

# How to Recommend a Grant & Grantee in Donor View How to Recommend a Grant

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#### To log into **DonorView**.

## 2 Click on Recommend a Grant on your Donor Dashboard.

Call <u>1.800.810.0366</u>   donorsupport@igiftfund.org		www.igiftfund.org
iGiftFund stewards for donor advised f	unds	Donors & Fundholders
Donor Dashboar	d	Donors & Fundholders/Donor Dashboard
Donor Dashboard <u>Fund Activity</u> <u>Contribution Activity</u>	Welcome, John Fund	Your Donor Contact:
Grant History Recurring Grants Fund Relationships	The Smith Foundation (Fund ID 84903) Independent Charitable Gift Fund	Total Contributions           Recent Contributions           AMOUNT         TYPE           STATUS         DATE
<u>My Profile</u> Forms & Documents	Fund Balance \$875,000.00 (available) <u>\$875,000.00</u> (market value)	\$875,000.00 Managed Money Received 10/1/2019 See All Contributions

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 Gra	ants		Donors & Fundho	olders/Recommend a Gran
Donor Dashboard Fund Activity Contribution Activity Recommend a Grant Grant History	Fund The Smith Foundation The Smith Foundation (Fund I Independent Charitable Gift Fou	7 <b>84</b> 903) nd	<b>Fund Balance</b> \$875,000.00 (available) <u>\$875,000.00 (</u> market va	alue)
Fund Relationships My Profile Forms & Documents	Recommend a Grant / Mánag If you would like to recommend grantees to which you may reco	e my Grantees I grants to multiple organiz mmend grants as a group There	rations at once, click "Add to Cart" , rather than individually. are no items in the cart for the c	" to store a list of urrently selected accoun
	Search by Keyword Charity Name Focus Area	Grantee List Use this table to grantee to your grantee from yo Grant" button b	o keep track of your favorite gran watch list, click the "Add a Grant our list, click the "x". To recomme peside the grantee name.	tees. To add a new ee" button. To remove a nd a grant, click the "Nev
	State/Province	No records to disp	GRANTEE	REMOVE GRANTEE
	SUBMIT	ADD A GRAN	TEE	

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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	<u>Details</u>	New Grant
Dallas Pets Alive	Animal - related	<u>Details</u>	New Grant
Homeless & Orphaned Pets Endeavor	Animal - related	Details	New Grant

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

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- 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
Donor Dashboard Fund Activity Contribution Activity Recommend a Grant Grant History Recurring Grants Fund Relationships My Profile Forms & Documents Complete Fields	I would like to recommend a grant to: Dallas Pets Alive Address 11700 Preston Rd. Suite 660 #263, Dallas, TX 75; • Recommended Grant Amount:

Clicking submit recommendation is <u>NOT</u> the last step in submitting your grant request!!

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.

	Donors & Fundholders/Recommend a Grant/Grant Entry/Confirm Grant Recommendation
Donor Dashboard Fund Activity Contribution Activity Recommend a Grant Grant History Recurring Grants Fund Relationships My Profile Forms & Documents	Grantee: Dallas Pets Alive 11700 Preston Rd. Suite 660 #263, Dallas, TX 75230 Grant Amount: single payment in the amount of \$500.00 Grant Letter Comments: For the pets By clicking the Confirm Grant Recommendation button, I understand and acknowledge that a grant must directly and fully support a charitable program and a Grant may not be used for any of the following: • To provide private benefit to me or any other related individual • To provide private benefit to me or any other related individual • To provide private benefit to me or any other related individual • To pay for dues, membership fees, or a pledge • To purchase tickets to a charitable event or benefit, such as banquets, golf tournaments, auctions, sponsorships • To support organizations on the terror-watch list • To support a political party or candidate for election Mour grant request is NOT submitted until you click the Confirm Grant Recommendation button.

You will receive a *confirmation* with a *transaction ID*.

Your grant request should now appear on the Grant History tab of your Dashboard.

Grant Submitted		Donors & Fundholders/Recommend a	Grant/Grant Entry/Grant Submitte	tted
Donor Dashboard Fund Activity Contribution Activity Recommend a Grapt Grant History Recurring Grants Fund Relationships My Profile Forms & Documents	Thank you for your Grant Recommendation.	Your transaction ID is: <b>17745.</b> BACK TO DONOR DASHBOARD	VIEW GRANT HISTORY	

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## How to Recommend a Grantee

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



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Log into DonorView.

#### 2 Click on Recommend a Grant on your Donor Dashboard

donorsupport@igiftfund.org		www.gutuno.og
GiftFund stewards for donor advised	funds	Donors & Fundholders
Donor Dashboa	rd	Donors & Fundholders/Donor Dashboa
Donor Dashboard	Welcome, John	
Donor Dashboard <u>Fund Activity</u> <u>Contribution Activity</u>	Welcome, John <b>Fund</b>	Your Donor Contact:
Donor Dashboard <u>Fund Activity</u> <u>Contribution Activity</u> <u>Recommend a Grant</u> Grant History	Welcome, John Fund The Smith Foundation The Smith Foundation (Fund ID 84903)	Your Donor Contact: Total Contributions
Donor Dashboard <u>Fund Activity</u> <u>Contribution Activity</u> <u>Recommend a Grant</u> <u>Grant History</u> <u>Recurring Grants</u>	Welcome, John Fund The Smith Foundation The Smith Foundation (Fund ID 84903) Independent Charitable Gift Fund	Your Donor Contact: Total Contributions Recent Contributions
Donor Dashboard <u>Fund Activity</u> <u>Contribution Activity</u> <u>Recommend a Grant</u> <u>Grant History</u> <u>Recurring Grants</u> <u>Fund Relationships</u>	Welcome, John Fund The Smith Foundation The Smith Foundation (Fund ID 84903) Independent Charitable Gift Fund	Your Donor Contact:         Total Contributions         Recent Contributions         AMOUNT       TYPE         STATUS       DATE

Click Add a Grantee to request we add it to our database.

Recommend Grant	ts	Donors & Fundholders/Recommend a (	Grant
Donor Dastboard     Fund Activity     Contribution Activity.     Recommend a Grant     Grant History.	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)	
Fund Relationships My Profile Forms & Documents	Recommend a Grant / Manage my Grant Nyou would like to recommend grants to grantees to which you may recommend	ntees o multiple organizations at once, click "Add to Cart" to store a list of grants as a group, rather than individually. There are no items in the cart for the currently selected acco	ount.
	Search by Keyword Charity Name Focus Area All	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 remov grantee from your list, click the "x". To recommend a grant, click the " Grant" button beside the grantee name.	ve a 'New
	State/Province	GRANTEE REMO GRAN No records to display.	IOVE NTEE

Donor Dashbo	bard Fund	Search by Keyword
Fund Activity	The Smith Foundation	Charity Name
Recommend a	Grant The Smith Foundation (Fund ID 84903)	
<u>Grant History</u>	Independent Charitable Gift Fund	Focus Area
Recurring Grai	nts ships If you are unable to find an organization using	All
<u>My Profile</u>	the search, you may Suggest A Grantee or	State/Province
Forms & Docu	ments return to the <u>Grantee List</u> .	
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Donor Dashboard Fund Activity Contribution Activity	as much information as you have available and e Donors & Fundholders/Reco Please enter the information below about this potential grantee organization. We vereview of this organization before any grant payments can be distributed.	d click Submit. mmend a Grant/Suggest A Grantee vill perform a due diligence
Donor Dashboard Fund Activity Contribution Activity Recommend a Grant	as much information as you have available and Please enter the information below about this potential grantee organization. We we 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	d click Submit. mmend a Grant/Suggest A Grantee vill perform a due diligence o recommend grants to it, though
Donor Dashboard Fund Activity Contribution Activity Recommend a Grant Grant History Recurring Grants	as much information as you have available and Please enter the information below about this potential grantee organization. We we 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 they will not be processed until the organization is approved.	d click Submit. mmend a Grant/Suggest A Grantee vill perform a due diligence o recommend grants to it, though
Donor Dashboard Fund Activity Contribution Activity Recommend a Grant Grant History Recurring Grants Fund Relationships	as much information as you have available and Please enter the information below about this potential grantee organization. We we 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 they will not be processed until the organization is approved. Grantee Name	d click Submit. mmend a Grant/Suggest A Grantee vill perform a due diligence o recommend grants to it, though

lecommend a Grant	In the meantime, this organization will show in your Grantee List.	You will be able to recommend grants to it, though
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	Email	
	Website	
	Comments	
	SUBMIT	

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## Click back to grantees.

<u>Donor Dashboard</u> <u>Fund Activity</u> <u>Contribution Activity</u>	<b>Grantee Suggestion Received</b> Your suggestion has been submitted to the Foundation. Prior to approval, we must review the organization to ensure they meet our requirements for granting.
Recommend a Grant <u>Grant History</u> <u>Recurring Grants</u> Fund Belationships	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.
<u>My Profile</u> Forms & Documents	BACK TO GRANTEES

Once you click submit, you will receive a confirmation stating that your grantee suggestion has been received.

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

	ants	Donors & Fundholders/Recommend a Gran
Donor Dashboard     Fund Activity     Contribution Activity     Recommend a Grant     Grant History	<b>Fund</b> The Smith Foundation The Smith Foundation (Fund ID 8 Independent Charitable Gift Fund	Fund Balance \$874,500.00 (available) \$875,000.00 (market value) 903)
<u>Fund Relationships</u> <u>My Profile</u> <u>Forms &amp; Documents</u>	If you would like to recommend g grantees to which you may recom Search by Keyword Charity Name Cupcakes for Kids Focus Area	There are no items in the cart for the currently selected accour Grantee List Use this table to keep track of your favorite grantees. To add a new grantee from your list, click the "Add a Grantee" button. To remove a grantee from your list, click the "x". To recommend a grant, click the "Ne Grant" button beside the grantee name.
	All - State/Province	GRANTEE REMOVE GRANTE NEW CDANT Add to Cupcakes for Kids
	SUBMIT	Cart 5 Sweets Ln , Hudson, OH 12345