Community Foundation
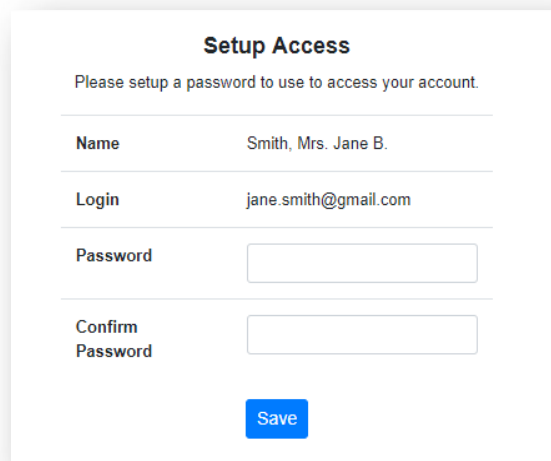## Santa Cruz County

Donor Portal Guide

www.cfscc.org

Donor Portal Guide

Donor Portal

As a fund holder of Community Foundation Santa Cruz County, you have the ability to access your fund information online through our Donor Portal. Within the portal, you can easily check your fund balance, view and download quarterly market summaries, request and track grants, add to your fund and more. The Donor Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

Initial Login Process and Creating Your Account

You will receive an email from the Community Foundation with a custom invitation link to create your account in the Donor Portal. Your username will be your email address that we have on file. If you would like to change your username for any reason, please contact our team at recommend@cfscc.org. Once you click on the invitation link in the email, we'll prompt you to create a password of your choice.


Returning Users

To access the Donor Portal, visit the Community Foundation's website at www.cfscc.org and click Donor Login on the top navigation bar, above the "Give" button. You will be redirected to a login page where you will enter your unique username and password. If you forgot your credentials, please contact our team at recommend@cfscc.org. While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you.
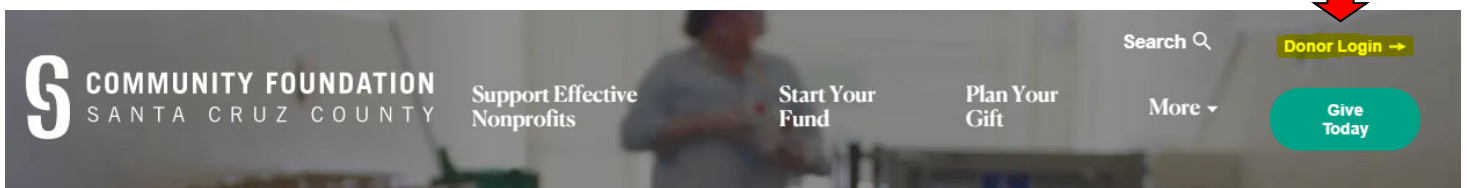
Note: If you unsuccessful in logging on, please contact our team at recommend@cfscc.org or Hilary Bryant at (831) 662-2065.

Donor Portal Features

Once logged in, your fund's home page will appear. **Current Balance** is the amount in your fund as of the date viewed. (Note: the current balance may not yet include fees or pro-rated earnings attributable to the fund, depending on the date viewed. These are allocated monthly.)

Available Cash is the amount available for grantmaking. If you have an endowed fund, you will have a **Spendable Balance**, which is the result of the current year's spending calculation plus any unspent grantmaking funds from previous years.

Solutionaires Fund

| Home | Gift History | Grant History | Recommend A Grant | Nonprofit Impact Profiles | Statements | Files | Give | Logout |

Current Balance: $874.77
Available Cash: $874.77

The tabs at the top of the page under the fund name display different features available to you as a fund holder.

Home: Your homepage is a quick snapshot of your fund's most recent activity. It will show your fund's current balance, the spendable amount, all fund advisors, recent contributions and recent grant history.

Choose Fund: If you have more than one fund you can select the one you wish to view on this tab.

Gift History: This tab shows all contributions made to your fund. Clicking on a contributor's name will bring up their history of contributions including date of gift and amount.

Grant History: This tab shows the history of grants awarded from your fund including date, organization name, purpose and amount.

Recommend a Grant: This tab allows you to make a grant request from your fund and see recent grant statuses.

Nonprofit Impact Profiles: This tab allows lets you browse a selection of local nonprofits with current giving opportunities. You can find one-page profiles of their current needs and impact.

Statements: This tab shows your fund's quarterly fund statements. Next to the statement you wish to view, click Print and the system will generate a PDF in a new window that you may view, save or print.

Files: This tab will show any viewable files regarding your fund. At this time, fund agreements are not available through the Donor Portal, but please contact our team at recommend@cfscc.org if you want to get a copy of your fund agreement.

Give: This tab opens up a new window for you to make a gift to your fund. You can also set up a recurring donation, or give to another fund at the Community Foundation.

Logout: Clicking Logout will automatically log you out of the Donor Portal. If you do not log out this way, you will be automatically logged out at midnight.

Recommending a Grant from Your Fund to an Organization

To recommend a grant from your fund, click the Recommend a Grant tab. Recommending a grant is a three-step process:

1. **Choose a Grantee in one of four ways:**

    A. Choose from Previous Grantee
    Choose the organization you want to support from this drop-down list of organizations you have previously supported.

    or

    B. Other Foundation Funds
    Choose an endowment fund you want to support from this drop-down list of funds at the Community Foundation.

    or

    C. Search for Other Grantees
    Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations. Once you find the organization you want to support, click Create Request.

    or

    D. Enter Grantee Information Manually
    If you can't find the organization you wish to support, you will need to enter the organization's information manually: name, address and phone number. Once you enter this information, click Submit.

Once the organization has been selected, you will be redirected to a new page to provide more detail including grant description, amount and whether you wish to be anonymous to the grantee.

2. **Enter Grant Details**
In the description field, please provide the grant purpose. Keep in mind that if you don't designate a specific grant purpose, your grant will be earmarked for General Support. A $250 minimum is required for each grant request. You can also choose to remain anonymous to the grantee by selecting the Anonymous checkbox. You may set up a recurring grant by checking the Recurring box and then filling in the recurrence start date and the recurrence interval. If you want to upload an attachment, such as a solicitation letter with details about the grant, you may do so. If you have additional instructions for notes you would like us to see, please enter them in the Special Handling Instructions field. Once you are finished entering this information, click Review.

Recommending a Grant, continued

3.   Review and Submit Request
Review your grant request details and click
Submit Request. Once you submit the request,
you will receive an automated confirmation
email and our staff will begin processing. If you
wish to make changes to your request, click **Edit
Request**.

Review New Grant Request

Grantee	Aztecas Youth Soccer Academy
Description	
Amount	$ 250
Anonymous	Yes

Special Handling Instructions to CFSCC

Thank you for giving through your fund at Community Foundation Santa Cruz County! We review each grant suggestion upon receipt and issue grants as soon as possible. In some cases, we may need to contact you and/or the suggested grant recipient for additional information before approving the grant. If you need to make any changes to your grant recommendation, please edit in your donor portal (if the status is still listed as "pending") or contact us at recommend@cfscc.org.

Submit Request   **Edit Request**

Viewing Recent Grant History

To review your **most recent** grant history, click the **Recommend a Grant** tab.

Grants

Date	Status	Recipient	Description	Amount
08/28/2018	Pending	ArtsinStark	General Support	100.00

Under the Status column, you will see one of six statuses for each grant:

Request means that your grant request has been sent to our staff. If you would like to cancel a grant request before it is processed, click the yellow Cancel button.

Cancelled means your grant request has been cancelled.

Pending means that our staff is currently processing your grant request. Approved means your grant request has been approved but not yet paid.

Paid means that the grant request has been approved and a payment has been sent to the organization.

Completed means the grant request has successfully been fulfilled.

Email Alerts

If you have a donor-advised fund we will alert you via email every time a grant has been paid from your fund. If you would like to cancel these alerts, please contact our team at recommend@cfscc.org.

Donor Portal - Find Giving Opportunities

What's an Impact Profile?

To support local giving, we've offered Santa Cruz County nonprofits the chance to share one page summaries of their work, key accomplishments and goals they have in the year ahead. If you're looking for new ideas of where you might give, we hope it's a helpful tool to learn and make decisions with. If you're moved to give, you can recommend a grant of any size from the Recommend A Grant tab.
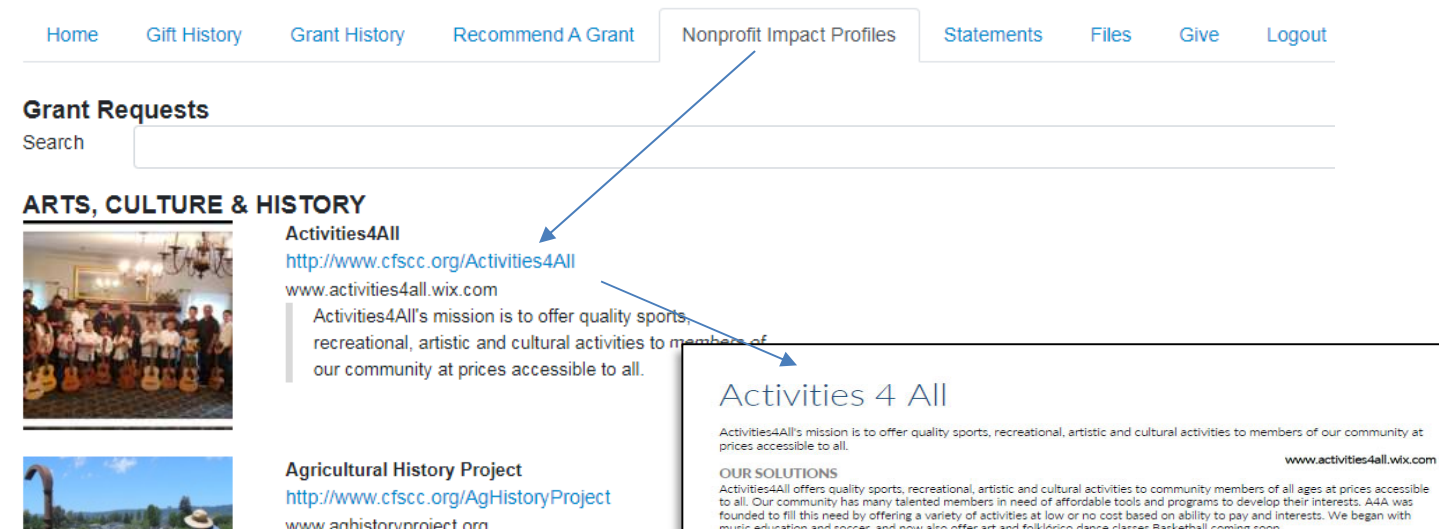
How can I view the one-page Impact Profiles of various nonprofits?

Click on the Nonprofit Impact Profiles tab:
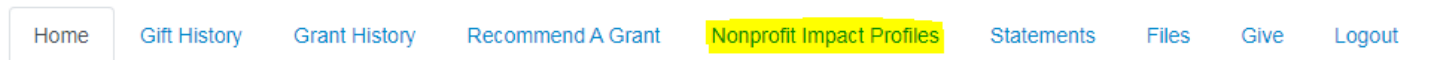
Scroll through the list and or use the search box to search for a name. Click the blue link to see the Impact Profile.

What if I want to make a grant after reading an Impact Profile?

Return to the **Recommend A Grant** tab. See page 4 To submit a grant through the portal or see page 7 for email and phone options.

We'd love your feedback on how to make the Nonprofit Impact Profiles even more useful to you As you consider giving opportunities. Let us know at recommend@cfscc.org.

Donor Portal - Frequently Asked Questions

How often are quarterly fund statements posted?

Quarterly fund statements are posted the month following the end of each quarter. You will be notified via email when your statement is ready to be viewed in the Donor Portal. If you are not receiving these notification emails, please contact our team at recommend@cfscc.org.

How do I change my password?

If you need to change your password, please contact our team at recommend@cfscc.org or call Hilary Bryant, Donor Services Officer, at 831.662.2065. While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you.

How long does it take for my recommendation to be processed?

Generally, recommendations are processed within five business days. If the recommendation is to an organization that is new to us, it may take longer.

To what kind of organizations can I make recommendations?

Grant recommendations must be made to 501(c)(3) organizations (including schools, churches and government entities).

What is the minimum amount for a grant recommendation? A $250 minimum is required for each grant recommendation.

Are there other ways to submit a donor recommendation?

Yes, recommendations may be submitted via email or phone

Email: Send your recommendation to recommend@cfscc.org. Please include the fund name, grant amount, grant purpose, whether or not you wish the grant to be anonymous, and any additional instructions in the email. A member of our team will confirm your recommendation and you will receive an auto-generated email from the Donor Portal, indicating that the recommendation is entered in the system.

Phone: Please speak to Hilary Bryant, Donor Services Officer, at 831.662.2065. After your conversation, Hilary will send you an email to confirm your recommendation. You will also receive an auto-generated email from the Donor Portal, indicating that the recommendation has been entered in the system.

How do I know if a grant I recommended has been paid?

You will receive an email notification when the grant is paid. You can also see your most recently paid grants on your Donor Portal homepage.

Who do I contact if I'm having issues with the Donor Portal?

If you have any questions or are experiencing issues with the Donor Portal, please contact our team at recommend@cfscc.org or call Hilary Bryant, Donor Services Officer, at 831.662.2065.