



Donor Portal Guide

Effective June 24, 2019

Donor Portal Guide

Donor Portal

As a fundholder of Fairfield County's Community Foundation, you have the ability to access your fund information online through your FCCF Donor Portal. Within the portal, you can easily check your fund balance, view and download monthly Fund Statements, 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 Fairfield County's Community Foundation 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 Philanthropic Services at 203-750-3200 or Help@FCCFoundation.org. Once you click on the invitation link in the email, you will be prompted to create a password of your choice. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.

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 - Accessing Donor Portal once your account has been set-up

To access the Donor Portal, visit Fairfield County's Community Foundation's website at www.FCCFoundation.org and click Login, then Donor Portal on the top navigation bar. You will be redirected to a login page where you will enter your unique username and password. If you forgot your credentials, please select "Forgot Password."

Note: The Donor Portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact Philanthropic Services at 203-750-3200 or Help@FCCFoundation.org.



Select "Donor Portal" from the drop down menu that will appear from here

Donor Portal Features

Once you are logged in, your fund's homepage will appear (see example below). *If you manage multiple funds, you will see a Choose Fund menu. Choose the fund you wish to review from the drop-down menu.*



Your Donor Portal

The Wang Family Fund

Home Contributions Grants Grant Request Statements Files Donate Other Logout

Current Balance: \$17,110,229.95

The tabs at the top of the page display different features available to you as a fundholder:

Home

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

Contributions

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

Grants

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

Grant Request

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

Statements

This tab shows your fund's monthly Fund Statements. Next to the summary 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 and other confidential documents are not available through the Donor Portal, but please contact Philanthropic Services if you would like any documents added to your account.

Donate

This tab opens up a new window for you to make a gift to your fund. You can also set up a recurring donation.

Other Fund Activity

This tab shows other payments from the fund activity. Excluding Donor Advised.

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.

Submitting a Grant Request

To recommend a grant from your fund, click the **Grant Request** 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 Fairfield County's 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**.

Choose from previous Grantee

A Grantees you have given to in the past

B Other foundation funds

or

C Search for other Grantees

Name

or

D Enter Grantee information manually

Name *

Address *

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including grant description and amount.

2. Grant Details

In the description field, please provide the grant purpose and any special handling. Keep in mind that if you don't designate a specific grant purpose, your grant will be earmarked for General Support. A \$500 minimum is required for each grant request. You can also choose to remain anonymous by selecting the Anonymous checkbox. Additionally, upload attachments. Once you are finished entering this information, click **Review**.

New Grant Request

Grantee

Description 15/255 characters

Amount

Anonymous

Attachment No file chosen (or drag and drop anywhere on the page)

Attachment Description

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.

Review New Grant Request

Grantee	Person-to-Person
Description	General Support
Amount	\$ 500
Anonymous	No

Viewing Grant History

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

Grants

Date	Status	Recipient	Description	Amount
08/28/2018	Pending	ArtsinStark	General Support	500.00

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 pending 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 check has been paid out to the organization.

Completed means the grant request has successfully been fulfilled.

Email Alerts

We will alert you via email every time a donation is made to your fund or a grant has been awarded from your fund. These alerts can be cancelled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations. If you would like to cancel these alerts, please contact Philanthropic Services at 203-750-3200 or Help@FCCFoundation.org.

Questions

If you have any questions about the Donor Portal, contact Philanthropic Services at 203-750-3200 or Help@FCCFoundation.org.

Donor Portal Frequently Asked Questions

How do I change my password?

If you need to change your password, please click on the "Forgot Password?" link on the webpage where you enter your user ID and password and follow the prompts. If this doesn't work, contact us at Help@FCCFoundation.org or call 203-750-3200. While we can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you. However, we'd be happy to reset it for you!

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

Generally, grant recommendations are processed within 3-8 business days.

What is the minimum amount for a grant recommendation?

A \$500 minimum is required for each grant recommendation.

Can I recommend a grant from my donor advised fund to attend a charity event such as a gala, fund raising dinner, or golf outing?

No – The most common reason for denying a grant is a donor's desire to use that grant for table sponsorship or event tickets. When you make your initial contribution to a donor advised fund, your contribution is 100% tax deductible. That is because you do not receive any goods or services in exchange for that contribution. Charitable events and galas provide their attendees with benefits that aren't tax deductible -- such as food, drinks and/or door prizes. Therefore, grants recommended for these purposes cannot be approved. You can, however, make a grant request for general support of the organization's gala, fundraising event, or golf outing and then purchase tickets using your credit or debit card.

Can I recommend a grant from my donor advised fund to any charity or nonprofit organization?

Not necessarily – FCCF can make grants to charitable non-profit organizations that are tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3) and public charities under IRS Section 509(a). This includes public schools and most churches and religious organizations. FCCF can also make grants to private operating foundations (e.g., hospital foundations and college foundations). FCCF cannot make grants to private non-operating foundations. If you have a special grant request, please contact a member of FCCF's staff at Help@FCCFoundation.org or 203-750-3200.

Can I recommend a grant from my donor advised fund to pay a pledge or commitment I have made to a charitable organization?

No – IRS regulations prohibit grants from donor advised funds to satisfy a pledge obligation. You can, however, inform the charitable organization of your intent to make a grant recommendation from your donor advised fund, but that this grant request is subject to the pre-approval of FCCF's Board of Directors.

Can I recommend a grant from my donor advised fund to help fund one of FCCF's programs or initiatives?

Yes – FCCF is a 501(c)(3) non-profit organization and can process an internal transfer directly from your donor advised fund to an internal account that has been set up specifically for all of our programs or initiatives.

Can I recommend a grant from my donor advised fund to pay for a college scholarship for a student?

No – IRS regulations prohibit grants from donor advised funds to be for the benefit of a specific person. You may, however, make a grant to a college or university for general scholarship support or to be added to a specific scholarship fund administered by the school.

Are there any other specific types of grants that FCCF cannot make from donor advised funds?

Yes – Per IRS regulations, FCCF cannot make grants from donor advised funds:

- to individuals or for the benefit of a specific person;
- to political candidates, political parties, or to 501c4 advocacy groups;
- for any personal benefit, such as tuition, dues, membership fees, or any goods purchased at a charitable auction.

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

Your most recent grants paid will be listed on your Donor Portal homepage. Or, you may click on the Grant Request tab and on the right side of this page, you will see your recent grant requests with their status.

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 Philanthropic Services Team at Help@FCCFoundation.org or 203-750-3200.