

Conduct Grantmaking

The Orange County Community Foundation is pleased to provide Donor Advisors the opportunity to create, submit and view grant recommendations from their fund:

Instructions

To conduct grantmaking activities, log onto the [OCCF](#) website, click **Make a Grant** from the menu on the left and once in the **Make a Grant Request** page, choose from the following tabs:

- **Make a Grant from My Fund:** Specify the fund from which to make the grant and choose a recipient to be the beneficiary.
 - Select the recipient from a previous grant made from the fund, from OCCF's agency database or enter a new recipient.
 - Input the grant amount to award, the purpose for the recommendation and the name by which the grant should be acknowledged by the recipient.
 - Select the checkbox to indicate an understanding of the legal statement and either **Save as Draft** or **Submit** the recommendation for processing. Clicking **Clear Form** will delete all the information entered in the fields.
- **View Past Recipients:** View previously awarded grants by Fund. Click the headers to sort the information by **Organization Name**, **Address** or **City/State**. Click **Create Grant** to create a new grant recommendation.
- **View Saved Grant Recommendations:** Select the Fund and view your saved grant requests by status of **Saved not Submitted**, **Submitted** or **Processed**. Select the grants to submit for processing or to delete.

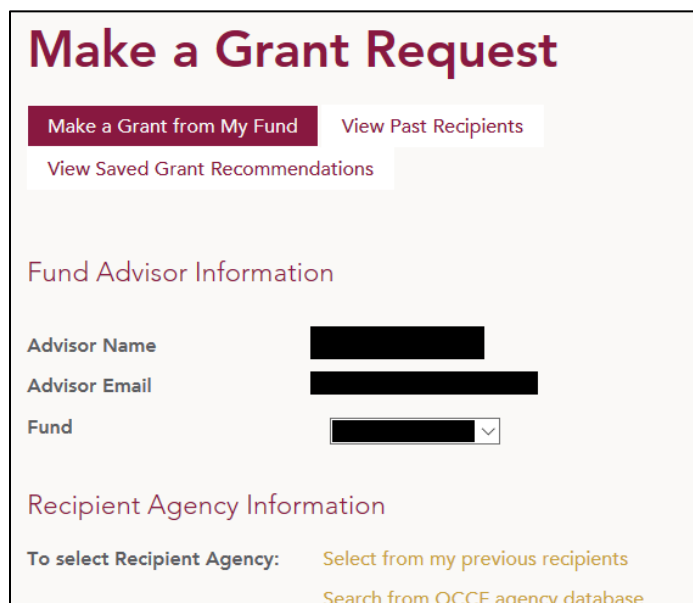
A screenshot of the "Make a Grant Request" web form. The title "Make a Grant Request" is at the top in a large, dark red font. Below the title are three tabs: "Make a Grant from My Fund" (highlighted in dark red), "View Past Recipients", and "View Saved Grant Recommendations". The form is divided into two main sections: "Fund Advisor Information" and "Recipient Agency Information". Under "Fund Advisor Information", there are three fields: "Advisor Name" (with a blacked-out input), "Advisor Email" (with a blacked-out input), and "Fund" (with a dropdown menu showing a blacked-out selection). Under "Recipient Agency Information", there is a label "To select Recipient Agency:" followed by two options: "Select from my previous recipients" and "Search from OCCF agency database".

Figure 1: Make a Grant Request