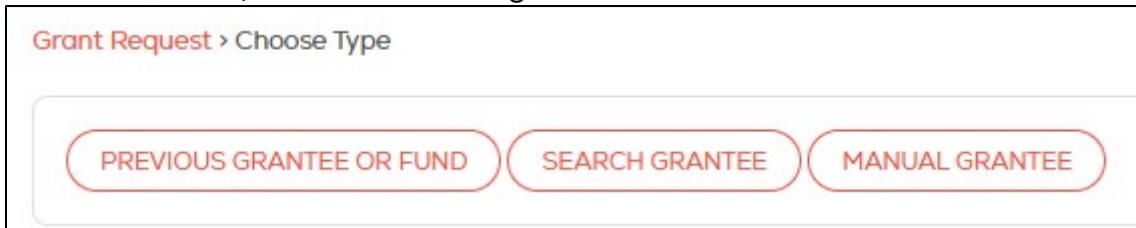


Make Grant Recommendations

To make grant recommendations, click the CREATE GRANT REQUEST button on the right side of the page. If you have more than one fund, make sure the correct fund is selected in the fund selection dropdown.



You have a few options to enter the grantee for the recommendation:



1. **PREVIOUS GRANTEE OR FUND** – click in the box to select from previous grantees or funds you have given to in the past.



You can also select from previous grantees under the Grants tab in the Grants section by clicking Copy.



2. **SEARCH GRANTEE** – Enter a grantee name to search. You can also provide City, State, and EIN (Employer Identification Number) to provide better search results. When searching for names, you'll have better results entering the words for the organization name in the correct order.

Search for Grantees

Search

The search results will list any matching grantees in the Rhode Island Foundation system and Candid (formerly GuideStar). Click on each button to see the results.

Search Results for "Rhode Island"

Rhode Island Foundation Results

CANDID RESULTS

If you see a match, click the CREATE REQUEST button.

3. **MANUAL GRANTEE** – enter the information for the grantee and click Submit. Required fields have asterisks.

Grant Request > Choose Type > Search

Enter Grantee information manually

* These fields are required.

Submit

Enter the information listed under Grant Request:

Grant Request
Grantee
Primary Contact
Address
Additional Grantee Contact
Description
Amount

- **Additional Grantee Contact** – click the checkbox if you want to specify a contact at the organization.
- **Description** – provide a description for the grant.
- **Amount** – provide the grant amount.
- **Anonymous** – select if you wish to remain anonymous.
- **Recurring** – if you would like the grant to be recurring, select the recurrence start date, recurrence interval, and number of recurrences (leave blank if there is no end date).
- **Attachment** – provide any files you would like to include with the recommendation.
- **Attachment Description** – provide a description for any attached files.
- **Additional Instructions** – provide any special request information. If you'd like the donor name(s) to appear differently in the grant letter, please provide it here.

Certain text boxes, like Additional Instructions, allow you to expand the text box to provide more space by dragging the bottom right corner of the box.

Additional Instructions (If you're advising on another's behalf, please indicate the advisor's name)	
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When all information has been entered, click the Add to Cart button.



The recommendation is now listed under “Grant Request Cart” and has yet to be submitted. You can now either move forward with submitting that recommendation or add other recommendations so they can all be submitted at once.

Grant Request Cart		
Recipient	Description	Attachment

To add another recommendation before submitting, go through the same steps as above, starting with entering the grantee.

When ready to submit, click Review Grant Requests in the Grant Request Cart section.

Grant Request Cart	Review Grant Requests

Review the information on the Review Grant Requests screen. If edits need to be made, select the CART button to return to the list under Grant Request Cart. Click the Edit button for the grant request to edit.

Description	Attachment	Amount	
		100.00	Edit

After making updates, select Update Cart.

Update Cart

Click Review Grant Requests to return to the Review Grant Requests screen. After reviewing information, click Submit Grant Requests.

You also certify that the Rhode Island Foundation will not result in more than an incidental benefit to you.
Submit Grant Requests

After submitting, you'll see the message “Grant Request Submitted”. You will also receive a confirmation email with the subject line “Request Confirmation”. Click Continue to return to the RECOMMEND A GRANT/ RECENT GRANT ACTIVITY section.

Grant Request Submitted

Continue

Your recommendation will now be listed on the RECOMMEND A GRANT/ RECENT GRANT ACTIVITY page with its current status. The status will change as it moves through the grant process. To view when a grant recommendation has been paid, check back to this page or the Grants tab to view the status.

If at any point before the grant has been paid you would like to cancel the recommendation, click the Cancel button.

Amount
100.00

Cancel

If you have any questions related to the grant recommendation process, please contact Paula O'Brien, Advised Grants Officer, at 401-427-4018 or pobrien@rifoundation.org.