Make Grant Recommendations

To make grant recommendations, click the Recommend A Grant tab. If you have more than one fund, make sure you've selected the correct fund under Choose Fund.

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

1. **Choose from previous Grantee** – look in the dropdown to select from previous grantees from your fund.

   ![Choose from previous Grantee](image1)

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

   ![Grants](image2)

2. **Search for other Grantees** – Enter a grantee name to search. You can also provide City and State 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 other Grantees](image3)
The search results will list any matching grantees in the Rhode Island Foundation system and GuideStar. Click on each button to see the results.

If you see a match, click Create Request.

3. **Enter Grantee information manually** – enter the information for the grantee and click Submit. Required fields have asterisks.

Enter the information listed under Grant Request:

- **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 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.

When all information has been entered, click the Add to Grant Requests button.

The recommendation is now listed under “Unsubmitted Grant Requests” 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.

To add another recommendation before submitting, go through the same steps as above, starting with entering the grantee.
When ready to submit, click Review and Submit Grant Requests in the Unsubmitted Grant Requests section.

Review the information on the Review Grant Requests screen. If edits need to be made, select the Recommend a Grant tab to return to the list under Unsubmitted Grant Requests. Click the Edit button for the grant request to edit.

After making updates, select Update Grant Request.

Click Review and Submit Grant Requests to return to the Review Grant Requests screen. After reviewing information, click 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 main page.
Your recommendation will now be listed on the Recommend A Grant 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 yellow Cancel button.

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.