



## FUNDHOLDER PORTAL INSTRUCTIONS

Click the link below to find the information you need:

- [Create an Account](#)
- [How to Select your Fund](#)
- [How to View your Fund Statement](#)
- [How to Recommend a Grant](#)

### CREATE AN ACCOUNT

- All users must create an account to get started, you should have received an email from [Grant@GRFoundation.org](mailto:Grant@GRFoundation.org) with the subject line “Welcome to your new fund portal with Grand Rapids Community Foundation” inviting you to the fundholder portal. If you don’t see this email, check your junk folder and let us know.
- Follow the instructions in the email to activate your account and set up your unique password, which must be 10 characters long. Click **Register**.

### HOW TO SELECT YOUR FUND

- You can select your fund on the “News & Info,” “Fund Summary,” and “Recommend a Grant” tabs. If you serve as a fund advisor for multiple funds, they will all appear in a dropdown menu. See examples for each page below.
  - On the “News & Info” page, click “**View Funds**” on the left-hand side, and select the fund you would like to view.


The screenshot shows the Grand Rapids Community Foundation Fundholder Portal. At the top, there is a navigation bar with the following tabs: News & Info, Fund Summary, Fund Statement, Recommend a Grant, Grant History, Gift History, Documents, and FAQ. Below the navigation bar, the page title is "Grand Rapids Community Foundation Fundholder Portal". On the left side, there is a "View Funds" section with a dropdown menu currently set to "Fund for Community Good". Below the dropdown menu, there is a link for "Need assistance?" and an email address: "Email us at the below or call 616-454-1751". On the right side, there is a heading "Thank you for your philanthropic partnership!" followed by a paragraph: "There are many ways to use this portal to support community and manage your fund." Below this paragraph, there are three bullet points: "View your fund statement by clicking Fund Statement in the navigation row at the top of this page.", "Support a nonprofit from your Donor Advised Fund by clicking the Recommend a Grant tab and choosing a nonprofit of your choice.", and "Add to your fund or make a donation today. [lick here](#) to visit the Community Foundation's donation page."



## HOW TO VIEW YOUR FUND STATEMENT

- Click “Fund Statement”

The screenshot shows the website's navigation bar with the OUR logo and menu items: Home, Fund Summary, Fund Statement, Recommend a Grant, Grant History, Gift History, and FAQ. Below the navigation bar is a light green header area labeled "[Header Text]". On the left, there is a "View Funds" section with a dropdown menu currently set to "Fund for Community Good". Below this is the "Foundation Staff Contact" information, including "grant #", "Contact:", and the email address "grant@ourfoundation.org". On the right, there is a grey box labeled "[Content Text]" with the text "Make a Grant Recommendation" and "Support the cause".

- Your fund statement preview will show year to date by default. To change the date range, type the start and end dates, then click “**Apply Filter**”. When typing the start and end dates or using the drop-down feature, you have to start with the year, then month, then day.
  - If you would like to see your fund’s year-to-date details, select July 1 for the start date.
  - To print your fund statement according to the date range chosen, click the printer icon in the top right corner of the PDF preview.
  - To download a PDF according to the date range chosen, click the  button in the top right corner of the PDF preview, and save for your records.



Grand Rapids Community Foundation Fundholder Portal

**Fund for Community Good** Fund Statement

Start Date: 07/01/2023 End Date: 06/30/2024 [Apply Filter](#)

July 2023

out Your Fund(s)

As a quarterly basis online approximately 45 - 55 days after the close of a quarter. If you edit the dates to review your statement prior to a quarter close, your fund's As a reminder, the Community Foundation's fiscal year runs from July 1 to June 30; however, you may select a time period of your choice to review.

4d3b-9c3f-882358c98f76 1 / 46 75%

**Summary of Fund Activity**  
Fund for Community Good - # 00091  
Fund Statement: 7/1/2023 through 6/30/2024

**BUILDING A LASTING LEGACY FOR TOMORROW**

## HOW TO RECOMMEND A GRANT

**For Agencies** – the new verbiage for “Requesting a Distribution” is “**Recommend a Grant**”.

- Ensure the fund listed on the left-side dropdown is the fund you would like for the distribution.

OUR GRAND RAPIDS community FOUNDATION

News & Info Fund Summary Fund Statement **Recommend a Grant**

Grand Rapids Community Foundation Fundholder Portal

To view spendable/grantmaking balance, click on Fund Summary  
*Note:* For agency funds, recommend a grant = requesting a distribution  
 For recurring grant recommendations, email [grant@grfoundation.org](mailto:grant@grfoundation.org)

**View Funds**

Fund for Community Good

Need assistance?

**Recommend a Grant**

Fund Name

Fund for Community Good



- You can either type in the search bar your organization’s name or scroll through the alphabetical list to find your organization’s name in the dropdown.

### For Donors

- Click on **“Recommend a Grant”**

The screenshot shows the Grand Rapids Community Foundation Fundholder Portal. At the top, there is a navigation bar with the logo and menu items: News & Info, Fund Summary, Fund Statement, and Recommend a Grant. Below the navigation bar, there is a header section with the text: "Grand Rapids Community Foundation Fundholder Portal". A grey box contains instructions: "To view spendable/grantmaking balance, click on Fund Summary", "Note: For agency funds, recommend a grant = requesting a distribution", and "For recurring grant recommendations, email grant@grfoundation.org". The main content area is divided into two columns. The left column is titled "View Funds" and contains a dropdown menu with "Fund for Community Good" selected. Below the dropdown is a link "Need assistance?". The right column is titled "Recommend a Grant" and contains a "Fund Name" dropdown menu with "Fund for Community Good" selected.

- Ensure the fund listed on the left is the one you would like to recommend a grant from.

This screenshot is similar to the previous one but includes an additional dropdown menu. The "View Funds" dropdown is still "Fund for Community Good". Below it is the link "Need assistance?" and the text "Email us at the below or call 616-454-1751". The "Recommend a Grant" section has the "Fund Name" dropdown set to "Fund for Community Good". Below this dropdown is a new dropdown menu labeled "Would you like to grant to".

- You have the option to grant to Establish Fund (GRCF fund/initiative) or a nonprofit organization. Choose one from the dropdown.



## Recommend a Grant

Fund Name

Fund for Community Good

Would you like to grant to

Organization

Established Fund

- If you want to grant to a nonprofit, select organization from the dropdown, then either type in the search bar for the nonprofit you are looking for or scroll through the alphabetical list for the nonprofit's name in the dropdown.
  - If you don't see the nonprofit after typing it in, click "Create new organization" or select "charity search".

Fund Name

Fund for Community Good

Would you like to grant to

Organization

Organization Name \*

nasa

[Charity Search](#) [Create new organization](#)

Distributions must be a minimum of \$250.00

## Fundholders

- Type the amount you would like to grant/distribute.
  - **The minimum amount is \$250**



Would you like to grant to

Organization

Organization Name \*

Grand Rapids Community College Foundation

Amount \*

\$ 250

Distributions must be a minimum of \$250.00

- Under “Timing of grant,” you can click “Issue this grant upon Foundation Approval,” or “Issue this grant on the following specific date”.
  - **Please note grants are paid on a biweekly basis via ACH payment. If you specify a date, we cannot guarantee it will be paid on that exact date.**

Would you like to grant to

Organization

Organization Name \*

Grand Rapids Community College Foundation

Amount \*

\$ 250

Distributions must be a minimum of \$250.00

Timing of grant

Issue this grant on the following specific date

Grant Date \*

07/16/2024

- Select the grant type.
  - You can choose between general operating/unrestricted or purpose if not general operating/unrestricted.



Would you like to grant to

Organization

Organization Name \*

Grand Rapids Community College Foundation

Amount \*

\$ 250

Distributions must be a minimum of \$250.00

Timing of grant

Issue this grant on the following specific date

Grants are paid on a biweekly basis via ACH payment. If you specify a date we cannot guarantee it will be paid on that exact date.

Grant Date \*

07/16/2024

Grant Type \*

General Operating/Unrestricted

Purpose if not general operating/unrestricted

- If you select "Purpose if not general operating/unrestricted," please provide a short description of the grant's purpose such as capital campaign, specific program, endowment, etc.

Grant Type \*

Purpose if not general operating/unrestricted

Purpose of grant \*

Endowment

(e.g. general support, capital campaign, specific program, endowment, etc.)

- You can choose to issue your grant anonymously. Click the check box if you choose to do so.



Purpose of grant \*

Endowment

(e.g. general support, capital campaign, specific program, endowment, etc.)

Upload Documentation

Choose File No file chosen

Please issue this grant anonymously

Need help? Email us at [Grant@GRFoundation.org](mailto:Grant@GRFoundation.org)