test	Draft		

5. Complete the additional tabs, answering all required questions. Depending on the proposal, you may have different questions which align with identified priorities from your LOI.\*



The screenshot shows the "BOARD PROPOSAL" tab of an application form. It includes the following fields and sections:

- Application ID: 223
- Submission Deadline: 10/28/2020
- Tabs: ORGANIZATION, REQUEST, **BOARD PROPOSAL**, PROGRAM METRICS
- Section: **Project Details**
- Fields: Project Start Date (mm/dd/yyyy), Project End Date (mm/dd/yyyy)
- Section: **Timeline**
- Text: "Please provide a timeline of major project milestones described in the executive summary."
- Text: "If available, please upload an existing timeline document."
- Buttons: Save Draft, Withdraw, Submit

A red box with the letter "b" and an arrow points to the "Submit" button.

a. Ensure all tabs are correct and required questions are completed entirely.

b. Click “Submit”

\* Due to the nature of some requests, we may require additional information which would appear in a Program Metrics tab. Please note that not all requests will require this information.

## AGREEMENT

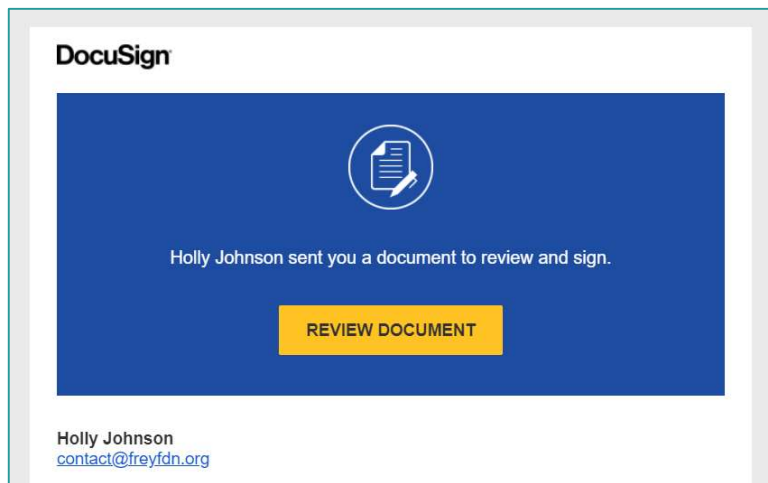
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### GRANT AWARD PROCESS

The Frey Foundation has two different procedures for grant awards based on the reporting requirements of the award. For some grants, printed letters may be sent in the mail with an accompanying check. Endorsement of the enclosed check confirms a grantee’s acceptance that all grant funds will be used only for activities proposed in the grant application.

For other grants, we employ DocuSign to execute agreements prior to activating the grant.

### DOCUSIGN PROCESS



- 1.** The organization leader will receive an invitation from DocuSign NA4 System ([dse\\_NA4@docusign.net](mailto:dse_NA4@docusign.net)) to review and sign the grant agreement.
- 2.** Click on “Review Document”
- 3.** Follow the prompts on the DocuSign website to review and sign the agreement.

Upon completion of the DocuSign agreement, a confirmation email will be sent to the contacts listed in the award letter (if applicable). A copy of the signed agreement will be included as an attachment. Additionally, the agreement will always be available in the application on the grant portal.



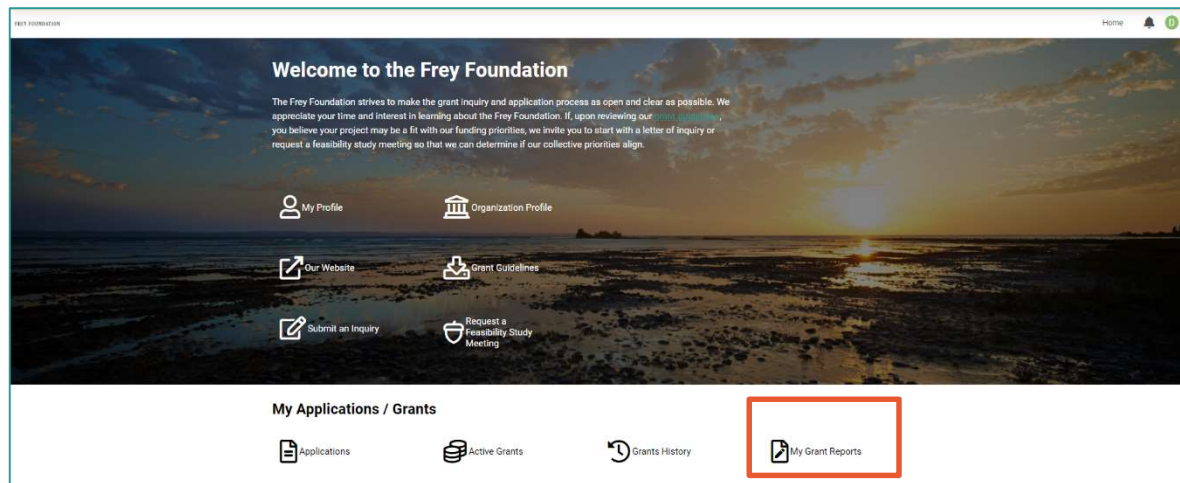
## REPORTING

### MONITORING PROCESS

An email reminder will be sent to the reporting contact 30 days prior to the due date for an upcoming report or progress meeting as outlined in the grant agreement. This email will include instructions for completing the respective requirement.

### REPORT SUBMISSION (PROGRESS REPORT, CONTINGENCY REPORT, FINAL REPORT)

1. From the applicant portal, click “My Grant Reports” to view scheduled reports.



2. In the “Scheduled” tab, open the desired report by clicking on its respective row.

My Grant Reports

**Grant Reports**

SCHEDULED REVISIONS REQUIRED (0) PREVIOUS

1-2 of 2

#	Application ID	Project Title	Report Type	Status	Due Date
1	11041	The Negotiation	Final Report	Scheduled	03/31/2017
2	11037	The Convention	Final Report	Scheduled	08/26/2014

3. Fill out the form and click “Submit.”

Final Report Information

\* Project Narrative

Describe the progress made toward the proposed goals and objectives including a list of major outcomes.

\* Lessons Learned

Please relate any lessons learned from the project activities.

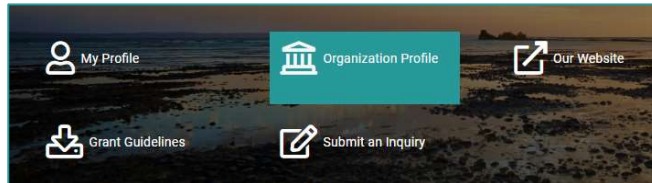
Save Draft Submit



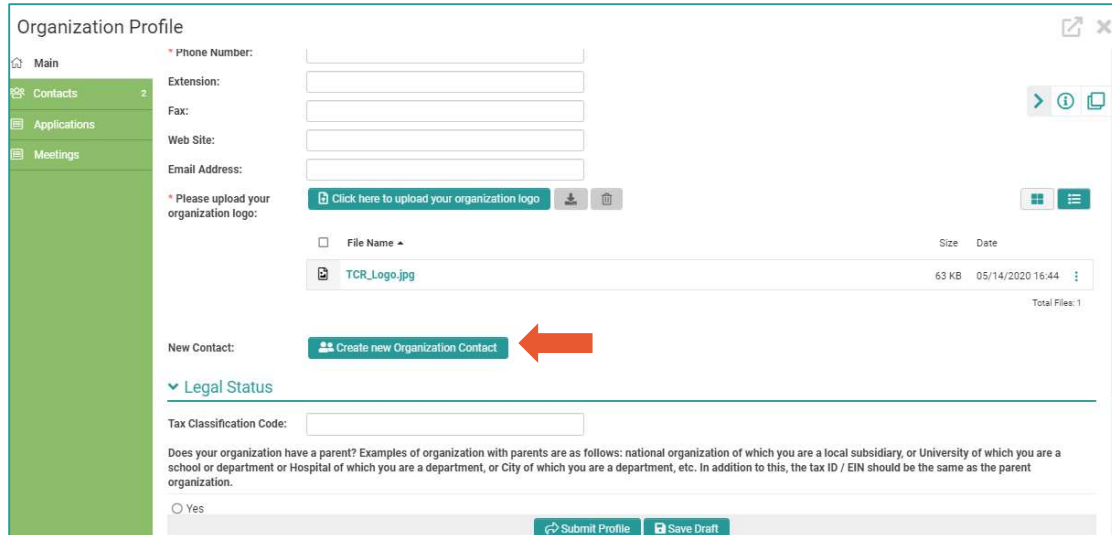
## ADDITIONAL FUNCTIONS

### ADDING ADDITIONAL USERS

1. Follow the instructions to [log into your grant portal](#).
2. Click on “Organization Profile”



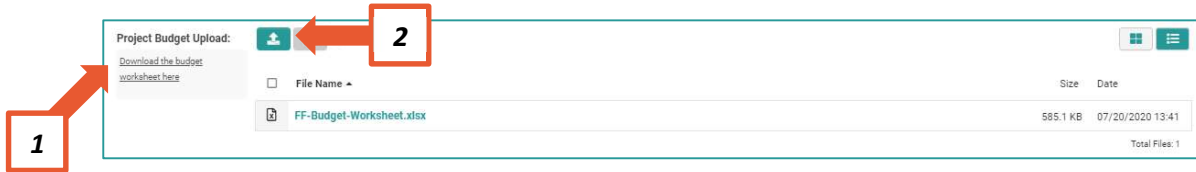
3. Scroll down to “New Contact,” click on “Create new Organization Contact”

A screenshot of the 'Organization Profile' form. The form is titled 'Organization Profile' and has a sidebar on the left with 'Main', 'Contacts', 'Applications', and 'Meetings'. The main content area has several input fields: 'Phone Number', 'Extension', 'Fax', 'Web Site', and 'Email Address'. There is a section for uploading an organization logo with a button that says 'Click here to upload your organization logo' and a file upload table. The table has columns for 'File Name', 'Size', and 'Date'. One file is listed: 'TCR\_Logo.jpg' with a size of '63 KB' and a date of '05/14/2020 16:44'. Below the table is a 'New Contact:' section with a button that says 'Create new Organization Contact' and a red arrow pointing to it. At the bottom of the form are 'Submit Profile' and 'Save Draft' buttons.

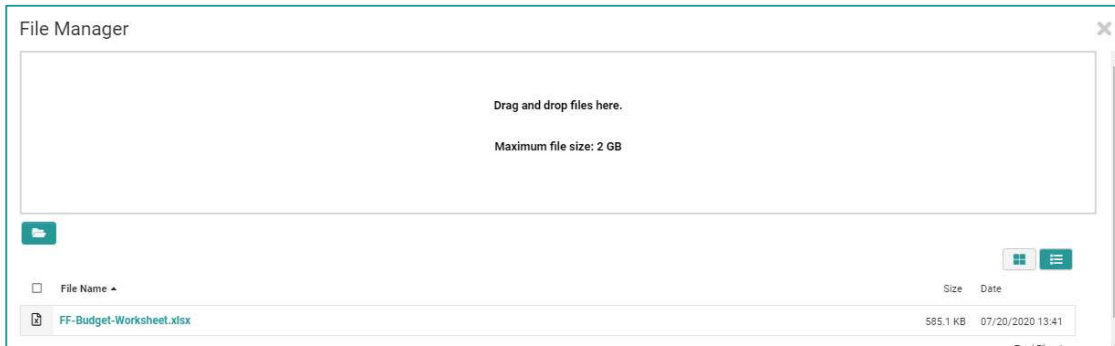
4. Complete Contact Information for the new contact. An email with login information will be sent to the new contact.

## UPLOADING BUDGET WORKSHEET

1. Download and complete the budget worksheet.
2. Click on the upload button.

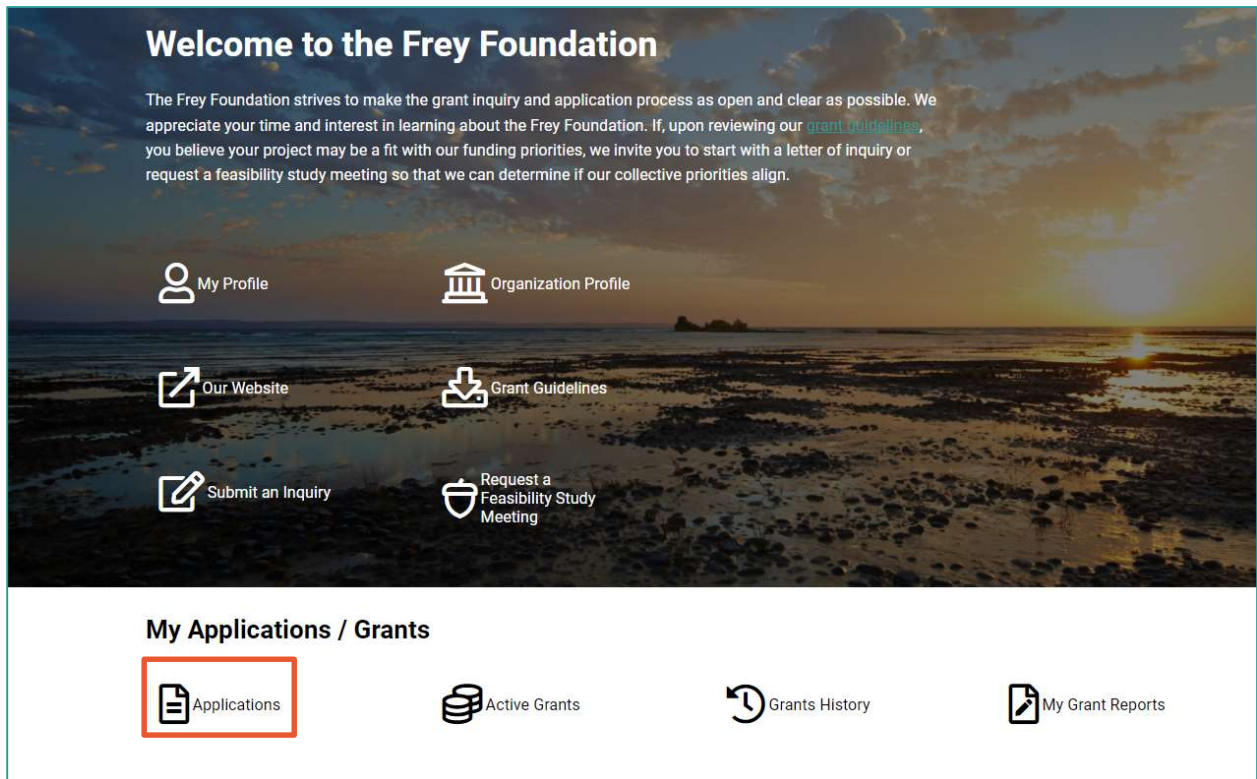


3. Upload the completed budget worksheet



## SUBMITTING REVISIONS

1. Click on “Applications”



2. Click on the “Revisions Required” tab

3. Open the application.



IN PROGRESS	REVISIONS REQUIRED (1)	SUBMITTED
#	Application ID	Organization
1	11462	Demo Video Test Org 1

4. Requested changes will be highlighted on the application in yellow.

ORGANIZATION      **INQUIRY**      PROPOSAL

▼ Project Summary

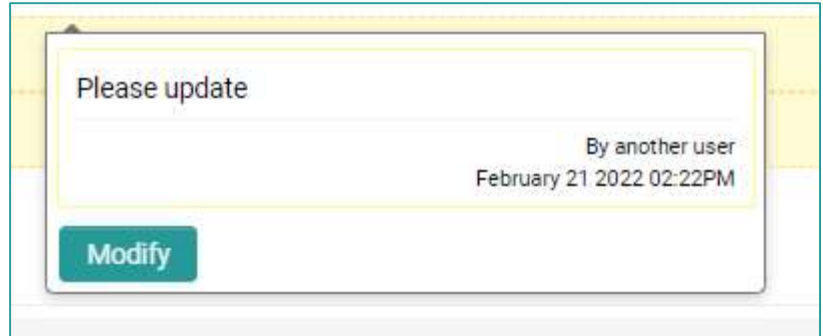
\* Project Title: Project Title

\* Project Budget: \$0

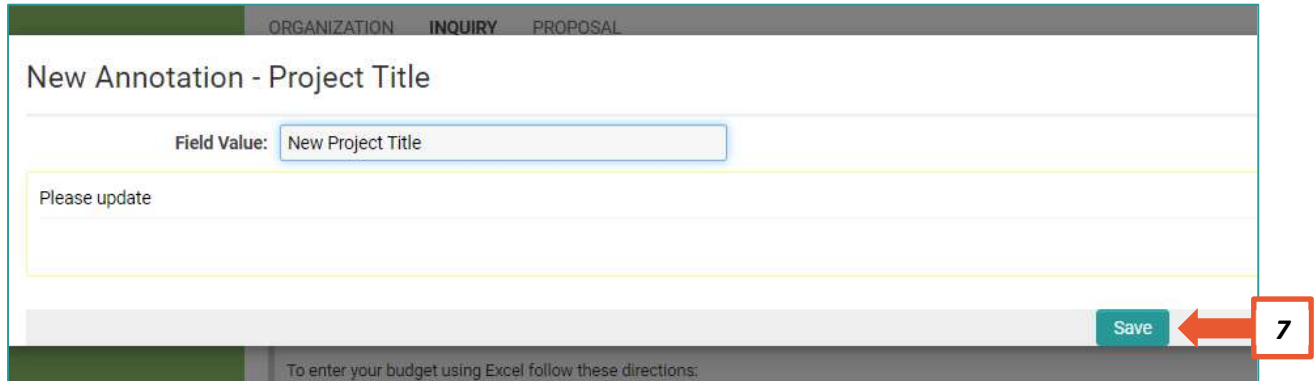
\* Request Amount: ?

5. Click on the highlighted field

6. Click "Modify"



7. Enter the requested information in the "Field Value," click "Save"



8. Repeat steps 4-6 for all highlighted fields

9. Click "Submit"

