



TOGETHER WE THRIVE

Fund Portal Guide

Effective March 31, 2025

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ABOUT THE FUND PORTAL

As a Fund Representative of Fairfield County's Community Foundation (FCCF), your fund information is available online through the FCCF Fund Portal. Within the portal, you can easily check the fund balance, view and download monthly Fund Statements, request and track grants, make contributions to the fund and more. The Portal is available 24/7 from anywhere, on any device.

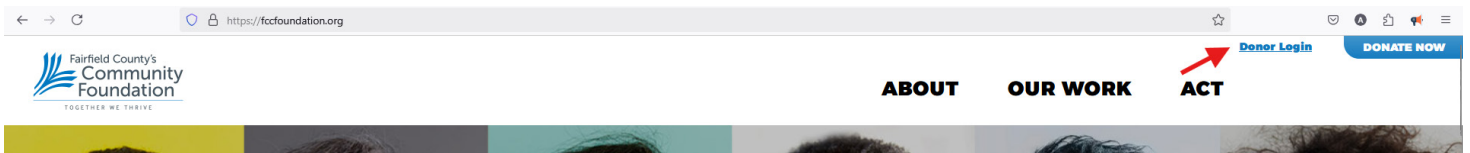
CREATING YOUR ACCOUNT

You will receive an email from Fairfield County's Community Foundation with a custom invitation link to create your account. 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 us 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. You will also be prompted to select a two-factor authentication method; this can be via email, text or your preferred authentication application.

LOGGING INTO YOUR ACCOUNT

To access the Fund Portal once your account has been set up, visit Fairfield County's Community Foundation's website at www.FCCFoundation.org and click Login on the top navigation bar.

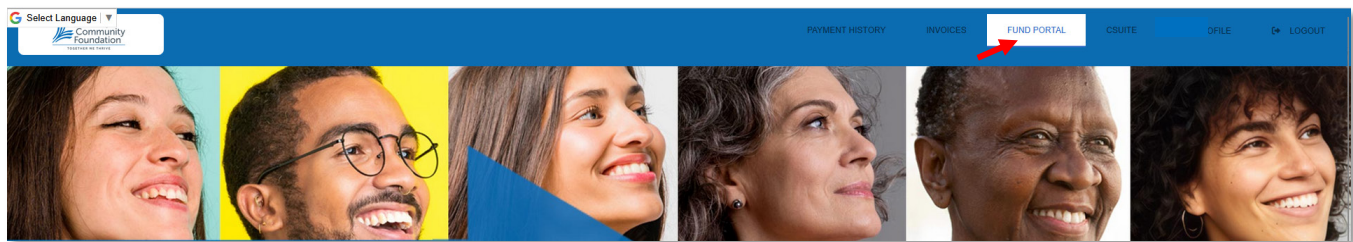


You will be redirected to a login page where you will enter your unique username and password. If you forgot your credentials, please select "Forgot Password."

A screenshot of the 'Login' page. It features two input fields: 'Username' and 'Password'. Below the fields is a blue button labeled 'LOGIN'. Underneath the button are two links: 'Login with email' and 'Forgot your password?'.A screenshot of the 'Two Factor Method' page. It lists five authentication options with radio buttons: 'Use authenticator app', 'Email pin to *****@fc*****org', 'Email pin to ***@gm***com', 'Text pin to ***-***-3229', and 'Text pin to ***-***-'. Below the options is a blue button labeled 'NEXT'. At the bottom, there is a link: 'Login with username/password'.

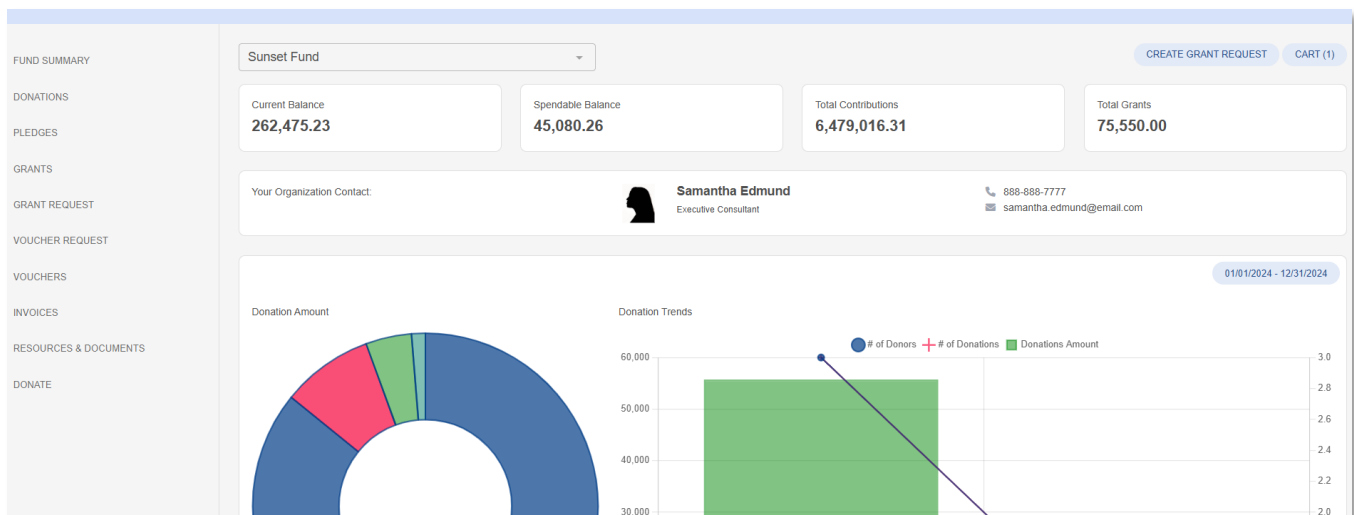
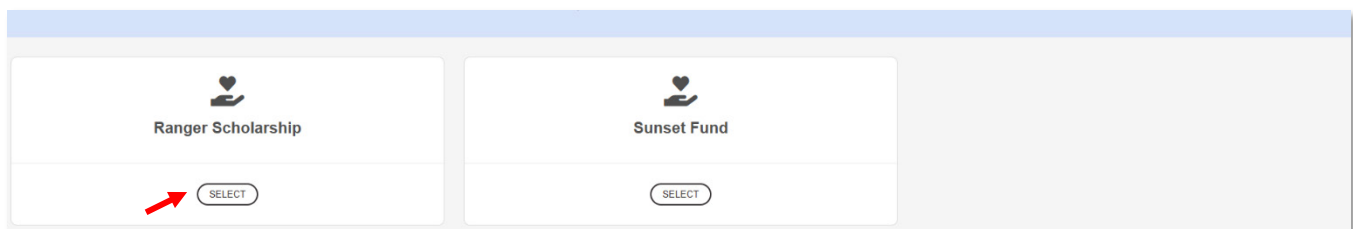
Note: The Fund Portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact us at 203-750-3200 or Help@FCCFoundation.org.

Once you are logged in, you will find a **FUND PORTAL** tab in the top navigation of your homepage.



FUND PORTAL FEATURES

The Fund Portal page displays your Fund Summary (see example below) or, if you manage multiple funds, click “select” to choose the Fund Summary you’re seeking.



In addition to summary, the left side menu gives you access to the following pages: Donations, Grants, Payments, Invoices, Resources & Documents, and Donate.

FUND SUMMARY

This displays a quick snapshot of your fund’s most recent activity, including the fund’s current balance, recent contributions and grant history, as well as FCCF contact information for your assigned steward.

DONATIONS

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

GRANTS

Grant Summary displays award information per Grantee including the grantee name, the number of grants, and the total amount granted to the grantee. The columns of information can be sorted. Clicking on the grantee name takes you to individual grant details for that grantee.

Grant History displays details of grants paid from the selected fund. Grant ID, date, status, grantee, description, advisor, and amount are displayed along with the ability to copy the grant and submit a new request. The list of grants can be exported.

Recurring Grants display information for any recurring grant you have set up, including grant ID, grantee information, start date, interval, total grants past and future grant amount, . Informational columns can be sorted.

Community Funding Opportunities is a listing of eligible proposals received through our competitive grantmaking process that the Foundation was unable to fund. Fund Representatives with Donor Advising permissions can make grant recommendations to help fulfill these requests and sustain programs that serve the Fairfield County community.

GRANT REQUEST

For Fund Representatives with Donor Advising permissions the Grant Request page displays pending and submitted requests. Grant requests are displayed in a list that includes the request date, status, recipient, description, and amount. From this tab Donor Advised Fund Representative can edit, delete, cancel, or create new grants.

RESOURCES & DOCUMENTS

This section contains additional secondary navigation for Statements, Files, The Fairfield County Nonprofit Directory, Financials, Investment Reports, Term Investments, and Split Interest.

Fund Statements shows individual monthly statements and an option to create a manual statement based on your preferences. Statements, in PDF format, will be viewable in a new browser window that can be downloaded or printed.

Files show any viewable files regarding your fund. At this time, fund agreements and other confidential documents are not available through the Fund Portal. If you would like any documents added to your account, please contact us via email at Help@FCCFoundation.org.

DONATE

This redirects you to the Community Foundation's Giving Hub where users can make direct donations via credit card to FCCF Funds, view and register for Foundation Events & Convenings, or access the Fairfield County Nonprofit Directory.

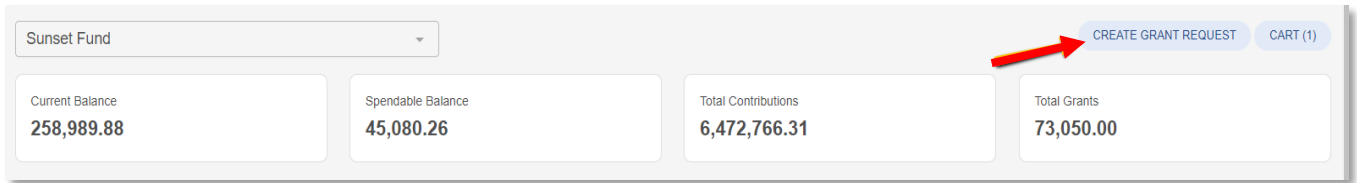
LOGGING OUT

Clicking Logout on the top menu bar automatically logs you out of the Portal. If you do not log out, the system will automatically log you out at midnight.

SUBMITTING A GRANT REQUEST FOR DONOR ADVISED FUNDS AND AFFILIATE ORGANIZATIONS

Fund Representatives with Donor Advising permissions can recommend a grant in three easy steps:

1. click **Create Grant Request**.

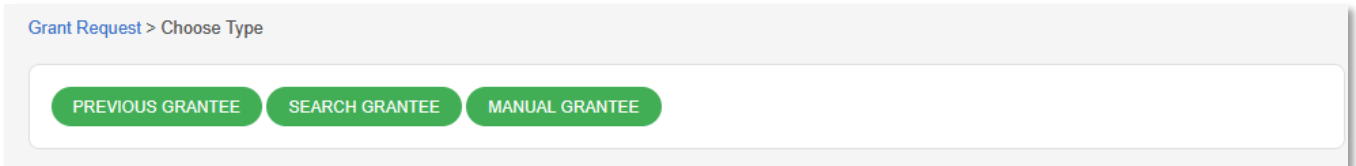


Sunset Fund

CREATE GRANT REQUEST CART (1)

Current Balance 258,989.88	Spendable Balance 45,080.26	Total Contributions 6,472,766.31	Total Grants 73,050.00
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2. **Choose a Grantee** in one of three ways:

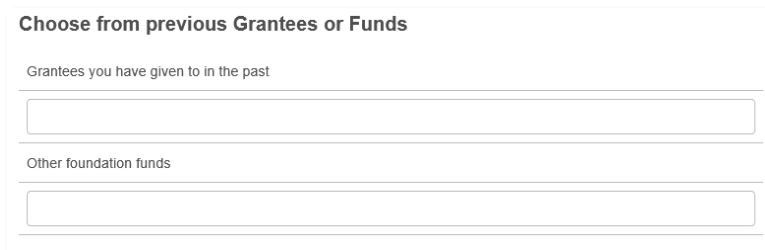


Grant Request > Choose Type

PREVIOUS GRANTEE SEARCH GRANTEE MANUAL GRANTEE

a. Choose a Previous Grantee

Choose a drop-down list of organizations you supported in the past or search for other FCCF Funds.



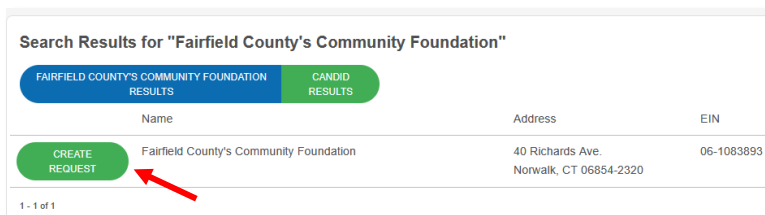
Choose from previous Grantees or Funds

Grantees you have given to in the past

Other foundation funds

b. Search for Grantees

Search for an organization you want to support by entering the organization's name and/or Employee Identification Number (EIN). Results can be filtered by profiles in FCCF's or Candid's GuideStar Database. Once you find the organization you want to support, click **"Create Request"**.



Search Results for "Fairfield County's Community Foundation"

FAIRFIELD COUNTY'S COMMUNITY FOUNDATION RESULTS CANDID RESULTS

Name	Address	EIN
Fairfield County's Community Foundation	40 Richards Ave. Norwalk, CT 06854-2320	06-1083893

CREATE REQUEST

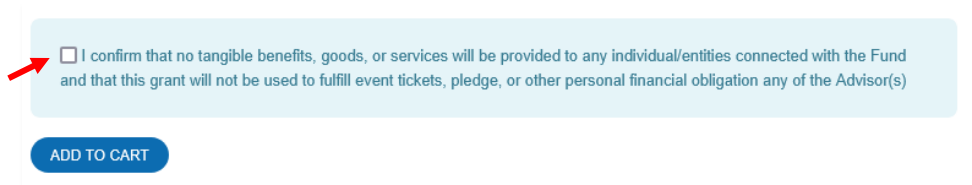
1 - 1 of 1

c. Manually Enter Grantee Information

If you can't find the organization you wish to support, you will need to manually enter the organization's name, address and phone number. Once you enter this information, click **"Submit"**.

3. Grant Details

In the description field, please provide the grant purpose and any special handling such as “2025 Summer Camp”; please note that requests without a specific grant purpose are earmarked for General Operating Support – the most flexible option for grantee. You can also choose for your grant to remain anonymous by selecting the Anonymous checkbox. Additionally, there is an ability to upload attachments. Once you have finished entering this information, **check the required confirmation box and then “Add to Cart.”**

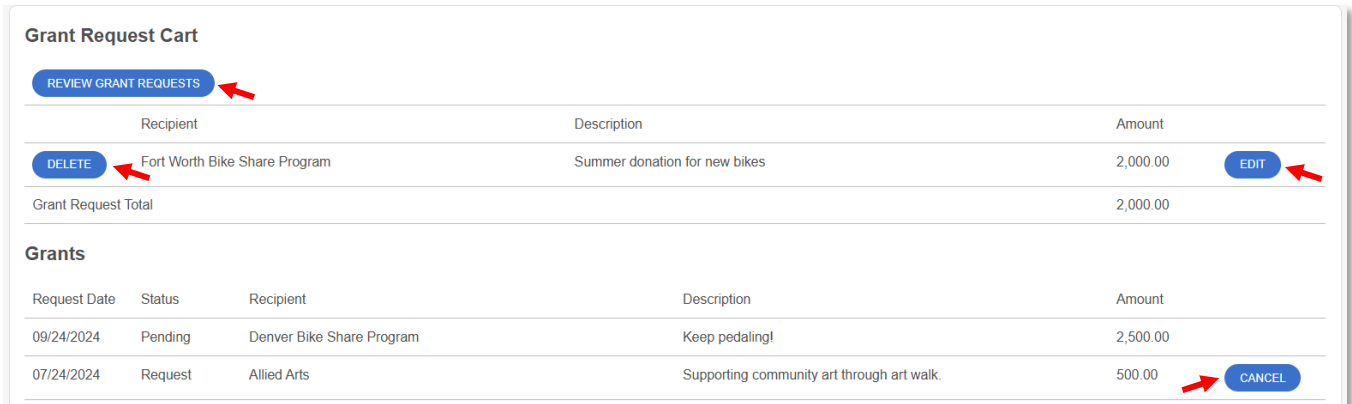


I confirm that no tangible benefits, goods, or services will be provided to any individual/entities connected with the Fund and that this grant will not be used to fulfill event tickets, pledge, or other personal financial obligation any of the Advisor(s)

ADD TO CART

4. Review and Submit Request

If you want to start another grant request, repeat the process by clicking the “create grant request” button. Once all your requests are complete, click “**Review Requests**” to submit your request(s). You also have the option to delete and edit requests not yet submitted or cancel previously submitted requests that have not been processed.



Grant Request Cart

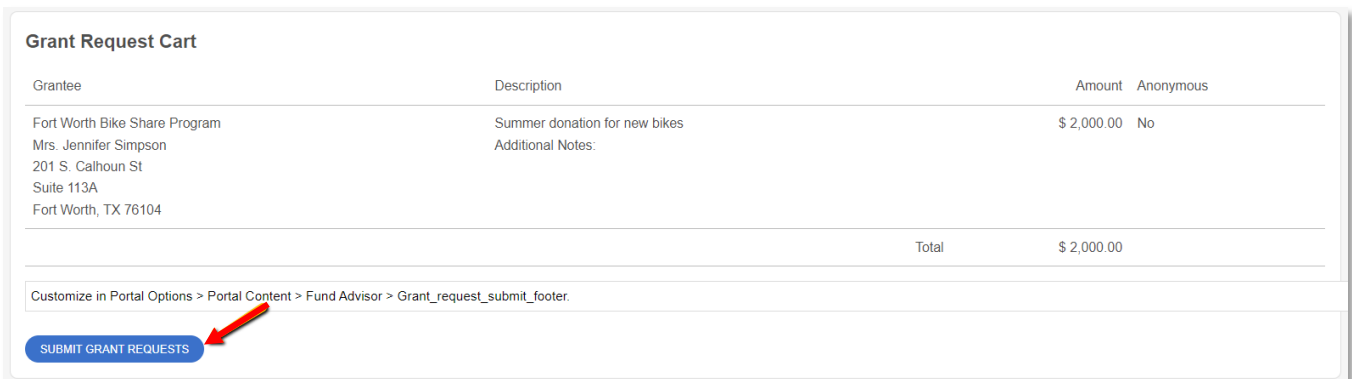
REVIEW GRANT REQUESTS

Recipient	Description	Amount
Fort Worth Bike Share Program	Summer donation for new bikes	2,000.00
Grant Request Total		2,000.00

Grants

Request Date	Status	Recipient	Description	Amount
09/24/2024	Pending	Denver Bike Share Program	Keep pedaling!	2,500.00
07/24/2024	Request	Allied Arts	Supporting community art through art walk.	500.00

Once you’ve reviewed and confirmed that the grant information is correct, click “**Submit Grant Requests**”.



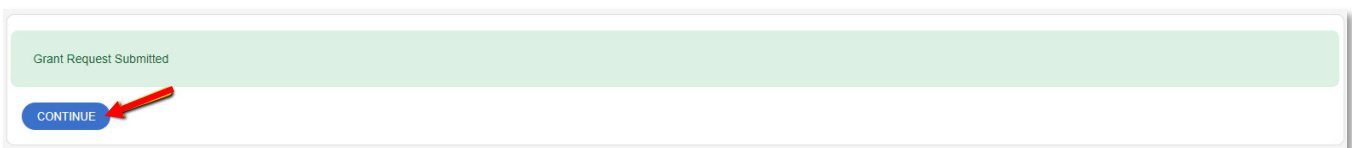
Grant Request Cart

Grantee	Description	Amount	Anonymous
Fort Worth Bike Share Program Mrs. Jennifer Simpson 201 S. Calhoun St Suite 113A Fort Worth, TX 76104	Summer donation for new bikes Additional Notes:	\$ 2,000.00	No
Total		\$ 2,000.00	

Customize in Portal Options > Portal Content > Fund Advisor > Grant_request_submit_footer.

SUBMIT GRANT REQUESTS

In addition to an on-screen “Grant Request Submitted” confirmation, you will receive an email notification of your request submission. You can return your portal homepage by clicking “Continue”








Grant Request Submitted

CONTINUE

VIEWING GRANT HISTORY & STATUS

Your recent grant history can be found in the “Grant Request” tab.

Request Date	Status	Recipient	Description	Amount	
07/24/2024	Request	Allied Arts	Supporting community art through art walk.	500.00	
07/01/2024	Pending	Make-A-Wish Foundation of America	May sponsorship	2,000.00	
06/30/2024	Request	Make-A-Wish Foundation of America	June sponsorship	2,000.00	
06/30/2024	Request	Denver Bike Share Program	Keep pedaling!	2,500.00	
05/15/2024	Request	Denver Bike Share Program	Bike helmets save lives.	2,250.00	
05/15/2024	Pending	The Gloss Mountains Foundation	Genealogy Support	1,750.00	
05/15/2024	Paid	Allied Arts	Community Art support	3,500.00	

In the Status column, you’ll 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 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 with the grantee organization

EMAIL ALERTS

The portal is set to send an email notification every time a donation is made to your fund or a grant request from your fund has been received. You may opt out of these notifications at any point, and this will take effect on future transactions. You will not be notified of past grants or donations. If you would like to opt out of these notifications, please contact Philanthropic Services at 203-750-3200 [or Help@FCCFoundation.org](mailto:Help@FCCFoundation.org).

QUESTIONS

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

FUND PORTAL FREQUENTLY ASKED QUESTIONS

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

If you have any questions or are experiencing issues with the Fund Portal, please contact our Team at Help@FCCFoundation.org or 203-750-3200.

How do I change my password?

If you need to change your password, please click on the "Forgot Password?" link on the portal login page 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 existing user passwords and cannot look them up for you. However, we'd be happy to reset it for you!

Can I make grant recommendations from any fund?

No, only Donor Advised Fund representatives that have retained grant advising may submit grant recommendations.

Scholarship, Agency and Field of Interest Funds do not have grant request capabilities. If you have questions about the type of charitable account you advise, please contact our Team at Help@FCCFoundation.org or 203-750-3200.

DONOR ADVISED FUND FREQUENTLY ASKED QUESTIONS

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

Generally, grant recommendations are processed within 5-7 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 qualified charitable organization in good standing with a 501(c)(3) designation and classified by the IRS as a public charity. This may include 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 would like to discuss a special grant request, please contact us 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 the grant request is subject to pre-approval by 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! As a 501(c)(3) non-profit organization, FCCF can process an internal transfer directly from your Donor Advised Fund to a designated internal account set up specifically for all our programs or initiatives. We greatly appreciate the support!

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 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 Donor Advised Fund grants to:

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

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

Information on all funds grant activity is available via your Fund Portal grants section listed on the lefthand menu options.