



Springfield Foundation

For **good.** For **ever.** For **all.**<sup>®</sup>

**GO** fund

Donor Portal Guide

Revised 4.17.24

# The Set-up Process

---

1. The email address you provided will be connected to your fund.
2. **You will receive a GoFund email with a link that you must click within 7 days.**
3. When you click the link, it will take you to the GoFund portal sign-in page, where you can create a password for your account.
4. Use your email address and password to sign in.
5. When you sign in, you will be taken to the GoFund home page, where you can navigate to all your fund information.

If you have more than one fund, you can use the same password. If a new fund is connected to your email address, you will receive an email saying that this fund has been added to your account. If you forget your password, there is a reset password option on the sign-in page.

---

If you have any questions, please reach out to our office at:

937-324-8773

[sarah@springfieldfoundation.org](mailto:sarah@springfieldfoundation.org)

# How to Sign In

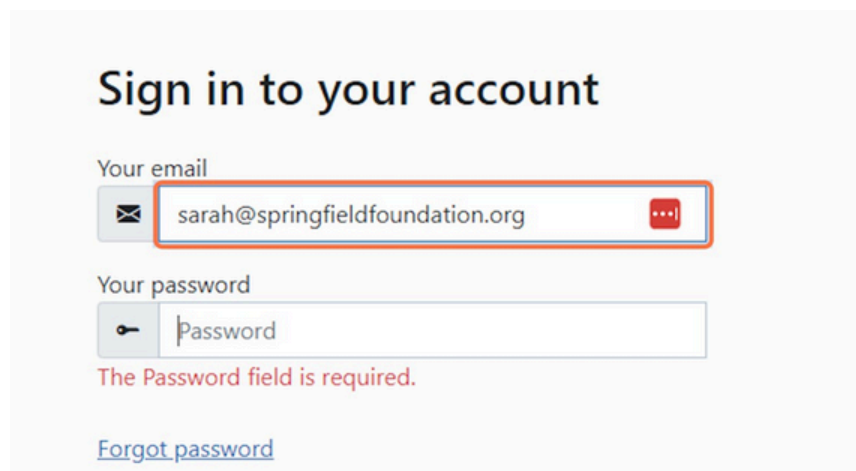
## Step One

Go to our website at:

[www.springfieldfoundation.org/donors/donor-portal.html](http://www.springfieldfoundation.org/donors/donor-portal.html)

## Step Two

Enter your email address



**Sign in to your account**

Your email

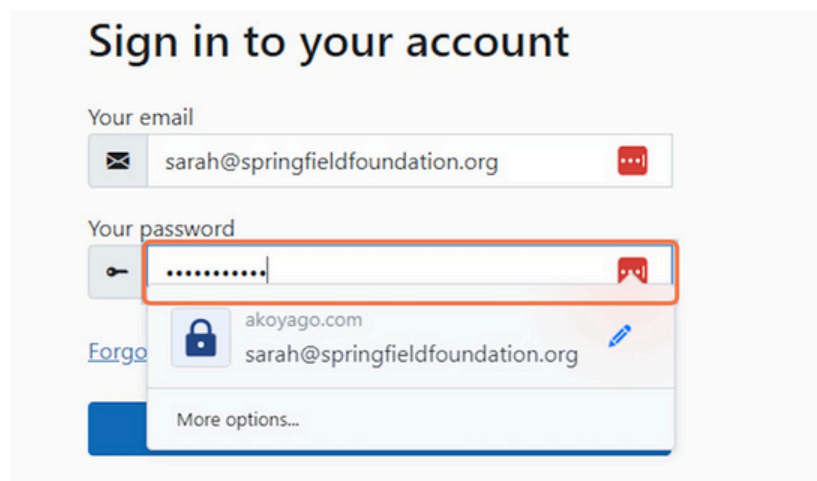
Your password

The Password field is required.

[Forgot password](#)

## Step Three

Enter your password



**Sign in to your account**

Your email

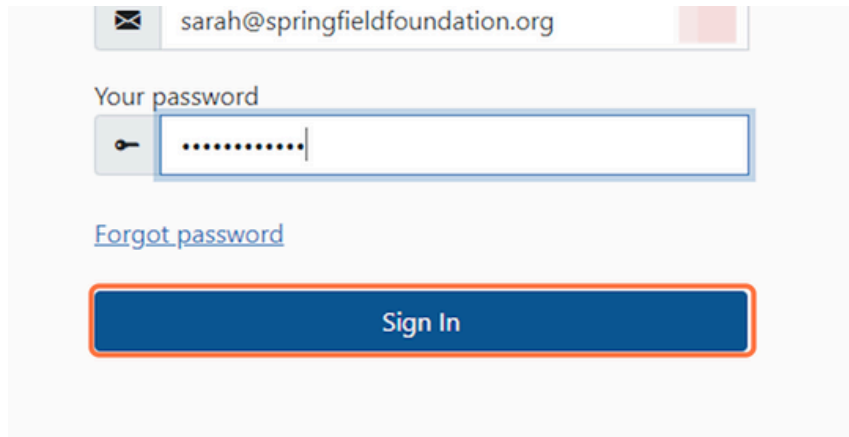
Your password

[Forgot](#)

- akoyago.com
- sarah@springfieldfoundation.org

More options...

## Step Four Click Sign In



sarah@springfieldfoundation.org

Your password

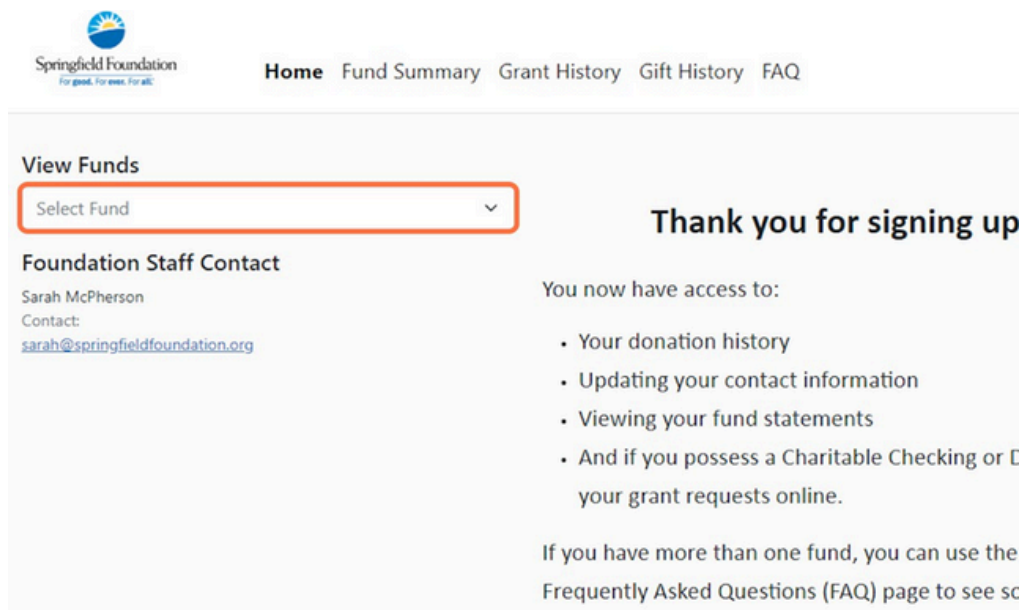
.....


[Forgot password](#)

**Sign In**

## Step Five

You are now on the GoFund home page and can navigate to your fund from the drop down menu in the top left.



 Springfield Foundation  
For good. For ever. For all.

**Home** Fund Summary Grant History Gift History FAQ

**View Funds**

Select Fund

**Foundation Staff Contact**

Sarah McPherson  
Contact:  
[sarah@springfieldfoundation.org](mailto:sarah@springfieldfoundation.org)

**Thank you for signing up**

You now have access to:

- Your donation history
- Updating your contact information
- Viewing your fund statements
- And if you possess a Charitable Checking or E your grant requests online.

If you have more than one fund, you can use the Frequently Asked Questions (FAQ) page to see sc

# How to Request a Grant

## Step One

Click on Recommend a Grant from the top navigation menu

## Step Two

Click on Organization or Established Fund from the drop down menu under "Would you like to grant to"

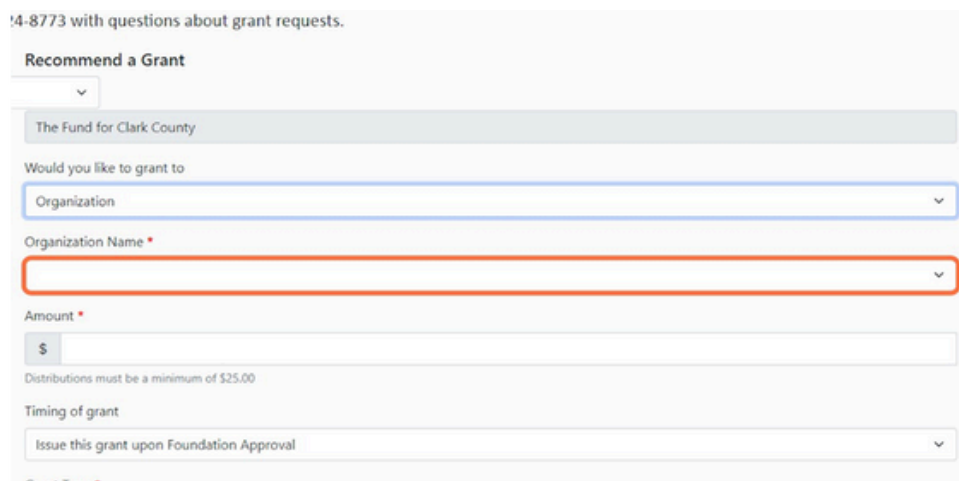
Grants must be made to 501(c)(3) nonprofit organizations recognized by the IRS. You may request a grant to an Established Fund at the Springfield Foundation (this is an endowment fund that already exists at the foundation).



The screenshot shows the 'Recommend a Grant' form. At the top, there is a dropdown menu for 'The Fund for Clark County'. Below that is the question 'Would you like to grant to' with a dropdown menu set to 'Organization', which is highlighted with a red rectangular box. Other fields include 'Organization Name \*', 'Amount \*' (with a '\$' symbol and a note 'Distributions must be a minimum of \$25.00'), 'Timing of grant' (set to 'Issue this grant upon Foundation Approval'), and 'Grant Type \*'.

## Step Three

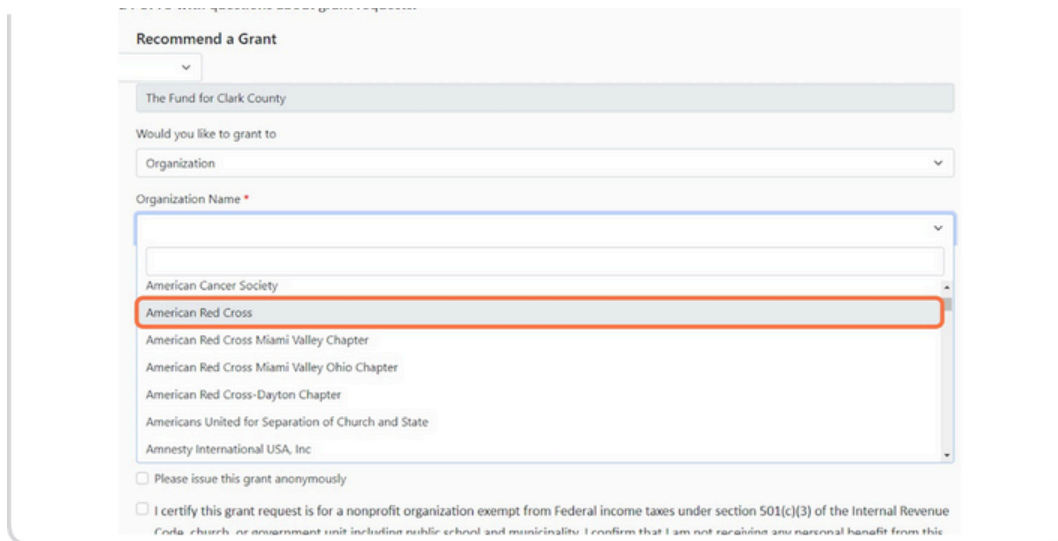
If donating to an organization, use drop down menu to look it up.



This screenshot is similar to the previous one but highlights the 'Organization Name \*' dropdown menu with a red rectangular box. The 'Would you like to grant to' dropdown is still set to 'Organization'. The rest of the form fields are the same as in the previous screenshot.

## Step Four

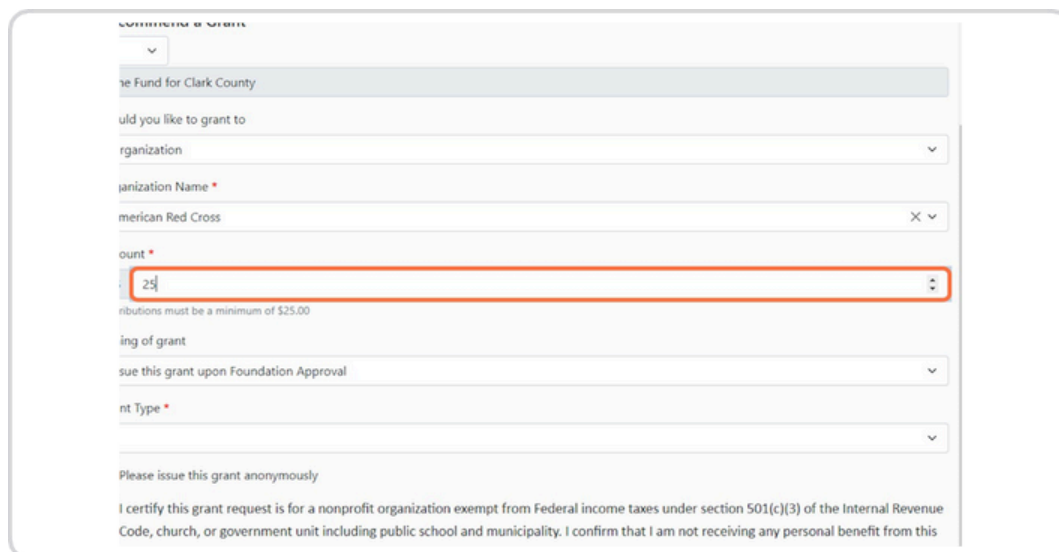
Click on the Organization Name or create one if not listed. To create a new organization, you will need the Organization Name and Contact Name.



The screenshot shows a web form titled "Recommend a Grant". The form is partially filled out. At the top, there is a dropdown menu for "The Fund for Clark County". Below that, there is a field for "Would you like to grant to" with a dropdown menu set to "Organization". The "Organization Name" field is highlighted with a red box and shows a dropdown menu with several options: "American Cancer Society", "American Red Cross" (which is selected and highlighted with a red box), "American Red Cross Miami Valley Chapter", "American Red Cross Miami Valley Ohio Chapter", "American Red Cross-Dayton Chapter", "Americans United for Separation of Church and State", and "Amnesty International USA, Inc". Below the dropdown menu, there are two checkboxes: "Please issue this grant anonymously" and "I certify this grant request is for a nonprofit organization exempt from Federal income taxes under section 501(c)(3) of the Internal Revenue Code, church, or government unit including public school and municipality. I confirm that I am not receiving any personal benefit from this".

## Step Five

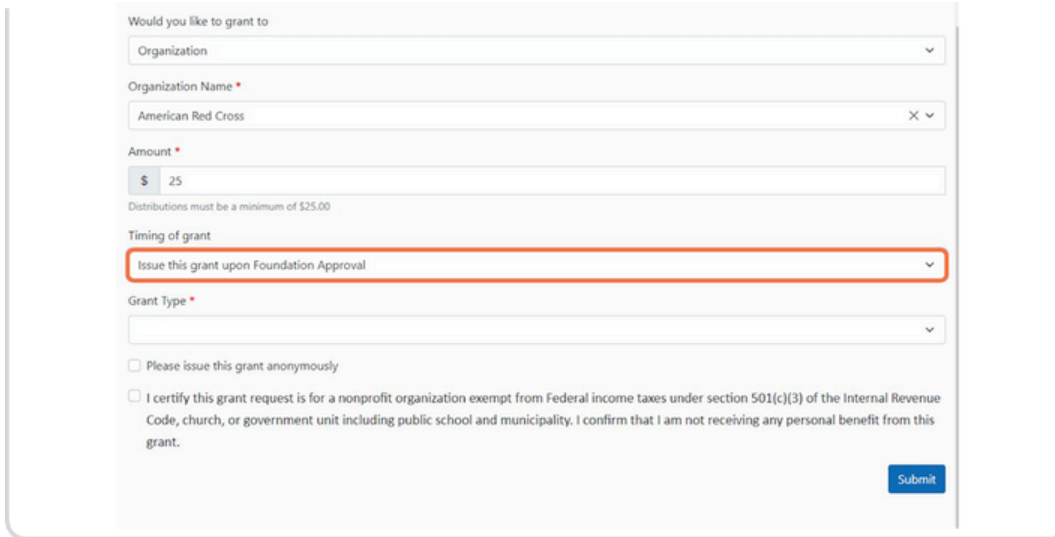
Type in donation amount



The screenshot shows the same "Recommend a Grant" form as in Step Four. The "Organization Name" dropdown menu is now set to "American Red Cross". The "Amount" field is highlighted with a red box and contains the number "25". Below the "Amount" field, there is a note that says "Contributions must be a minimum of \$25.00". The rest of the form is the same as in Step Four.

## Step Six

Click on Timing of Grant to be upon approval or on a specific date.



Would you like to grant to

Organization

Organization Name \*

American Red Cross

Amount \*

\$ 25

Distributions must be a minimum of \$25.00

Timing of grant

Issue this grant upon Foundation Approval

Grant Type \*

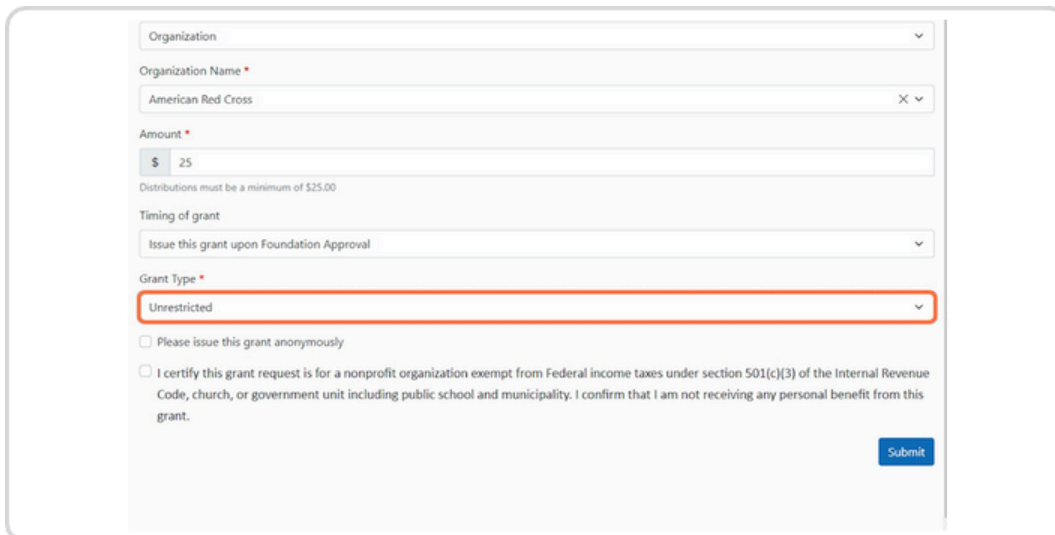
Please issue this grant anonymously

I certify this grant request is for a nonprofit organization exempt from Federal income taxes under section 501(c)(3) of the Internal Revenue Code, church, or government unit including public school and municipality. I confirm that I am not receiving any personal benefit from this grant.

Submit

## Step Seven

Click on Grant Type as Unrestricted or Restricted (If restricted, indicate purpose.)



Organization

Organization Name \*

American Red Cross

Amount \*

\$ 25

Distributions must be a minimum of \$25.00

Timing of grant

Issue this grant upon Foundation Approval

Grant Type \*

Unrestricted

Please issue this grant anonymously

I certify this grant request is for a nonprofit organization exempt from Federal income taxes under section 501(c)(3) of the Internal Revenue Code, church, or government unit including public school and municipality. I confirm that I am not receiving any personal benefit from this grant.

Submit

## Step Eight

Check optional Anonymous box and/or Certification box

The screenshot shows a web form titled "Recommend a Grant". On the left, under "View Funds", it lists "The Fund for Clark County" and "Foundation Staff Contact" with Sarah McPherson's name and email. The main form fields include: "The Fund for Clark County" (dropdown), "Would you like to grant to" (text), "Organization" (text), "Organization Name" (American Red Cross), "Amount" (\$25), "Timing of grant" (Issue this grant upon Foundation Approval), "Grant Type" (Unrestricted), and a checked radio button for "I certify this grant request is for a nonprofit organization exempt from Federal income taxes under section 501(c)(3) of the Internal Revenue Code, church, or government unit including public school and municipality. I confirm that I am not receiving any personal benefit from this grant." A "Submit" button is at the bottom right.

## Step Nine

Click Submit

This close-up shows the bottom of the form. It features the certification text: "I certify this grant request is for a nonprofit organization exempt from Federal income taxes under section 501(c)(3) of the Internal Revenue Code, church, or government unit including public school and municipality. I confirm that I am not receiving any personal benefit from this grant." Below the text is a blue "Submit" button.



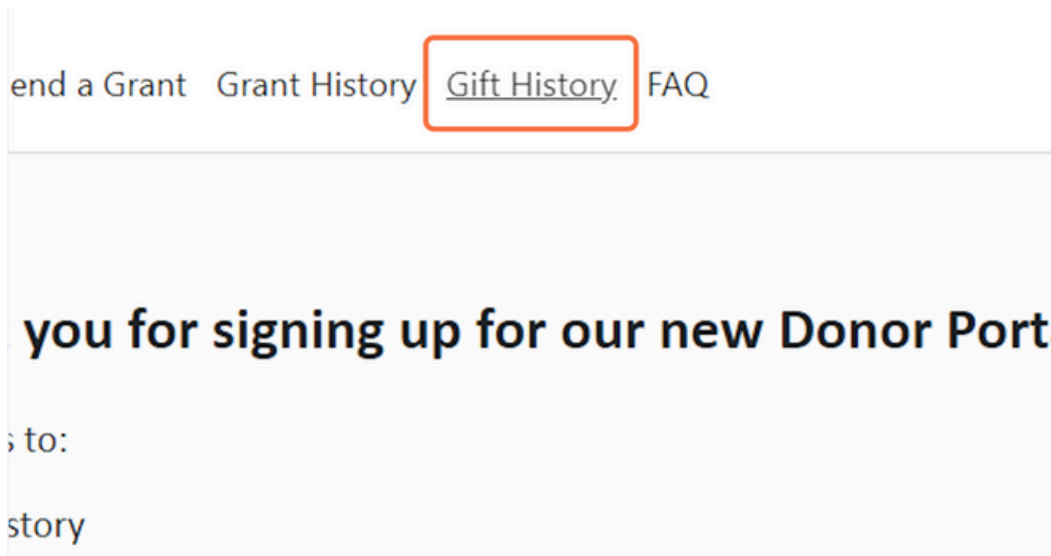
# How to see Gift History

## Step One

Start from the GoFund home page

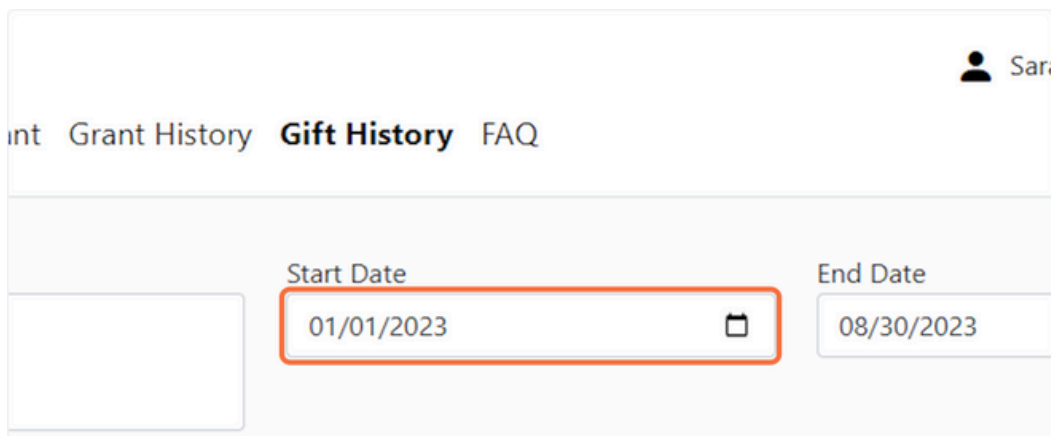
## Step Two

Click on Gift History



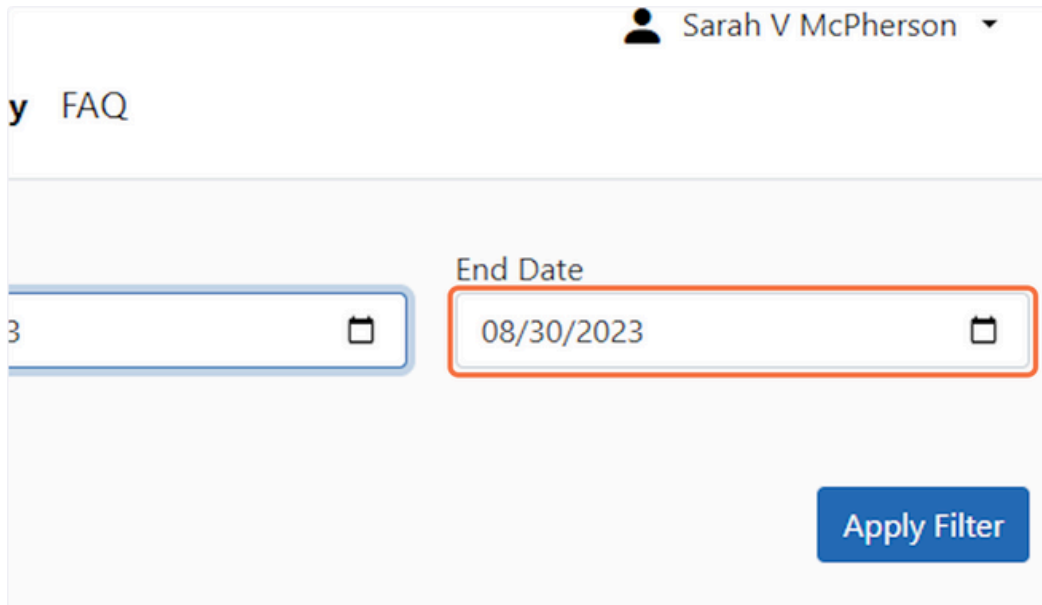
## Step Three

Click on and Enter Start Date



## Step Four

Click on and Enter End Date



Sarah V McPherson

y FAQ

3

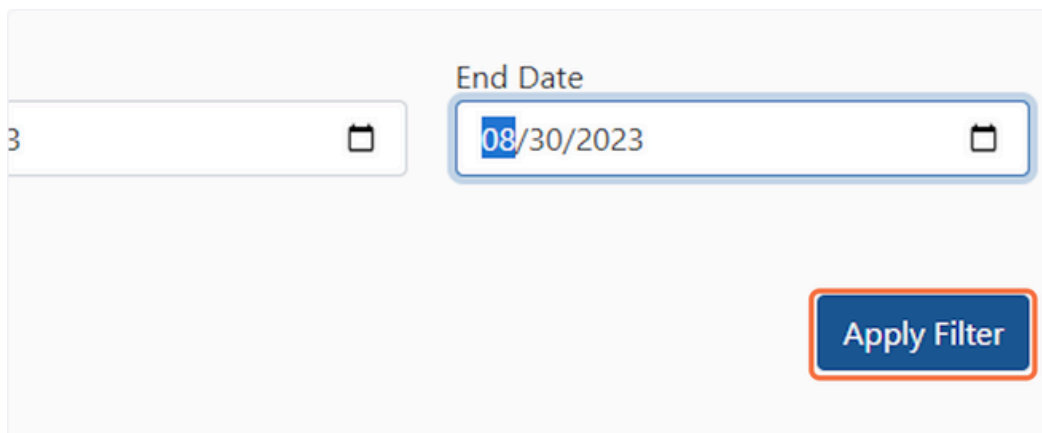
End Date

08/30/2023

Apply Filter

## Step Five

Click on Apply Filter



3

End Date

08/30/2023

Apply Filter

## Step Six

Your gift history for the entered dates will appear

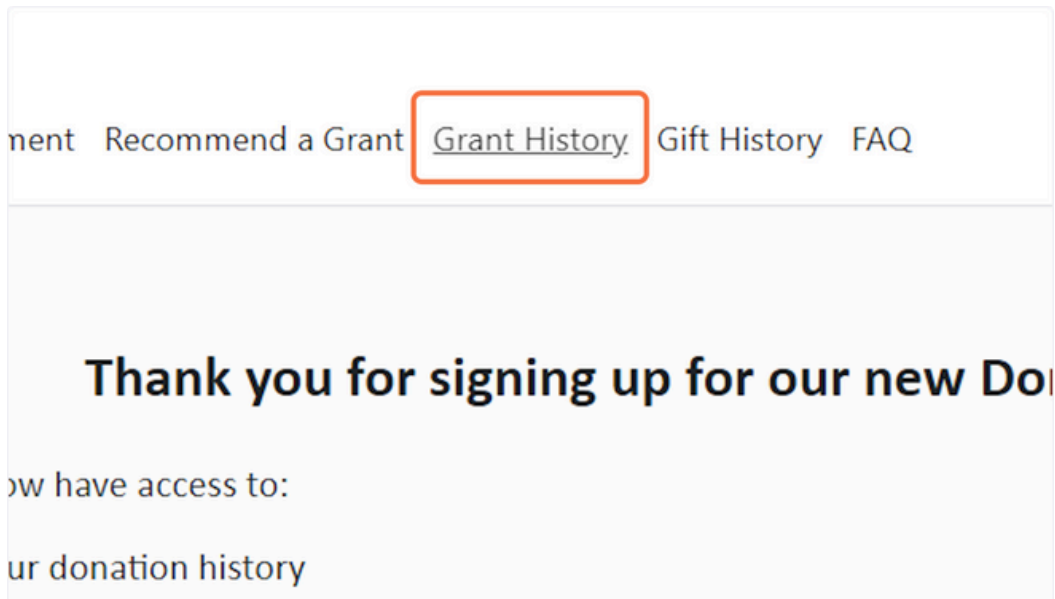
# How to see Grant History

## Step One

Start from the GoFund home page

## Step Two

Click on Grant History



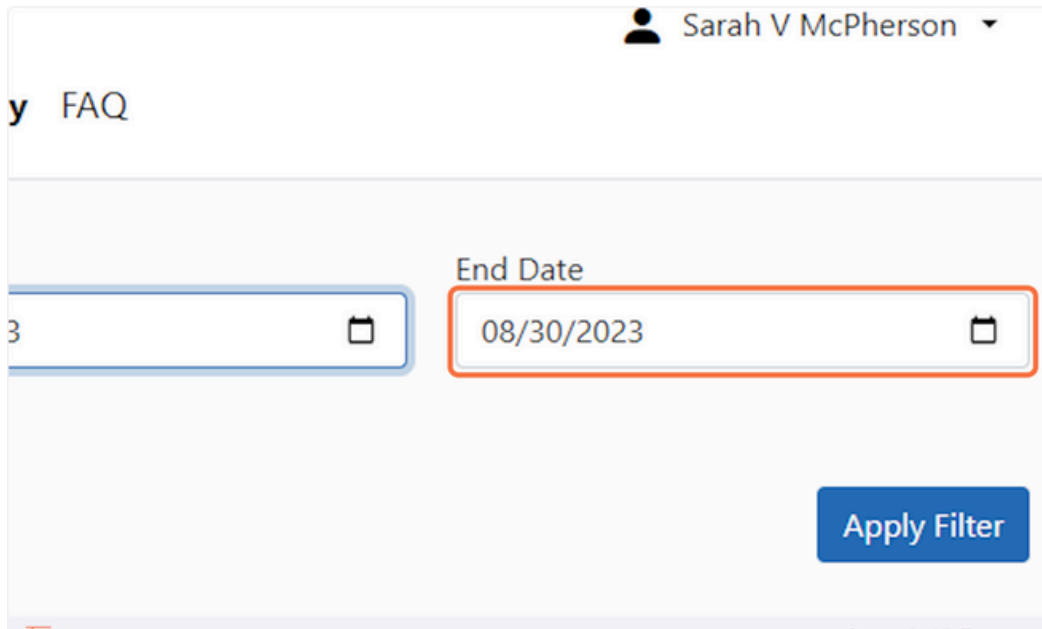
## Step Three

Click on and Enter Start Date



## Step Four

Click on and Enter End Date



Sarah V McPherson

y FAQ

3

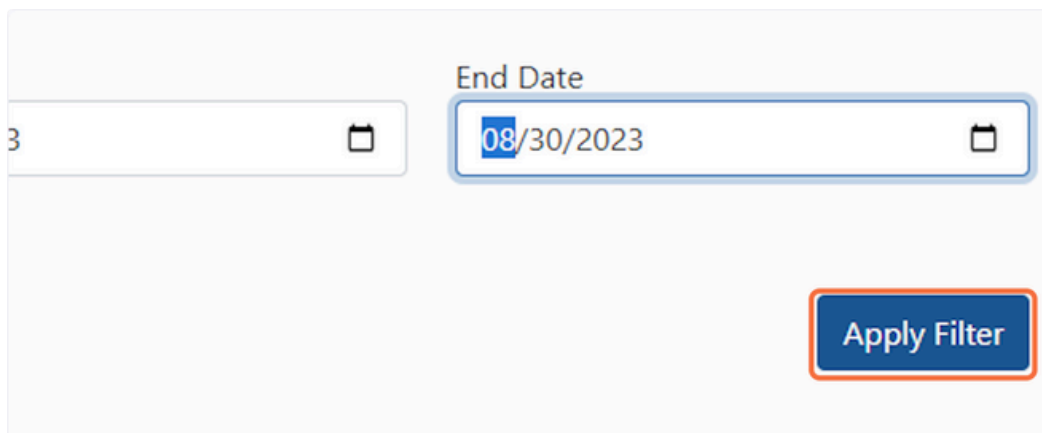
End Date

08/30/2023

Apply Filter

## Step Five

Click on Apply Filter



3

End Date

08/30/2023

Apply Filter

## Step Six

Your grant history for the entered dates will appear

# How to see Fund Statements

## Step One

Start from the GoFund home page

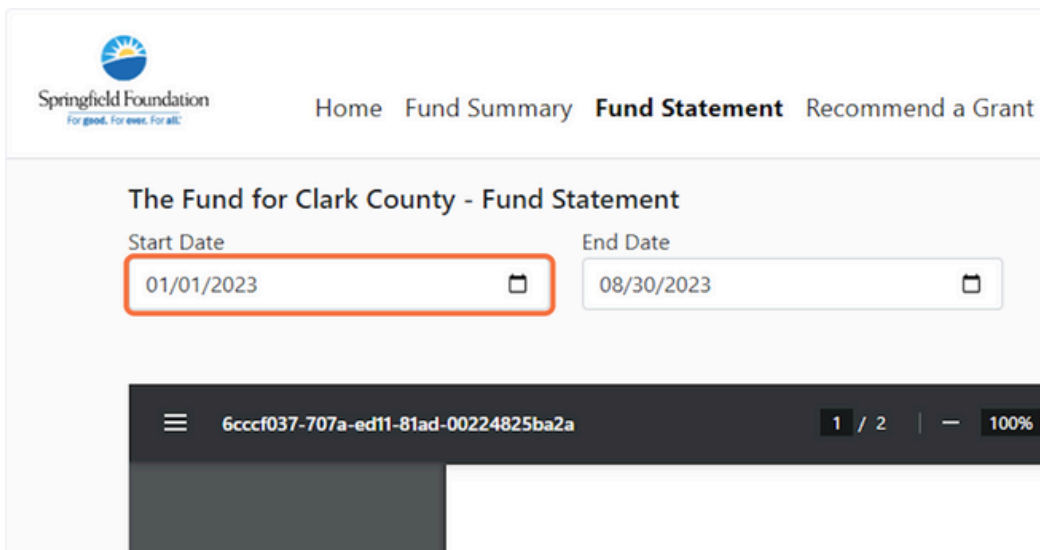
## Step Two

Click on Fund Statement



## Step Three

Click on and Enter Start Date



## Step Four

Click on and Enter End Date

Home Fund Summary **Fund Statement** Recommend a Grant Grant History Gift Hist

or Clark County - Fund Statement

End Date

08/30/2023

037-707a-ed11-81ad-00224825ba2a 1 / 2 100%

## Step Five

Click on Apply Filter

Apply Filter

Download Print

## Step Six

Your fund statement for the entered dates will appear

# FAQ

---

**How can I view my various funds?** If you are on the “Home” or “Recommend a Grant” pages, you will see a drop-down list on the left side labeled "View Funds." Use it to select the fund you would like to view. You also can select the fund from the “Fund Summary” page. Just click the fund name at the top of the page and select the one you wish to view.

**When are fund statements updated?** Your fund balance is always available on the donor portal. Investments are updated monthly and are complete by the beginning of the second month. (For example, March’s updates are available May 1st)

**How do I know if my grant recommendation worked?** Once you click "Submit," you will see a “thank you” page informing you that your grant recommendation has been received and will be processed. If you do not see this screen, then your recommendation was not successfully submitted. You will not receive a confirmation email. If you have any questions regarding your recommendation, please reach out to us, and we will be happy to help.

**When will my grant recommendation be processed?** Grant recommendations for the same week are due on Tuesday by 5pm. They are processed and then mailed by Friday, unless we require more information to fulfill the request. In such a case, we will contact you to ask for additional details.

**Have additional questions that should be on our FAQ?** Let us know! Contact us at 937-324-8774 or [sarah@springfieldfoundation.org](mailto:sarah@springfieldfoundation.org).