



# Donor Portal Guide

Username: **Your email address on file with DCCF**

Password:

**Direct Link to the Donor Portal:**

**<https://dccfoundation.fcsuite.com/erp/fundmanager>**

# Donor Portal Guide

## Donor Portal

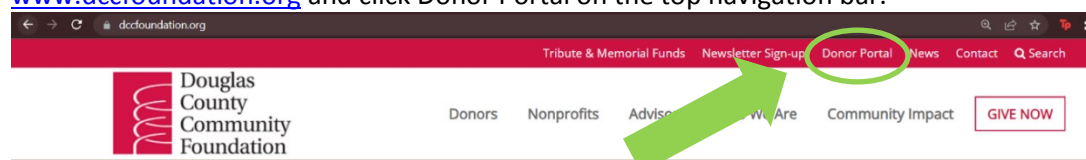
As a Douglas County Community Foundation fund holder, you have the ability to access your fund information online through our [Donor Portal](#). Within the portal, you can easily check your fund balance, view and download quarterly fund statements, request and track grants, contribute to your fund, print tax receipts, and more. The [Donor Portal](#) makes it easy to manage your fund and is available 24/7 from anywhere, on any device. While most browsers are compatible with our software, **Safari** is **not** compatible with the functionality of the system.

## Initial Login Process and Creating Your Account

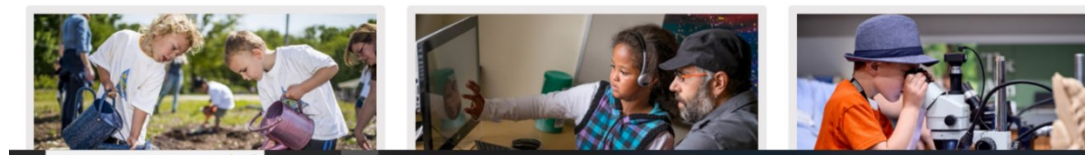
You will receive an email from Douglas County Community Foundation with a custom invitation link to create your account in the Donor Portal. Your username will be your email address that we have on file. If you would like to change your username for any reason, please contact Heather Hoy at 785-843-8727 or [heatherhoy@dccfoundation.org](mailto:heatherhoy@dccfoundation.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. The password requirements are:

- Minimum of eight (8) characters
- Include a minimum of one (1) each of three (3) of the characters below:
- Lower case letters
- Upper case letters
- Numbers
- Special characters (i.e. !,\$,#,%,&)

To access the Donor Portal, visit Douglas County Community Foundation's website at [www.dccfoundation.org](http://www.dccfoundation.org) and click Donor Portal on the top navigation bar.



# Local expertise.



You will be redirected to a login page where you will enter your username and password. Your username will be your email address. If you don't know your password, click on the **Forgot Password** link and reset your password.

If you wish to go directly to the Donor Portal site, the website address is:

<https://dccfoundation.fcsuite.com/erp/fundmanager>



[Profile](#)

**PLEASE NOTE:** Balance amounts do NOT include recent market activity. For updated balance information, please contact Chip Blaser [chipblaser@dccfoundation.org](mailto:chipblaser@dccfoundation.org).

[Forgot Password?](#)

Login

**PLEASE NOTE:** Balance amounts do NOT include recent market activity. For updated balance information, please contact Chip Blaser [chipblaser@dccfoundation.org](mailto:chipblaser@dccfoundation.org).

## Donor Portal Features

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

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



[Profile](#)

### Family Charitable Fund

[Home](#) [Gifts](#) [Grants](#) [Grant Request](#) [2023 DCCF Mid-year Nonprofit Organization Mid-year Grant Catalog](#) [Fund Statements](#) [Files](#) [Donate To Your Fund](#)  
[Gift Receipts](#) [Vouchers](#) [Invoices](#) [Logout](#)

**PLEASE NOTE:** Balance amounts do NOT include recent market activity. For updated balance information, please contact Chip Blaser [chipblaser@dccfoundation.org](mailto:chipblaser@dccfoundation.org).

**Date Created:**

**Current Balance:**

**Total Contributions:**

**Total Grants:**

Fund Advisors are: Blaser, Mr. Chip F.; Blaser, Mrs. Karen

#### Top 10 Contributors



## Donor Portal Tab Information

**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.

**Gifts** 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.

**DCCF Nonprofit Grant Catalogs** An opportunity for you to connect with nonprofit organizations' current funding needs and donate directly from your fund. Participating nonprofit organizations must have a fund with DCCF and be a registered 501(c)(3).

**Fund Statements** This tab shows your fund's quarterly 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 and documents regarding your fund. At this time, fund agreements and other confidential documents are not available through the Donor Portal. Please contact Heather Hoy, [heatherhoy@dccfoundation.org](mailto:heatherhoy@dccfoundation.org), or 785-843-8727, ext. 104, if you would like any documents added to your Donor Portal.

**Donate to your fund** This feature is only available if you grant DCCF permission to add your fund. You may wish to do this if you want to make credit card gifts to your fund online. This tab opens up a new window for you to make a gift to your fund. You can also set up a recurring gift. You will need to type the name of your fund into the search bar to access the ability to donate to your fund.

**Gift Receipts** This tab will allow you to view and download gift receipts for tax deductible gifts you have made to the foundation throughout the year.

**Invoices and Vouchers** This tab is available for organization funds for special projects and events.

**Logout** Clicking Logout will automatically log you out of the Donor Portal. If you do not log out, you will be automatically logged out of the Donor Portal at midnight Mountain Time.

**Export** The Export function only appears in the menu beside "Logout" for the following tab items: Gifts, Grants, Vouchers, and Invoices. This feature will allow you to download a .csv document with the information from the portal.

## Submitting a Grant Request

To recommend a grant, or multiple grants from your fund, click the Grant Request tab. Submitting a grant request is a **FOUR**-step process.

### STEP 1: CHOOSE 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.

PLEASE NOTE: Balance amounts do NOT include recent market activity. For updated balance

NOTE: There is an active grant catalog happening. You can give [here](#)

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. The Douglas County Community Foundation will receive notification of your request and process your grant. We will notify you once the grant has been completed. If you have any questions or concerns, please contact Heather Hoy at [heatherhoy@dccfoundation.org](mailto:heatherhoy@dccfoundation.org).

PLEASE NOTE: YOU MUST CLICK ON "REVIEW" ON THE RIGHT SIDE OF THE SCREEN BELOW YOUR GRANT REQUESTS TO FINALIZE SUBMISSION.

Grants already processed from your fund are listed.

#### Choose from previous Grantee

Grantees you have given to in the past

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

Foundation funds you have given to in the past

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

#### Search for other Grantees

Name

City

State

Search

- 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.

**Enter Grantee information manually**

Name \*

Address \*

City\*

State\*

Zipcode \*

Phone \*

Email

\* required information


**E. Grant Details**

In the description field, please provide any special instructions. A \$100 minimum is required for each grant request. You can also choose to remain anonymous by selecting the Anonymous checkbox.

**STEP 2: ADD TO GRANT REQUEST**

You need to click on “**Add to Grant Requests**” once you have entered all the information. If you are finished entering grant requests, move on to **STEP 3**. Or, you may go back to the top of the left column and enter additional grant requests.

Grant Request Notes



Add To Grant Requests

## STEP THREE: REVIEW AND SUBMIT GRANT REQUESTS

Review your grant request details **ON THE RIGHT SIDE OF THE SCREEN** you will see “Unsubmitted grant Requests” and click **REVIEW AND SUBMIT GRANT REQUESTS**.

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. The Douglas County Community Foundation will receive notification of your request and process your grant. We will notify you once the grant has been completed. If you have any questions or concerns, please contact Heather Hoy at [heatherhoy@dccfoundation.org](mailto:heatherhoy@dccfoundation.org).

**PLEASE NOTE: YOU MUST CLICK ON "REVIEW" ON THE RIGHT SIDE OF THE SCREEN BELOW YOUR GRANT REQUESTS TO FINALIZE SUBMISSION.**

Grants already processed from your fund are listed.

Choose from previous Grantee

Grantees you have given to in the past

### Unsubmitted Grant Requests

	Recipient	Description	Amount	
Delete	Lawrence Humane Society	Giving for Good	2,500.00	Edit
			Grant Request Total	2,500.00

Review and Submit Grant Requests

## STEP 4: SUBMIT GRANT REQUESTS

Review your grant request details, read the **grant recommendation acknowledgement**, and click on **SUBMIT REQUESTS**.

**PLEASE NOTE: Balance amounts do NOT include recent market activity. For updated balance information, please contact Chip Blaser [chipblaser@dccfoundation.org](mailto:chipblaser@dccfoundation.org).**

### Review Grant Requests

Grantee	Description	Amount	Anonymous
Americana Music Academy	Grant Request Notes:	\$ 200.00	No
Total		\$ 200.00	

I acknowledge that this grant suggestion must meet the approval of the Board of Directors of Douglas County Community Foundation. I also understand that this suggested grant does not represent the payment of any pledge or other financial obligation of mine or any member of my family, and that neither I nor any member of my family expects any personal benefit from the grant. To keep the IRS happy, in relation to this grant, I agree that every penny of this grant will be used for a charitable purpose, and neither I nor anyone I know will receive anything more than a coffee mug or any other incidental benefit in return.

Submit Requests

You will then be prompted to click on CONTINUE and you will return to the grant request section of your online fund information.

**\*\*\*You will receive an email confirming the submission of your grant requests. If you do not receive an email within one hour of submitting your request, please contact Heather Hoy.\*\*\***

## 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	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 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.

## Questions

If you have any questions about the Donor Portal, contact Heather Hoy at 785-843-8727 or [heatherhoy@dccfoundatiof.org](mailto:heatherhoy@dccfoundatiof.org).



# Donor Portal Frequently Asked Questions

## How often are quarterly fund statements posted?

Quarterly fund statements are posted during the month immediately following the end of each quarter (January 31, April 30, July 31, October 31). You will be notified via email when your fund statement is ready to be viewed in the Donor Portal. If you are not receiving these notification emails, please contact Heather Hoy at 785-843-8727 or [heatherhoy@dccfoundation.org](mailto:heatherhoy@dccfoundation.org).

## How do I change my password?

If you need to change your password, click on the Forgot Password link on the login page and reset your password.

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

Generally, grant recommendations are processed and paid within two to three weeks of receiving the recommendation. If you need a grant to be processed more quickly, please call the DCCF office.

## What organizations are eligible to receive grants from my donor-advised fund?

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

## Are there other ways to submit a donor recommendation?

Yes, recommendations may be submitted through email, mail, or fax.

- **Email:** Email [heatherhoy@dccfoundation.org](mailto:heatherhoy@dccfoundation.org) with your recommendation. Please include the fund name, grant amount, any grant purpose or special instructions, and any additional information in the email. Heather will email a confirmation of the recommendation.
- **Mail or Fax:** If you prefer to make manual recommendations, you can fill out the Donor Recommendation form (attached.) You can then mail to our office:  
900 Massachusetts,  
Suite 406  
Lawrence, KS 66044 or  
Fax 785-843-8735 the form to Douglas County Community Foundation.

## 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. Please refer to the "Viewing Grant History" section in the Donor Portal Guide.

## 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 Heather Hoy at [heatherhoy@dccfoundation.org](mailto:heatherhoy@dccfoundation.org) or 785-843-8727.

## Donor-advised Fund Grant Guidelines

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With your donor-advised fund, you can enjoy supporting any 501(c)(3) public charity in the United States, including governmental, educational and religious institutions. Rest assured that the Douglas County Community Foundation (“DCCF”) will exercise due diligence to make sure grants from your fund are given to organizations that have met 501(c)(3) IRS requirements.

In some cases, DCCF may need to contact you and/or the suggested grant recipient for additional information before approving the grant. Following these guidelines will help expedite DCCF’s approval process.

### **GRANT RECOMMENDATIONS AND REQUESTS**

Grants from your donor-advised fund must be made to charitable organizations. When making your grants, you may see the terms grant suggestion, grant recommendation and grant request. This is because DCCF technically owns the assets in your fund, and any grant recommendations are subject to review and approval by DCCF. However, DCCF makes every effort to approve all grant recommendations that are made in accordance with IRS regulations.

### **GRANT RECOMMENDATION AGREEMENT**

As part of making a recommendation, you will need to agree to the following statements:

“I acknowledge that this grant suggestion must meet the approval of the board of directors of Douglas County Community Foundation. I also understand that this suggested grant does not represent the payment of any pledge or other financial obligation of mine or any member of my family, and that neither I nor any member of my family expects any personal benefit from the grant.

To keep the IRS happy, in relation to this grant, I agree that every penny of this grant will be used for a charitable purpose, and neither I nor anyone I know will receive anything more than a coffee mug or any other incidental benefit in return.”

### **MEMBERSHIPS**

You may use your fund to cover the cost of a membership if the charity confirms that the full cost is 100 percent tax deductible. You may also use your fund to cover the cost of a membership if your grant suggestion states that you waive the more than incidental benefits related to the membership.

Below are examples of incidental membership benefits that you can receive in exchange for your grant from your donor-advised fund:

- Preferred access to special ticketed events where you pay for tickets separately
- Invitations to members-only exhibits
- Very low-cost items, such as a newsletter, calendar, key chain or coffee mug
- Logo or name recognition in event materials

## **EVENTS**

You may use your fund to make grants to charities in support of events, but here are a few things to keep in mind:

### **Tickets, Tables, and Sponsorships**

The full cost to attend events (both the tax-deductible and non-tax-deductible portions) must be paid from your personal bank account. Sponsorship, when you do not attend or there are no tickets, may be made as long as you do not receive more than an incidental benefit in return. When submitting a grant request for a sponsorship, please note in your grant suggestion that no tickets or table will be accepted or used.

Keep in mind that the amount that can be paid from your donor-advised fund is not always the tax-deductible amount published by the charity. If you choose not to accept any benefits associated with a sponsorship (including not attending), the entire amount may be paid through your donor-advised fund.

### **Raffles and Auctions**

You may use your fund to support fund-a-need calls for donations at charitable events, but you may not use your fund to purchase raffle tickets or auction items.

## **SCHOLARSHIPS AND TUITION**

You may use your donor-advised fund to support a scholarship program administered by a 501(c)(3) public charity or educational institution, but you may not earmark dollars to assist a specific individual.

## **MISSION TRIPS, RACES AND OTHER DONATIONS IN HONOR OF INDIVIDUALS**

You may make a contribution to a 501(c)(3) public charity or religious institution in honor of an individual as long as the charity exercises complete discretion and control over the donation. DCCF understands that many donations do not provide a direct benefit to an individual but are in recognition of an individual's fundraising efforts. Therefore, when submitting grants in honor of individuals, please explicitly state that the donations are "in honor of [individual's name]." "In honor of John Smith's Mission Trip." or "In honor of Jane Smith's 5k Race Team."

## **ATHLETIC FUNDS**

You may use your fund to support a college or university athletic program if your grant suggestion states that you waive all benefits, including priority seating at athletic events, ticket rights or points.

## **PLEDGES AND COMMITMENTS**

You may use your fund to fulfill non-binding commitments to 501(c)(3) public charities. However, Treasury and the IRS prohibit using the term "pledge" on grant checks or related correspondence. Instead, please reference "donation," "grant," or "gift" in your grant suggestion.

# Douglas County Community Foundation

900 Massachusetts, Suite 406

Lawrence, KS 66044

Telephone: 785-843-8727

Fax: 785-843-8735

## Grant Recommendation Form

Date \_\_\_\_\_

Pursuant to the terms of the \_\_\_\_\_ Fund which is administered at the Douglas County Community Foundation, I suggest a distribution from the fund in the following amount to the listed nonprofit organization:

Organization \_\_\_\_\_

Amount \$ \_\_\_\_\_

Contact Person at Organization (if known) \_\_\_\_\_

Organization Address \_\_\_\_\_

\_\_\_\_\_

Special Instructions \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I acknowledge that the recommendation above must meet the approval of the Foundation's Board of Directors. The above-suggested grant does not represent the payment of any pledge or other financial obligation of mine, my advisors, or any related parties. Neither I, nor my advisors or related parties, expects or will accept any personal benefit from the grant.

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone