

Submit Grant Recommendations in the Portal (*Donor-Advised Funds ONLY*)

STEP 1

From any screen in the **Fund Information** tab, click the **CREATE GRANT REQUEST** button

Read all the instructions on the screen before proceeding!

- Choose one (1) of the three (3) options for identifying the intended grantee:
 - Select a previous grantee or recipient fund (*from drop-down menus*);
 - Search for grantee (*from the Community Foundation database or the Candid database*); or
 - Manually enter new grantee (*using the organization's name and mailing address*)

OPTION 1

For **PREVIOUS GRANTEE OR FUND** use the dropdown menus to select previous grantee or fund



Choose from previous Grantees or Funds

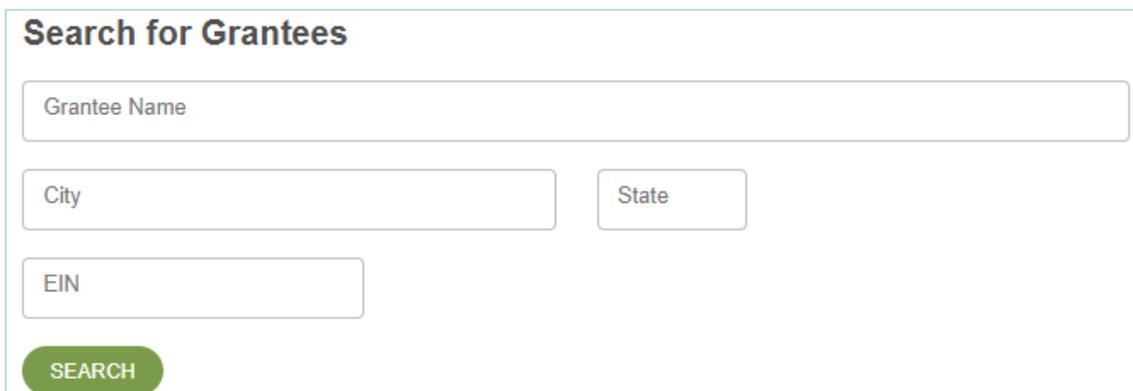
Grantees you have given to in the past

Foundation funds you have given to in the past

Other foundation funds

OPTION 2

For **SEARCH GRANTEE** enter organization name, partial name, or keyword) and state, at minimum



Search for Grantees

Grantee Name

City State

EIN

SEARCH

OPTION 2 continued

The Community Foundation database is searched first (*the current selected button is green*).

Search Results for "fluffy dog"

COMMUNITY FOUNDATION ALLIANCE RESULTS CANDID RESULTS

Name

No results found, please check Candid Results button above

Click Candid results button to widen search. Once found, click Create Request at left of name.

Search Results for "fluffy dog"

COMMUNITY FOUNDATION ALLIANCE RESULTS CANDID RESULTS

Name

CREATE REQUEST	Big Fluffy Dog Rescue
CREATE REQUEST	Pyr Paws and Fluffy Tails Rescue

OPTION 3

For **MANUAL GRANTEE** enter the organization's information in the form and then click Submit.

Enter Grantee information manually

Grantee Name *

Street Address * Apartment, Suite, Building, other

City * State * Zipcode *

Email Phone

EIN

* These fields are required.

SUBMIT

STEP 2

After selecting the grantee, please complete all necessary fields of the grant recommendation form. (NOTE: Grant recommendations must go through the full approval process prior to payout.)

Grant Request

Grantee	Big Fluffy Dog Rescue
Description	<input type="text"/> 0/255 characters
Amount	<input type="text"/>
Anonymous	<input type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)
Attachment Description	<input type="text"/>
Please provide additional information, if any, about the recommendation and indicate here if you would like the grant check provided to you for personal presentation.	<input type="text"/>

Description – A description of your recommended grant purpose. *If no description is entered here, the final grant, if approved, will reflect ‘for general support’ as its purpose.*

Amount – The grant amount you are recommending. The **Spendable Balance** on the Fund Summary screen will reflect the deduction of this amount once your grant recommendation is submitted. (NOTE: Grant recommendations must go through the full approval process prior to payout.)

Anonymous – Select this check box if you wish to grant anonymously.

Recurring – To set up a recurring grant, check this box, then follow prompts to select a **Recurrence Start Date**, **Recurrence Interval**, and **Number of Recurring** (or leave blank). Subsequent recommendations will be automatically submitted based on your selections and can only be cancelled by contacting your Regional Director of Development.

Attachment – Attachments may be added to the grant recommendation, such as images or files (*optional*).

Attachment Description – Describe the attachment, if any (*optional*).

Additional Information – Use this box to provide additional information and indicate if you would prefer the grant check be provided to you for personal presentation to grantee

Review – Click Review to verify information

STEP 3

Review New Grant Request

Verify that all entered information is correct, then carefully read the legal disclosure at bottom.

Review New Grant Request

Grantee

Description

Amount

Anonymous

Please provide additional information, if any, about the recommendation and indicate here if you would like the grant check provided to you for personal presentation.

By choosing Submit Request, I understand that the recommendation included on this form is advisory in nature and that the Community Foundation must independently research and verify the charitable nature of this recommendation prior to approving a grant from the fund. I further understand that grant recommendations cannot be made to satisfy any existing legally enforceable pledges or obligations or to personally obtain any direct tangible benefit from the grant distribution including, but not limited to, memberships, dinners, gala or event tickets. (Note: Grant recommendations from advised funds established by civic groups or clubs must be submitted by the group's president/leader. By submitting this form, the group's president/leader attests to the group's consensus in recommending the grant.)

[EDIT REQUEST](#) [SUBMIT REQUEST](#)

STEP 4

Submit Request

By submitting this request you agree that this recommendation adheres to all requirements and conditions of the legal disclosure shown at bottom of the **Review New Grant Request** screen.

To see the **Status** of your submitted grant recommendation as it moves through the due diligence and approval process, click the **Recommend A Grant** menu option on the left of the screen. Status are:

Request – Status at time of submission (*a non-recurring grant recommendation can only be cancelled from the Portal during this stage*)

Pending – Status during due diligence review process

Approved – Status once grant has been approved

Paid – Status once grant payment has been issued (*may take up to 14 business days for check to be received*)

You may submit multiple grant recommendations per session, using the remaining current **Spendable Balance** shown on the Home page. Simply restart the process for each grant recommendation.