

Using the Donor Portal to Submit Grant Recommendations

The CFNRV's donor portal allows donor advisors to make grant recommendations to qualified charitable organizations through the grant catalog. Below are instructions for recommending grants from your fund(s). You can also learn about the portal's full set of features at <https://cfnrv.org/giving/donor-portal/>.

Before you start, make sure that you have signed up with the CFNRV to use the portal! We ask our fund holders to submit a Donor Opt-In Form and the Instructions and Guidelines for Users to the CFNRV staff to get started.

- **If you already have access to the Donor Portal:** You will use the same username and password created when you first enrolled. Should you have any trouble, email cfnrv@cfnrv.org.
- **If you have not signed up for access to the Donor Portal:** Complete both the Donor Opt-In Form and Instructions and User Guidelines, which have been sent to you by mail and are available to download at <https://cfnrv.org/grants/responsive-grants/information-for-donors/>. The complete forms can be scanned and emailed to cfnrv@cfnrv.org or mailed to PO Box 6009, Christiansburg, VA 24068-6009. The CFNRV staff will then set-up your account and you will receive further instructions via email.

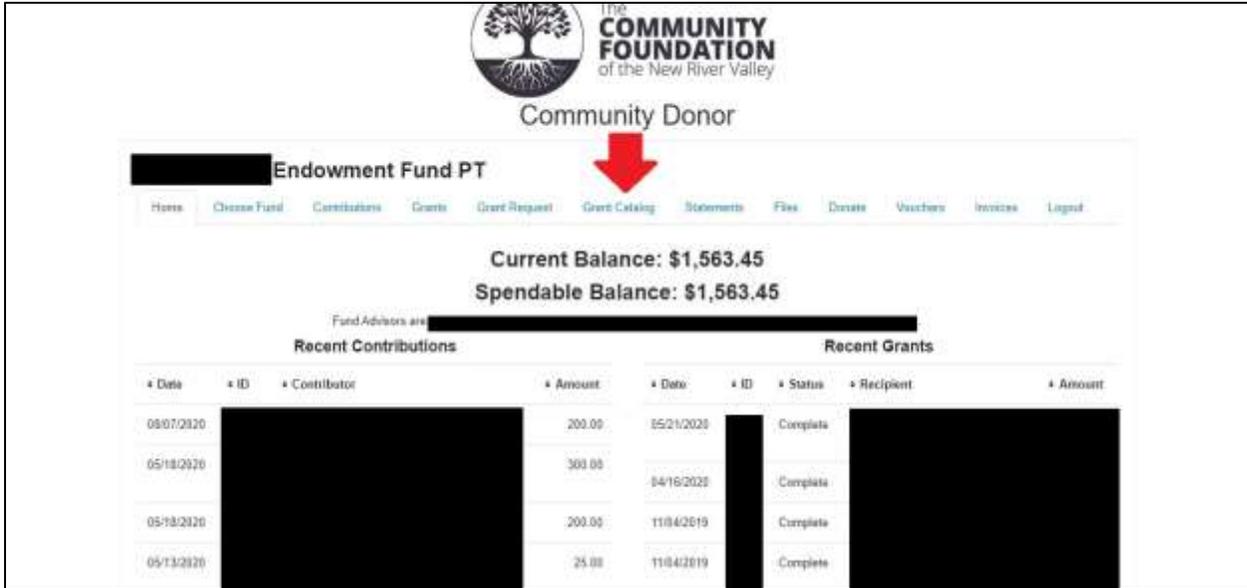
Step-by-Step Guide to Recommending Grants

Step 1: Visit <https://cfnrv.fcsuite.com/erp/fundmanager/> and login with your username and password. You can also access the donor portal by visiting <https://cfnrv.org/giving/donor-portal/>. Once logged in, you will see all the funds associated with your account. The endowment and pass-through components of your fund are listed separately since we manage these separately within our accounting systems.

Step 2: Click on your endowment first and begin by spending the money available from that; then you can come back and use money in your pass through (PT).

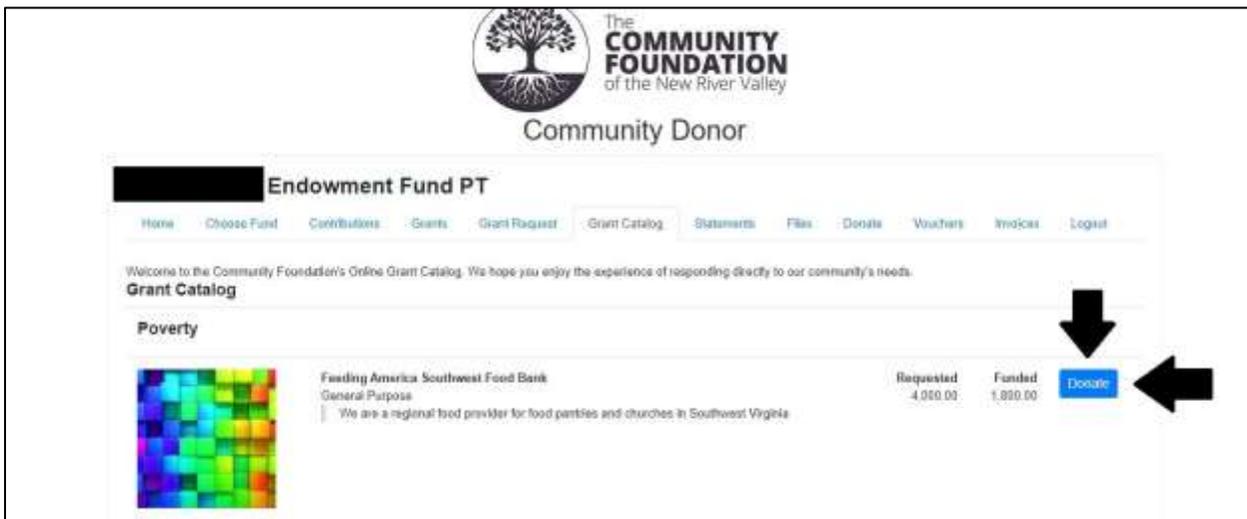


Step 3: Once you have access your fund, you will see recent contributions and grants as well as the current balance of your fund and the spendable balance, which is the amount you can assign to grant requests in the grant catalog. Click on the Grant Catalog tab to access all grant requests.



Step 4: Read through the summaries of each request. Grant requests are grouped by area of interest (e.g. poverty, education, arts and culture). Each entry includes the organization name, a summary of the organization, the amount requested, and the amount that has already been funded by other donors.

Step 5: Once you have settled on the grant you want to support with your fund, click the blue Donate button to the right of the Requested and Funded amounts.



Step 6: Enter the amount that you would like to award from your fund as the Donation Amount. You can choose to make this grant anonymous if you would like. Note that you do not need to complete the Optional Information section. Then click the blue Review button at the bottom of the page.

A few things to remember when assigning funding:

- **The donation amount cannot exceed the spendable balance you saw when first accessing your fund.** If your endowment has \$700 as the spendable balance, you can allocate up to that amount only.
- **You do not need to fully fund the request, however, we ask you to be thoughtful about the amount you award as you may be the only donor supporting this request.** For example, if \$4,000 of the request is unfunded, awarding just \$100 may not make a huge impact for this organization. We encourage you to make fewer grants in larger amounts rather than spreading your available funding out over many applications.
- **The money available to spend from your endowment and that from your pass-through (PT) must be assigned separately.** Let's say you want to award a grant of \$1,000 to a specific organization and you have \$700 available to spend from your endowment and \$300 from your pass-through (PT). Begin by clicking on your endowment first under the Choose Fund tab and complete all of the steps to assign the \$700 to the grant request. Once you complete that grant from your endowment, click on the Choose Fund tab again, select your pass-through (PT) and complete the request process again for the \$300 from your pass-through.

Donate To Grant Request

Feeding America Southwest Food Bank
General Purpose
We are a regional food provider for food pantries and churches in Southwest Virginia

Grant Request	4,000.00
Unfunded Amount	2,200.00
Donation Amount	150.00

Anonymous

Optional Information

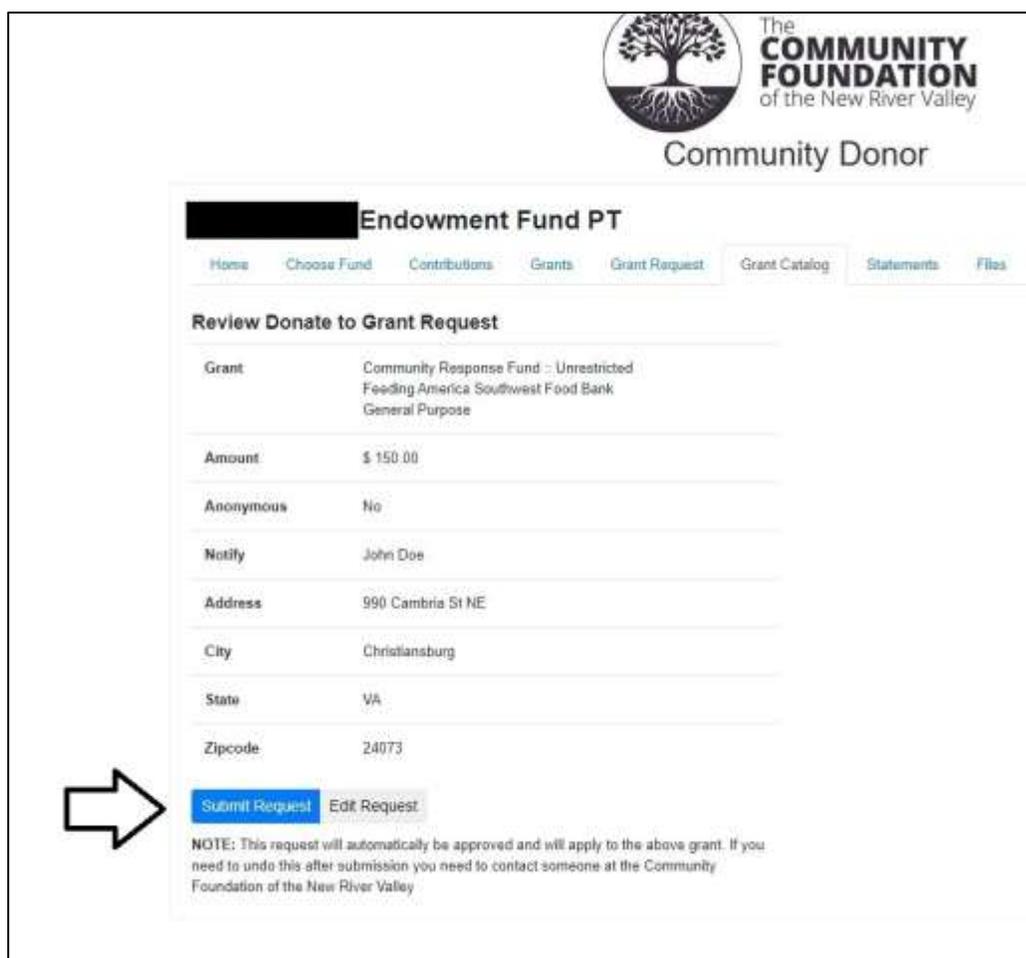
Notify the following person of this donation

Name: John Doe
Address: 990 Cambria St NE
City: Christiansburg
State: VA
Zipcode: 24073

[Review](#)

Step 7: After hitting Review, you will see a summary report of the grant you would like to make including the amount, whether you would like to be anonymous, and any of the optional information you completed. Click Edit Request to make changes if needed. Click Submit Request once the information is correct.

Please note that the grant catalog requires that all money assigned by donor advisors in the system gets allocated to a **“Community Response Fund”** from which all the grant checks will be cut. This is simply how the software handles the accounting for the multiple CFNRV funds awarding grants in the catalog. Please know that your money will be given to the specific grant request you fund in the catalog and your fund will be acknowledged as the grantor in CFNRV publications unless you choose to remain anonymous.

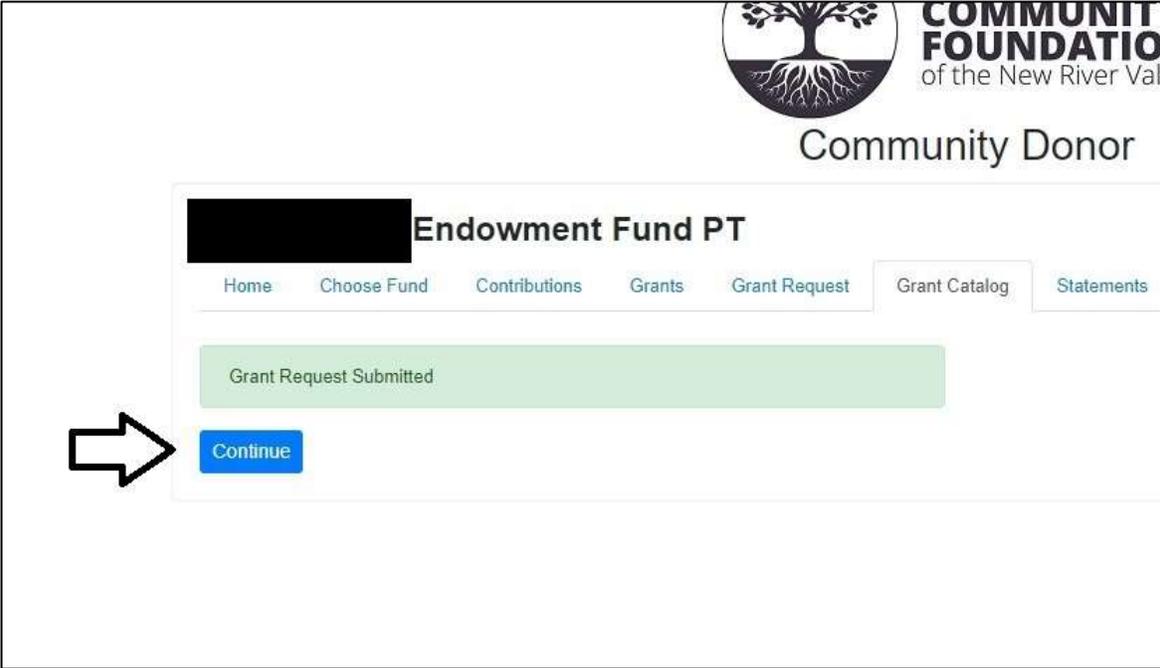


The screenshot displays the 'Review Donate to Grant Request' page for 'Endowment Fund PT'. The page includes a navigation menu with options like Home, Choose Fund, Contributions, Grants, Grant Request, Grant Catalog, Statements, and Files. The main content area shows the following details:

Grant	Community Response Fund - Unrestricted Feeding America Southwest Food Bank General Purpose
Amount	\$ 150.00
Anonymous	No
Notify	John Doe
Address	990 Cambria St NE
City	Christiansburg
State	VA
Zipcode	24073

Below the table are two buttons: 'Submit Request' (highlighted in blue) and 'Edit Request'. A blue arrow points to the 'Submit Request' button. A note at the bottom states: 'NOTE: This request will automatically be approved and will apply to the above grant. If you need to undo this after submission you need to contact someone at the Community Foundation of the New River Valley.'

Step 8: You will receive a message that your grant request was successfully submitted. Click Continue.



Step 9: You are finished with this grant request! Notice that the Funded amount has increased by the amount you donated from your fund. Complete this process for each grant request you would like to support until you have exhausted your spendable balance or have funded all the grants you would like to support in this cycle.



Questions?

Contact the CFNRV staff at cfnrvc@cfnrvc.org or call 540-381-8999.