



Northwest  
Minnesota  
**FOUNDATION**

## Fund Advisor & Fund Viewer Web Portal Quick Start Guide – **NAVIGATING GRANTS**

Northwest Minnesota Foundation's (NMF) online portal provides you with 24/7 access to your fund account at NMF. Once logged in, you can review and complete a number of tasks for your fund(s).

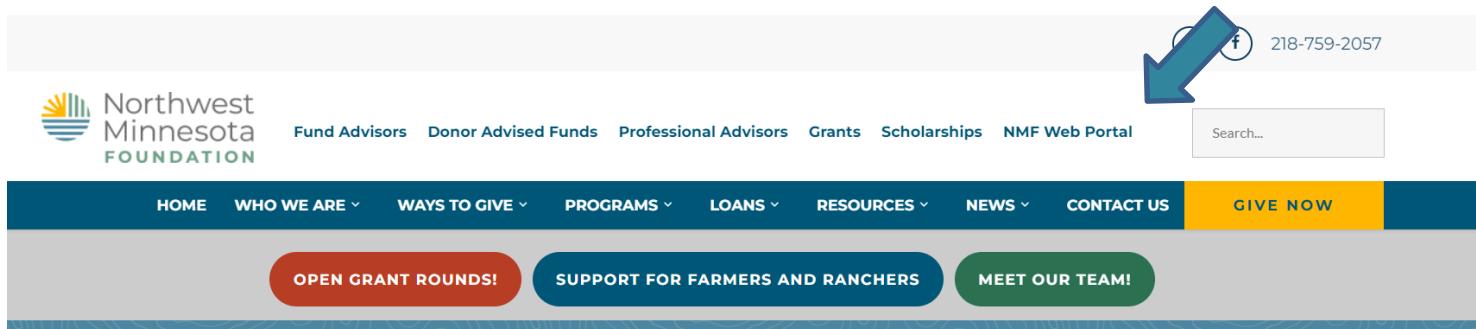
If you are a Fund Advisor (Fund Chairperson, Fund Secretary/Treasurer or the Fund Contact) for a fund at NMF, you will use the Fund Advisor view. As a **Fund Advisor**, with qualified permissions, you can do the following:

- View your fund's financial records, including fund statements and history of contributions and distributions.
- Recommend grants and check grant history.

If you have questions, you may reach out to your Philanthropy Officer or Chris Bell, Philanthropy Specialist at [chrisb@nwmf.org](mailto:chrisb@nwmf.org).

### LOG ON to the PORTAL

Click on the link to access the portal: <https://nwmf.spectrumportal.net/#/donors/home> or go to [www.nwmf.org](http://www.nwmf.org) and click on the link to the portal on our home page.



The screenshot shows the Northwest Minnesota Foundation website. At the top, there is a header with the foundation's logo, name, and a search bar. The main navigation menu includes links for Fund Advisors, Donor Advised Funds, Professional Advisors, Grants, Scholarships, and NMF Web Portal. Below the menu, there is a secondary navigation bar with links for Home, Who We Are, Ways to Give, Programs, Loans, Resources, News, Contact Us, and Give Now. At the bottom, there are three call-to-action buttons: 'OPEN GRANT ROUNDS!', 'SUPPORT FOR FARMERS AND RANCHERS', and 'MEET OUR TEAM!'. The 'NMF Web Portal' link in the top header is highlighted with a large blue arrow pointing towards it.

Northwest Minnesota FOUNDATION

Fund Advisors   Donor Advised Funds   Professional Advisors   Grants   Scholarships   NMF Web Portal

Search...

HOME   WHO WE ARE   WAYS TO GIVE   PROGRAMS   LOANS   RESOURCES   NEWS   CONTACT US   GIVE NOW

# Fund Advisors

## NAVIGATE THE SITE

**TILES MENU ITEMS** - this page provides summary information. For further detail, please go to the Grant History button on the drop down menu.

### Fund Summary (See additional section below)

View fund balance, current available balance and fund statements.

### Grant History (See additional section below)

View history of grants/scholarships or endowment distributions.

### Grants in Progress

View or recommend grants that have not yet been approved.

### Recommend Grant (See additional section below)

Make grant recommendations and view grant history.

### Recommend Transfer

Make transfers recommendations and view history.

### Grant Opportunities

See special grantmaking opportunities available through NMF.

### Gift History (See additional section below)

View a history of contributions to your fund.

### Reports

Access your full fund statement here

## GRANT SUMMARY

The grant summary tile allows you to:

1. Recommend a grant.
2. View pending grant recommendations.
3. View your grant/distribution history. You may also view grant history on the separate grant history tile.

**FUND ADVISOR**

- Home
- IV Fund Summary
- Grant History 
- Grants in Process
- Recommend Grant
- Recommend Transfer
- Grant Opportunities
- Gift History
- Reports

## Recommending a Grant

To make a grant recommendation, you have three options.

1. To make a grant recommendation to a previous grantee:

- Click on grant history.
- Find the grantee on the list of previous grantees.
- Click on the box with 3 dots to the left of the grantee you wish to recommend a grant to.
- Click on “Create a grant recommendation.”
- Under the Grant Information tab, edit the amount, grant purpose, etc. and click Save.

2. To make a grant recommendation to a new or previous grantee:

- On the **Grant Summary** tile, click on **Make a Grant Recommendation**.
- Complete the information on the following three tabs:
  - Recipient
  - Grant Information
  - Submission

## Fund Transfer Recommendation

Donor Name	Chloe Keprios	Target Fund
Donor Email	chloek@nwmf.org	Amount
Status	NEW	

Please select each tab to view/edit your Fund Transfer Request details.

**FUND ADVISOR**

**IV**

**Fund Details** **Recipient** **Grant Information** **Acknowledgement** **Submission**

 **Source Fund \***  
Available Balance\* \$0.00  
Pending Grants & Payments \$0.00

\* As of 1/7/2022

**Next Tab**

**Home**  
**Fund Summary**  
**Grant History**  
**Grants in Process**  
**Recommend Grant**  
**Recommend Transfer**  
**Grant Opportunities**  
**Gift History**  
**Reports**



3. To make a grant recommendation for an interfund transfer to another fund at Northwest Minnesota Foundation (e.g. Northwest Minnesota Foundation Women's Fund):

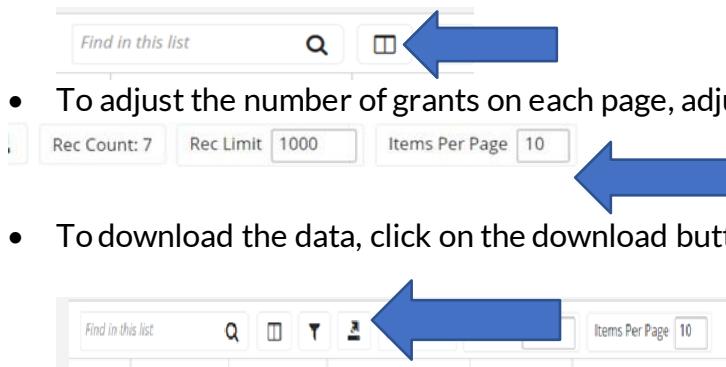
- Use the drop-down menu and select **Recommend Transfer**.
- Complete the information on the following three tabs:
  - Recipient
  - Grant Information
  - Submission

4. If you are a committee making grant recommendations, please e-mail your committee minutes where grants have been approved to Chris Bell, [chrisb@nwmf.org](mailto:chrisb@nwmf.org). We are working on a feature within the portal so that you may upload your minutes. Advised Funds do not need to provide any additional supporting documentation.

## GRANT HISTORY

The **Grant History** tile provides many ways to search your grant history (2012 to present) and to organize the information.

- Click on **Grant History** on the **Grant Summary** tile.
- You may search by grantee name or use the filter function to narrow your search.
- You may choose the columns that will show in the list by clicking on the column icon.



- To adjust the number of grants on each page, adjust the number on **Items per Page**.
- To download the data, click on the download button and choose the format you wish to use.

## ADDITIONAL RESOURCES

- To change your password or edit contact information, click on **My Account** from the navigation bar at the top of your home screen.
- To view NMF's newsletter, click on **Resource Newsletter** under **NEWS** on the NMF home page. To receive newsletters directly, contact Bethany Wesley at [Bethanyw@nwmf.org](mailto:Bethanyw@nwmf.org)

## FIND HELP

- Each page on the portal has help topics to answer your questions. Click on the green half circle on the upper right-hand side of your screen for additional information.

## Web Portal

### Sign In

Welcome to the updated Northwest Minnesota Foundation Web Portal. You must register and create a new password. New registrations will be verified and approved within 1-4 business days.

Once your new registration is verified, you will have full access to the portal.



- For staff assistance, contact Chris Bell, Philanthropy Specialist, at [chrisb@nwmf.org](mailto:chrisb@nwmf.org)