Introduction to the Fund Advisor Portal

Click on a section under Contents to navigate to those specific instructions.

Contents

Navigation	1
Tabs and what they do	
To Recommend a Grant	
To look up an organization:	
To copy a previous grant request	
To make a grant request recurring.	
Once Submitted	

Navigation

Once you've created an account and logged into the fund portal, click on the fund you wish to access.

GIVE NOW



Choose Fund

Community Action Fund
Greatest Needs Fund

The **Fund Portal Home** Page will show the name of the fund, the different tabs of information, the **current balance** of the fund, and the **remaining spendable** if the fund is endowed, as well as the Fund Advisors for the fund.



The tab you select will be highlighted in dark blue.

Tabs and what they do

HOME – shows the general information on the fund listed above

CHOOSE FUND – lets you view a different fund that you advise

CONTRIBUTIONS – shows donations which can be sorted by Date, Contributor, Type, and Amount – <u>clicking on the **Contributor's** name allows you to view all donations/gifts from that individual or organization to your fund.</u>

GRANTS – gives a <u>summary</u> of grants out of your fund to organizations, showing a count of the total number per organization and the total amount granted to them. <u>Clicking on the organization's name shows you the fund's history of grants to that individual organization, including purpose and amount per individual grant.</u>

GRANT REQUEST – for donor advised and organizational funds, this is where grant recommendations can be made. It allows you to select a recipient from a previous grant, select a foundation fund, search for a grant recipient, or enter the information manually. This also shows the most recent grants from your fund, as well as their status. See below for information on how to submit a grant request.

STATEMENTS – Allows you to view published statements for your fund by clicking the blue <u>View</u>. These are generated by the finance department, so may not appear in the portal immediately after a quarter ends. As you will not be able to generate a custom date range statement, please email Patty at <u>pmacdonald@ghacf.org</u> or Mary at mbrimmer@ghacf.org for assistance or if you have any questions regarding your statements.

Statements

Description	Date Range				
Fund Statement 2022/06/30 - College Access	01/01/2022 - 06/30/2022	View			

DONATE – Allows you to donate to a variety of foundation funds.

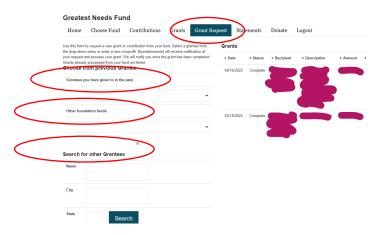
LOGOUT – logs you out of your fund portal account.

To Recommend a Grant

You can copy a previous grant's information **OR** look up an organization through the Grant Request Tab.

To look up an organization:

Go to the Grant Request tab



Selecting a **Grantee you have given to in the past** via the dropdown menu will automatically take you to the request form without a need for any additional information.

Selecting a fund from the <u>Other Foundation Funds</u> drop down will do the same – allowing you to enter the amount, special instructions, and if it's anonymous or recurring.

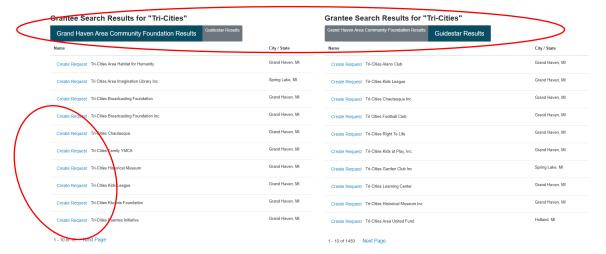
<u>Searching For a Grantee</u> will let you input the **Name** (or a part of the name), **City** (if known), and **State** (if known). The more information included in the initial search allows for a more targeted list to generate. You may also search for other foundation funds here by using the **Name** field.

Search for other Grantees Name Search again Name City City State Search Search Search

The results will show all options available withing the GHACF database. This may be over several pages so be sure to check if a blue **Next Page** is below the list.

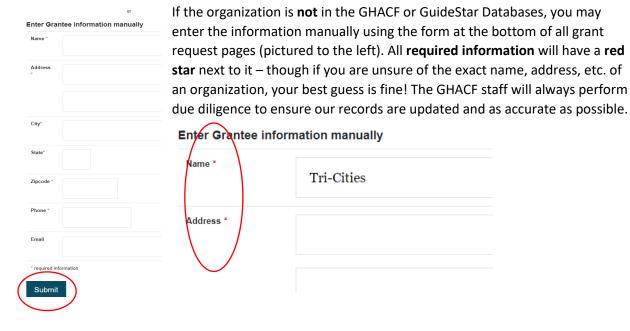
1 - 10 of 21 Next Page

If the organization does not show up, you can either search again using different or broader information or select the gray <u>GuideStar Results</u> at the top of the search, which will search the GuideStar Database for potential matches. The list you are viewing will be highlighted in navy.

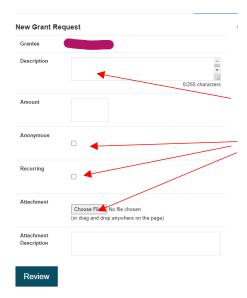


If the organization you wish to give to is listed, select the blue <u>Create Request</u> next to the organization name to generate a request form.

Please note that certain organizations, like religious institutions, educational institutions, and government entities, may not be listed under GuideStar due to their IRS classification. They may still qualify for a grant even if they don't show within the GuideStar Database. Please email Adrienne Whisman (awhisman@ghacf.org) for more information or questions related to this.



Once you've filled out the manual entry form, hit **submit** to get to the request form.

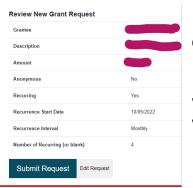


Once you've selected or entered your recipient organization's name, the **New Grant Request Form** will prompt you to fill in additional details.

The **Description Box** allows for any special designations or instructions.

A grant can be marked **anonymous** and/or **recurring**, and **files can be uploaded** as supporting documents for the request (this could be information on the project, the appeal letter, minutes, or a communication about potential funding opportunities). No attachment description is needed unless you feel it is necessary.

These documents will be submitted along with your request and viewable by foundation staff.



Once you've filled in all relevant fields, you can hit review.

When you hit review, you are given an overview of the grant, which you can then **Edit Request** or **Submit Request**.

To copy a previous grant request

Please note, every processed grant from your fund will have a <u>COPY</u> button next to it. Clicking the <u>Copy</u> button allows you to copy the **Grant Recipient**, the special instructions (**Description**), and **Amount** into a new grant request – allowing you to review the information and submit it easily.



This allows you to easily repeat a grant. If you'd like to make this specific grant recurring, you can easily do so here as well (instructions for this are on the next page).

Continue to fill out the rest of the **Request form** as needed and follow the normal grant request directions in order to submit it.

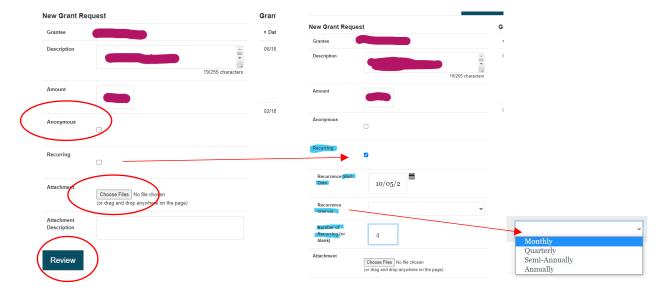
To make a grant request recurring.

Check the **Recurring Box** in the **Grant Request Form**.

Set a start **Date** (either the day's date or a set date like the first of the month)

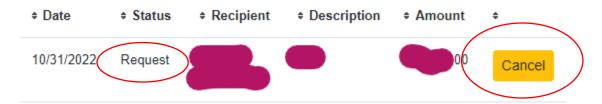
Set the recurrence interval (Monthly, Quarterly, twice a year, Annually) and

How many instances of recurrence (leaving it blank sets no end date)



Once Submitted

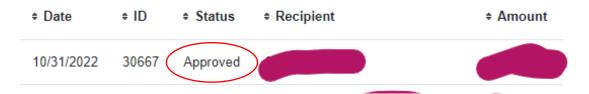
Your grant history will reflect the new request as soon as you hit **Submit**. You can cancel a request by clicking the yellow **Cancel** button next to it.



Once the grant has been reviewed and the GHACF staff has begun processing it, the grant status will change to **Pending** and the **grant can no longer be canceled**. If you need to edit or cancel a request once it's pending, please email Adrienne Whisman at awhisman@ghacf.org.



Once a grant request has been vetted and approved by staff, the status will update to **Approved**.



Once a check has been created, the status will update to **Paid**.



Once the grant has been mailed, the status will update to **Complete**.



Select the **Grant Request**Tab to submit new grant

recommendations. Captain John Tuttle Family Fund Pas Grants **Grant Request** Fund S Contributions atements Donate In keeping with best practices and respe e GHACF and its affiliates will continue to share donor names with fund advisors, but will no longer share gift amount information. Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. You can also attach any relevant documents to your request. The Grand Haven Area Community Foundation will receive notification of your request and process your grant. We will notify you once the grant has been completed. Grants already processed from your fund are listed. Other foundation funds has a If you have any questions, please reach out to Adrienne Whisman at awhisman@ghacf.org. drop down of "promoted" or Choose from previous Grantee actively fundraising funds. Other foundation funds Search for other Grantees Search for other Grantees allows you to search the GHACF database, the City GuideStar Database, and organizations you have given to in the State past, including foundation funds. Search See next page for additional details. **Enter Grantee information manually**

Address

Enter Grantee Information manually allows you to input the organization's contact information if you can't find it using the search bar above. If you are unsure about a required field, or if you do not know the information, a substitute can be used (e.g., 555-555-555).

Home Contributions Past Grants Grant Request Fund Statements Donate Logout

In keeping with best practices and respecting donor confidentiality, the GHACF and its affiliates will continue to share donor names with fund advisors, but will no longer share gift amount information.

rantee Search Results for "spring lake district library Grand Haven Area Community Foundation Results City / State EIN Create Request (OUTDOO) - Spring Lake District Library Outdoor Beautification Fund Create Request (SLDLRenovation) -Spring Lake District Library Renovation Fund Create Request (SLDL) - Spring Lake District Library Endowment Fund Spring Lake, MI 35-1920511 Create Request Spring Lake District Library Using **Search for other Grantees** will show Create Request (WARNER) - Spring Lake District Library Restricted Endowment Fund organizations and funds already in the GHACF system. If you select **GuideStar** 1 - 5 of 5 **Results** at the top, this will show all tax-Search again exempt organizations who are required to Name file (schools, religious organizations, municipalities/government entities, etc. normally do not show up in GuideStar – but City can still be granted to if they meet other requirements). State Search nee Search Results for "spring lake district library" Guidestar Results 38-2412375 Spring Lake, MI Create Request Friends of Spring Lake District Library Spring Lake, NJ 22-1982858 Create Request Spring Lake Golf Club Spring Lake, MI 38-2494268 Create Request Spring Lake Education Association Make sure to Spring Lake, MI 38-6018020 Create Request Spring Lake Yacht Club triple check the Spring Lake, NJ 46-1966834 Create Request Spring Lake Police Foundation city and state before hitting Spring Lake, NC 43-2011377 Create Request F-YAL of Spring Lake submit! 87-2770195 Spring Lake, NC Create Request Victory Chapel of Spring Lake Spring Lake, NC 20-0003733 Create Request Spring Lake Church of God 91-0436606 Spring Lake, NC Create Request Spring Lake Assembly of God

Spring Lake, NJ

22-2187962

1 - 10 of 804 Next Page

Create Request Spring Lake Historical Society Inc.

Home Contributions Past Grants **Grant Request Fund Statements** Donate Logout In keening with hest practices and respecting depor confidentiality, the GHACF a affiliates will continue to sna onor names amount information. it will no longer share **NEW!** The portal now allows you to bulk submit requests. Once all your nt Requests rantee from t documents recommendations are in, under the Grant Recipient Description Amount Request tab, you will see a list of your request and (GENL) - Greatest 500.00 Needs Fund current requests for review. Select **Review** to confirm the details and submit. Spring Lake District general 1.000.00 Delete Library support n@gha This is mandatory to allow your request (YOUTH) - Youth 500.00 support Delete to reach foundation staff! Other foundation funds general 250.00 Delete support **Grant Request Total** 2,250.00 Review Search for other Grantees Captain John Tuttle Family Fund Home Contributions Past Grants **Grant Request Fund Statements** Donate Logout In keeping with best practice, and Once you've confirmed all the details are correct, select **Submit** or names **Requests** to send them to the foundation to process. **Review Grant Requests** Grantee If you need to edit or delete any request, simply return to the (GENL) - Greatest Needs Fund **Grant Request** page and select the yellow **Delete** button or Spring Lake District Library the grey **Edit** button next to the request. (YOUTH) - Youth Fund support \$ 500.00 No Additional Information: Fake Nonprofit general support \$ 250.00 No 123 Test Additional Information NoWhere, MI 49417 555-555-5555 \$ 2 250 00 Total Submit Requests

Captain John Tuttle Family Fund

A successful submission will show a green dialog box with "Grant Request Submitted". From here, you can either close the tab or click Continue.



Captain John Tuttle Family Fund

Home	Contributions	Past Grants	Grant Request	Fund State	ements	Donate	Logout		
keeping	with best practices		donor confidentiali sors, but will no lor					to share d	onor name
	o request a new grant or co menu or enter a new nonpr	,		prants Date	Status	Recipient	Description	Amount	
The Grand Haven Area Community Foundation will receive notification of your regulat and process your grant.					Request	Fake Nonprofit	general support	250.00	Cancel
	ou once the grant has been processed from your fund a	And Aller		08/07/2023	Request	(YOUTH) - Youth Fund	support	500.00	Cancel
	questions, please reach ou		at awhaman@ghacf.org.	08/07/2023	Request	Spring Lake District Library	general support	1,000.00	Cancel
Other found	ation funds		~	08/07/2023	Request	(GENL) - Greatest Needs Fund	(500.00	Cancel
Search for	other Grantees	or							

Once submitted the <u>Grant Request</u> tab will show the status of the request. If the request has not been processed by the GHACF, you can still <u>Cancel</u> the request by clicking the yellow <u>Cancel</u> button next to it. If that button is no longer there or you need to edit a grant, please reach out to foundation staff.

Please note that foundation staff are able to view in progress grant carts. This allows us to reach out if we notice a recommendation has not been submitted to confirm your intent.

Please also note that once a grant has been processed, a confirmation email or letter will be sent to you confirming the details and the grant Status will be marked as "complete."