Welcome to The Columbus Foundation’s new Fund Portal! This step-by-step guide will help you suggest and manage grants from your fund.

SUBMITTING AND MANAGING GRANTS FROM DONOR ADVISED FUNDS

To suggest a grant from a fund, first log in to the Fund Portal at columbusfoundation.org. Then, click the SUGGEST A GRANT tab and follow these steps.

PART ONE — CHOOSE A GRANTEE

You may choose a Grantee in one of four ways:

1. **Choose from Previous Grantee**—select a grantee to support from this drop-down list of organizations.

2. **Featured Foundation Funds**—from this drop-down menu, you may select one of The Columbus Foundation’s featured funds to support.

3. **Search for Funds and Grantees**—search for a specific organization or fund to support. The more information included, the better the search results will be.
To search for a fund, include the following information:
- Fund Name

To search for an organization, include the following information:
- Organization Name
- City
- State (abbreviated)

Once you have found the organization or fund you’re looking for, click CREATE REQUEST.

From the Search Results, please note whether you are selecting a nonprofit or fund to support. Only nonprofits will display a City/State and an EIN next to the name.

4. Enter Grantee Information Manually—if you aren’t able to locate the organization you’d like to support through The Columbus Foundation and Affiliated Organizations’ or Guidestar’s Results, you will need to enter the organization’s information manually. This includes the organization’s name, address, and phone number. The fields marked with a red asterisk are required. Once you enter this information, click SUBMIT. You will be redirected to a new page to fill in grant details (this will appear on the next page).
PART TWO — ENTER GRANT DETAILS

In the Description field, if applicable, provide the grant purpose and instructions for the recipient.

Enter the Amount of your grant. A $100 minimum is required for each suggested grant.

If you would like to remain anonymous, select the Anonymous checkbox.

If you would like to make the grant in honor or in memory of someone, please include that information, along with their contact details if you would like them to be notified, in the Additional Information for TCF Staff field.

Once you are finished entering this information, click ADD TO GRANT REQUESTS.

Note—after you click Add to Grant Requests, you will be redirected back to the Suggest a Grant page, shown below.

NEW FEATURES:

- Make a recurring gift by selecting Recurring and choosing the start date and recurrence interval and/or number of occurrences. If you would like to make changes after you have initiated a recurring grant, please contact your Donor Services Advisor or email donorservices@columbusfoundation.org.

- Using the Attachment feature, attach any backup or additional information to a grant request (e.g., nonprofit event information related to a grant).
PART THREE — REVIEW AND SUBMIT REQUEST

Under YOUR CART on the top right side of the Suggest a Grant tab, you will see the grant(s) you have suggested.

You’re not done yet! Your grant will not be initiated until you review and submit the request.

To continue, click REVIEW AND SUBMIT GRANT REQUESTS.

If you click DELETE, your grant request will be immediately and permanently deleted.

Click EDIT to make changes to your grant request.

Once you have reviewed your grant request(s), click SUBMIT GRANT REQUESTS. Once submitted, The Columbus Foundation team will begin processing the grant request.

You will be redirected to the confirmation page, shown below.
MANAGE AND VIEW GRANT SUGGESTIONS

MANAGE CURRENT GRANT SUGGESTIONS

You can review your current grant requests on the Suggest a Grant tab in the Grants section. Under the STATUS column, you will see one of five statuses for each grant:

REQUEST A grant suggestion has been submitted to The Columbus Foundation team for processing. To cancel a grant request before it is processed, click the CANCEL button.

CANCELED A grant suggestion has been canceled.

PENDING The Columbus Foundation team is currently processing the grant request.

APPROVED The grant request has been approved but not yet paid.

PAID/COMPLETE The grant request has been approved, and a payment has been made to the organization.

VIEW OR COPY PAST GRANT DETAILS

Once you click the GRANTS DETAILS tab, you will see two ways to view your previous and pending grants.

The first section, GRANTEE SUMMARY, allows you to view your grants grouped by organization or fund name, listed alphabetically. It also includes the number of grants and the total grant amount that has been issued from your fund to each grantee.
As you scroll down on the Grants Details tab, the second section is **GRANTS**. This is sorted by grant date. **If you click on the grant identification number** on the left side, it will bring up additional details about this grant, including payment information.

If you'd like to suggest a grant for the same amount to that organization or fund, you can click **COPY**, and it will auto-populate a grant suggestion with the same description and amount.

To export the information listed on the **Grant Details** tab into a spreadsheet to save and/or print, click **EXPORT** in the main menu at the top.

You can also view or copy past grant suggestions by **clicking the grantee name** in the Grantee Summary section of the page. A list of your grants to that organization or fund will appear. If you click **COPY**, a grant suggestion will auto-populate with the same description and amount for you to review and submit.