



# Donor Portal Guide

[www.cfsc.org](http://www.cfsc.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, recommend 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@cfsc.org](mailto:recommend@cfsc.org). Once you click on the invitation link in the email, we'll prompt you to create a password of your choice.

**Setup Access**

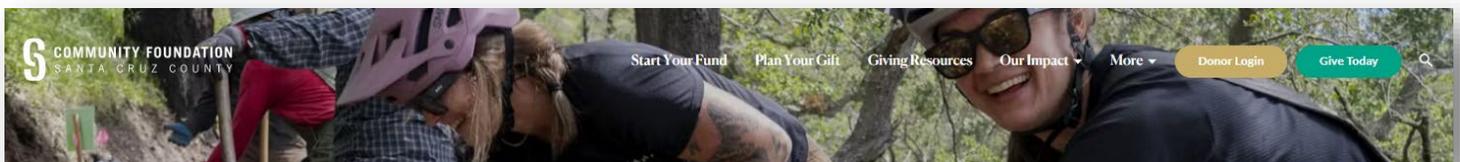
Please setup a password to use to access your account.

Name	Smith, Mrs. Jane B.
Login	jane.smith@gmail.com
Password	<input type="password"/>
Confirm Password	<input type="password"/>

[Save](#)

## Returning Users

To access the Donor Portal, visit the Community Foundation's website at [www.cfsc.org](http://www.cfsc.org) and click the gold Donor Login button 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@cfsc.org](mailto:recommend@cfsc.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.

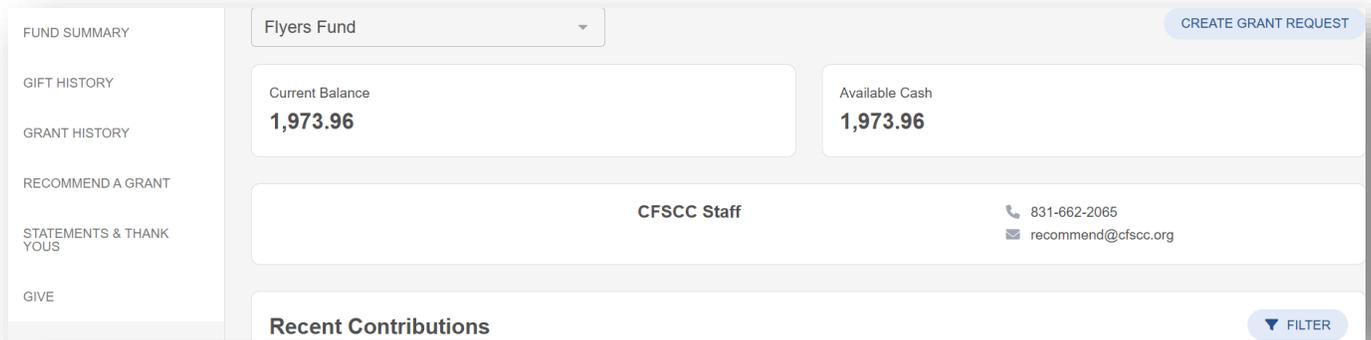


**Note:** If you are unsuccessful in logging on, please contact our team at [recommend@cfsc.org](mailto:recommend@cfsc.org) or Abbey Ohtake at (831) 662-2033.

## Donor Portal Features

Once logged in, your fund's home page will appear for you to select to view. **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.



The menu to the left of the fund summary displays different features available to you as a fund holder.

**Fund Summary:** 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.

**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. Click over to "Grant History" tab to view details.

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

**Nonprofit Impact Profiles:** This tab 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 & Thank Yous:** This tab shows your fund's quarterly fund statements. Next to the statement you wish to view, click View and the system will generate a PDF in a new window that you may view, save or print. The Thank Yous tab will show any viewable files regarding your fund, such as grantee thank you notes. Currently, fund agreements are not available through the Donor Portal, but please contact our team at [recommend@cfsc.org](mailto:recommend@cfsc.org) if you want to get a copy of your fund agreement.

**Give:** This page is where you 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. Create a Grant 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.

### Choose from previous Grantee

Grantees you have given to in the past

or

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

Other foundation funds

or

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**.

### Search for other Grantees

Name

Search

or

or

**D. Enter Grantee Information Manually**  
If you can't find the organization you wish to support through any of the above ways, you will need to enter the organization's information manually: name, address and EIN. All of that information can be found on the organization's website. Once you enter this information, click **Submit**.

### Enter Grantee information manually

Name \*

Address \*

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 operating support. A \$250 minimum is required for each grant recommendation. **Please write your name in the last text box if you would like it included in the grant award letter.** 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**.

**Grant Request**

Grantee	Community Foundation Santa Cruz County
Primary Contact	Susan True
Description	<input type="text"/>
Amount	<input type="text"/>
Anonymous	<input type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)
Attachment Description	<input type="text"/>
Would you like your name included in the award letter? Do you have any other instructions for us?	<input type="text"/>

## Recommending a Grant, continued

### 3. Review and Submit Request

Review your grant recommendation details and click **Submit Request**. Once you submit the recommendation, you will receive an automated confirmation email and our staff will begin processing. If you wish to make changes to your recommendation, click **Edit Request**. If we have begun processing the grant, you will not be able to edit your recommendation. Please email [recommend@cfsc.org](mailto:recommend@cfsc.org) to make any changes to your recommendation.

**Review New Grant Request**

Grantee	Community Foundation Santa Cruz County
Description	for general operating support
Amount	\$ 250
Anonymous	No

Would you like your name included in the award letter? Please include my name in the award letter.

Do you have any other instructions for us?

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@cfsc.org](mailto:recommend@cfsc.org).

You cannot submit this request because the amount requested is more than the fund's available cash balance.

[EDIT REQUEST](#)

## Viewing Recent Grant History

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

Grants					
Request Date	Status	Recipient	Description	Amount	
12/02/2024	Complete	Black Surf Santa Cruz	for general operating support with no gift acknowledgement needed	500.00	

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

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

**Cancelled** means your grant recommendation has been cancelled.

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

**Paid** means that the grant recommendation has been approved, and a payment has been sent to the organization.

**Completed** means the grant recommendation has successfully been paid and 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@cfsc.org](mailto:recommend@cfsc.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 starting at \$250.00 from the Recommend A Grant tab.

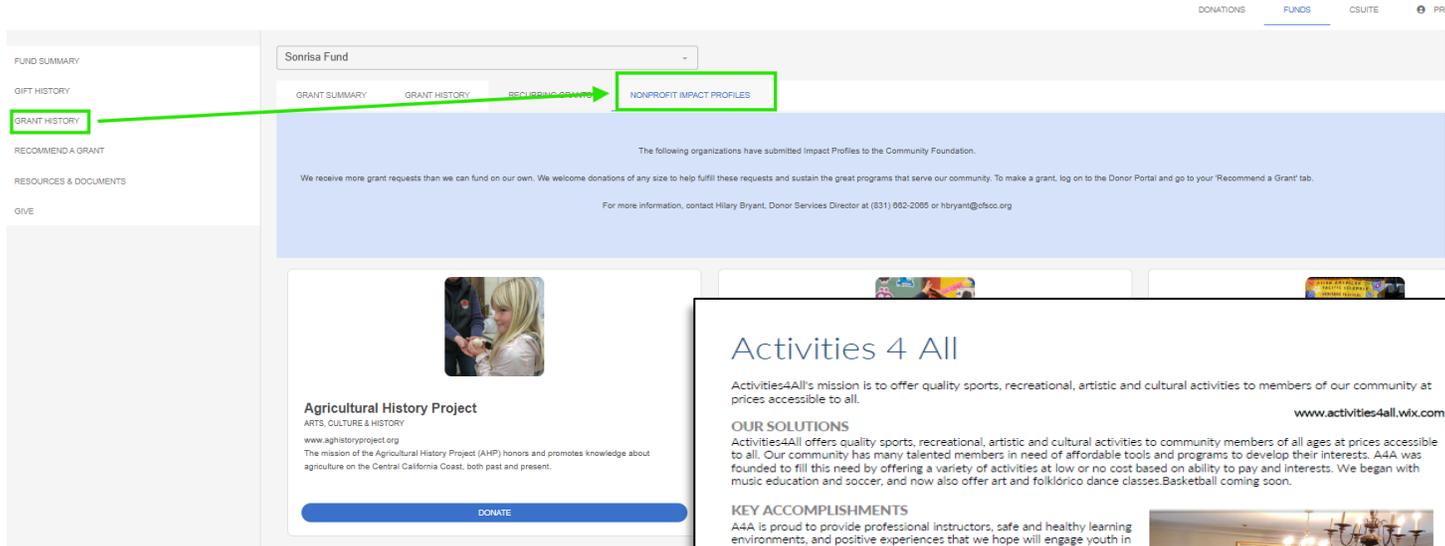
## How can I view the one-page Impact Profiles of various nonprofits?

Click on the Nonprofit Impact Profiles tab:

## Solutionaires Fund



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@cfsc.org](mailto:recommend@cfsc.org).

### Activities 4 All

Activities4All's mission is to offer quality sports, recreational, artistic and cultural activities to members of our community at prices accessible to all. [www.activities4all.wix.com](http://www.activities4all.wix.com)

**OUR SOLUTIONS**  
Activities4All offers quality sports, recreational, artistic and cultural activities to community members of all ages at prices accessible to all. Our community has many talented members in need of affordable tools and programs to develop their interests. A4A was founded to fill this need by offering a variety of activities at low or no cost based on ability to pay and interests. We began with music education and soccer, and now also offer art and folklorico dance classes. Basketball coming soon.

**KEY ACCOMPLISHMENTS**  
A4A is proud to provide professional instructors, safe and healthy learning environments, and positive experiences that we hope will engage youth in our community and discourage gang involvement and other unhealthy behaviors.

- We began in 2010 and received nonprofit status in 2015. Our activities align with state educational standards and we are seeing participants grow to become mentors and teachers to younger students.
- We serve 500 community members (except during the pandemic).
- We serve 100 students in virtual music and dance classes during the pandemic (80 youth and 20 adults – their parents).
- A4A musicians perform live at nursing homes, schools, and festivals.

**THE DIFFERENCE WE MAKE**  
Community-driven, A4A welcomes everyone regardless of age, income, education, race, religion, or sexual orientation. All participants are low-income, migrant, and Spanish speaking, and usually entire families participate together in music and dance classes, and in soccer activities, with parents often serving as volunteer coaches.

Return participants	90%
Return volunteers	85%
Low-income participants	100%
Youth served annually	300
Served annually	250 soccer players; 150 music students (40 adults/110 kids)

We request feedback from families, volunteers, and instructors to improve. We also evaluate the impact of our organization by observation and by our return rate. We see participants develop skills, personal growth, and educational growth; and note that most participants stay with us for years, engaged with their chosen activity. Our volunteer staff includes: executive director, treasurer, soccer coordinator, music coordinator, 4-6 administrative assistants part-time.

**GOALS & DREAMS**  
We have some immediate needs to serve clients and also hope to improve organizationally to better support the Watsonville community. Here is our list of dreams with estimates totaling \$30,000:  
Organizational: Design a professional, bilingual website + update our Facebook page. \$1,500  
Two laptops for our treasurer and top administrative volunteer. \$1,000  
Top priority: Two pairs of soccer goals (for two games at a time) \$4,000/one pair  
Video camera so that our tech-savvy youth can create videos of music and dance performances \$1,500.  
Musical instruments for students: Violin, guitar, trumpet, bass, accordion, drums. \$4,000.  
Quality sound system for live performances. \$5,000.  
Soccer program: Balls, uniforms, training equipment (cones, ladders, etc.) and trophies. Cost TBD.  
Staff development - CPR, first aid, sexual harassment prevention for coaches, volunteers and instructors. Soccer referee training. Cost TBD.  
Clean-up crews for facilities, soccer referees; soccer field maintenance.

BY THE NUMBERS	
Annual Budget	\$57,282
Paid Workforce Size	0
People Served Annually	500
% of continuing participants	90
% of continuing volunteers	90
Low income participating families	100

# Donor Portal - Grantee Thank You Notes

## Acknowledgements from Grantees

Grantees regularly send personalized Thank You notes to the Community Foundation. It is our practice to forward personalized correspondence electronically to Donor Advisors every week.

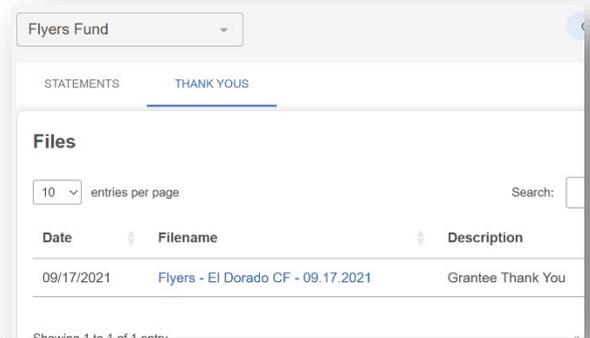
## Communication Preferences

When your fund is established, the Philanthropic Services Coordinator will reach out with Donor Portal instructions. At this time, you can choose if you would like Thank You notes to be physically sent to you via mail, or if electronic copies are preferred.

## How To Access Your Thank You Notes

All acknowledgements are accessible in the Funds section of the Donor Portal under the Resources & Documents section.

Navigate to the Thank Yous tab to view your archive. Files are named by Fund Name – Grantee – Date Received



## Best Practices

We want to ensure fund advisors receive proper acknowledgement for their generosity. When we send out grant information, it is standard to only include the Fund Name. If you wish for your name to be included, please write in how you would like to be acknowledged in the last text box of the grant recommendation page.

Would you like your name included in the award letter? Do you have any other instructions for us?

Include Jane Smith in the award letter.

## Have Questions?

If you need help accessing your Thank You notes, updating your communication preferences, or have any questions regarding Donor Portal access, please reach out to Philanthropic Services Coordinator Abbey Ohtake at [aohtake@cfsc.org](mailto:aohtake@cfsc.org) or 831.662.2033.

# 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@cfsc.org](mailto:recommend@cfsc.org).

## How do I change my password?

If you need to change your password, please contact our team at [recommend@cfsc.org](mailto:recommend@cfsc.org) or call Abbey Ohtake, Philanthropic Services Coordinator at 831.662.2033. 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@cfsc.org](mailto:recommend@cfsc.org). Please include the fund name, grant amount, grant purpose, whether or not you wish the grant to be anonymous or include your name, 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 Director 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 into 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@cfsc.org](mailto:recommend@cfsc.org) or call Abbey Ohtake, Philanthropic Services Coordinator, at 831.662.2033.