

Guide to Recommending Grants at RSF Social Finance

1. Send an email to grantrec@rsfsocialfinance.org using one of the following:
 - a. PDF Grant Recommendation Form
 - b. Email with text of grant recommendation (see page 3)
 - c. Excel or PDF of Multiple Grant Recommendation Form to submit multiple grant recommendations at once. Be sure to check the check box at the bottom acknowledging the legal language confirmation.
2. Recommend a grant on the [Client Portal](#)
 - a. Step 1: Select Grantee
 - i. On the portal's "Donors & Fundholders" View, click on "Recommend a Grant" on the left-hand side menu.
 - ii. From there, you can search by keyword and find a grantee. We recommend just using one word of the grantee name as there can be syntax issues that make it difficult to find the grantee. If the grantee is not in our database, you can click on "Add a Grantee".
 1. Fill out the details of the new organization. You will be taken back to the "Recommend a Grant" page, where you should be able to see the new organization under the "Frequent Grantee List".
 - iii. Once you've chosen the organization, click on "New Grant" which will take you to a grant details page to enter the relevant details.
 - b. Step 2: Create a New Grant
 - i. The grant entry page will ask you for all the relevant grant details.
 - ii. Note: the minimum grant amount is \$250 for domestic grantees. For international grants, the minimum is \$5,000.
 - iii. Once you click "Continue", you are taken to the last step.
 - c. Step 3: Confirm Grant Recommendation
 - i. On the last page, you will have to sign off on the legal language to submit a complete grant recommendation. It will not be submitted if you do not click on "Confirm Grant Recommendation"!
 - d. Step 4: Confirmation Email
 - i. After confirming, you will receive a confirmation email from iPhi. Email grantrec@rsfsocialfinance.org if there are any issues, or you would like to make any changes.
 - ii. If you would like to provide the grantee's check address, ACH or wire information, you can open the link in a new tab and fill out the DocuSign form.
3. Check Client Portal or email grantrec@rsfsocialfinance.org for grant updates. We will:
 - a. Contact the grantee.
 - b. Verify their 501c3 status or conduct any necessary due diligence.
 - c. Receive their preferred payment method and update all details in grant system.
 - d. Approve grants on Tuesdays and Thursdays for payment on Wednesdays and Fridays.
 - e. The approved grants will go out via check (mailed with award letter), ACH or wire. The ACH or wire payments will be sent via our bank account at Beneficial State Bank, and

the grantees will receive the payment award letter via email from ps@rsfsocialfinance.org.

- f. RSF client portal will show the grants changing from “Entered” status to “Posted”. The “Posted” date is the date we initiated payment and sent the award letter.

Questions?

Please contact grantrec@rsfsocialfinance.org!

GRANT RECOMMENDATION EMAIL

Send an email with this information to grantrec@rsfsocialfinance.org.

Fund Name:

Grantee Organization:

[Fiscally Sponsored Project, if applicable:]

Grant Contact (Name & Email):

Grant Amount:

One-time or Recurring Grant (if recurring, what cadence and end date?):

Grant Purpose:

Fund Named or Anonymous:

Please disclose any relationships (familial, business, or otherwise) with the recommended grantee:

Legal acknowledgement of below (Y/N):

I/we acknowledge that this grant will not fulfill an existing pledge (legally binding pledge made before this grant has been approved by RSF); provide a benefit, goods or services for any specific individual or myself/ourselves or my/our family; pay for dues, membership fees, tuition, goods from charitable auction; support a political campaign or lobbying activity; to support a private non-operating foundation; or to support a Type III non-functionally integrated supporting organization.

I/We understand that this is a recommendation and not a direction. I/We understand that RSF will perform the necessary due diligence to ensure that the organization is a legitimate charity under IRS regulations and that the grant is charitable in nature. RSF may turn down the grant recommendation if the grant does not meet the criteria for approval.