



Bay Area

community foundationSM

Donor Portal Guide

www.BayFoundation.org

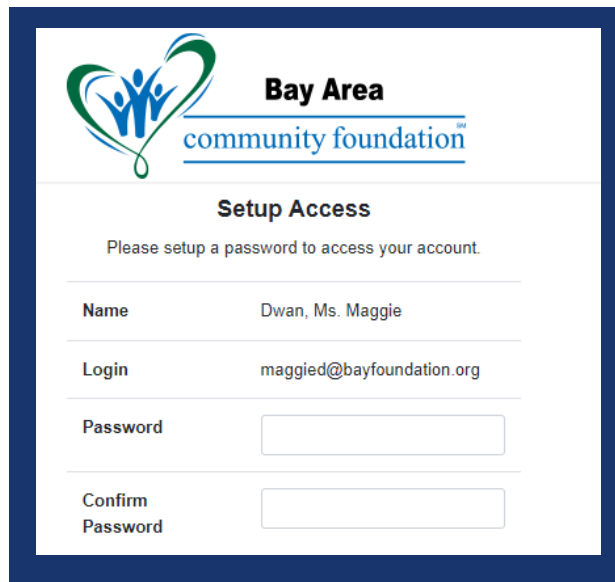
Donor Portal Guide

Donor Portal

As a fund holder of the Bay Area Community Foundation (BACF), you have the ability to access your fund information online through our Donor Portal. Within the portal, you can easily check your fund balance, see who is making gifts to your fund, view and download fund statements, donate 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

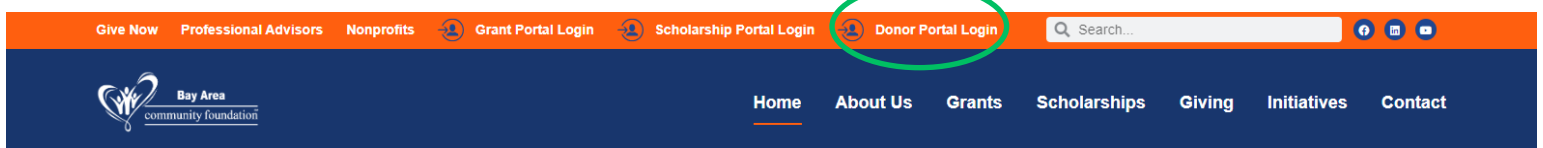
You will receive an email from BACF with a custom invitation link to create your account in the Donor Portal. Your username will be your email address that we have on file. If you would like to change your username for any reason, please contact our team at bacfnd@bayfoundation.org. Once you click on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



The screenshot shows the 'Setup Access' page of the Bay Area Community Foundation Donor Portal. At the top left is the BACF logo, which consists of three stylized human figures in blue and green forming a heart shape. To the right of the logo is the text 'Bay Area community foundation' with 'community foundation' in a smaller font and a trademark symbol. Below the logo and text is the heading 'Setup Access' and a sub-heading 'Please setup a password to access your account.' The form contains four fields: 'Name' with the value 'Dwan, Ms. Maggie', 'Login' with the value 'maggied@bayfoundation.org', 'Password' with an empty input box, and 'Confirm Password' with an empty input box. The entire form is enclosed in a dark blue border.

Returning Users

To access the Donor Portal, visit BACF's website at www.bayfoundation.org and click Donor Login on the top navigation bar. You will be redirected to a login page (please reference the following page) where you will enter your unique username and password. If you forgot your credentials, please contact our team at bacfnd@bayfoundation.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 bacfnd@bayfoundation.org or Maggie Dwan at (989)893-4438.

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.)

Your Fund Name will appear here

Home	Contributions	Grants	Grant Request	Statements	Files	Donate/Give Now	Logout
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Date Created: 5/29/2001

Current Balance: \$59,661.90

Spendable Balance: \$753.00

Total Contributions: \$910.00

Total Grants: \$9,594.00

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

(Note: The tabs appear based on fund type, there may be information in this section that does not appear within your portal.)

- **Home:** Your homepage is a quick snapshot of your fund's most recent activity. It will show an overview of your fund's financials, 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.
- **Contributions:** 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.
- **Grants:** This tab shows the history of grants awarded from your fund including date, organization name, purpose and amount. (Donor Advised Funds only)
- **Grant Request:** This tab allows you to make a grant request from your fund and see recent grant statuses. (Donor Advised Funds only)
- **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.
- **Donate/Give Now:** 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 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 organization 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**.



Choose from previous Grantee

Other foundation funds

or

Search for other Grantees

Name

City

State

Search

or

Enter Grantee information manually

Name *

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 Program Support. 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. Once you are finished entering this information, click **Review**.

Grant Request

Grantee Community Initiative Fund

Description

0/255 characters

Amount

Anonymous

Recurring

Attachment

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

Attachment
Description

Review

Recommending a Grant, continued

2. 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	Community Initiative Fund
Description	General Program Support
Amount	\$ 250
Anonymous	No

[Submit Request](#) [Edit Request](#)

Viewing your Grant History

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

Grants

Date	Status	Recipient	Description	Amount	
05/12/2023	Request	Community Initiative Fund	General Program Support	250.00	Cancel

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 bafcnd@bayfoundation.org.

Donor Portal Guide

How often are 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 bacfnd@bayfoundation.org.

How do I change my password?

If you need to change your password, please contact our team at bacfnd@bayfoundation.org or call Maggie Dwan, Donor Relations and Communications Officer, at (989)893-4438. 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 two weeks.

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?

The grant minimum amount varies based on fund type. Please call the office at (989)893-4438 with amount inquiries.

Are there other ways to submit a donor recommendation?

Yes, recommendations may be submitted via email or phone. Please call the office at (989)893-4438 to speak with a staff member who can assist you.

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 bacfnd@bayfoundation.org or call Maggie Dwan, Donor Relations and Communications Officer, at (989)893-4438.