



THE CATHOLIC

COMMUNITY FOUNDATION

OF SANTA CLARA COUNTY

Donor Advisor User Guide

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Login

To login to the Donor Portal:

- Go to www.cfoscc.org and click LOGIN (top right corner)
- Or, go to www.giving.cfoscc.org

The screenshot shows the website's header with navigation links: CONTACT US, LOGIN, PROFESSIONAL ADVISORS, Who We Are, What We Do, and Join Us. The main banner features a photo of a man and a boy working together at a table, with the text "Collaborating for Change". Below the banner are three columns: "Giving" (The Foundation offers exciting opportunities to expand Catholic Philanthropy in Santa Clara Valley), "Donor Advised Funds" (These funds offer tax advantages and exposure to specific needs in our Catholic community), and "Grants" (Funds that were available for grantmaking for the 2015 Spring Grant Cycle totaled more than \$200,000).

Enter your User Name and Password in the appropriate box, and click Login.

The screenshot shows the login page with the following elements: a header with CONTACT US, LOGIN, and PROFESSIONAL ADVISORS; a navigation menu with User Actions, Who We Are, What We Do, and Join Us; a "WELCOME" heading; a "Returning Users LOG IN HERE" section with a "For Assistance:" link (Contact us at (408)995-5219 or info@cfoscc.org); a "Website User Name" input field; a "Password:" input field; a "Remember Login" checkbox; a "LOG IN" button; and links for "NEW USER REGISTRATION" and "Forgotten Password".

Home Page

On the Home Page you will find:

- Quick links to common donor actions under Manage My Account

The screenshot shows the website's header with navigation links: CONTACT US, LOGIN, PROFESSIONAL ADVISORS, Donor Actions, Who We Are, What We Do, and Join Us. The main content area includes a welcome message, contact information for assistance, and a list of actions available to users. A green bar highlights the 'Manage My Account' section, which contains links for viewing fund summaries, making grant requests, updating profiles, adding to funds, and email preferences. A PDF icon is also present for a user guide.

CONTACT US LOGIN PROFESSIONAL ADVISORS

THE CATHOLIC COMMUNITY FOUNDATION OF SANTA CLARA COUNTY

Donor Actions Who We Are What We Do Join Us

WELCOME TO YOUR CUSTOM PORTAL

Welcome to GIVING.CFOSCC.ORG

GIVING.CFOSCC.ORG is the online resource for The Catholic Community Foundation of Santa Clara County.

For Assistance:
Contact us at (408)995-5219 or info@cfoscc.org

Within this area of the Catholic Community Foundation you are able to:

- Update your user profile.
- View listings of prior gifts.
- Make payments on existing pledges.
- Make new gifts to the Foundation.
- Adjust settings on emails from the Foundation.

zzz123's Profile Information

Dr. and Mrs. DAF Recommendation, M.D.
777 N First St Suite 490
San Jose, CA 95112-6349

Email: finigan@cfoscc.org
Phone:
Website user name: zzz123
Account #: 600323

Manage My Account

- [View my Fund Summary](#)
- [Make a Grant Request](#)
- [Update My Profile](#)
- [Add to My Fund](#)
- [Email Preferences](#)

PDF Adobe [DAF User Guide](#)

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- The full list of actions can be found by hovering over Donor Actions at the top to reveal the dropdown menu shown below.

This screenshot shows the 'Donor Actions' dropdown menu open, revealing options: My Home Page, Fund Summary, Add to My Fund, Update My Profile, and Logout. The rest of the page content is partially obscured by the dropdown menu.

CONTACT US LOGIN PROFESSIONAL ADVISORS

THE CATHOLIC COMMUNITY FOUNDATION OF SANTA CLARA COUNTY

Donor Actions Who We Are What We Do Join Us

WELCOME TO YOUR CUSTOM PORTAL

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PDF Adobe [DAF User Guide](#)

Fund Summary

Access your Fund Summary from either the Donor Actions menu or the Manage My Account links.

- If you have multiple funds with the Foundation, you can select which to view from the dropdown menu.
- Click the links in the Year to Date column to see detailed information.

The screenshot shows the 'Fund Summary' page for '6000 - Donor Advised Fund 1'. It includes a navigation bar with 'CONTACT US', 'LOGIN', and 'PROFESSIONAL ADVISORS'. The main header features the foundation's logo and navigation links: 'Donor Actions', 'Who We Are', 'What We Do', and 'Join Us'. The 'FUND SUMMARY' section has a dropdown menu for 'Select Fund' set to '6000 - Donor Advised Fund 1'. Below this, there is contact information for assistance: '(408)995-5219 or info@cfoscc.org'. A table displays financial data for 'Year to Date' and 'Last Fiscal Year'.

	Year to Date	Last Fiscal Year
Contributions	\$10,000.00	\$10,000.00
Grants	\$5,000.00	\$6,000.00
Investment Activity	\$20.65	\$4.47
Admin Fee	-\$225.00	-\$725.00
Invested Balance	\$8,075.12	
Amount Available for Grantmaking	\$8,075.12	

My Contributions

Click on the linked field of Contributions from the Fund Summary to:

- Add money to your fund.
- View past contributions.

The screenshot shows the 'Gift History of a Fund' page for '6000 - Donor Advised Fund 1'. It includes the same navigation bar and header as the Fund Summary page. The 'GIFT HISTORY OF A FUND' section has a dropdown menu for 'List of all gifts donated to fund:' set to '6000 - Donor Advised Fund 1'. Below this, there are radio buttons for 'Current Fiscal Year', 'Previous Fiscal Year', and 'Specify Date Range'. A table displays gift history with columns for 'Date', 'Donor', 'Amount', 'Type', and 'Notes'. A green box titled 'Using this page' contains instructions and a 'Please Note' section. At the bottom, there are buttons for 'Back to Fund Summary' and 'Add to My Fund'.

Date	Donor	Amount	Type	Notes
02/04/2015	Donor Advised Fund Holder	\$10,000.00	Credit Card	

Using this page

This page is designed to provide you with a detailed listing of donations made to your donor advised fund. This list does not include transfers made from another fund into this one.

The information displayed in this section are for this fund only and does not include funds donated separate from your donor advised fund.

Please Note - Not all data is in real time and may not reflect your transactions since the end of last month. If you have any questions, please contact us as 408.995.5219 or info@cfoscc.org.

[Back to Fund Summary](#) [Add to My Fund](#)

New Grant Request

Begin a new grant request from either the Donor Actions menu or the Manage My Account links.

- Select the appropriate fund from the dropdown menu, if necessary.
- To grant to:
 - Any 501(c)3, please see page 7
 - An existing fund of the Foundation, see page 9
- Enter an amount and purpose for the grant.
- Review the information you have entered, and then check I Agree under Legal Statement.
- Click Submit Request when ready, or Cancel Request if necessary.

Donor Name DAF Recommendation
Confirmation Email info@foscc.org
Funding Source 6XXX - Donor Advised Fund
Funds Currently Available for Grants: \$1,429,746.91
Grant Type Grant To A Recipient Grant To A Fund

RECIPIENT INFORMATION

To Select Recipient Organization: [Select From Your Grant History](#)
[Search Our Database \(or Add New Organization\)](#)

Recipient Organization
Recipient Address
Recipient Contact
Contact Title
Contact Phone
Contact Email

GRANT INFORMATION

Grant Amount \$ *
Recommended minimum amount \$250

Grant Purpose *

Special Request for Catholic Community Foundation Staff

Make my grant anonymous

LEGAL STATEMENT

Grantmaking guidelines are included in the terms and conditions of my advised fund agreement. I realize my nonbinding grant recommendation is subject to review and approval by the Board of Directors.

I acknowledge the grant recommendation does not represent the payment of any personal pledge or other financial obligation. Nor do I expect or will accept any personal benefit, goods or services in exchange for this grant.

I Agree

This grant, if made, is for the public benefit of the non-profit it is intended for, and not for any one individual, including but not limited to myself.

[Print](#)

Submitted grant recommendations may not appear immediately on your fund summary, but will be visible after the grant has been entered into our database.

Granting to a 501(c)3

To grant to a 501(c)3 click Search Our Database (or Add New Organization) from the Recipient Information section.

(If you would like to duplicate one of your previous grants, please see page 8.)

RECIPIENT INFORMATION

To Select Recipient Organization: [Select From Your Grant History](#)
[Search Our Database \(or Add New Organization\)](#)

Recipient Organization

Recipient Address

Recipient Contact

Contact Title

Contact Phone

Contact Email

Enter the organization's name you wish to grant to, click the Search Aliases box, and click Search. If the correct organization appears, click the Create Grant link at the end of the row.

After selecting the correct organization you will be taken back to screen shown on Page 6 to complete the grant request.

Using this page

Please enter the organization's name in the "Recipient" box and click the "Search" button. If you don't find the name you are looking for, please check the spelling or you can leave the box blank and click the "Search" button to bring up our entire database.

Once you click the "Search" button a list will appear. Please make sure the address is correct, especially if the organization has multiple sites or affiliates.

You can click on the organization's name for more details about the organization or click on the link to "Create a Grant."

Recipient

Search Aliases

Organization Name	Address	City/State	
Catholic Charities of Santa Clara County	2625 Zanker Rd Ste 200	San Jose, CA	Create Grant
Catholic Community at Stanford	PO Box 20301	Stanford, CA	Create Grant

Granting to a 501(c)3

If the organization you wish to grant to is not in our database:

- Click New Recipient.
- Enter the Organization's name, and any other information you may have.
- Click Save.

Using this page

Please enter the organization's name and information. If the organization has multiple sites or affiliates, please include as much information as possible including contact name. For example, if you are recommending a grant to a religious order, please specify which location.

Organization	<input type="text"/>	*
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
City	<input type="text"/>	
State	<input type="text"/>	
Zip	<input type="text"/>	
Contact Name	<input type="text"/>	
Title/Position	<input type="text"/>	
Contact Phone	<input type="text"/>	
Contact Email	<input type="text"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

You will be taken back to screen shown on Page 6 to complete the grant request.

Granting from Fund History

To grant from your Fund History:

- Select the date range if necessary.
- Click Create Grant at the end of the correct row.

GRANT HISTORY

List of all grants awarded from fund:

Current Fiscal Year Previous Fiscal Year Specify Date Range

<u>Date</u>	<u>Recipient</u>	<u>Amount</u>	<u>Purpose</u>	<u>Check No.</u>	
11/01/2016	Loaves and Fishes Family Kitchen	\$450.00	In support of Trivia Tournament	1165	Create Grant
10/25/2016	Loma Prieta Community Foundation	\$250.00	Loma fire fund	1160	Create Grant

You will be taken back to screen shown on Page 6 to complete the grant request.

Granting to a Fund of the Foundation

To grant to one of the many funds the Foundation holds:

- Select the Grant to a Fund button.
- Pick the fund you would like to grant to from the drop down menu.

DONOR INFORMATION

[Print](#)

Donor Name DAF Recommendation

Confirmation Email finigan@cfoscc.org

Funding Source 1022-Legacy - RIF - Parish Stewardship Endowment

Funds Currently Available \$1,429,746.91
for Grants:

Grant Type Grant To A Recipient Grant To A Fund

Grant to (select Fund from drop down list)

GRANT INFORMATION

Grant Amount \$

Recomm

Grant Purpose

Special Request for Catholic Community Foundation Staff

Make

5000 - Unrestricted
5000 - Unrestricted
5010 - Saint Joseph the Builder Endowment
5020 - Parish Refurbishment and Repair
5021 - Cathedral Basilica Preservation Endowment
5022 - Parish Stewardship Endowment
5023 - Parish Outreach Endowment
5031 - Seminarian Endowment
5032 - Diaconate Training Endowment
5040 - Education Tuition Assistance
5050 - ILM Endowment (Institute for Leadership in Ministry)
5051 - Pastoral Ministry Training and Formation Endowment
5052 - Youth Ministry Staff Recruitment and Training Endowment
5053 - Young Adult Ministry Program Endowment
5054 - Social Justice Education Endowment
5070 - New Parish Acquisition and Construction Fund
6019 - Rev. Rick Rodoni Charitable Fund
7001 - Apollonia Andre Fund for Liturgical Music
8001 - Catholic Extension Endowment
8002 - Notre Dame Education
8003 - Catholic Charities Endowment

You will be taken back to screen shown on Page 6 to complete the grant request.

Questions?

If you have any questions about the Online Portal, please contact:

Marie Galetto
Marketing & Grants Program Manager
408.995.5219 x21
galetto@cfoscc.org

