



Springfield Foundation

For **good.** For **ever.** For **all.**[®]

GO fund

Donor Portal Guide

Revised 6.25.26

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

How to Sign In

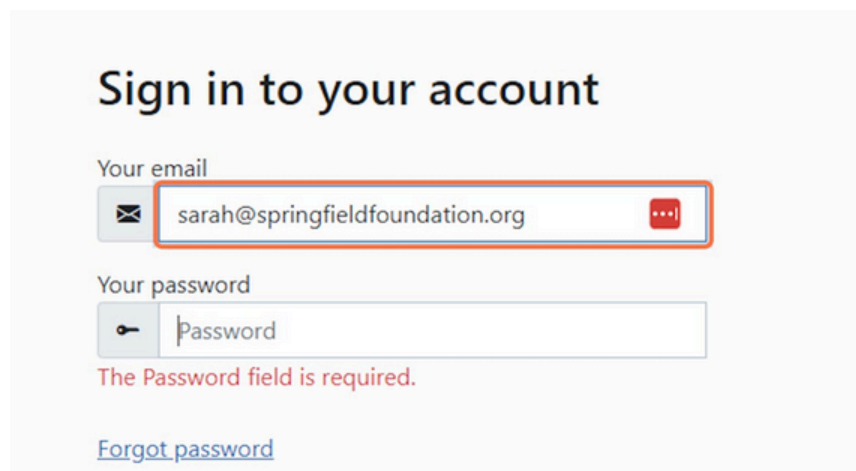
Step One

Go to our website at:

www.springfieldfoundation.org/donors/donor-portal.html

Step Two

Enter your email address



Sign in to your account

Your email

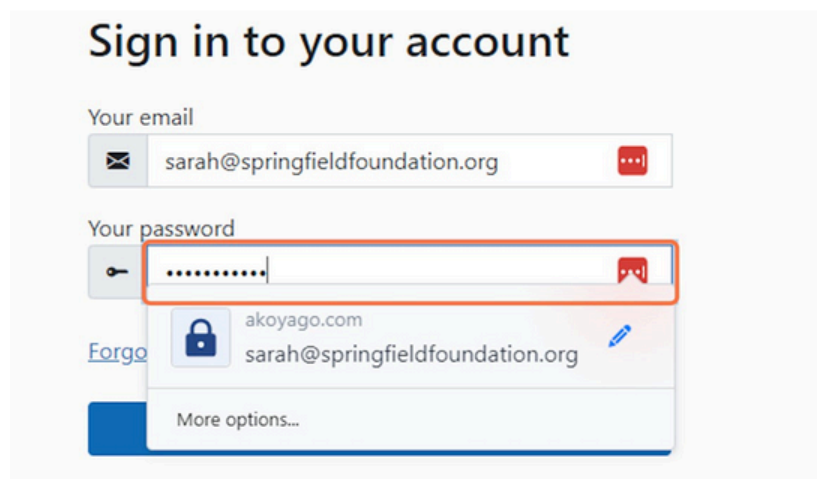
Your password

The Password field is required.

[Forgot password](#)

Step Three

Enter your password



Sign in to your account

Your email

Your password

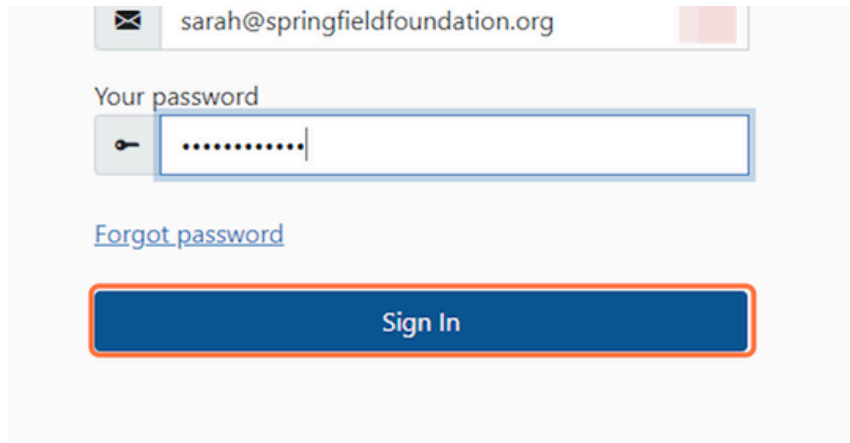
[Forgot](#)

- 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. If you have multiple funds, your multiple funds will be listed at the top of the home page. On the other pages, you will see a drop-down list on the top, left side. 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.

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"

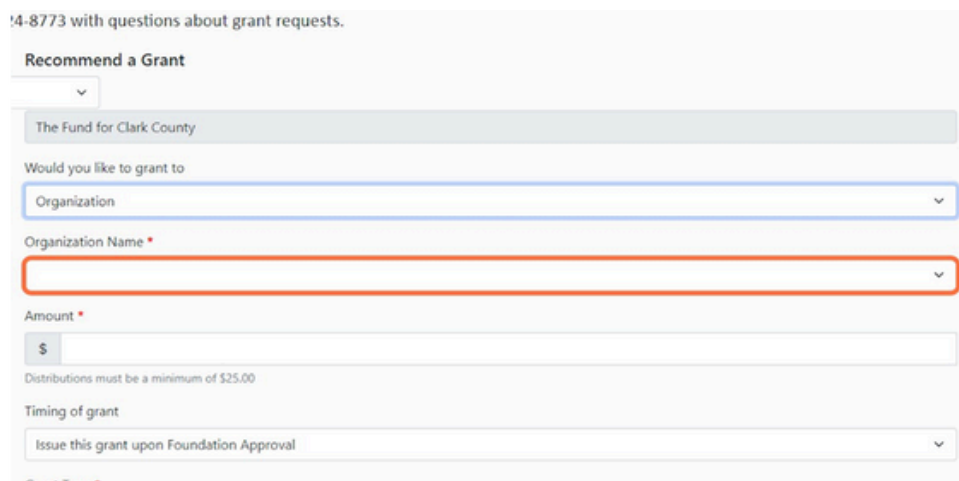
Grants must be made to 501(c)(3) nonprofit organizations recognized by the IRS. You may request a grant to an Established Fund at the Springfield Foundation (this is an endowment fund that already exists at the foundation).



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 showing 'Organization' selected. This dropdown menu is highlighted with a red rectangular box. Below this are fields for 'Organization Name', 'Amount' (with a '\$' symbol and a note 'Distributions must be a minimum of \$25.00'), 'Timing of grant' (with a dropdown menu showing 'Issue this grant upon Foundation Approval'), and 'Grant Type'.

Step Three

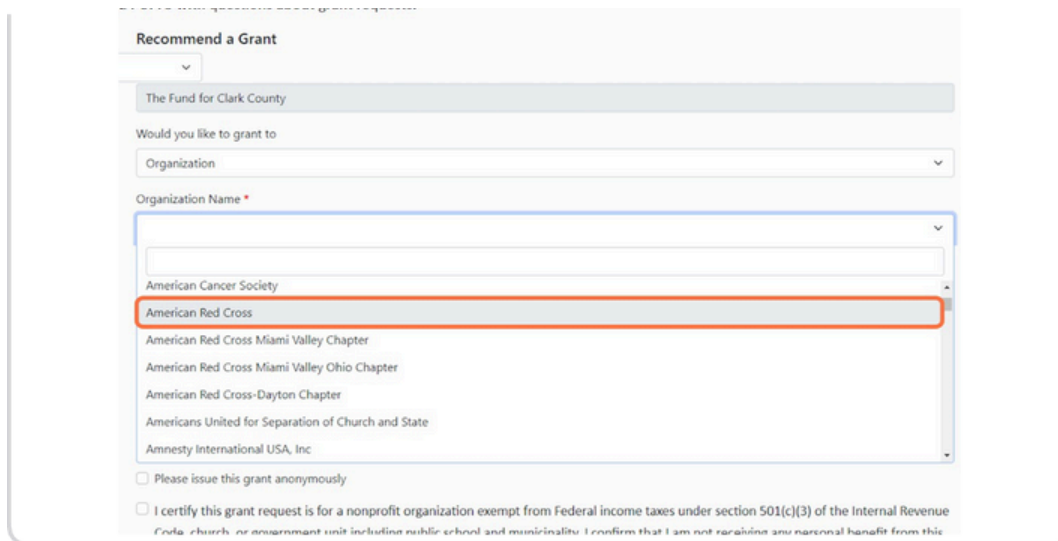
If donating to an organization, use drop down menu to look it up.



This screenshot is similar to the previous one, but the 'Organization Name' dropdown menu is highlighted with a red rectangular box. The rest of the form, including the 'Would you like to grant to' dropdown (which still shows 'Organization'), the 'Amount' field, 'Timing of grant' dropdown, and 'Grant Type' field, remains the same.

Step Four

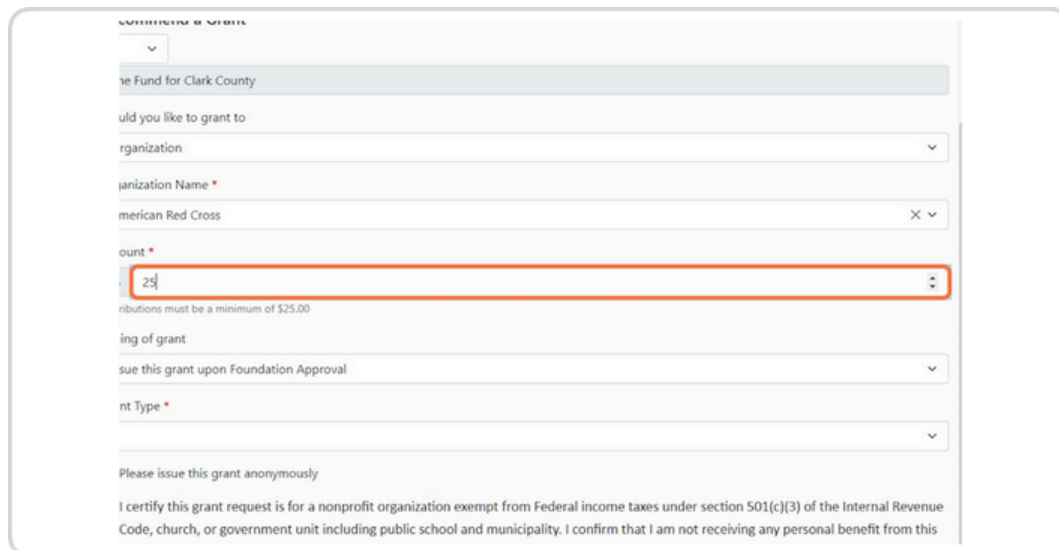
Click on the Organization Name or create one if not listed. To create a new organization, you will need the Organization Name and Contact Name.



The screenshot shows a web form titled "Recommend a Grant". The form is partially filled out. The "Organization" dropdown menu is open, showing a list of organizations. The "American Red Cross" option is highlighted with a red rectangular box. Below the dropdown menu, there are two radio button options: "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

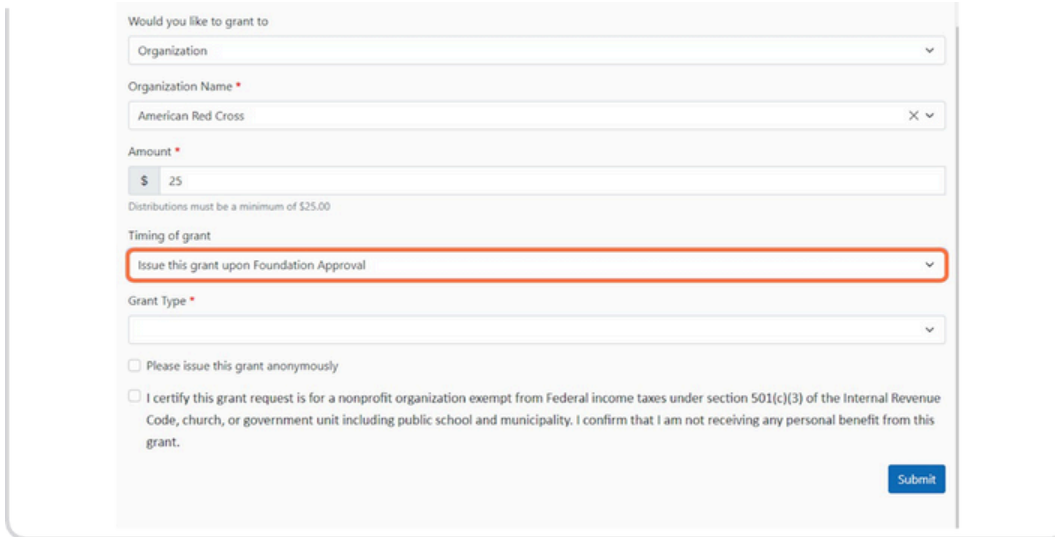
Type in donation amount



The screenshot shows the same "Recommend a Grant" form. The "Organization Name" dropdown menu is now closed, and the text "American Red Cross" is visible in the field. The "Amount" field is highlighted with a red rectangular box and contains the number "25". Below the "Amount" field, there is a note: "Contributions must be a minimum of \$25.00". The form also includes the same two radio button options as in the previous screenshot.

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 *

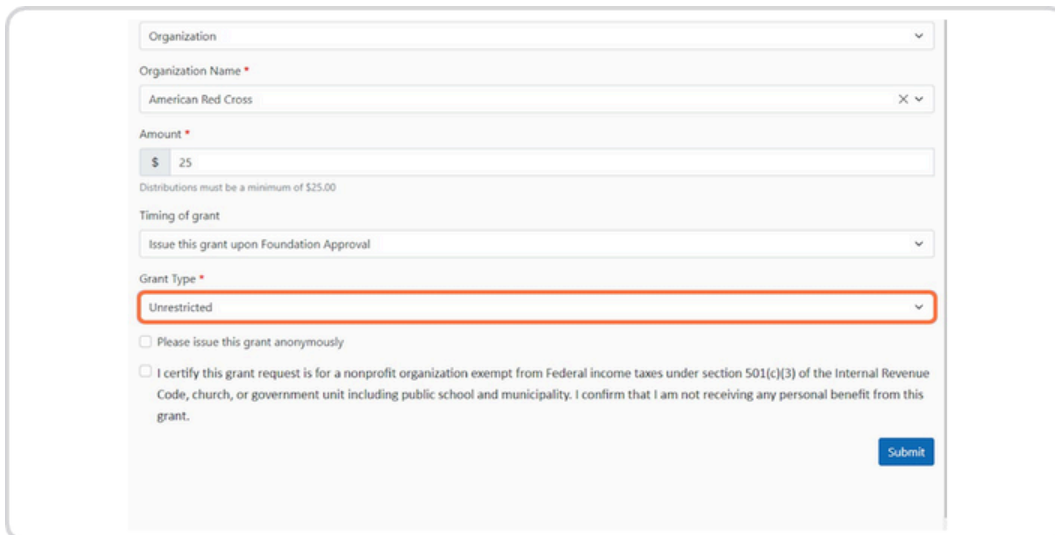
Please issue this grant anonymously

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

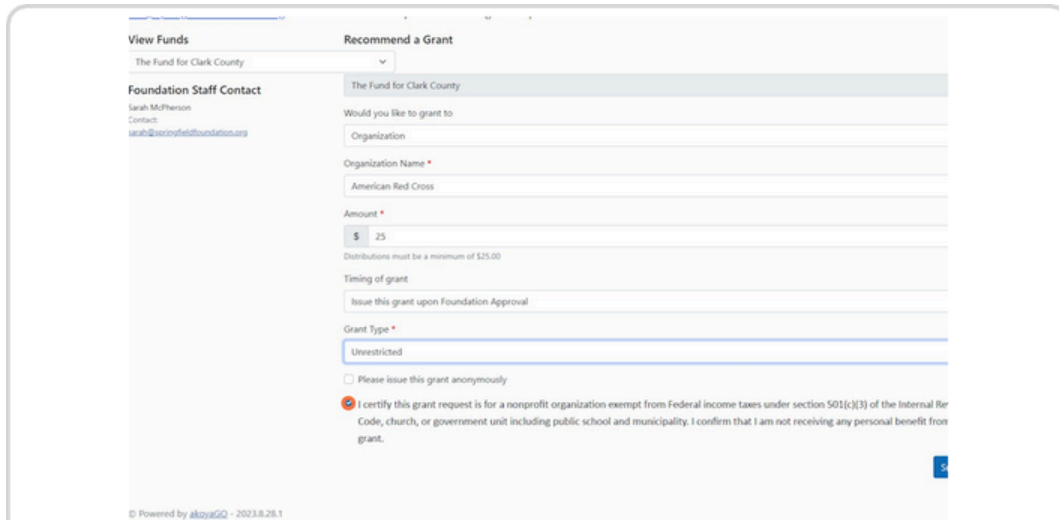
Please issue this grant anonymously

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

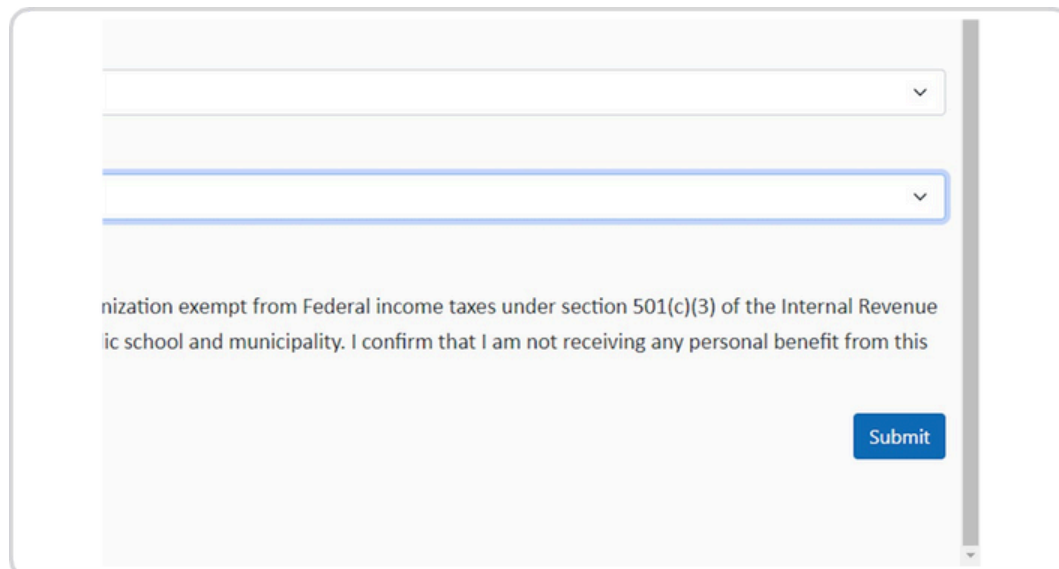
Check optional Anonymous box and/or Certification box



The screenshot shows a web form titled "Recommend a Grant" for "The Fund for Clark County". The form includes a "Foundation Staff Contact" section with Sarah McPherson's name and email. The main form fields include "Organization" (American Red Cross), "Amount" (\$25), and "Grant Type" (Unrestricted). At the bottom, there are two checkboxes: "Please issue this grant anonymously" (unchecked) 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 grant." (checked). A blue "Submit" button is visible in the bottom right corner.

Step Nine

Click Submit



This close-up view shows the bottom portion of the form, including the "Certification" checkbox which is checked. Below the text of the certification, a blue "Submit" button is prominently displayed.

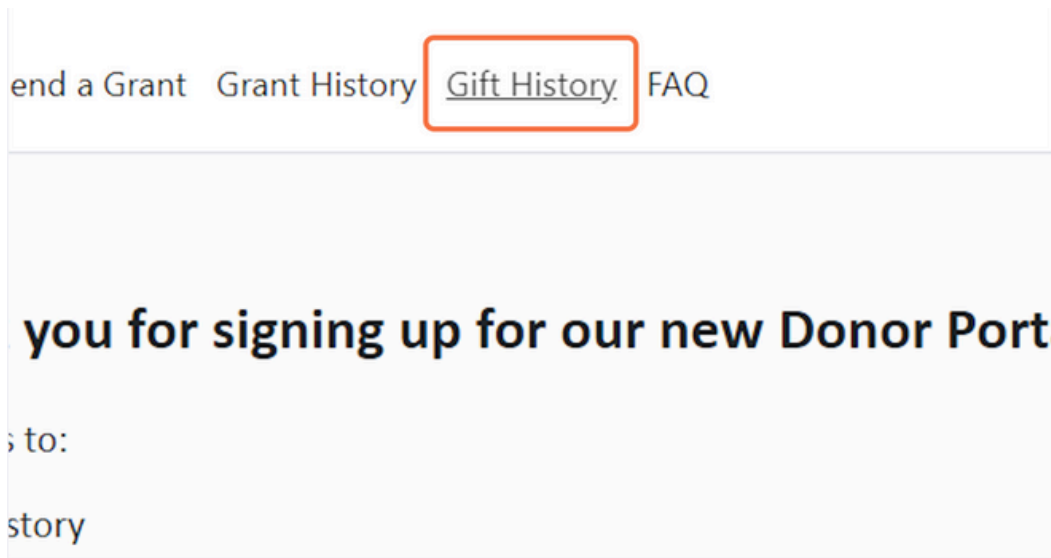
How to see Gift History

Step One

Start from the GoFund home page

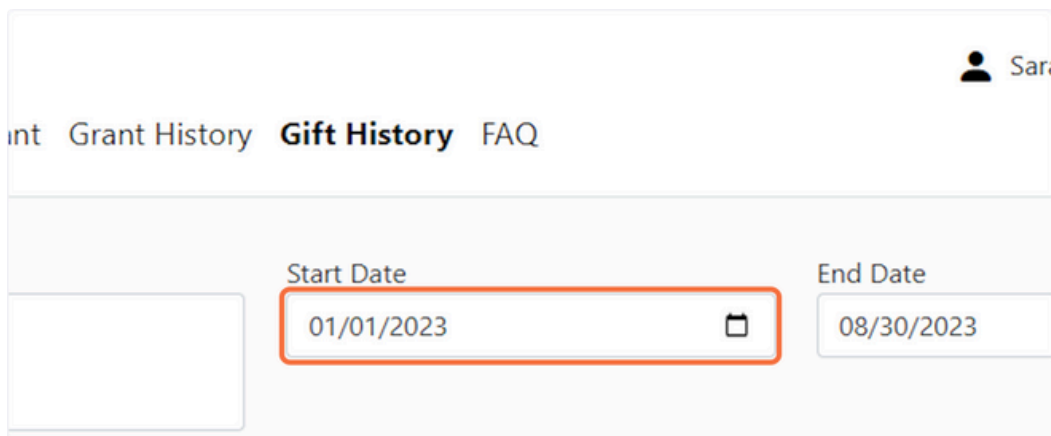
Step Two

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

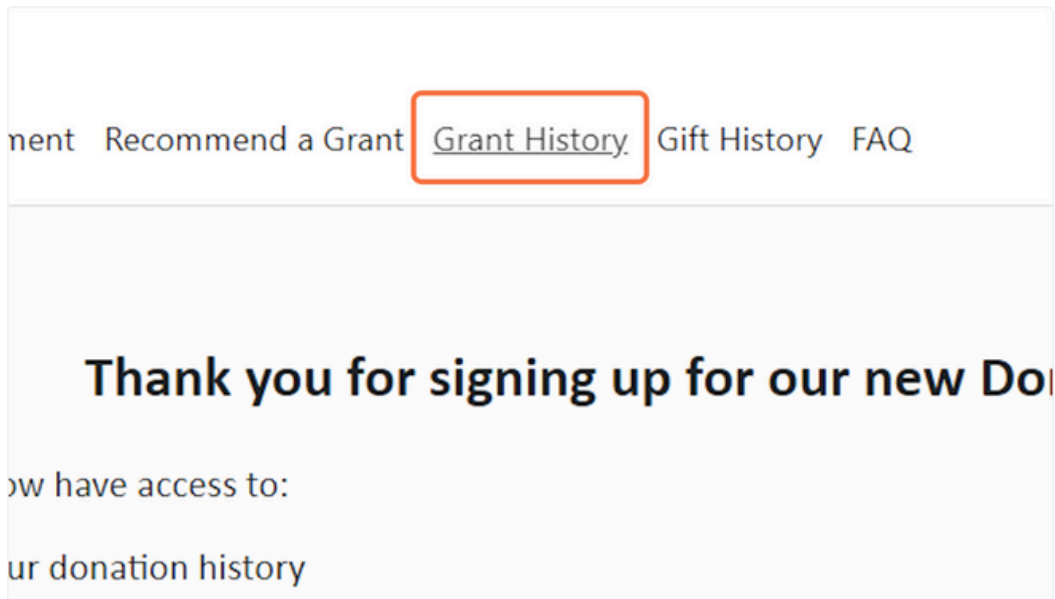
How to see Grant History

Step One

Start from the GoFund home page

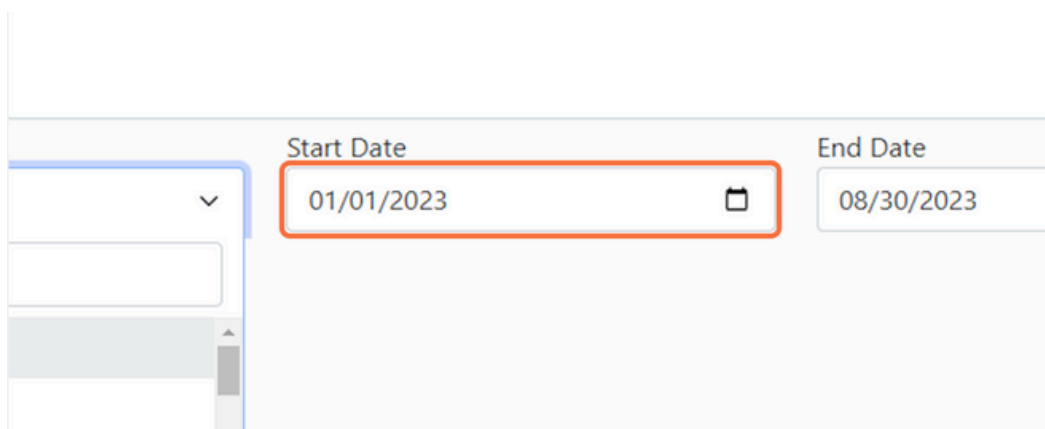
Step Two

Click on Grant History



Step Three

Click on and Enter Start Date



Step Four

Click on and Enter End Date

Sarah V McPherson

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

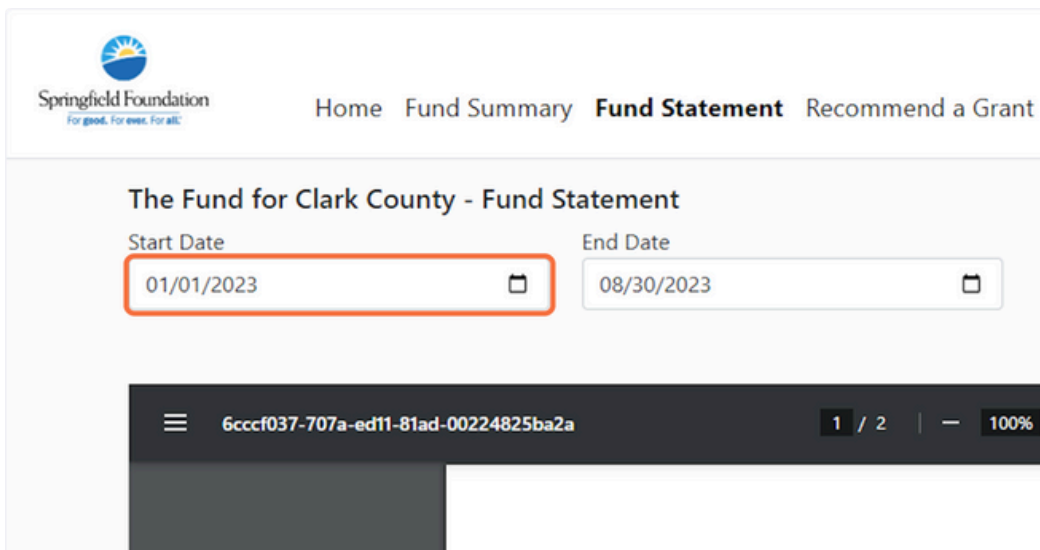
Step Two

Click on Fund Statement



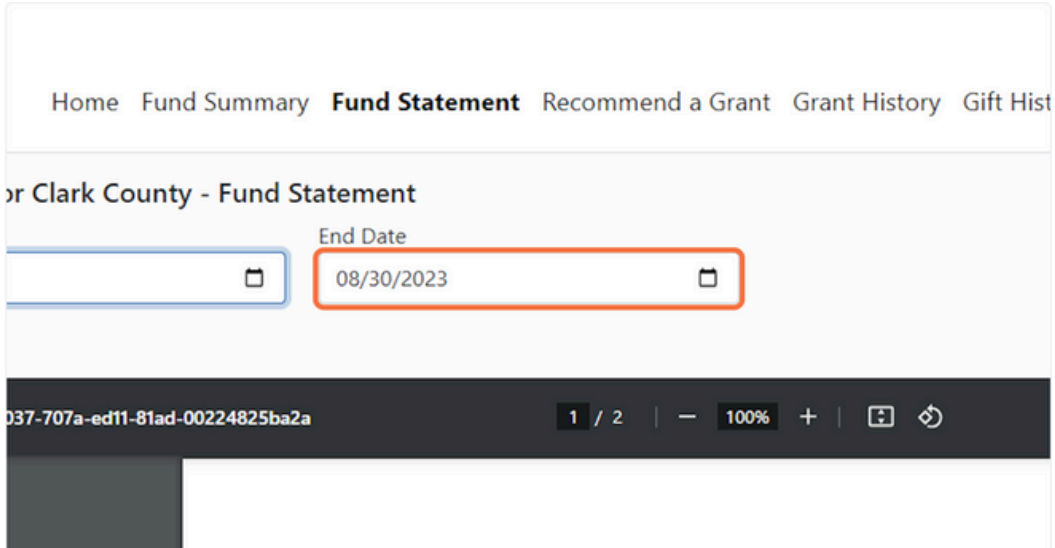
Step Three

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

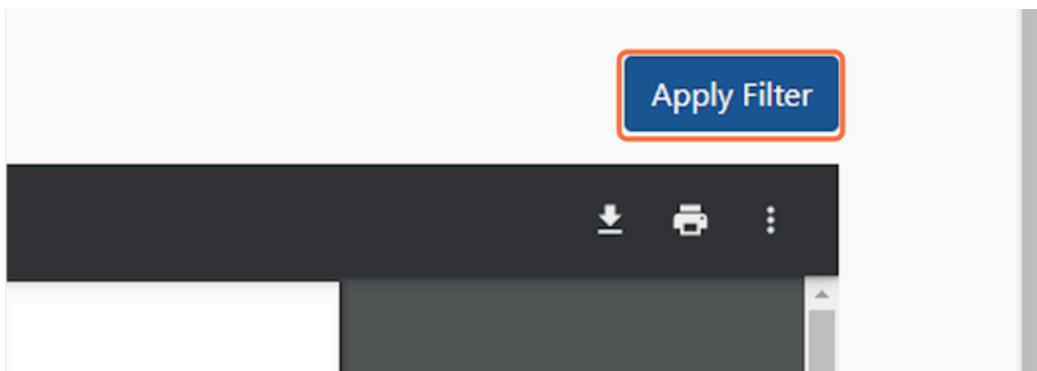
End Date

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” page, your multiple funds will be listed at the top. On the other pages, you will see a drop-down list on the top, left side. 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 emailed 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.