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Welcome

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.

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.
**Registration**

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

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.
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.

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

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](#).
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.
**APPLICANT PORTAL**

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.

![Welcome to the Frey Foundation](image)

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

![Application Form](image)

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

![Application Form](image)
4. Review that the information in the Organization tab is correct

5. Select the Application tab and complete all required information

6. Click “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.

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

3. From the applicant portal, click “Applications” to view available applications.
4. Click on the desired application. This application will appear in “Draft” status.

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.*

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

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) 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.


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.

3. Fill out the form and click “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”

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

![Welcome to the Frey Foundation](image)

2. Click on the “Revisions Required” tab

![My Applications / Grants](image)

3. Open the application.

![Application ID](image)

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