



FUND PORTAL RESOURCES

NAVIGATING THE FUND PORTAL

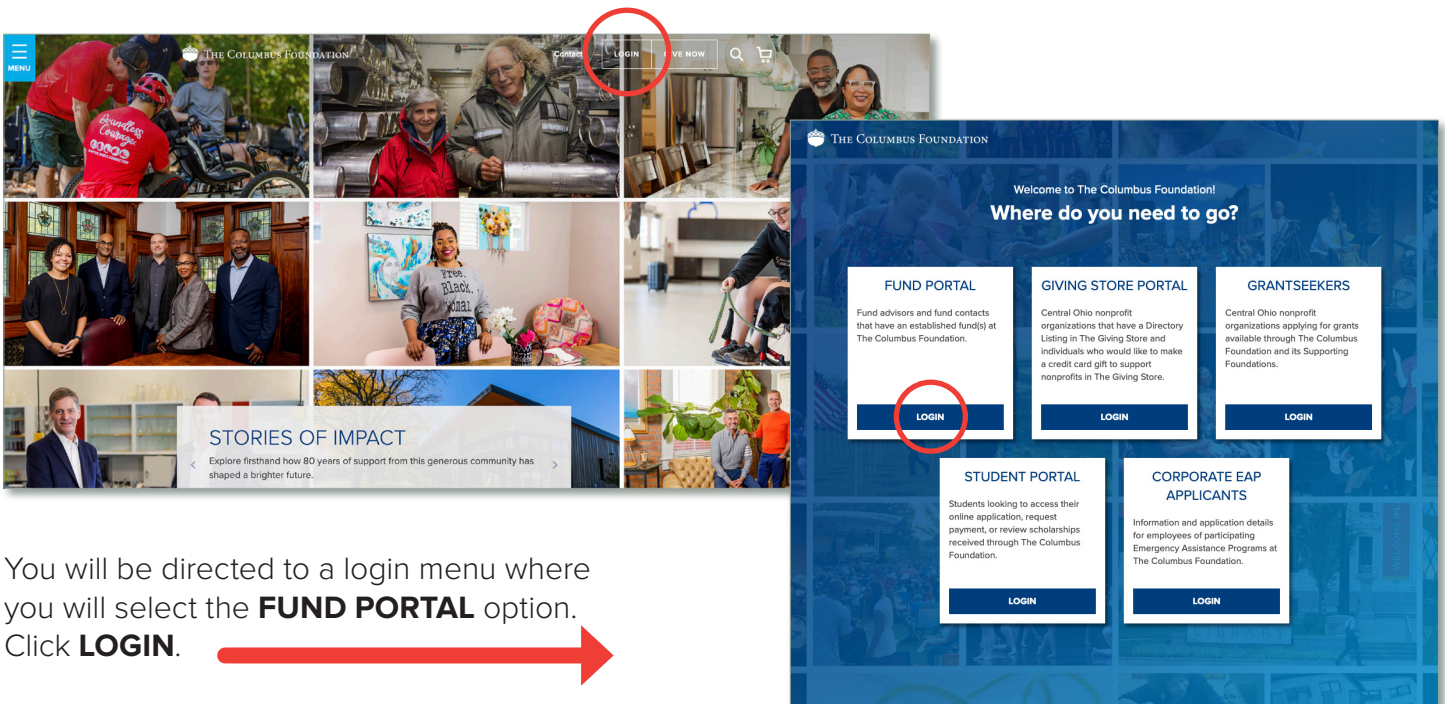
DONOR RESOURCES

Welcome to The Columbus Foundation's Fund Portal!

This guide will help you navigate the Fund Portal, where you can continue to manage your fund from anywhere.

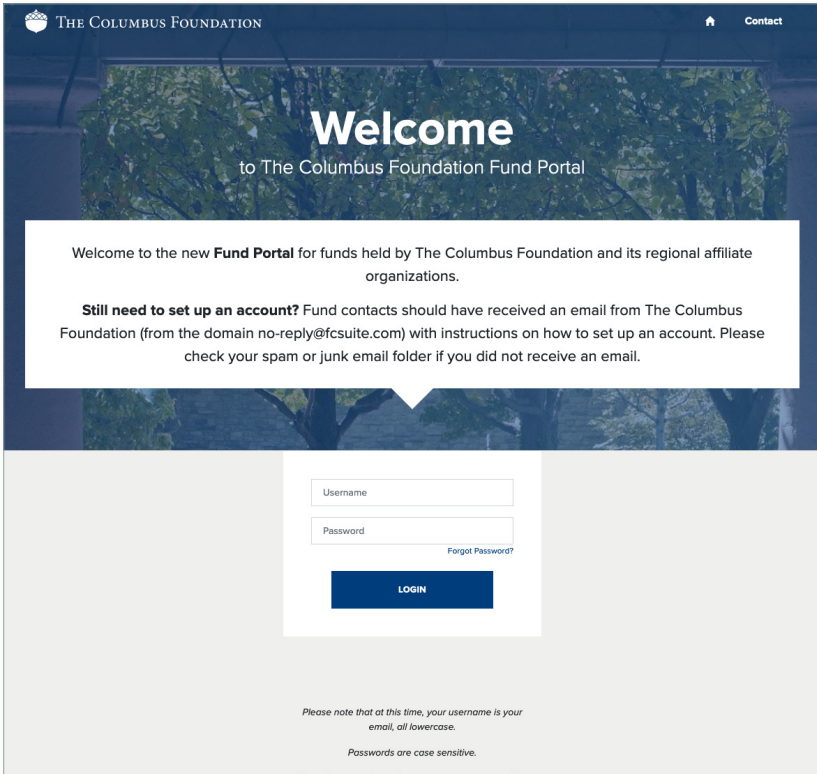
ACCESSING THE FUND PORTAL

You can access the Fund Portal anytime by visiting columbusfoundation.org and clicking on "LOGIN" at the top right corner of the homepage.

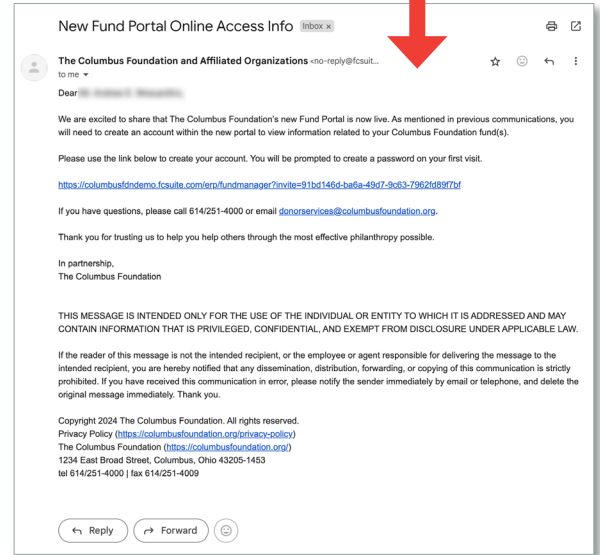


You will be directed to a login menu where you will select the **FUND PORTAL** option. Click **LOGIN**.

This will take you to the login screen where you will enter your username (which is your email in all lowercase) and password.

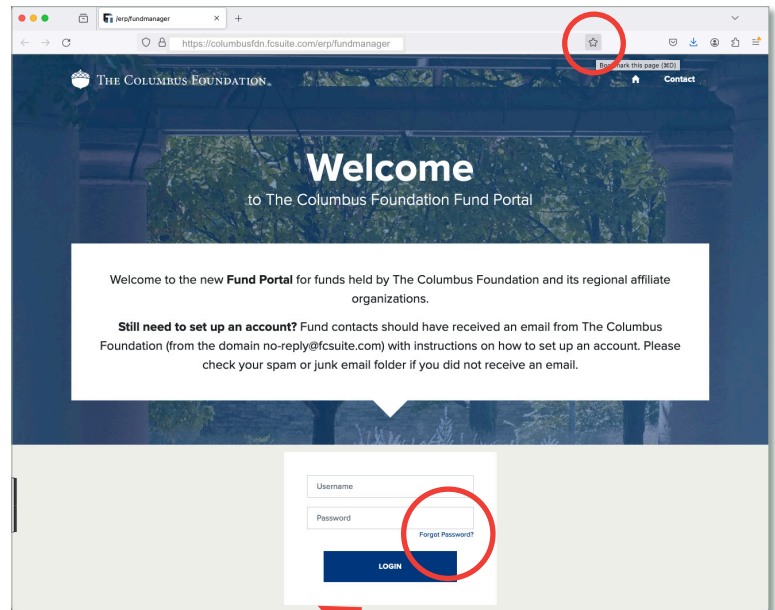


Below is an example of the email that was sent to you to set up access to your Fund Portal.



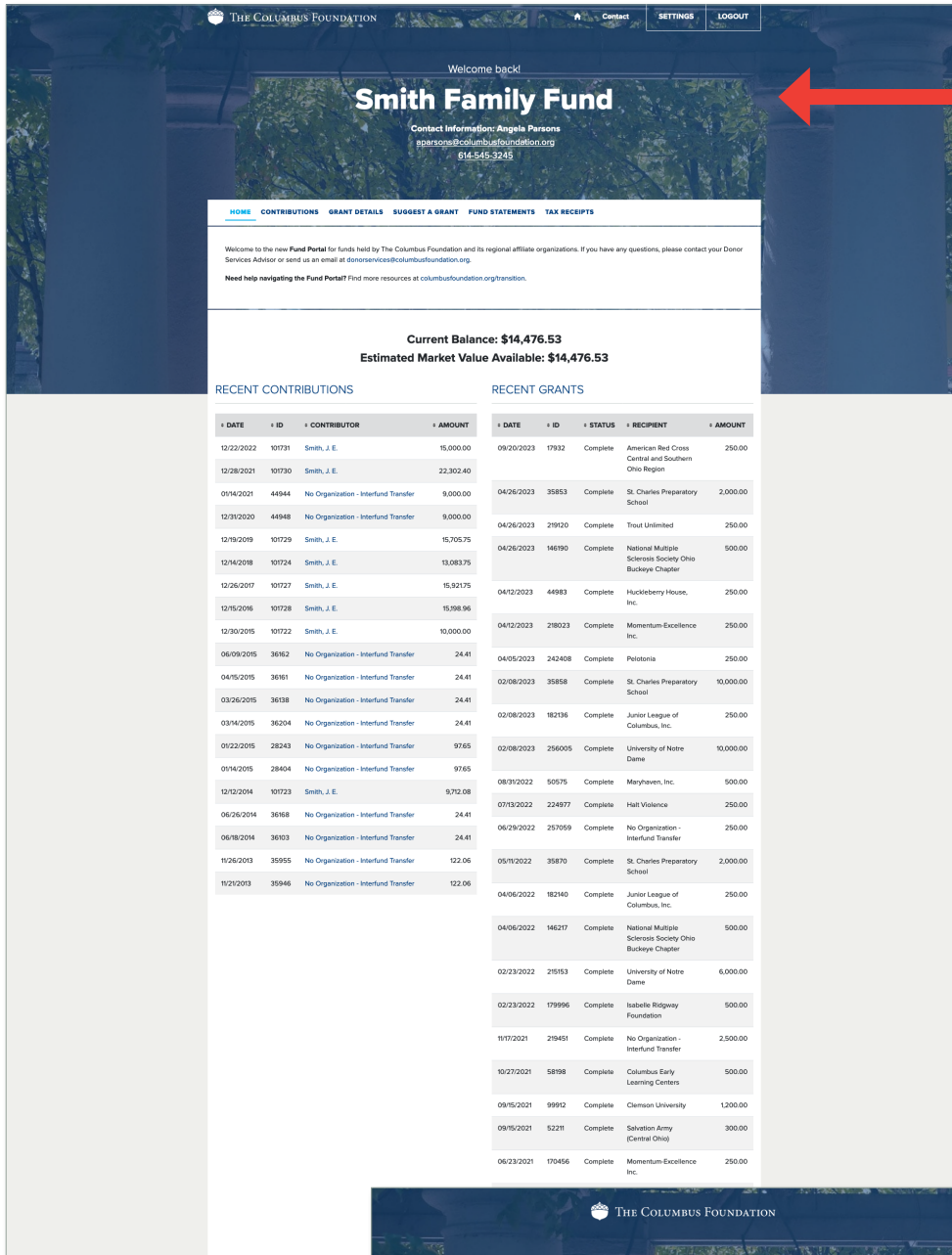
We encourage you to bookmark the login page. In many browsers, this can be done by clicking the star icon located on the right-hand side of the address bar.

If you have not yet set up access to your Fund Portal account, please refer to our [Setting Up Access to Your Account](#) guide.



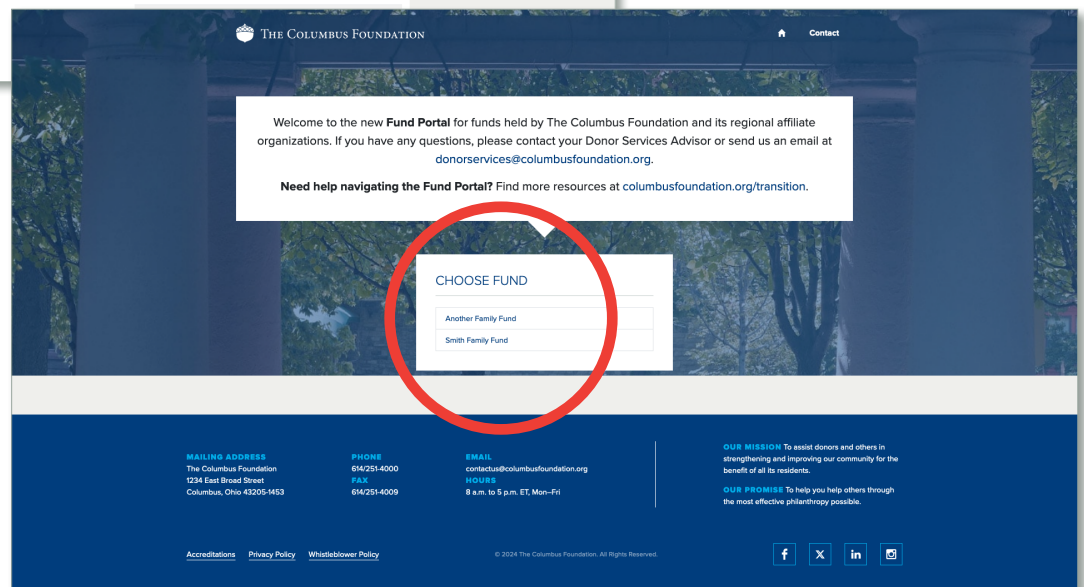
PLEASE NOTE: The Columbus Foundation team **does not** have the ability to access your password. If you forget your password, you can reset it on the Fund Portal login page by clicking on the **“Forgot Password?”** link. If you still need assistance, please email donorservices@columbusfoundation.org or call 614/251-4000.

FUND PORTAL LANDING PAGE

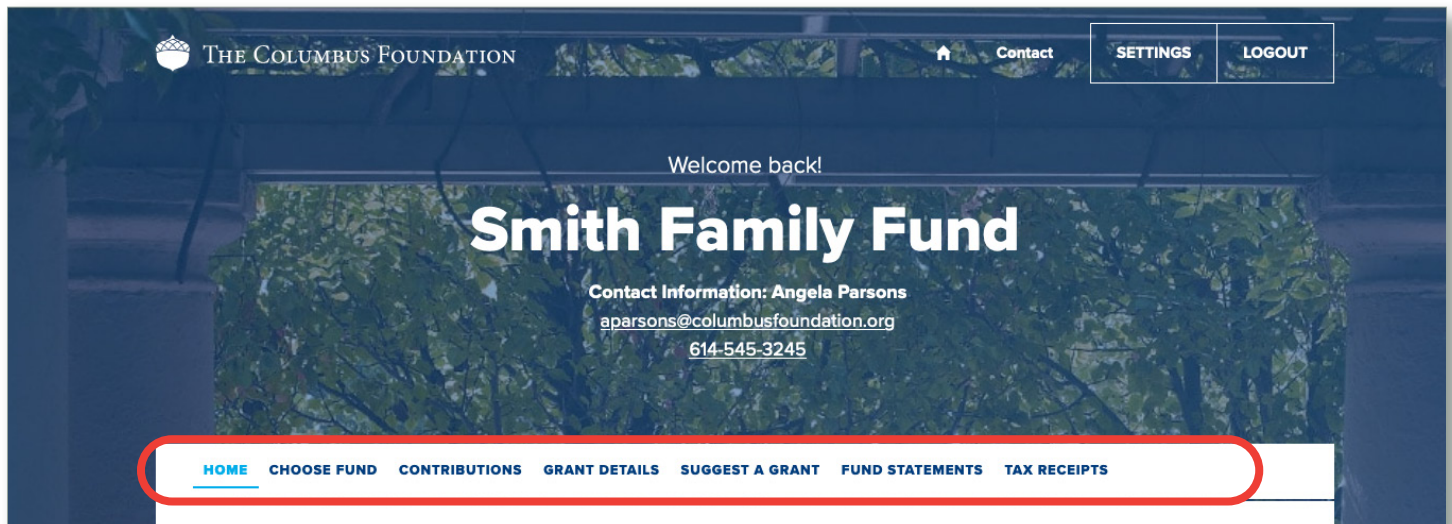


Once you are logged in, your fund's landing page will appear.

If you manage multiple funds, you will see a **CHOOSE FUND** menu. Choose the fund you wish to review from the menu.



TABS ON THE FUND PORTAL LANDING PAGE



Please note: Your access to various tabs on the Fund Portal is a reflection of your role and permissions for a given fund and might not be as extensive as those listed below.

HOME

The landing page provides a quick snapshot of a fund’s most recent activity. It lists current balance and estimated market value, recent contributions, and grant history.

CHOOSE FUND

This tab will only appear if you manage more than one fund, and will allow you to toggle back and forth between funds.

CONTRIBUTIONS

This tab provides details on gifts made to the fund. You can also export this information into a spreadsheet to save and/or print.

GRANT DETAILS

This tab:

- Shows the grant history with options to review details about previous grants by organization or fund name and by date.
- Allows advisors for Donor Advised Funds to “Copy” the details of previous grants to suggest a new grant.
- Gives you the option to export information on previous grants into a spreadsheet to save and/or print.

SUGGEST A GRANT

This tab is where advisors for Donor Advised Funds can suggest a grant from a fund and see the status of recent grant submissions.

FUND STATEMENTS

This tab displays quarterly fund statements once they become available. Next to the fund statement you wish to view, you can click “Print,” and the system will generate a PDF in a new window that you may view, save, and/or print. To view historic statements, please contact your Donor Services Advisor.

TAX RECEIPTS

In this tab, you can view and print tax receipts for your personal charitable donations. To access historic tax receipts, please contact your Donor Services Advisor.

SUBMITTING AND MANAGING GRANTS FROM DONOR ADVISED FUNDS

Please note: The remainder of this guide is related to **Donor Advised Funds**.

To suggest a grant from a fund, 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**.

The screenshot shows the 'SUGGEST A GRANT' page for the Smith Family Fund. The page has a navigation menu with 'HOME', 'CONTRIBUTIONS', 'GRANT DETAILS', 'SUGGEST A GRANT', 'FUND STATEMENTS', and 'TAX RECEIPTS'. Below the navigation menu, there is a 'WELCOME BACK' message and contact information for Angela Parsons. The main content area is divided into two sections: 'CHOOSE FROM PREVIOUS GRANTEE OR FUND' and 'SEARCH FOR GRANTEES AND FUNDS'. The 'CHOOSE FROM PREVIOUS GRANTEE OR FUND' section has a dropdown menu for 'Grantees you have given to in the past' and another for 'Other foundation funds'. The 'SEARCH FOR GRANTEES AND FUNDS' section has input fields for 'Name', 'City', and 'State', and a 'SEARCH' button. A red box highlights the search section, and a red arrow points to the 'SEARCH' button. Another red arrow points to the 'CHOOSE FROM PREVIOUS GRANTEE OR FUND' section.

The screenshot shows the 'Grantee Search Results for "The Columbus Foundation"' page. The page has a navigation menu with 'HOME', 'CONTRIBUTIONS', 'GRANT DETAILS', 'SUGGEST A GRANT', 'FUND STATEMENTS', and 'TAX RECEIPTS'. Below the navigation menu, there is a 'WELCOME BACK' message and contact information for Angela Parsons. The main content area is a table with search results for 'The Columbus Foundation'. The table has columns for 'Name', 'City / State', and 'EIN'. The search results show 'The Columbus Foundation' with 'Columbus, OH' and '316044264'. A red circle highlights the 'CREATE REQUEST' button next to the search result. A red arrow points to the 'CREATE REQUEST' button.

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.

NEW FEATURE:
Guidestar Results searches a national database of IRS-recognized tax-exempt organizations and thousands of faith-based nonprofits.

Name	City / State	EIN
CREATE REQUEST (307) - Boys and Girls Club of Columbus Fund		
CREATE REQUEST Boys and Girls Club of Benton and Franklin Counties	Pasco, WA	91-1673327
CREATE REQUEST Boys and Girls Club of Boston, Inc.	Boston, MA	04-2103922
CREATE REQUEST Boys and Girls Club of Cecil County Maryland	Aberdeen, MD	52-2190263
CREATE REQUEST Boys and Girls Club of Collier County	Naples, FL	65-0279110
CREATE REQUEST Boys and Girls Club of Dane County Inc.	Madison, WI	39-1925617

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).

4 → ENTER GRANTEE INFORMATION MANUALLY

ENTER GRANTEE INFORMATION MANUALLY

Name *

Address *

City *

State *

Zipcode *

Phone *

Email

* required information

SUBMIT

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.

Welcome back!

Smith Family Fund

Contact Information: Angela Parsons
aparsons@columbusfoundation.org
614-545-3245

HOME CONTRIBUTIONS GRANT DETAILS SUGGEST A GRANT FUND STATEMENTS TAX RECEIPTS

GRANT REQUEST

Grantee: The Columbus Foundation

Description: If applicable, provide the grant purpose and instructions for the nonprofit recipient. 86/255 characters

Amount: 500

Anonymous:

Recurring:

Attachment: No files selected. (or drag and drop anywhere on the page)

Attachment Description:

Additional Information for TCF Staff: 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 Instructions for TCF Staff field.

(Example)
Grant made on behalf of Firstname Lastname.
Please notify them at firstname@gmail.com.

(Example)
Grant made in honor of Firstname Lastname.
Please notify them by mail at:
1234 Streetname Drive
City, State ZIP code



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).

Welcome back!

Smith Family Fund

Contact Information: Angela Parsons
aparsons@columbusfoundation.org
614-545-3245

HOME CONTRIBUTIONS GRANT DETAILS SUGGEST A GRANT FUND STATEMENTS TAX RECEIPTS

Use this form to request a new grant from your fund to a nonprofit grantee or fund. Select a grantee or fund from the dropdown menus or enter a new grantee. All grants will be distributed from The Columbus Foundation directly to the grant recipient. The Columbus Foundation will notify you once the grant has been completed.

Please include the grant purpose and any special instructions for the nonprofit in the **Description** field of your Grant Request. Any additional instructions for TCF staff, such as 'in honor of' or 'on behalf of' information, should be provided in the **Additional Instructions for TCF Staff** field of your Grant Request form.

CHOOSE FROM PREVIOUS GRANTEE OR FUND

Grantees you have given to in the past:

Other foundation funds:

or

SEARCH FOR GRANTEES AND FUNDS

Name:

City:

YOUR CART

Recipient	Description	Amount
<input type="button" value="DELETE"/> The Columbus Foundation	If applicable, provide the grant purpose and instructions for the nonprofit recipient.	500.00 <input type="button" value="EDIT"/>
Grant Request Total		500.00

GRANTS

DATE	STATUS	RECIPIENT	DESCRIPTION	AMOUNT
09/20/2023	Complete	American Red Cross Central and	This grant is made in memory of Rick	250.00

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.

THE COLUMBUS FOUNDATION

Welcome back!

Smith Family Fund

Contact Information: Angela Parsons
aparsons@columbusfoundation.org
614-545-3245

HOME CONTRIBUTIONS GRANT DETAILS SUGGEST A GRANT FUND STATEMENTS TAX RECEIPTS

Use this form to request a new grant from your fund to a nonprofit grantee or fund. Select a grantee or fund from the dropdown menus or enter a new grantee. All grants will be distributed from The Columbus Foundation directly to the grant recipient. The Columbus Foundation will notify you once the grant has been completed.

Please include the grant purpose and any special instructions for the nonprofit in the **Description** field of your Grant Request. Any additional instructions for TCF staff, such as 'in honor of' or 'on behalf of' information, should be provided in the **Additional Instructions for TCF Staff** field of your Grant Request form.

CHOOSE FROM PREVIOUS GRANTEE OR FUND YOUR CART

Grantees you have given to in the past	Recipient	Description	Amount	
<input type="text"/>	The Columbus Foundation	If applicable, provide the grant purpose and instructions for the nonprofit recipient.	500.00	<input type="button" value="DELETE"/> <input type="button" value="EDIT"/>
Other foundation funds			Grant Request Total	500.00

SEARCH FOR GRANTEES AND FUNDS

GRANTS

DATE	STATUS	RECIPIENT	DESCRIPTION	AMOUNT
09/20/2023	Complete	American Red Cross Central and	This grant is made in memory of Rick	250.00

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.

THE COLUMBUS FOUNDATION

Welcome back!

Smith Family Fund

Contact Information: Angela Parsons
aparsons@columbusfoundation.org
614-545-3245

HOME CONTRIBUTIONS GRANT DETAILS SUGGEST A GRANT FUND STATEMENTS TAX RECEIPTS

REVIEW GRANT REQUESTS

Grantee	Description	Amount	Anonymous
The Columbus Foundation 1234 E Broad St Columbus, OH 43205-1405	If applicable, provide the grant purpose and instructions for the nonprofit recipient. Additional information for TCF Staff: 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. Additional Instructions for TCF Staff field. (Example) Grant made on behalf of Firstname Lastname . Please notify them at firstname@gmail.com .	\$ 500.00	No
Total		\$ 500.00	

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.

THE COLUMBUS FOUNDATION

Welcome back!

Smith Family Fund

Contact Information: Angela Parsons
aparsons@columbusfoundation.org
614-545-3245

HOME CONTRIBUTIONS GRANT DETAILS SUGGEST A GRANT FUND STATEMENTS TAX RECEIPTS

SUCCESS

Grant Request Submitted

MAILING ADDRESS
The Columbus Foundation
1234 East Broad Street
Columbus, Ohio 43205-1453

PHONE
614/251-4000
FAX
614/251-4009

EMAIL
contactus@columbusfoundation.org
HOURS
8 a.m. to 5 p.m. ET, Mon-Fri

OUR MISSION To assist donors and others in strengthening and improving our community for the benefit of all its residents.

OUR PROMISE To help you help others through the most effective philanthropy possible.

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.

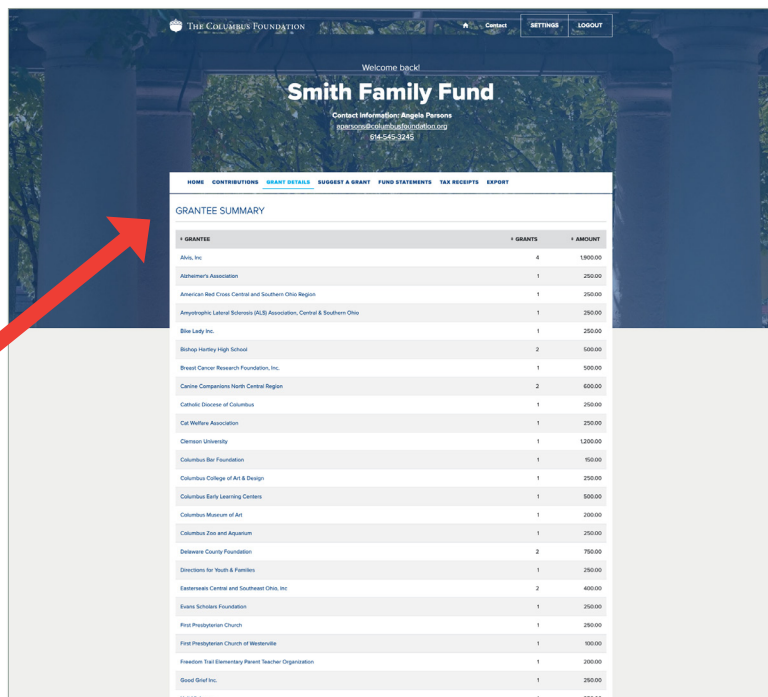
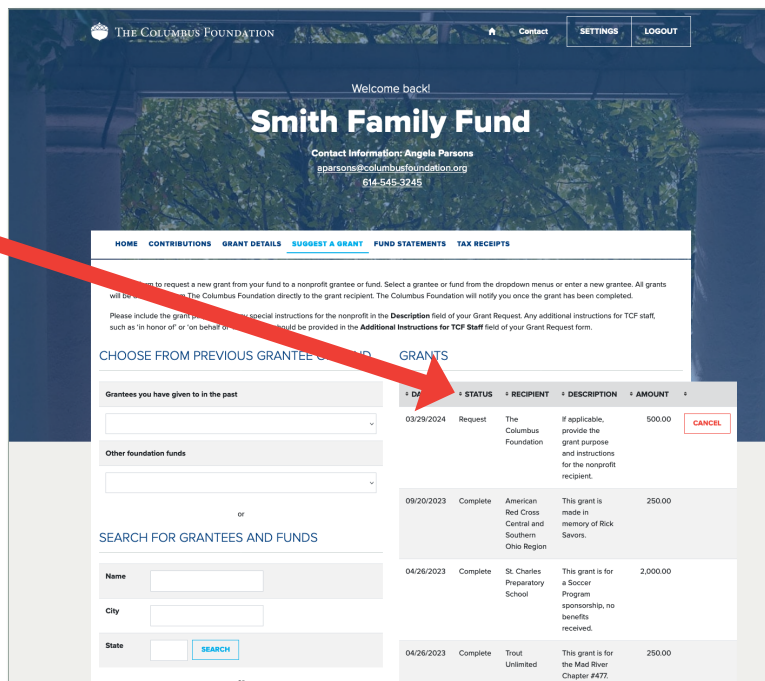
PAID/ COMPLETE

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.

ID	DATE	STATUS	RECIPIENT	DESCRIPTION	ADVISOR	AMOUNT
1922	08/20/2022	Complete	American Red Cross Central and Southern Ohio Region	This grant is made in memory of Bob Savors.		250.00
29800	04/26/2023	Complete	Trust Unlimited	This grant is for a...		250.00
46960	04/26/2023	Complete	Delaware County Ohio Buckeye Chapter	This grant is to be added to Steven and Paula O'Reilly's Walk MS Columbus 2023 amount raised.		500.00
22553	04/26/2023	Complete	St. Charles Preparatory School	This grant is for a Easter Program sponsorship, no benefits received.		2,000.00
29823	04/12/2023	Complete	Momentum-Excellence Inc.	This grant is for Soraya Therese's Sleep Out.		250.00
44883	04/12/2023	Complete	Huckberry House, Inc.	This grant is for Soraya Therese's Sleep Out.		250.00
24248	04/15/2023	Complete	Peisano	This gift should be allocated to older Ohio Lawrenco #20,055.		250.00
38888	02/08/2023	Complete	St. Charles Preparatory School	This grant is our first installment of The Vision for the Future - Preparing Leaders for the Next One Hundred Year Challenge.		10,000.00
250003	02/08/2023	Complete	University of Notre Dame	This grant is made on behalf of Angela Gupte Parsons (Class of '86 and Jay Parsons (Class of '84), for recognition in the Book Society.		10,000.00
80736	02/08/2023	Complete	Junior League of Columbus, Inc.	This grant is in honor: \$450 for dues and an additional \$500 for the endorsement.		250.00
50075	08/31/2022	Complete	Mayhew's, Inc.	This grant is for Anya's House renovations and is being made in memory of John Gupte.		500.00
224977	07/19/2022	Complete	H&H Violence	This grant is for Better Together: Mentors Mentor.		250.00
257059	05/29/2022	Complete	No Organization - Interfund Transfer	This represents an interfund transfer.		250.00
38870	05/17/2022	Complete	St. Charles Preparatory School	This grant is for a Soccer Program sponsorship, no benefits received.		2,000.00
18027	04/06/2022	Complete	National Multiple Sclerosis Society Ohio Buckeye Chapter	This grant is to be added to Steven and Paula O'Reilly's Walk MS Columbus 2022 amount raised.		500.00
18240	04/06/2022	Complete	Junior League of Columbus, Inc.	This grant is in honor: \$450 for dues and an additional \$500 for the endorsement.		250.00
			University of Notre Dame	This grant represents \$2,000 on behalf of Angela Gupte Parsons (Class of '86 and \$3,000 on behalf of Jay Parsons (Class of '84), for recognition in the Book Society.		6,000.00
			Isabella Ridgway Foundation			500.00
			No Organization - Interfund Transfer	This represents an interfund transfer.		2,500.00
			Columbus Early Learning Centers	This grant is for Better Together: Build a Playground.		500.00
			Cheriton University	This grant is for the Civil Engineering operating amount in the College of Engineering, Computing and Applied Sciences.		1,200.00
			Salvation Army Central Ohio	This grant is for Best Shoes this holiday season, and is being made in honor of Tom Sigmond and Craig Wilkins.		300.00
			Momentum-Excellence Inc.			200.00

GRANTEE	GRANTS	AMOUNT
Abis, Inc	4	1,900.00
Alzheimer's Association	1	250.00
American Red Cross Central and Southern Ohio Region	1	250.00
Amlyotrophic Lateral Sclerosis (ALS) Association, Central & Southern Ohio	1	250.00
Blue Lady Inc.	1	250.00
Bishop Hartley High School	2	500.00
Breast Cancer Research Foundation, Inc.	1	500.00
Carline Companions North Central Region	2	600.00
Catholic Diocese of Columbus	1	250.00
Cat Welfare Association		
Clemson University		
Columbus Bar Foundation		
Columbus Children's Hospital		
Columbus Early Learning Centers		
Columbus Museum of Art		
Columbus Zoo and Aquarium		
Delaware County Foundation		

ID	DATE	STATUS	RECIPIENT	DESCRIPTION	ADVISOR	AMOUNT
29578	04/19/2018	Complete	AMH, Inc	The grant came with the following message: This grant is to support the programs of Abis since we missed the Evening of Light event.		250.00
39616	05/03/2017	Complete	AMH, Inc	This grant is for the commitment to the Abis Family and Children's Program made during the Evening of Lights event.		1,000.00
3787	04/13/2015	Complete	AMH, Inc	This grant is in honor of...		250.00
29558	05/05/2014	Complete	AMH, Inc	This grant is for the first Evening of Light.		400.00

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.