Introduction to the Fund Advisor Portal

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

Contents

Navigation

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

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.

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 – clicking on the **Contributor's** name allows you to view all donations/gifts from that individual or organization to your fund.

GRANTS – gives a summary of grants out of your fund to organizations, showing a count of the total number per organization and the total amount granted to them. **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**.

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 **View**. 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 pmacdonald@ghacf.org 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 **Other Foundation Funds** drop down will do the same – allowing you to enter the amount, special instructions, and if it's anonymous or recurring.

Searching For a Grantee 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.

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.

If the organization does not show up, you can either search again using different or broader information or select the gray **GuideStar Results** 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 **Create Request** 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.

If the organization is **not** in the GHACF or GuideStar Databases, you may enter the information manually using the form at the bottom of all grant request pages (pictured to the left). All **required information** will have a **red star** next to it – though if you are unsure of the exact name, address, etc. of an organization, your best guess is fine! The GHACF staff will always perform due diligence to ensure our records are updated and as accurate as possible.

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

New Grant Request

Grantee

Description

0/255 characters

Amount

Anonymous ☐

Recurring ☐

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

Attachment
Description

Review

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.

Review New Grant Request

Grantee	
Description	
Amount	
Anonymous	No
Recurring	Yes
Recurrence Start Date	10/05/2022
Recurrence Interval	Monthly
Number of Recurring (or blank)	4

Submit Request **Edit Request**

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 **COPY** button next to it. Clicking the **Copy** 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.

Home	Choose Fund	Contributions	Grants	Grant Request	Statements	Donate	Logout

Grants

⇕ ID	⇕ Date	⇕ Status	⇕ Recipient	⇕ Description		⇕ Amount	
1971	05/28/2019	Complete					Copy

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

Home   Contributions   Past Grants   **Grant Request**   Fund Statements   Donate   Logout

In keeping with best practices and respecting your confidentiality, the 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.

If you have any questions, please reach out to Adrienne Whisman at awhisman@ghacf.org.

Choose from previous Grantee

Other foundation funds

[dropdown ⌄]

Other foundation funds has a drop down of "promoted" or actively fundraising funds.

or

Search for other Grantees

Name   [   ]

City   [   ]

State   [   ]   [Search]

Search for other Grantees allows you to search the GHACF database, the GuideStar Database, and organizations you have given to in the past, including foundation funds.

See next page for additional details.

or

Enter Grantee information manually

Name *   [   ]

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., 555-555-5555).

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.

Grantee Search Results for "spring lake district library"

	Grand Haven Area Community Foundation Results	Guidestar Results

Name		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		
Create Request	Spring Lake District Library	Spring Lake, MI	35-1920511
Create Request	(WARNER) - Spring Lake District Library Restricted Endowment Fund		

1 - 5 of 5

Search again

Name	
City	
State	[Search]

Using **Search for other Grantees** will show **organizations and funds** already in the GHACF system. If you select **GuideStar Results** at the top, this will show all tax-exempt organizations who are required to file *(schools, religious organizations, municipalities/government entities, etc. normally do not show up in GuideStar – but can still be granted to if they meet other requirements)*.

Grantee Search Results for "spring lake district library"

	Grand Haven Area Community Foundation Results	Guidestar Results

Name		City / State	EIN
Create Request	Friends of Spring Lake District Library	Spring Lake, MI	38-2412375
Create Request	Spring Lake Golf Club	Spring Lake, NJ	22-1982858
Create Request	Spring Lake Education Association	Spring Lake, MI	38-2494268
Create Request	Spring Lake Yacht Club	Spring Lake, MI	38-6018020
Create Request	Spring Lake Police Foundation	Spring Lake, NJ	46-1966834
Create Request	F-Y A L of Spring Lake	Spring Lake, NC	43-2011377
Create Request	Victory Chapel of Spring Lake	Spring Lake, NC	87-2770195
Create Request	Spring Lake Church of God	Spring Lake, NC	20-0003733
Create Request	Spring Lake Assembly of God	Spring Lake, NC	91-0436606
Create Request	Spring Lake Historical Society Inc	Spring Lake, NJ	22-2187962

Make sure to triple check the city and state before hitting submit!

1 - 10 of 804   Next Page

Search again

Captain John Tuttle Family Fund

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 ut will no longer share g amount information.

NEW! The portal now allows you to bulk submit requests. Once all your recommendations are in, under the **Grant Request** tab, you will see a list of your current requests for review. Select **Review** to confirm the details and submit.

This is mandatory to allow your request to reach foundation staff!

Other foundation funds

Search for other Grantees

Name

Grant Requests

	Recipient	Description	Amount	
Delete	(GENL) - Greatest Needs Fund		500.00	Edit
Delete	Spring Lake District Library	general support	1,000.00	Edit
Delete	(YOUTH) - Youth Fund	support	500.00	Edit
Delete		general support	250.00	Edit
		Grant Request Total	2,250.00	**Review**

Captain John Tuttle Family Fund

Home   Contributions   Past Grants   Grant Request   Fund Statements   Donate   Logout

In keeping with best practices and   or names wit

Once you've confirmed all the details are correct, select **Submit Requests** to send them to the foundation to process.

If you need to edit or delete any request, simply return to the **Grant Request** page and select the yellow **Delete** button or the grey **Edit** button next to the request.

Review Grant Requests

Grantee			
(GENL) - Greatest Needs Fund			
Spring Lake District Library			
(YOUTH) - Youth Fund	support Additional Information:	$ 500.00	No
Fake Nonprofit 123 Test NoWhere, MI 49417 555-555-5555	general support Additional Information:	$ 250.00	No
	Total	$ 2,250.00	

Submit Requests

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

Grant Request Submitted

Continue

Captain John Tuttle Family Fund

Home   Contributions   Past Grants   **Grant Request**   Fund Statements   Donate   Logout

n 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.

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.

If you have any questions, please reach out to Adrienne Whisman at awhisman@ghacf.org.

Choose from previous Grantee

Other foundation funds

[dropdown]

or

Search for other Grantees

Name [   ]

⇕ Date	⇕ Status	⇕ Recipient	⇕ Description	⇕ Amount	⇕
08/07/2023	Request	Fake Nonprofit	general support	250.00	Cancel
08/07/2023	Request	(YOUTH) - Youth Fund	support	500.00	Cancel
08/07/2023	Request	Spring Lake District Library	general support	1,000.00	Cancel
08/07/2023	Request	(GENL) - Greatest Needs Fund		500.00	Cancel

Once submitted the **Grant Request** tab will show the status of the request. If the request has not been processed by the GHACF, you can still **Cancel** the request by clicking the yellow **Cancel** 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."