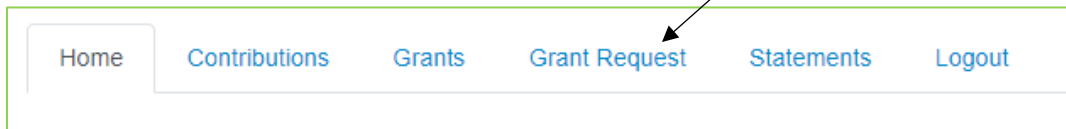


Making a Grant Request through the Donor Portal

Now that we have been utilizing our new portal system, we wanted to provide you with some “How to’s” on its capabilities when requesting a grant online.

1. To **request a grant** through the portal, click on the **“Grant Request”** tab.



A horizontal navigation menu with six tabs: Home, Contributions, Grants, Grant Request, Statements, and Logout. The 'Grant Request' tab is highlighted in blue and has a black arrow pointing to it from above.

2. You have the option to choose from the below drop-down menus: **A.** Organizations you have given to in the past. **B.** Internal funds held at the Foundation that you have supported previously. **C.** Other internal Foundation funds.

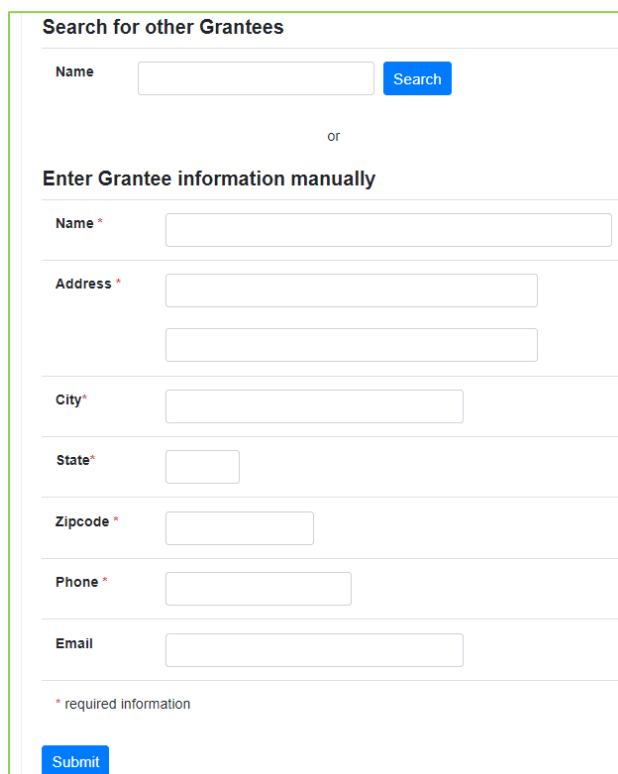


A form titled "Choose from previous Grantee" with three sections, each containing a drop-down menu:

- Grantees you have given to in the past**: A drop-down menu with a downward arrow.
- Foundation funds you have given to in the past**: A drop-down menu with a downward arrow.
- Other foundation funds**: A drop-down menu with a downward arrow.

This only shows if you have given to a Foundation Fund in the past.

3. If you are selecting a new organization, you have two options: search for the organization or manually enter the organization’s information.



A form titled "Search for other Grantees" with two main sections:

- Search for other Grantees**: A search bar with a "Name" label, a text input field, and a blue "Search" button.
- Enter Grantee information manually**: A series of text input fields for:
 - Name *
 - Address * (two stacked fields)
 - City *
 - State *
 - Zipcode *
 - Phone *
 - Email

At the bottom, there is a note: "* required information" and a blue "Submit" button.

4. With all options, once you enter the organization of choice, the below screen will populate. Please note that you will have to click the **“Submit”** button to get to the below screen, if you are entering manually.

New Grant Request

Grantee Partner's Fund

Description 0/255 characters

Amount

Anonymous

Recurring

Attachment No file chosen
(or drag and drop anywhere on the page)

Attachment Description

5. **Grantee** - once you have selected or entered the organization or Fund, more information boxes appear.

Description - you can provide any additional instructions such as “Annual Fund” or “In Memory of ____.”

Amount - you can only request a grant up to the amount of the fund’s balance. If you have an Endowed Fund, you will be able to submit a grant request over your Spending Policy Amount. The Foundation office will notify you if you attempt to overspend your Spendable Amount.

Anonymous - if you prefer the grant does not disclose your name, please check the box next to **“Anonymous.”**

Recurring - you have the choice to make a grant repeat at regular intervals. If you make this selection, the screen below will appear. Choose your start date, followed by how often and the number of times you wish the grant to recur. In the example below, this grant will happen annually for three years. If you leave the number option blank, the Foundation will notify you.

- Recurring grants affect the overall fund balance, as these grants are accrued in our system. Using the below example, the balance of the fund will be reduced by \$3,000.

Attachment – click **“Choose Files,”** if you have a donation form that needs to go with a grant.

6. Once you fill out all the required fields, hit the **“Review”** button.

The screenshot shows a form with the following fields and values:

- Anonymous:
- Recurring:
- Recurrence Start Date: 07/07/2021
- Recurrence Interval: Annually
- Number of Recurring (or blank): 3
- Attachment: Choose Files (No file chosen)
- Attachment Description: (empty)

A blue **Review** button is located at the bottom left of the form.

7. Review your grant request and **“Submit Request”** if correct. If you need to adjust the information, click **“Edit Request.”**

The screenshot shows a summary page titled **Review New Grant Request** with the following details:

Grantee	Operations Fund
Description	2021 Partner's Campaign
Amount	\$ 200.00
Anonymous	No
Recurring	Yes
Recurrence Start Date	07/01/2021
Recurrence Interval	Annually
Number of Recurring (or blank)	3

At the bottom, there are two buttons: **Submit Request** (blue) and **Edit Request** (grey).

8. If you wish to receive an email notifying you when grant checks are placed in the mail, please contact us and we will set up a notifications option in our system.
9. Plus, you can also see the status of the grant on the home screen. Under **“Recent Grants”** on the left-hand side, beneath **“Status.”**

Recent Grants				
↕ Date	↕ ID	↕ Status	↕ Recipient	↕ Amount
04/22/2021	11995	Approved	Gateway Arts Council	4,000.00