

# Grants Process 101

To begin the grants process, visit UJANet at [ujanet.ujafedny.org](http://ujanet.ujafedny.org)

## Letter of Intent (LOI)

- The LOI has two purposes:
  1. For organizations outside of UJA's network to show interest in an open grant opportunity and for UJA to determine whether it's the right partnership
  2. For UJA to collect required information and forms to set up a new grantee in our system
- To submit an LOI, click on the blue "Begin Letter of Intent (LOI)" button in the bottom right corner of the homepage
- The LOI content is a combination of general organizational information (address, contact information, EIN #, etc.) and program information. In addition, we require the following forms, which should be included on the "Attachments" page of the LOI:
  - [W9 Form](#)
  - [Grantee Direct Deposit Form](#)
    - Copy of a voided check or bank letter
  - 501c3 Confirmation Letter
- Once the UJA planning staff confirm that the organization submitting an LOI is ready to complete an application, the organization will be contacted by UJA staff to create UJANet users and a welcome email with instructions will be sent

## Application Submission and Review Process

- NOTE: This is where the process begins for grantees who have received grants from UJA in the past
- Login to UJANet using the credentials received with the UJANet welcome email
- In the *RFA 2.0* tab, grantees can view the Requests for Applications (RFA) available to their organization and begin applications
  - Grantees can begin an application and edit it later by visiting the *Applications 2.0* tab. There, grantees will see an "edit" button next to their application to continue filling it out.
- The application consists of organizational contact fields, questions about the program for which the organization is requesting funding, and a Financial Form to show budget projections
- Once an application is submitted, it goes through an internal staff and lay review process
  - At any step, UJA staff can choose to accept the application or send it back to the grantee for updates

## Grant Letter

- If a grant is approved, the grantee will receive an official grant letter
- The grant letter states any grant conditions, the grant period, grant number, grant title, grant amount, and pay schedule
- In a given fiscal year, the initial grant letter must be signed via DocuSign for UJA to release the first grant payment disbursement
  - The grant letter must be signed by the CEO and CVO, but a CFO can sign in the absence of a CVO
- After the initial letter is signed, any subsequent grant letters in a given fiscal year will not require a signature

## Programming and Grant Reports

- Once a grant letter is signed, grantees may begin programming
- The standard UJA grant period follows fiscal year July 1-June 30
- Typically, an organization will be asked to complete an interim report in January and a final report in August, after the grant period has ended
  - For off-cycle grants, the reporting dates may differ and will be communicated to grantees by the staff lead
- All reporting will be submitted via the *Grant Reporting 2.0* tab in UJANet
- In most cases, 10% of a grant will be held back until a final report is received and approved
- Reports follow a similar internal review process to the application review process