

How to Make Grants on the Donor Portal

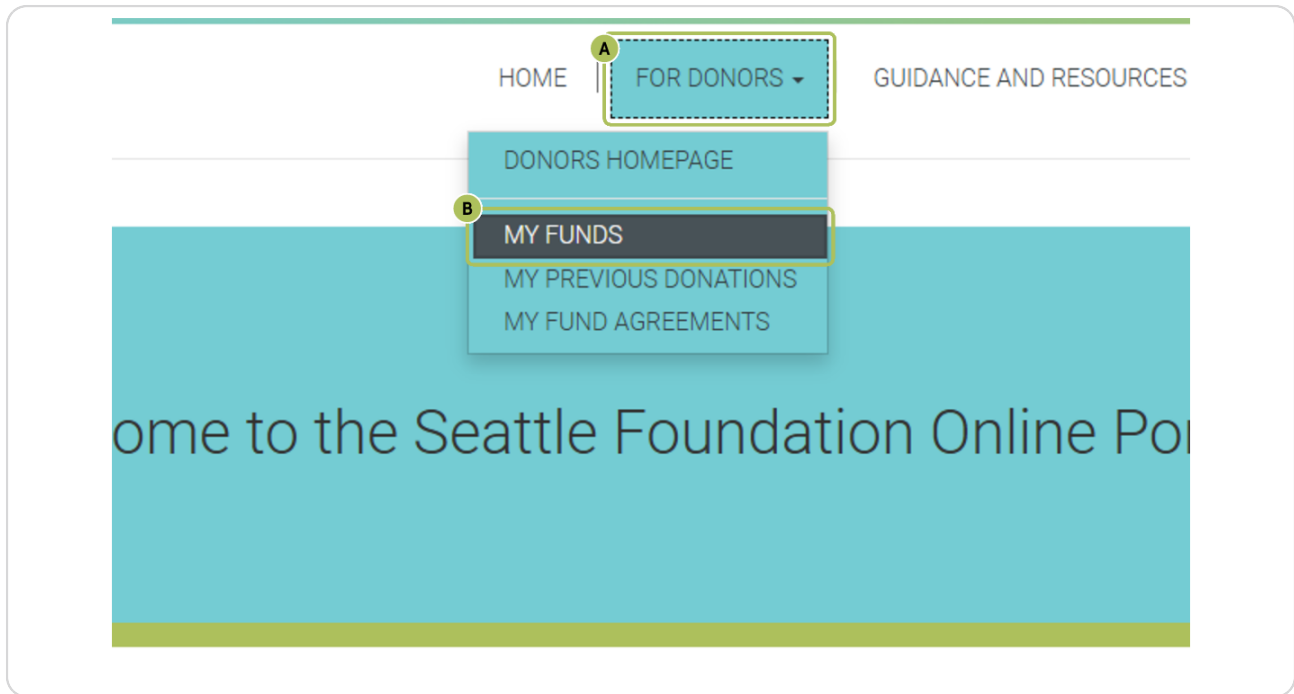
Please utilize this process for making one or more grants from your Fund.

34 Steps

STEP 1

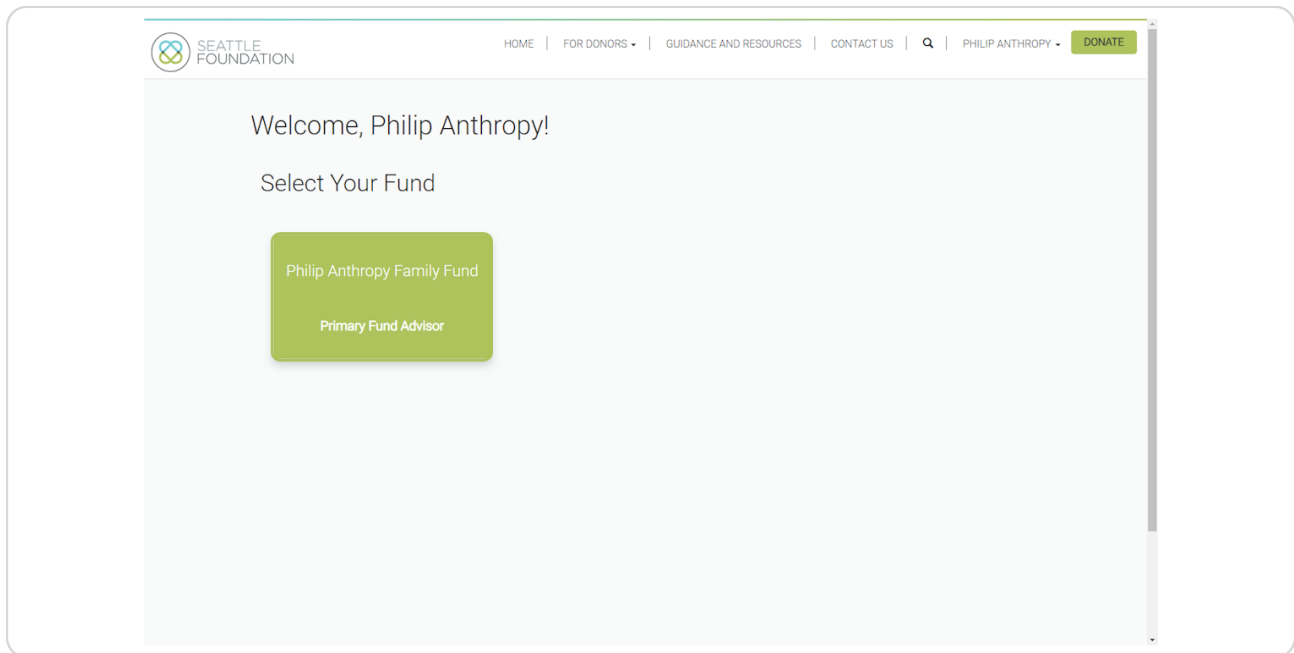
A. Log into your Portal account and click on FOR DONORS

B. Click on MY FUNDS



STEP 2

Select the Fund you would like to make a grant(s) from

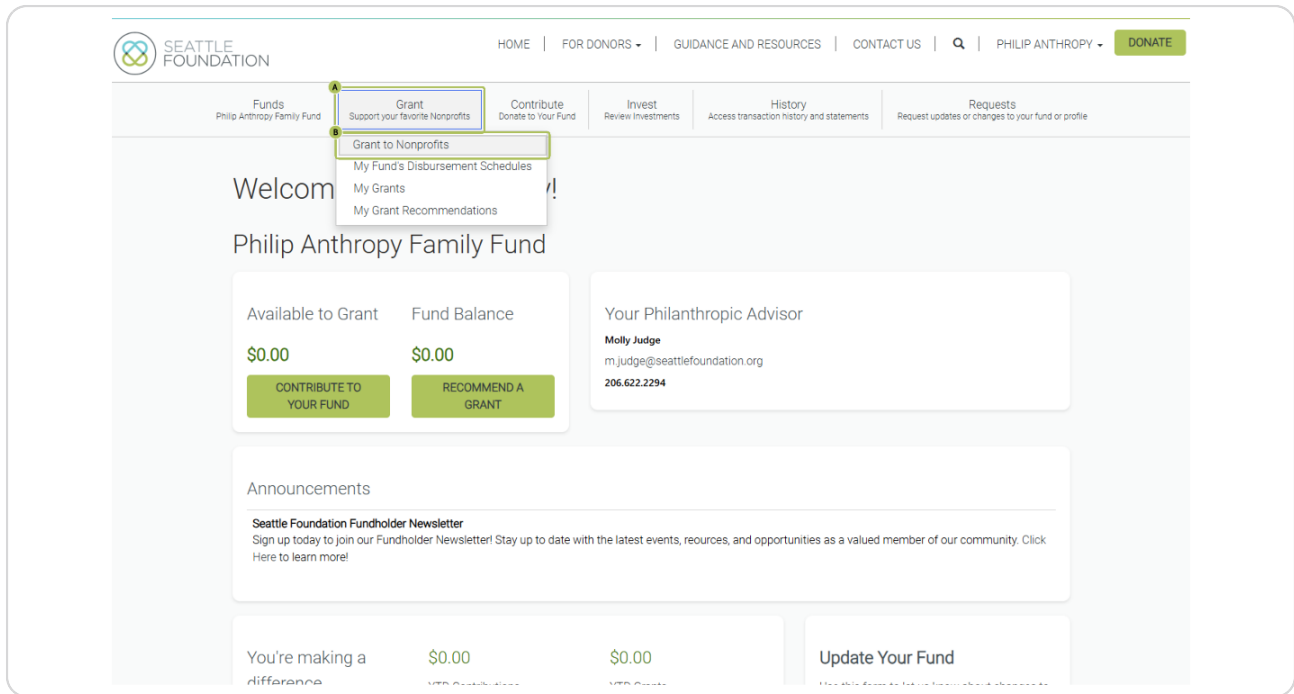


STEP 3

A. Click on Grant in the navigation bar

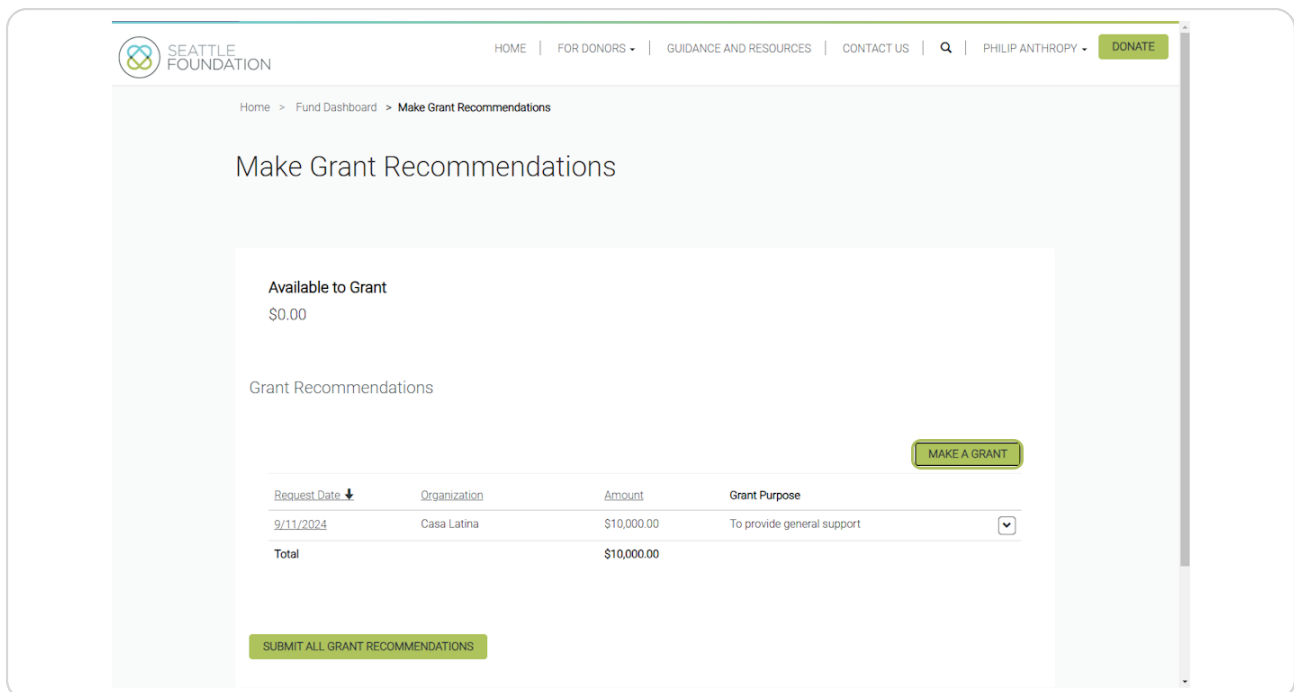
B. Click on Grant to Nonprofits

If you would like to make one quick grant, you are welcome to press "Recommend A Grant" found under your Fund Balance and follow a similar process.



STEP 4

Click on MAKE A GRANT



STEP 5

Select the magnifying glass to search for the organization you would like to grant to

Please note, if you are granting to an organization you have granted to in the past, you can press "Past Grant Recipient" and the system will filter through the organizations in your Fund's grant history. If you are granting to a new organization, you will need to provide the name of the organization and the website.

The screenshot shows the 'Create' modal form for creating a grant recommendation. The form is titled 'Create' and has a close button (X) in the top right corner. It is divided into two main sections: 'Grantee Information' and 'Additional Information'.

Grantee Information

- Grant Recipient Type**: Two radio buttons are present: 'Past Grant Recipient' and 'New Grant Recipient'.
- Organization ***: A text input field with a magnifying glass icon (search) to its right. A tooltip labeled 'Organization Launch lookup modal' is visible next to the search icon.

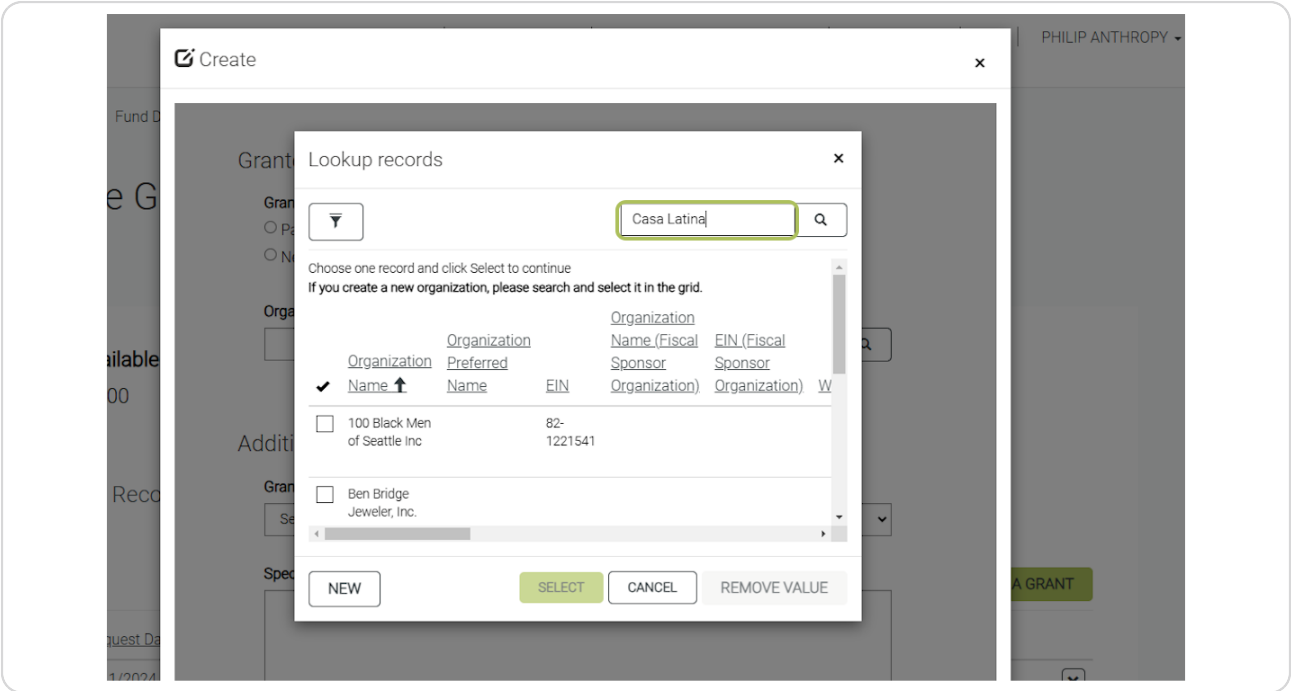
Additional Information

- Grant Purpose ***: A dropdown menu with 'Select' as the current selection.
- Special Instructions for Nonprofit Recipient**: A large text area for additional notes.

The background shows the Seattle Foundation website with the 'Make Grant' button highlighted. The top right of the page shows the user 'PHILIP ANTHROPY' and a 'DONATE' button. The bottom of the modal has a 'SUBMIT ALL GRANT RECOMMENDATIONS' button.

STEP 6

Search for the organization you would like to grant to



STEP 7

When the organization comes up, confirm it is the correct organization by reviewing it's information (City, State, EIN)

If the organization does not come up, please press NEW and add the name and website of the organization

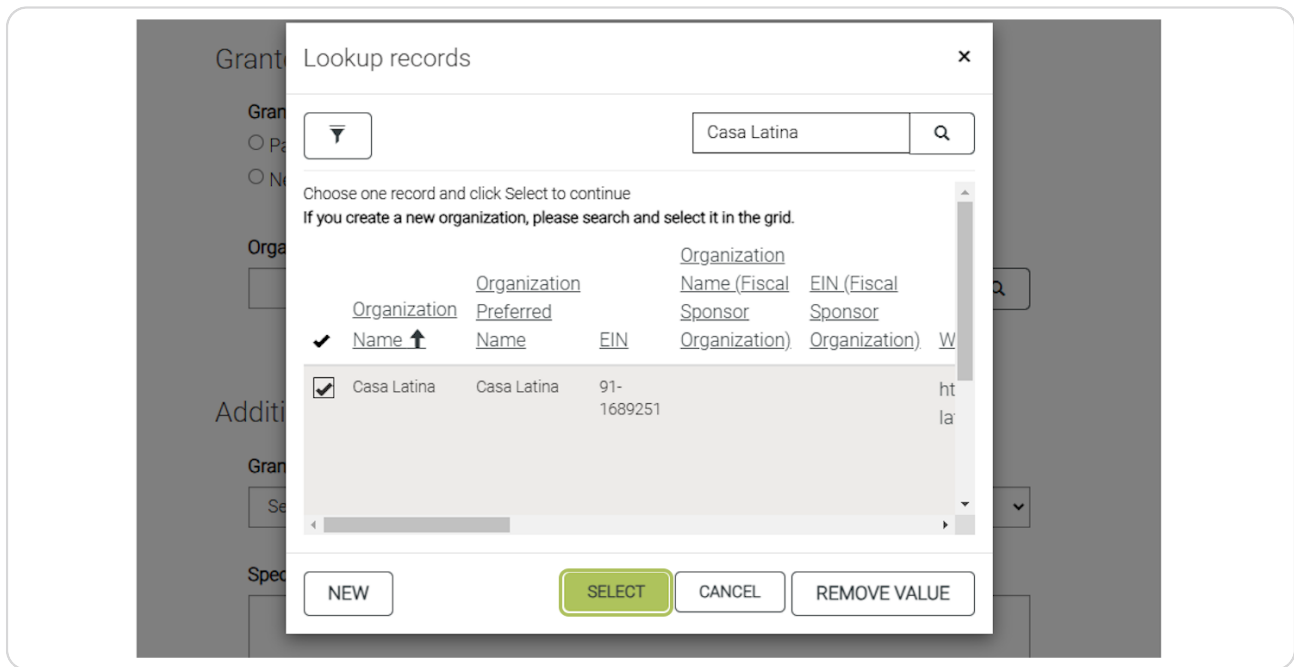
The modal window displays a table with the following columns: Organization (with a checkmark and an upward arrow), Organization Preferred, Organization Name (Fiscal Sponsor), EIN (Fiscal Sponsor), and Website. The table contains one row for 'Casa Latina' with an EIN of '91-1689251'. The 'SELECT' button is highlighted with a green box.

<input checked="" type="checkbox"/>	<u>Organization</u>	<u>Organization Preferred</u>	<u>Organization Name (Fiscal Sponsor)</u>	<u>EIN (Fiscal Sponsor)</u>	<u>Website</u>
<input type="checkbox"/>	Casa Latina	Casa Latina		91-1689251	ht la

Buttons: NEW, SELECT, CANCEL, REMOVE VALUE

STEP 8

Once you have confirmed the organization, Click on **SELECT**



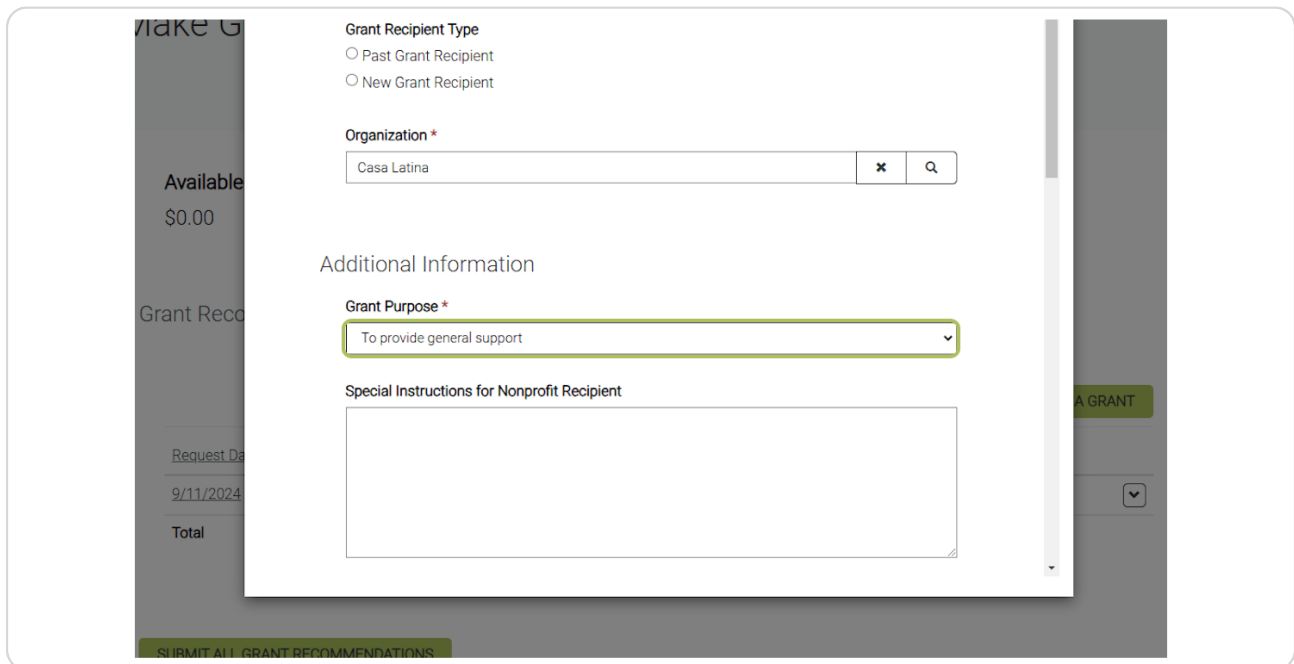
The 'Lookup records' dialog box is open, showing a search for 'Casa Latina'. The search results table is as follows:

<input checked="" type="checkbox"/>	<u>Organization</u> Name ↑	<u>Organization</u> Preferred Name	<u>EIN</u>	<u>Organization</u> Name (Fiscal Sponsor Organization)	<u>EIN (Fiscal Sponsor Organization)</u>	<u>W</u>
<input checked="" type="checkbox"/>	Casa Latina	Casa Latina	91-1689251	ht	la	

Buttons at the bottom: NEW, SELECT, CANCEL, REMOVE VALUE.

STEP 9

Select the Grant Purpose from the drop down menu



The grant form is shown with the following fields:

- Grant Recipient Type**
 - ☐ Past Grant Recipient
 - ☐ New Grant Recipient
- Organization ***
 - Casa Latina
- Additional Information**
 - Grant Purpose ***
 - To provide general support
 - Special Instructions for Nonprofit Recipient**
 -

Buttons at the bottom: SUBMIT ALL GRANT RECOMMENDATIONS, A GRANT.

STEP 10

A. Optional: Include Instructions for Nonprofit Recipient (this will be included in the grant transmittal letter to the organization)

B. Optional: Include Notes to Seattle Foundation Staff (this will stay internal to Seattle Foundation)

The screenshot shows a web form titled "Additional Information" for creating a grant. On the left, a sidebar contains the text "Make G", "Available \$0.00", "Grant Reco", "Request Da", "9/11/2024", and "Total". The main form area includes a "Grant Purpose" dropdown menu with the selected option "To provide general support". Below this are two large text input areas: "Special Instructions for Nonprofit Recipient" (labeled with a yellow 'A' in a circle) and "Notes to Seattle Foundation Staff" (labeled with a yellow 'B' in a circle). At the bottom of the form is a checkbox labeled "Keep the fund name anonymous *" with radio button options for "Yes" and "No". On the right side of the form, there is a green button labeled "A GRANT" and a small dropdown arrow icon.

STEP 11

Specify your Anonymity Preferences for your Fund Name

Make Grant

Available
\$0.00

Grant Record

Notes to Seattle Foundation Staff

Keep the fund name anonymous *

☐ Yes ☒ No

Keep the donor name anonymous *

☐ Yes ☐ No

Share donor contact information with grantee *

☐ Yes ☐ No

STEP 12

Specify your Anonymity Preferences for Donor Name

Make Grant

Available
\$0.00

Grant Record

Keep the fund name anonymous *

☐ Yes ☒ No

Keep the donor name anonymous *

☐ Yes ☒ No

Share donor contact information with grantee *

☐ Yes ☐ No

Grant Information

Is this a multi-payment grant or a recurring grant?

STEP 13

Specify if you would like to share your contact information with the grantee within the grant transmittal letter

If you press yes, a dropdown menu will appear and you will be asked to provide your preferred contact information (email, phone number or address) with the organization in the grant transmittal letter.

Make Grant

Available
\$0.00

Grant Record

Request Date
9/11/2024

Total

Keep the fund name anonymous *

☐ Yes ☒ No

Keep the donor name anonymous *

☐ Yes ☒ No

Share donor contact information with grantee *

☒ Yes ☐ No

Please provide the contact information you would like to share *

phil.anthropy@gmail.com

Grant Information

Is this a multi-payment grant or a recurring grant?

One-Time

STEP 14

Please specify whether this grant will be a one-time grant or recurring

This grant is an example of a multi-payment grant.

ON

home > Fund D

Make G

Available
\$0.00

Grant Reco

Request Da

9/11/2024

Create

phil.anthropy@gmail.com

Grant Information

Is this a multi-payment grant or a recurring grant?
Quarterly

Amount *
\$

Start Date *
M/D/YYYY

Number of Disbursements *

End Date

A GRANT

STEP 15

A. Type Amount

B. If you are setting up a multi-payment grant, please provide a Start Date

The screenshot shows a web form titled "Grant Information" for the Seattle Foundation. The form is part of a larger process, with a sidebar on the left showing "Make Grant" and "Available \$0.00". The main form area contains the following fields and labels:

- Grant Information**
- Is this a multi-payment grant or a recurring grant?** (Dropdown menu with "Quarterly" selected)
- Amount *** (Text input field with "1000" entered, preceded by a "\$" symbol. A green box highlights the input field, and a yellow circle with the letter "A" is next to the label.)
- Start Date *** (Text input field with "M/D/YYYY" placeholder. A green box highlights the input field, and a yellow circle with the letter "B" is next to the label. A calendar icon is to the right of the field.)
- Number of Disbursements *** (Text input field)
- End Date** (Text input field with "M/D/YYYY" placeholder. A calendar icon is to the right of the field. Below the field, it says: "**End Date will be calculated based on start date and number of disbursements entered")
- Total Amount** (Text input field. Below the field, it says: "**Total Amount will be calculated based on amount and number of disbursements entered")

On the right side of the form, there is a green button labeled "A GRANT" and a dropdown menu with a downward arrow.

STEP 16

For multi-payment grants, please specify the Number of Disbursements

Available

\$0.00

Grant Reco

Request Da

9/11/2024

Total

Amount *

\$

1000

Start Date *

12/1/2024

Number of Disbursements *

4

End Date

*End Date will be calculated based on start date and number of disbursements entered

M/D/YYYY

Total Amount

**Total Amount will be calculated based on amount and number of disbursements entered

\$

0

Acknowledgement and Representation *

A GRANT

SUBMIT ALL GRANT RECOMMENDATIONS

STEP 17

The system will automatically generate an End Date and Total Amount for your multi-payment grant. Please review.

The screenshot displays the 'Create Grant' form in the Seattle Foundation system. The form is titled 'Grant Information' and includes the following fields:

- Is this a multi-payment grant or a recurring grant?**: A dropdown menu with 'Quarterly' selected.
- Amount ***: A text input field containing '\$ 1000'.
- Start Date ***: A date picker showing '12/1/2024'.
- Number of Disbursements ***: A text input field containing '4'.
- End Date**: A date picker showing 'M/D/YYYY'. A note below states: '**End Date will be calculated based on start date and number of disbursements entered'.
- Total Amount**: A text input field showing '\$ 0'. A note below states: '**Total Amount will be calculated based on amount and number of disbursements entered'.

At the bottom of the form, there is a section for 'Acknowledgement and Representation *'. The background shows a sidebar with 'Make Grant' and 'Available \$0.00'.

STEP 18

A. Please acknowledge the statement

B. Click on Submit

Grant Reco

Request Da

9/11/2024

Total

consistent with its charitable purposes. I rep
used to satisfy a pledge, purchase a table or
more than an incidental benefit to donors, dc

A

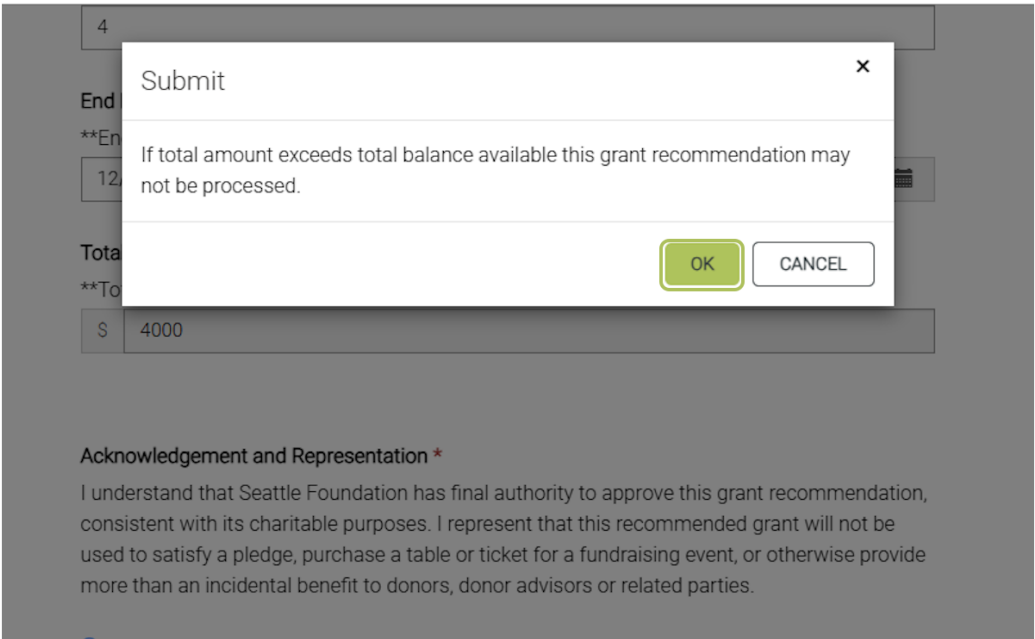
☒ Yes

B

SUBMIT

STEP 19

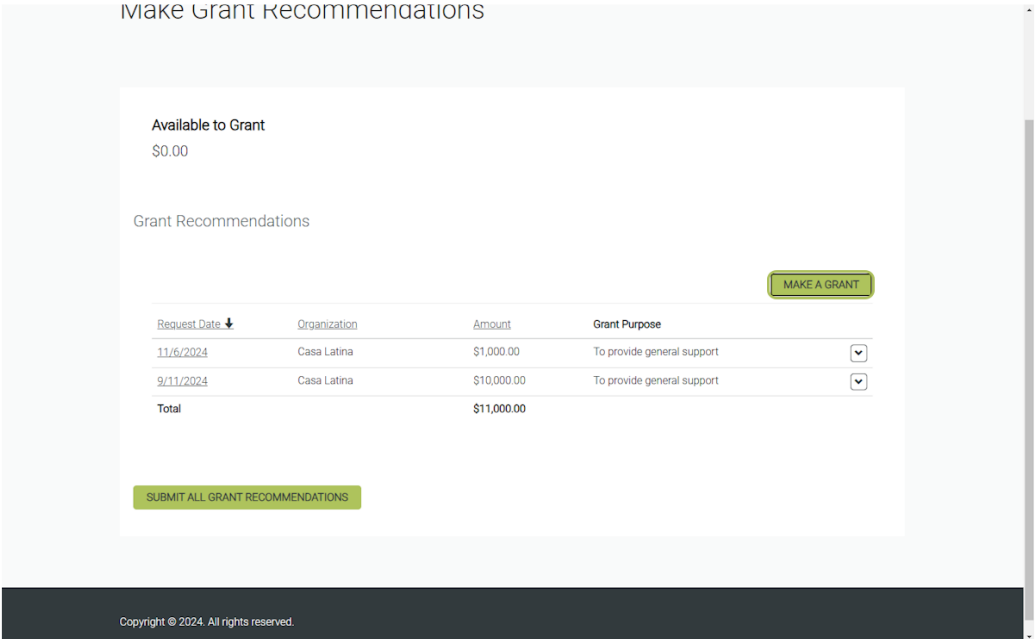
A warning will pop up, Click OK



The screenshot shows a 'Submit' dialog box with a close button (X) in the top right corner. The message inside the dialog reads: 'If total amount exceeds total balance available this grant recommendation may not be processed.' At the bottom of the dialog are two buttons: 'OK' (highlighted in green) and 'CANCEL'. In the background, a form is partially visible with fields for 'End', '**En', '12', 'Total', '**To', and a dollar amount of '\$ 4000'. Below the dialog, the text 'Acknowledgement and Representation *' is visible, followed by a paragraph: 'I understand that Seattle Foundation has final authority to approve this grant recommendation, consistent with its charitable purposes. I represent that this recommended grant will not be used to satisfy a pledge, purchase a table or ticket for a fundraising event, or otherwise provide more than an incidental benefit to donors, donor advisors or related parties.'

STEP 20

To make another grant, Click on MAKE A GRANT



The screenshot shows the 'Make Grant Recommendations' page. At the top, it says 'Make Grant Recommendations'. Below this, there is a section 'Available to Grant' showing '\$0.00'. Underneath is the 'Grant Recommendations' section. It contains a table with the following data:

Request Date ↓	Organization	Amount	Grant Purpose
11/6/2024	Casa Latina	\$1,000.00	To provide general support
9/11/2024	Casa Latina	\$10,000.00	To provide general support
Total		\$11,000.00	

At the bottom of the table is a green button labeled 'SUBMIT ALL GRANT RECOMMENDATIONS'. To the right of the table is a green button labeled 'MAKE A GRANT'. At the very bottom of the page, there is a footer: 'Copyright © 2024. All rights reserved.'

STEP 21

Select the magnifying glass to search for the organization you would like to grant to

The screenshot shows a web application interface for 'Make Grant Recommendations'. A modal window titled 'Create' is open, displaying the following fields:

- Grantee Information**
 - Grant Recipient Type**: Radio buttons for 'Past Grant Recipient' and 'New Grant Recipient'.
 - Organization ***: A text input field with a magnifying glass icon to its right. A tooltip 'Organization Launch lockup modal' is visible next to the icon.
- Additional Information**
 - Grant Purpose ***: A dropdown menu with 'Select' as the current option.
 - Special Instructions for Nonprofit Recipient**: A large text area.

The background form is partially visible, showing fields for 'Available' (\$0.00), 'Grant Recipient', 'Request Date' (11/6/2024, 9/11/2024), and a 'Total' field. A 'SUBMIT ALL' button is at the bottom left. The footer reads 'Copyright © 2024. All rights reserved.'

STEP 22

Search for the organization

The screenshot shows a 'Create' dialog box with a 'Lookup records' search interface. The search bar contains the text '100 Black Men of Seattle'. Below the search bar, there is a table of results. The table has columns for 'Organization Name', 'Organization Preferred Name', 'EIN', and 'Organization Website'. The first row is '100 Black Men of Seattle Inc' with EIN '82-1221541'. The second row is 'Ben Bridge Jeweler, Inc.'.

Organization Name	Organization Preferred Name	EIN	Organization Website
100 Black Men of Seattle Inc		82-1221541	
Ben Bridge Jeweler, Inc.			

STEP 23

A. Review the information to confirm it is the correct organization (City, State, EIN)

B. Click on SELECT

If the organization does not come up, please press NEW and add the name and website of the organization

STEP 25

Optional: Include Instructions for Nonprofit Recipient (this will be included in the grant transmittal letter to the organization)

Available

\$0.00

Grant Recd

Request Date

11/6/2024

9/11/2024

Total

SUBMIT ALL

Create

Additional Information

Grant Purpose *

To provide general support

Special Instructions for Nonprofit Recipient

Notes to Seattle Foundation Staff

Keep the fund name anonymous *

A GRANT

STEP 26

Optional: Include Notes to Seattle Foundation Staff (this will stay internal to Seattle Foundation)

Grant Reco

Request Da

11/6/2024

9/11/2024

Total

SUBMIT ALL

Notes to Seattle Foundation Staff

Keep the fund name anonymous *

☐ Yes ☐ No

Keep the donor name anonymous *

☐ Yes ☐ No

Share donor contact information with grantee *

☐ Yes ☐ No

A GRANT

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A. Specify your Anonymity Preferences for Fund Name
B. Specify your Anonymity Preferences for Donor Name




SEATTLE
FOUNDATION
the heart & science of philanthropy

STEP 28

Specify if you would like to share your contact information with the organization grantee

If you press yes, a dropdown menu will appear and you will be asked to provide your preferred contact information (email, phone number or address) with the organization in the grant transmittal letter.

 Create

lable
0
Reco
uest Da
/2024

Keep the fund name anonymous *

☐ Yes ☒ No

Keep the donor name anonymous *

☐ Yes ☒ No

Share donor contact information with grantee *

☐ Yes ☒ No

Grant Information

Is this a multi-payment grant or a recurring grant?

One-Time

STEP 29

Type Amount

Available

\$0.00

Grant Reco

Request Da

11/6/2024

9/11/2024

Total

UBMIT ALL

Share donor contact information with grantee *

☐ Yes ☒ No

Grant Information

Is this a multi-payment grant or a recurring grant?

One-Time

Amount *

\$ 5,000

Acknowledgement and Representation *

I understand that Seattle Foundation has final authority to approve this grant recommendation, consistent with its charitable purposes. I represent that this recommended grant will not be used to satisfy a pledge, purchase a table or ticket for a fundraising event, or otherwise provide more than an incidental benefit to donors, donor advisors or related parties.

☐ Yes

A GRANT

STEP 30

A. Review the grant information

Make Grant Recommendations

Create

Share donor contact information with grantee *

☐ Yes ☒ No

Grant Information

Is this a multi-payment grant or a recurring grant?

One-Time

Amount *

\$ 5,000

Acknowledgement and Representation *

I understand that Seattle Foundation has final authority to approve this grant recommendation, consistent with its charitable purposes. I represent that this recommended grant will not be used to satisfy a pledge, purchase a table or ticket for a fundraising event, or otherwise provide more than an incidental benefit to donors, donor advisors or related parties.

☒ Yes

Available

\$0.00

Grant Reco

Request Da

11/6/2024

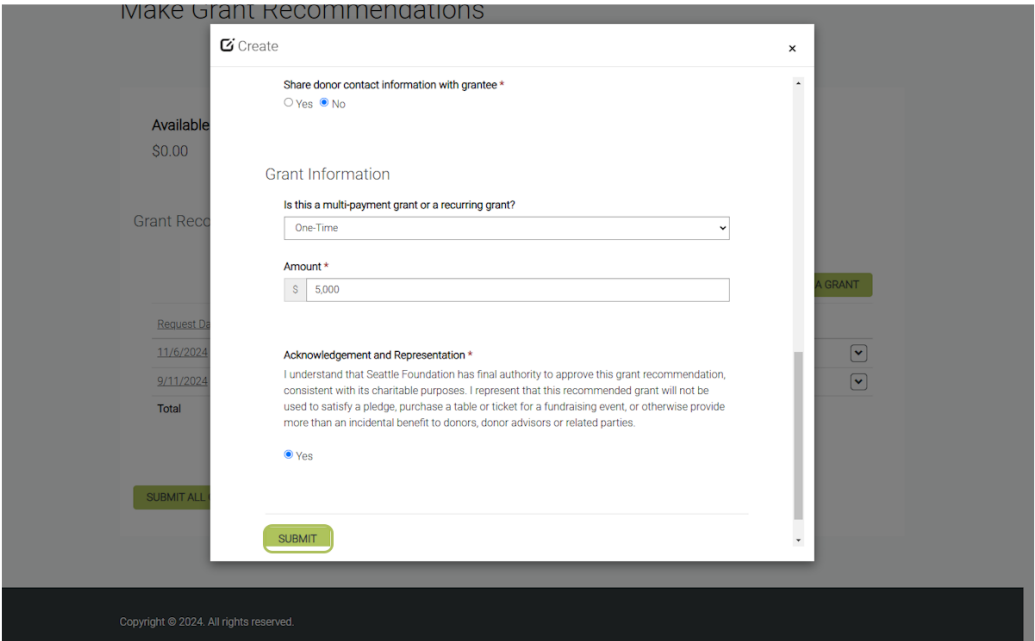
9/11/2024

Total

A GRANT

STEP 31

Please acknowledge the statement and Click on Submit



The screenshot shows a 'Create' modal window for making grant recommendations. The form includes the following fields and options:

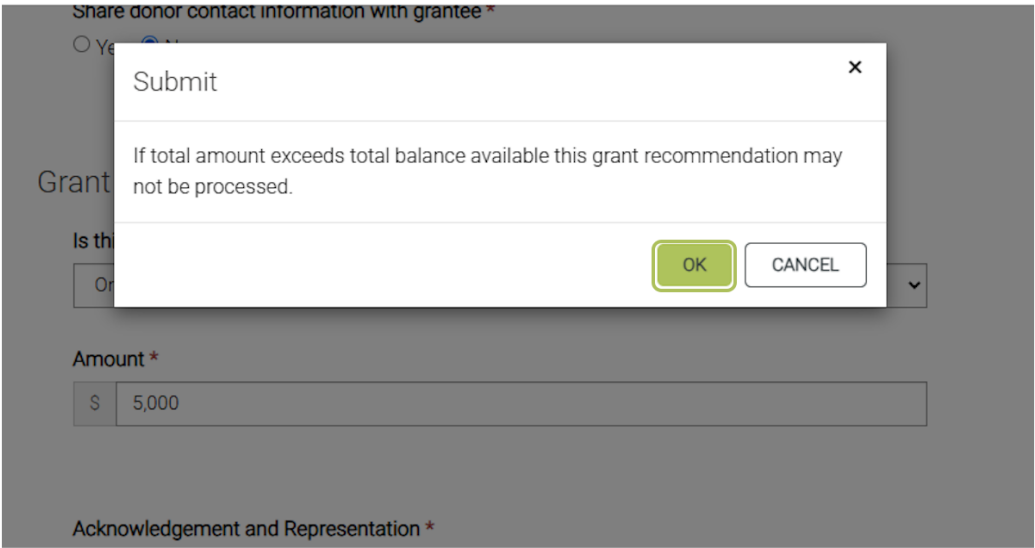
- Share donor contact information with grantee ***
☐ Yes ☒ No
- Grant Information**
Is this a multi-payment grant or a recurring grant?
One-Time
- Amount ***
\$ 5,000
- Acknowledgement and Representation ***
I understand that Seattle Foundation has final authority to approve this grant recommendation, consistent with its charitable purposes. I represent that this recommended grant will not be used to satisfy a pledge, purchase a table or ticket for a fundraising event, or otherwise provide more than an incidental benefit to donors, donor advisors or related parties.
☒ Yes

A green 'SUBMIT' button is highlighted at the bottom of the form. The background shows a table with columns for 'Request Date', 'Amount', and 'Status', with rows for dates 11/6/2024 and 9/11/2024. A 'SUBMIT ALL' button is also visible.

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STEP 32

A warning will pop up, Click OK



The screenshot shows a 'Submit' dialog box with the following text:

Submit

If total amount exceeds total balance available this grant recommendation may not be processed.

At the bottom of the dialog are two buttons: 'OK' (highlighted in green) and 'CANCEL'.

The background shows the same 'Create' form as in Step 31, with the 'SUBMIT' button highlighted.

STEP 33

Please review all of your the grant recommendations and Click on Submit All Grant Recommendations

Make Grant Recommendations

Available to Grant
\$0.00

Grant Recommendations

MAKE A GRANT

Request Date ↓	Organization	Amount	Grant Purpose
11/6/2024	100 Black Men of Seattle Inc	\$5,000.00	To provide general support
11/6/2024	Casa Latina	\$1,000.00	To provide general support
9/11/2024	Casa Latina	\$10,000.00	To provide general support
Total		\$16,000.00	

SUBMIT ALL GRANT RECOMMENDATIONS

STEP 34

Click on OK

Recommendations

Submit

Are you sure you would like to submit all grant recommendations?

OK CANCEL

ons

MA

Organization Amount Grant Purpose

