Grant Request

Applying for a Citi Foundation Grant

Citi Foundation Grants Management System Guide

Table of Contents

1. Resources ................................................................................................................................................. 2
2. Logging In to Your Account .................................................................................................................. 3
3. Accessing your Application .................................................................................................................. 4
4. Completing your Application ................................................................................................................ 4
5. Application Features ............................................................................................................................ 5
6. Updating Organization and Contact Information ................................................................................. 6
7. Selecting Geographical Area Served ..................................................................................................... 8
8. Uploading the Required Documentation ............................................................................................. 11
9. Saving and Submitting your Application ............................................................................................ 12
10. Revising your Application .................................................................................................................. 14
11. Approved Requests ............................................................................................................................. 18
1. Resources

The Citi Foundation seeks to track the results of our investments so that we can assess our broader impact as a grant maker. This results-oriented approach is reflected in our Citi Foundation guidelines and application questions. For more information on this framework and additional guidance, please see below.

Grant Guidelines

Please review the results we seek and examples of the investments we make in each of our focus areas below to determine if your program aligns with the Citi Foundation's guidelines.

Guidelines

Program Results

For more information on the Citi Foundation’s results-oriented framework and additional guidance, please see below.

Results Framework Overview

Defining Direct Service Program Results

Defining Capacity Building Program Results

Defining Systems Change Program Results

Program Results Paths

Program Results Examples

By receiving the Invitation to Apply email, you have been invited by your Citi Relationship Manager to apply for a 2015 grant from the Citi Foundation. Please follow the directions below to access and complete the grant application. If you require any assistance, please contact us at foundationsupport@citi.com.
2. Logging In to Your Account

In order to access your Citi Foundation account, visit [http://citi.fluxx.io](http://citi.fluxx.io)

If this is your first time accessing the Citi Foundation Grantee Portal, you will need to register your account. **Please follow the directions below to create your account.**

1. Click the “Reset or create password” link to register your account. You will be prompted to enter and submit your email address. You will then be emailed a link that will direct you to a site to create your Citi Foundation password.
2. Click the link provided in the email and enter the password that you would like to use.
3. If someone else at your organization needs the ability to view the application or subsequent reports and also needs an account, please email us at foundationsupport@ci.com with this person’s name, title, and email address. While this person will be able to view records, only the primary contact has the ability to make any edits. Please note that this account will provide this individual with access to information and reports related to all grants that your organization has received from the Citi Foundation.

**Note:** The system is accessible through any standard internet browser but please ensure that you are using the latest version of your browser. While it is not required, the system works particularly well in Google Chrome and so we encourage you to use Google Chrome if it is easily accessible. If using Internet Explorer, you will be prompted to download the Chrome frame.
3. Accessing your Application
Click “Pending Applications” to access your pending grant application.

Any pending grant applications for your organization will appear on this page. If you have been invited to apply for multiple grants, please reference the grant request ID to ensure you have identified the correct application.

4. Completing your Application
Click the application that you would like to update to access it. From this view you will be able to see all pertinent information about your application.

To complete your application, click “Edit.”
In Edit mode, complete all necessary application fields.

**Note:** Only the Primary Contact listed on the application will have the ability to edit. If the primary contact needs to be changed immediately, please email us at foundationsupport@citi.com with the request ID of your application and the full name and email address of the new primary contact.

### 5. Application Features

As you complete your Citi Foundation grant application, please take note of the following application features.

**A) Conditional Questions**

There are a number of questions throughout the application that are dependent upon your response to a previous question.

For example, if you indicate that you have received funding from the Citi Foundation in the past, you will be prompted to provide additional information.

If your organization was funded by the Citi Foundation in the past, please provide:

- **Grant Amount**
- **Program title**
- **A brief description of the program**
- **Progress to date including major results**

If you selected “No,” you would not be prompted to provide additional information. Please ensure that you complete any additional conditional questions where applicable.

**Note:** If you are completing a Capacity Building & Planning or Systems Change application and you indicate that your program will include provision of services directly to individuals, you will be required to provide additional quantitative information about the number of individuals served and the results that they will achieve.

**B) Locked fields**

Some information in your application, including the Investment Type, Focus Area, and Amount Requested, were predetermined by your Citi Relationship Manager and therefore cannot be edited. If you disagree with any of the predetermined information in your application, please discuss this with your Citi Relationship Manager and reach out to us at foundationsupport@citi.com.
C) Character limits

Some questions in the grant application have character limits that cannot be exceeded. If a question includes character limits, it will be indicated at the bottom of the field.

Program Narrative

Describe your program in detail, outlining the key elements, interaction with participants, and relevant information that is pertinent to successful implementation. Please limit your response to 7500 characters. You will not be able to submit your application if your answer exceeds characters.

Once the character limit has been reached, you will not be able to continue typing.

Note: Some questions include guidance on the suggested length of your response but do not include a character limit. In these instances, please take note of the suggestion and limit your response in these cases.

D) Numerical and Currency Fields

Some fields throughout the application require that you enter a numerical response. If you enter a non-numerical value in these fields, your response will be converted to “0” upon saving. Please ensure that you enter numerical values where required.

6. Updating Organization and Contact Information

It is important that the Citi Foundation have accurate contact information for your organization and the primary and financial contacts for this request. Please review the information currently on file for your organization. If this information is inaccurate or blank, please follow the directions below to make any necessary updates.

To review the current information on file, expand the “organization contact information” section.

Click the arrow to expand this section.
If the information is inaccurate or blank, click the blue hyperlink to update.

A pop-up will appear. Enter the updated information and click “Save.”

The information that you have entered will not immediately update your record. To inform us that the record needs to be updated, select the check box above this section. It is essential that you select the check box as it is the only indication that your organization or contact information needs to be updated.
7. Selecting Geographical Area Served

In Edit mode, click on the green plus “+” button in the top right corner.

A window will open where you can search for and select the appropriate geographical area.
A search box is provided so that you may easily make your selection(s). You are required to identify the geographical areas served down to the county level. In the search box, enter **ONE word from the name of the county**. If the name of your county has multiple words, for example “New York,” you should enter the word that will limit the results to the greatest extent—in this case “York.” Only options that match your search criteria will be shown.

Click the check box to select **ONLY** the county. You may then use the search box to find and select any additional counties that will be served. Note that while the first selection is no longer visible, it will remain selected.

**Note:** If your program is serving a national or statewide office, you should select only the county where your headquarter office is located.
A second window will open where you are required to allocate the percentage of the grant amount that will impact each county. Drag the bar beneath each county to identify the appropriate percentage. The sum of your selections must equal 100%.

Click “UPDATE PERCENTAGES” to save your allocation.

Direct Service and Systems Change Requests Only

After you have saved your changes, you will also see that certain demographic information about the counties that you have selected has populated. This information is for your reference and is only visible when not in Edit mode.

In particular, you should take note of the Median Family Income in the last column as you will be asked in a later question to indicate whether 51% or more of the population served by your program is low- to moderate-income, which is defined as having a family income that is less than 80% of the median family income.
To delete any of the geographical areas served that have been selected, hover over the entry that you would like to delete to show the delete icon.

A pop-up will appear asking you if you want to delete the post. Click “OK.”

You will need to revise your percentage allocation to ensure that it equals 100%.

8. Uploading the Required Documentation

To upload documents to your application:
Scroll to the “Request Documents” section at the bottom of your application. Click on the green plus “+” button in the top right corner.

Note: You may also upload this document when not in Edit mode.
In the new window, click the "Add files" button to access the file on your computer or drag the file into the window to select the appropriate documents.

Once the document is listed, select the appropriate document type to indicate which required or supporting document is being uploaded.

Click "Start Upload," to upload the files to your application.

The Status will show complete when it has been successfully attached. Close the window to return to your application.

9. Saving and Submitting your Application

Click “Save” to save the changes made to your application.
Once you have completed the application and uploaded the required documentation, click “Submit Application” to submit the application to your Citi Relationship Manager for review. All submitted applications will be sent to your Citi Relationship Manager for review before they are officially submitted to the Citi Foundation.

A pop-up will appear asking you to enter a note. You should NOT enter a note. Bypass this step by clicking “OK”.

The status of the application will change and you will no longer be able to take any action.

Click the “Back” button to return to your list of pending applications.

The status of the request will change indicating that it has been sent to your Citi Relationship Manager for review. The status will continue to change as the request moves through the Citi Foundation review process.
10. Revising your Application

If your Citi Relationship Manager or the Citi Foundation Program Officer requires additional information for your application, it will be sent back to you for revisions. The primary contact for your grant will receive an automated system email indicating that an item related to this request requires action. The application will return to the “Pending Applications” section of your grantee portal and an alert will indicate that there is a request requiring action.

A) Reviewing Comments

When you access the application, requested updates will appear as “posts” next to the fields that require them.

Click the post to view the feedback provided to you.
B) Responding to Comments

If necessary, you have the ability to respond to posts. To respond to a post, open the post and click “reply.”

Enter your response in the open field and click “Save”.

Your response will be added to the post.
C) Entering New Comments

You can also post comments on fields where your Citi Relationship Manager or the Citi Foundation Program Officer has not already added a post. To leave a new comment, hover over the field on which you would like to comment to show a post icon. Click on the icon.

Upon clicking on the icon, a comment field will appear. Enter your comment and click “CREATE POST.”

Once a comment is entered, the post will remain visible on the form indicating where comments have been left. Please note that the icon may take a few moments to appear.
D) Changing or Deleting Comments

To change or delete a post, click “edit.” You will only be able to modify the comments you have saved.

You will have the option to update your post and save it, as shown earlier, or delete. To delete, click the “Delete” button.

A pop-up will appear asking you if you want to delete the post. Click “OK.”
E) Saving and Resubmitting you Application

After you have made the necessary updates, click “Save” to save your changes. Click “Resubmit” to submit the application.

11. Approved Requests

If approved by the Citi Foundation, the request will move to the Approved section of the grantee portal. This section includes a listing of all previous Citi Foundation grants to this organization.

If you require any assistance completing your grant application, please contact us at foundationsupport@citi.com.

Thank you.