



FREQUENTLY ASKED QUESTIONS

DONOR PORTAL

How do I create a username and password?

Your username is your email. To create a password, click on “Create or Reset Your Password” located underneath the “Password” field. Your password must be 12 characters in length and must include upper- and lower-case letters, a number, and a special character. Once you register, you will receive an email from the donor portal.

How do I reset my password?

If you cannot remember your password, click on “Create or Reset Your Password” located underneath the “Password” field on the login page.

If you are logged into your account and wish to change your password, click on your name in the upper right-hand corner and from the dropdown, choose “Settings”. From there, you will be able to update your password.

How do I make a grant request?

Making a grant request to an organization you have previously supported: Click the “View Fund Info” tab and then select the “Grants” tab. Your most recent grants are listed first. Select “Show Filter / Sort Options” to sort your list. Once you find the organization name, click “Grant Again” to open the Grant Request form and edit accordingly.

Making a grant request to an organization you have not previously supported: Click on the “Request a Grant” tab. Enter the name of the organization and the city in the search field to see if the organization is already in our database. Once the search results appear, select the correct organization name to begin your grant request. Grant Amount and Purpose must be completed on the Grant Request form and the terms must be accepted in order to submit.

Making a grant request to an organization that is not in the database: If, after searching the database, the organization cannot be found, select “enter the request manually” and complete the Organization Name and Address fields. Grant Amount and Purpose must be completed on the Grant Request form and the terms must be accepted in order to submit.

Due diligence will be conducted on the organization in order to ensure grants are made to qualified recipients.

What is reflected in my fund statement?

Preliminary statements may not reflect net investment returns and administrative fees. Contributions and grants are updated daily and will be reflected in the statement the day after it has been posted. It may take seven to ten business days for contributions to post. You can generate custom fund statements for selected dates by clicking on the “View Fund Info” tab and clicking on “Statements”.

How do I know the status of my grant request?

When you submit a grant request through the donor portal, it will appear on the “Requests” tab within the “View Fund Info” tab. Reference the key located within the “Requests” tab to verify what stage your grant request is in.

What is the difference between the “Requests” tab and the “Grants” tab?

The “Requests” tab is a continuous log of every grant request submitted through the donor portal and shows the status of the grant request. The “Grants” tab contains a list of the grants processed and paid from the fund and includes grants submitted by other methods such as email or phone.

How can I review previous grants?

Click the “View Fund Info” tab and then select the “Grants” tab. This reflects all grants paid since the fund was established. Click the name of the organization to review the grant details.

What do the terms on the “Advisors” tab mean?

Fund Founder

Fund founders are the individuals responsible for creating funds. Founders also typically serve as fund advisors.

Fund Advisor

Fund advisors are individuals who are authorized to view fund information. Fund advisors on donor-advised funds make recommendations for all fund-related matters, including grants and investments.

Successor Advisor

Successor advisors are individuals who will advise the fund after the Fund Advisors are no longer able or willing to do so.

Advisory Committee Member

Advisory committee members assist fund advisors in making grant and investment recommendations for funds and can receive information about funds.

Investment Manager

Investment managers actively oversee the fund's investments in a managed account on the financial advisor's platform.

Authorized Party

Authorized parties are individuals who can receive information about funds, but they are not listed as fund advisors or advisory committee members. Examples may include wealth managers, financial planners, accountants, attorneys, board members or nonprofit staff members.

Online Access

This column is checked for individuals who can access fund information through the online portal.

Request Grants

This column is only checked when an individual may independently request grants, meaning approval from only one person is required for the Community Foundation to process a grant request. This is not checked if more than one person must approve a request or if board minutes are required for confirmation.

If I have further questions, who can I contact?

Portal or grant processing questions: grants@eccf.org

Contributions to your fund: Michelle Pelletier, m.pelletier@eccf.org

Fund management or suggestions about local community needs: Carol Lavoie Schuster, c.lavoieschuster@eccf.org

GENERAL GRANTMAKING

How often are grant checks sent out?

Checks require 7-10 business days for processing. During busy times, such as the holiday season, look for information on the ECCF website regarding deadlines for submitting grant recommendations.

Is there a minimum grant amount I can suggest?

Yes, the minimum amount is \$250.

How quickly is activity posted to my fund and reflected in "Total Assets"?

- Contributions are normally posted within seven to ten business days of receipt, and they are reflected as of the date the deposit is received. Gifts of assets other than cash (stock, real estate, etc.) may take longer to show in the fund balance.
- Grants are normally processed within five to seven business days, if there is no extra due diligence required. The date reflects the day the grant check is generated.
- Administrative fees and net investment returns (realized and unrealized capital gains and losses, interest, dividends, and investment management fees) are

allocated monthly and are generally posted around the 15th of the following month.

What is the difference between a “Request” and a “Grant”?

We use the term “Request” because grants are subject to review and approval by the Community Foundation.

Can I use my donor-advised fund to pay for a membership?

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

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

- Free admission to all exhibits
- Discounted or free parking
- Discounts at the gift shop
- Preferred access to special ticketed events where you pay for tickets separately
- Invitations to members-only exhibits
- Low-cost items, such as a newsletter, calendar, key chain, or coffee mug

Can I use my donor-advised fund for events?

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

Tickets, Tables and Sponsorships

The full cost to attend in-person or virtual events (both the tax-deductible and non-tax-deductible portions) must be paid from your personal bank account. You may pay any remaining sponsorship costs from your fund, as long as you do not receive more than an incidental benefit in return. Logo or name recognition in event materials is not considered more than an incidental benefit. When submitting a grant request for a sponsorship, please note in your grant suggestion that you will cover the full cost of the tickets or table separately.

Here is an example of what you can pay from your donor-advised fund for an event:

- A \$5,000 event sponsorship includes a table for 10 and your name or logo in event materials.
- If the lowest ticket price to attend the event is \$100, you will pay \$1,000 for the table personally from your bank account ($\$100 \times 10$ seats at the table) and you can use your donor-advised fund to cover the remaining \$4,000.
- 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. The Community Foundation can help you calculate what portion of the event sponsorship can come from the fund based on the benefits received.
- If you choose not to accept any benefits associated with a sponsorship, the entire amount may be paid through the 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.

Can I use my donor-advised fund for scholarships?

You may use your 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.

Can I use my donor-advised fund to support someone's mission trip or 5k race?

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.

Many donations of this nature 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]." For example: "In honor of John Smith's Mission Trip" or "In honor of Jane Smith's 5k Race Team."

Can I use my donor-advised fund to give to an athletic fund?

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

Can I use my donor-advised fund to fulfill a pledge?

You may use your fund to fulfill 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" or "gift" in your grant request.

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