

Requesting Funds

To request funds after logging in:

- 1) Go to the search bar labeled “Find” and type in the name of your endowment. When you click into the search bar a list of all your endowments should drop down. Select the endowment from which you would like to request a distribution.
- 2) After selecting the endowment, you will see the name of the endowment below the search bar. Below the endowment name you will “Spendable balance” this is the maximum distribution available from the endowment.
- 3) Click on the blue “Recommend a grant” button to the right of the name of the endowment. From there a pop-up menu will ask you to select the recipient (this should be your organization), the fund (this should be the endowment you just selected), and the grant amount (this should be, at a maximum, the “Spendable balance”).
- 4) An other path to this recommendation pop-up menu would be to click on “Recommendations” in the top ribbon.

The screenshot displays the DonorCentral web application interface. At the top, a navigation ribbon contains the following items: DonorCentral, Home, Funds, Grants, Recommendations (highlighted with a red box), Gifts, Control panel, and Contact us. Below the ribbon, the page header shows 'Showing information for The Catholic Foundation' and a 'Stop viewing as advisor' link. The main content area features a 'Welcome to DonorCentral!' message. A section titled 'View your fund details' (labeled 1) contains a search bar with the placeholder text 'Find' and a magnifying glass icon. Below this, the details for the 'Support for Parishes Endowment Fund' (labeled 2) are shown, including a 'Spendable balance : \$233.66' (highlighted with a red box). A blue button labeled 'Recommend a grant' with a right-pointing arrow (labeled 3) is positioned to the right of the fund name. Below the button are links for 'See more fund details' and 'View latest fund statement (7/1/2015 - 06/30/2016)'. The 'Recommendations' menu item in the top ribbon and the 'Recommend a grant' button are both highlighted with red boxes.

- 5) The first pop-up menu that will appear after clicking “Recommend a grant” will be the “Charity” section where you will select a recipient. I recommend going to “Search for a recipient” and typing in your organization name in the “Select a charity” search bar. Churches named after saints will start with “St.” not “Saint”. For example, “St. Coleman”. If you cannot find your organization click the “Add a new charity” button and fill out the information requested. After finding or entering your organization, click “Next”.

The screenshot shows a 'Grant recommendation' pop-up window with a progress indicator at the top showing three steps: 'Charity' (active), 'Recommendation', and 'Agreement'. The 'Charity' section contains the following elements:

- A checkbox labeled 'Add a new charity' (annotated with '2)') which is currently unchecked.
- An 'Existing Charity' section with a dropdown menu labeled 'Select prior recipient *' containing the text 'Find in this list'.
- An 'OR' separator (annotated with '1)') above a dropdown menu labeled 'Search for a recipient *' containing the text 'Select a charity'.
- A blue 'Clear' button below the search dropdown.
- At the bottom, there are three buttons: 'Cancel', 'Next' (annotated with '3)'), and 'Save for later'.

- 6) After hitting “Next” you will be taken to the “Recommendation” section. Make sure the “Funding Source” is the correct endowment you want to request a disbursement from. In the “Amount” section, please make sure you are entering the “Spendable balance” as a maximum request. You can request less than the “Spendable balance”. However, **the minimum request is \$50**. Fill in the remaining boxes (Grant purpose, Special Instructions, etc.) and click “Next” at the bottom of the pop-up.

The image shows a screenshot of a web application window titled "Grant recommendation". The window has a close button (X) in the top right corner. The form is divided into sections: "Fund", "Grant", and "Grant purpose".

- Fund section:** Labeled "1)", it contains a dropdown menu for "Funding source *" with the selected option "Support for Parishes Endowment Fund". Below it is a checkbox for "Fund anonymous".
- Grant section:** Labeled "2)", it contains a text input field for "Amount *" with a dollar sign (\$) icon on the left. Below it is a checkbox for "Advisor anonymous".
- Grant purpose section:** A large empty text area for entering the grant purpose.

Red rectangular boxes highlight the "Funding source" dropdown and the "Amount" input field.

- 7) After clicking “Next” you will be taken to the “Agreement” section. Please click the radio button next to “I agree”. If you do not have any more endowment requests to complete, please click “Submit”. If you have multiple endowment requests you would like to make, please click “Save for later” (make sure to still click the radio button next to “I agree”).

Grant recommendation

Charity Recommendation Agreement

Important

PLEASE NOTE: U.S. Government regulations prohibit grants for memberships, sponsorships or tickets to events for you or your family members. Bifurcation of grants (splitting the deductible portion from the nondeductible portion of the grant) is not allowed.

The above recommendation does not represent the payment of any pledge or other financial obligation. I understand that final grant decisions are made by the Catholic Foundation, whose charge it is to see that all distributions are consistent with its broad charitable purposes.

1) I agree

2)

3)

- 8) If you clicked, "Submit" you will receive a confirmation email of the request and taken back to the home page. If you clicked "Save for later" you will be taken back to the home page where you can repeat the process detailed above for a different endowment fund. When you are ready to submit all your endowment requests. You will see "Unsubmitted recommendations" on your home page. Click the "Select all/none" radio button and then click "Submit". This will submit all of your endowment requests together. You are able to submit endowment requests one at a time by simply clicking "Submit" in step number 7 above.

The screenshot shows the DonorCentral interface for The Catholic Foundation. At the top, there is a navigation bar with links for Home, Funds, Grants, Recommendations, Gifts, Control panel, and Contact us. Below the navigation bar, the page displays the Catholic Foundation logo and a welcome message: "Welcome to DonorCentral! With DonorCentral, you can view your latest fund balances, get fund statements, and make grant recommendations as well as review your history."

The main content area is titled "Unsubmitted recommendations" (labeled 1). Below this title, there is a "Select all/none" radio button (labeled 2). A table of recommendations is shown, with one entry for "The Catholic Foundation" (labeled 3). The entry includes the following information:

<input type="checkbox"/>	The Catholic Foundation <small>Last saved 02/27/2019 11:44AM</small>	\$200.00
	257 East Broad Street Columbus, OH 43215 Submit Delete	Support for Parishes Endowment Fund

Below the table, there is a "Submit" button (labeled 3). At the bottom of the page, there is a section titled "View your fund details" with a search bar. The fund details for "Support for Parishes Endowment Fund" are shown, including a "Spendable balance : \$233.66" and a "Recommend a grant" button. A link to "See more fund details" is also present.