



# How to Recommend a Grant & Grantee in Donor View

## How to Recommend a Grant

- 1 To log into [DonorView](#).
- 2 Click on [Recommend a Grant](#) on your Donor Dashboard.

Call 1.800.810.0366 | donorsupport@igiftfund.org www.igiftfund.org [LOGOUT](#)

**iGiftFund**  
stewards for donor advised funds Donors & Fundholders

**Donor Dashboard** Donors & Fundholders/Donor Dashboard

Donor Dashboard

[Fund Activity](#)

[Contribution Activity](#)

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Welcome, John

**Fund**

The Smith Foundation

The Smith Foundation (Fund ID 84903)

Independent Charitable Gift Fund

**Fund Balance**

\$875,000.00 (available)

~~\$875,000.00~~ (market value)

**Your Donor Contact:**

**Total Contributions**

Recent Contributions

| AMOUNT       | TYPE          | STATUS   | DATE      |
|--------------|---------------|----------|-----------|
| \$875,000.00 | Managed Money | Received | 10/1/2019 |

[See All Contributions](#)

- 3 Search for your favorite charity in our database by using the [Search by Keyword](#). Using the ein or a combination of the name and location can help narrow it down. Less is more when using the search function.

**Recommend Grants** Donors & Fundholders/Recommend a Grant

[Donor Dashboard](#)

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**Fund**

The Smith Foundation

The Smith Foundation (Fund ID 84903)

Independent Charitable Gift Fund

**Recommend a Grant / Manage my Grantees**

If you would like to recommend grants to multiple organizations at once, click "Add to Cart" to store a list of grantees to which you may recommend grants as a group, rather than individually.

There are no items in the cart for the currently selected account.

**Search by Keyword**

Charity Name

Focus Area

State/Province

[SUBMIT](#)

**Fund Balance**

\$875,000.00 (available)

~~\$875,000.00~~ (market value)

**Grantee List**

Use this table to keep track of your favorite grantees. To add a new grantee to your watch list, click the "Add a Grantee" button. To remove a grantee from your list, click the "x". To recommend a grant, click the "New Grant" button beside the grantee name.

| GRANTEE                | REMOVE GRANTEE |
|------------------------|----------------|
| No records to display. |                |

[ADD A GRANTEE](#)

4 This search will yield a list of charities. Once you find your charity on this list, click [New Grant](#).

| Search Results                    |                  |                         |                           |
|-----------------------------------|------------------|-------------------------|---------------------------|
| NAME                              | FOCUS            | ACTIONS                 | ACTIONS                   |
| Austin Pets Alive                 | Animal - related | <a href="#">Details</a> | <a href="#">New Grant</a> |
| Dallas Pets Alive                 | Animal - related | <a href="#">Details</a> | <a href="#">New Grant</a> |
| Homeless & Orphaned Pets Endeavor | Animal - related | <a href="#">Details</a> | <a href="#">New Grant</a> |

5 Complete the fields as appropriate and click [Submit Recommendation](#).

- Single or Recurring Grant - *if recurring, specify the frequency of the payments and when recurring payments should end.*
- Grant amount
- Process date - asap or future date
- Contact – if one is listed, the grant letter will be addressed to this individual.
- Grant Purpose – this will be listed on the grant letter
- Anonymity – can select full or partial (if nothing is selected, Fund and Donor names will appear in the grant letter)
- Special Instructions – this field is an internal field in which you can add a note for the Grants Dept. This field has no effect on the grant check or letter.

### Grant Entry

Donors & Fundholders/Recommend a Grant/Grant Entry

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I would like to recommend a grant to:  
Dallas Pets Alive  
Address: 11700 Preston Rd., Suite 660 #263, Dallas, TX 75241

Recommended Grant Amount:  
 As a Single Payment  
 As a Recurring Payment  
Balance \$875,000.00  
Amount:

Single Payment:

Other Grant Recommendation Details:  
Name of Contact:   
Grant Purpose:   
 Full Anonymity - Please make this Grant Recommendation Anonymous.  
 Partial Anonymity - Do Not Share My Address with the Charity

Special Instructions:

Complete Fields

Clicking submit recommendation is NOT the last step in submitting your grant request!!

6

Once you click submit recommendation, you will get a review screen in which you will *confirm your grant recommendation* and *acknowledge* the grant purpose per iGiftFund’s Grant Making Guidelines. After you review, click [Confirm Grant Recommendation](#).

7

You will receive a *confirmation* with a *transaction ID*. Your grant request should now appear on the [Grant History tab](#) of your Dashboard.



## How to Recommend a Grantee

If you cannot find your favorite charity in our database, you can recommend it.

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- 2 Click on [Recommend a Grant](#) on your Donor Dashboard

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**Donor Dashboard** Donors & Fundholders/Donor Dashboard

Donor Dashboard  
Fund Activity  
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Welcome, John

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**Fund Balance**  
\$875,000.00 (available)  
\$875,000.00 (market value)

**Your Donor Contact:**

**Total Contributions**

Recent Contributions

| AMOUNT       | TYPE          | STATUS   | DATE      |
|--------------|---------------|----------|-----------|
| \$875,000.00 | Managed Money | Received | 10/1/2019 |

[See All Contributions](#)

- 3 Click [Add a Grantee](#) to request we add it to our database.

**Recommend Grants** Donors & Fundholders/Recommend a Grant

Donor Dashboard  
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**Recommend a Grant / Manage my Grantees**

If you would like to recommend grants to multiple organizations at once, click "Add to Cart" to store a list of grantees to which you may recommend grants as a group, rather than individually.

There are no items in the cart for the currently selected account.

**Search by Keyword**  
Charity Name  
Focus Area  
All  
State/Province

**Grantee List**  
Use this table to keep track of your favorite grantees. To add a new grantee to your watch list, click the "Add a Grantee" button. To remove a grantee from your list, click the "x". To recommend a grant, click the "New Grant" button beside the grantee name.

| GRANTEE                | REMOVE GRANTEE |
|------------------------|----------------|
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SUBMIT ADD A GRANTEE

4 Now click [Suggest a Grantee](#) from your dashboard.

[Donor Dashboard](#)  
[Fund Activity](#)  
[Contribution Activity](#)  
[Recommend a Grant](#)  
[Grant History](#)  
[Recurring Grants](#)  
[Fund Relationships](#)  
[My Profile](#)  
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**Fund**  
The Smith Foundation (Fund ID 84903)  
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If you are unable to find an organization using the search, you may [Suggest A Grantee](#) or return to the [Grantee List](#).

**Search by Keyword**  
Charity Name  
Focus Area  
All  
State/Province

5 Complete the fields with as much information as you have available and click [Submit](#).

**Suggest a Grantee** Donors & Fundholders/Recommend a Grant/Suggest A Grantee

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Please enter the information below about this potential grantee organization. We will perform a due diligence review of this organization before any grant payments can be distributed.

In the meantime, this organization will show in your Grantee List. You will be able to recommend grants to it, though they will not be processed until the organization is approved.

**Complete Fields**

Grantee Name  
Street  
City  
Country: UNITED STATES OF AMERICA  
State: Alabama  
Zip Code  
Tax Id  
Phone  
Fax  
Email  
Website  
Comments

[SUBMIT](#)

6 Once you click submit, you will receive a confirmation stating that your grantee suggestion has been received. Click [back to grantees](#).

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[Contribution Activity](#)  
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**Grantee Suggestion Received**  
Your suggestion has been submitted to the Foundation. Prior to approval, we must review the organization to ensure they meet our requirements for granting.

In the meantime, you will see the organization in your "Grantee List". You will also be able to recommend grants to the organization. Once the organization has been approved, your grant recommendation will be formally submitted.

[BACK TO GRANTEES](#)

6

The grantee you recommended should now appear on your [Grantee List](#) now. Click [New Grant](#) to recommend a grant.

## Recommend Grants

[Donors & Fundholders/Recommend a Grant](#)

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|  | GRANTEE  | REMOVE GRANTEE   |
|--|--|--|
| <input type="button" value="NEW GRANT"/> | <a href="#">Add to Cart</a><br><b>Cupcakes for Kids</b><br>5 Sweets Ln , Hudson, OH 12345                    |   |
| <input type="button" value="NEW GRANT"/> | <a href="#">Add to Cart</a><br><b>Dallas Pets Alive</b><br>11700 Preston Rd. Suite 660 #263 Dallas, TX 75230 |  |