

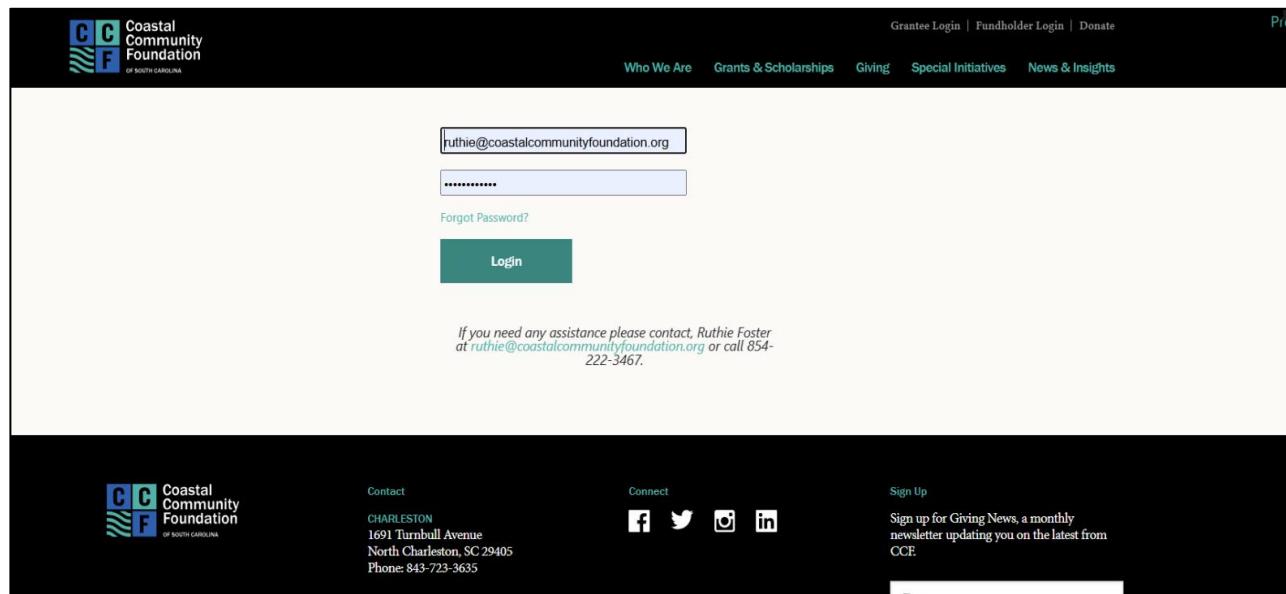
Coastal Community Foundation uses an online Portal to provide a secure and easy way through which you can access fund information. Depending on the type of fund you advise, you may be able to view the latest fund balances, make grant recommendations, or review gift history. The information provided below is meant to guide you in learning about this new system. If you need additional assistance, or have any questions, please contact the Philanthropy Manager at 854-222-3468 or by email at sarah@coastalcommunityfoundation.org

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Logging into the Portal for the First Time

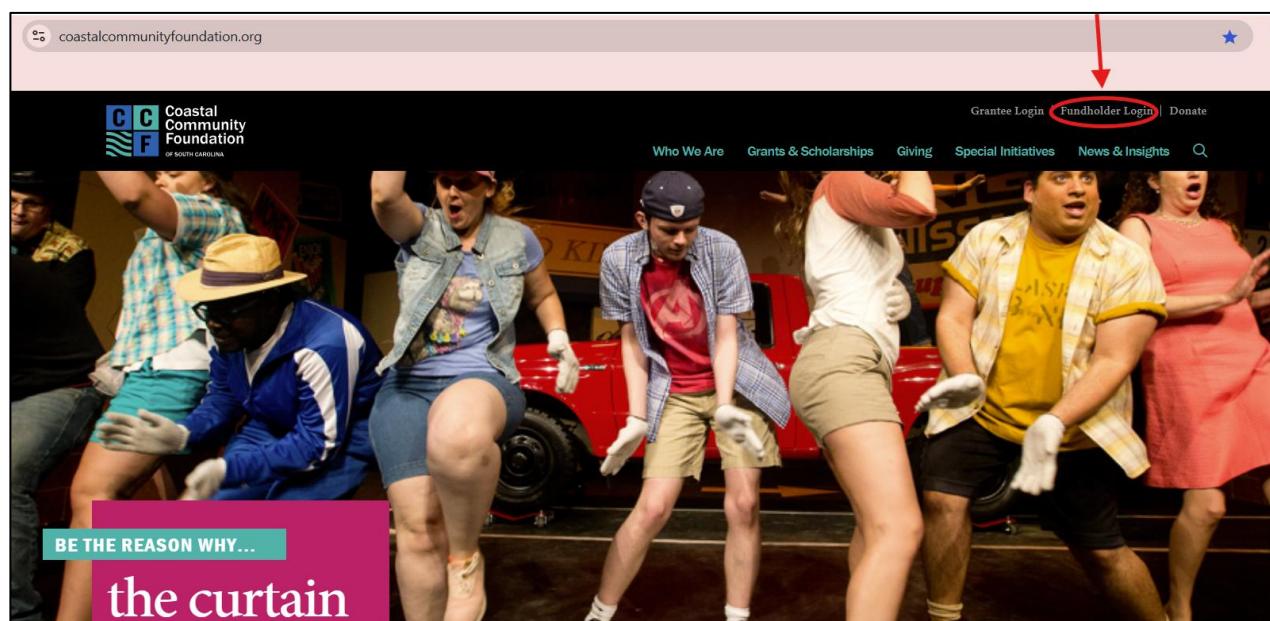
You will receive an email directly from the Stewardship and Donor Engagement Manager with a login name (typically your email address) and a link to access your personal Portal page. Select the link and you will be prompted to create a password for the Portal site. Once your password is created, go to the login page, enter your credentials, and log in. You should see the page below.



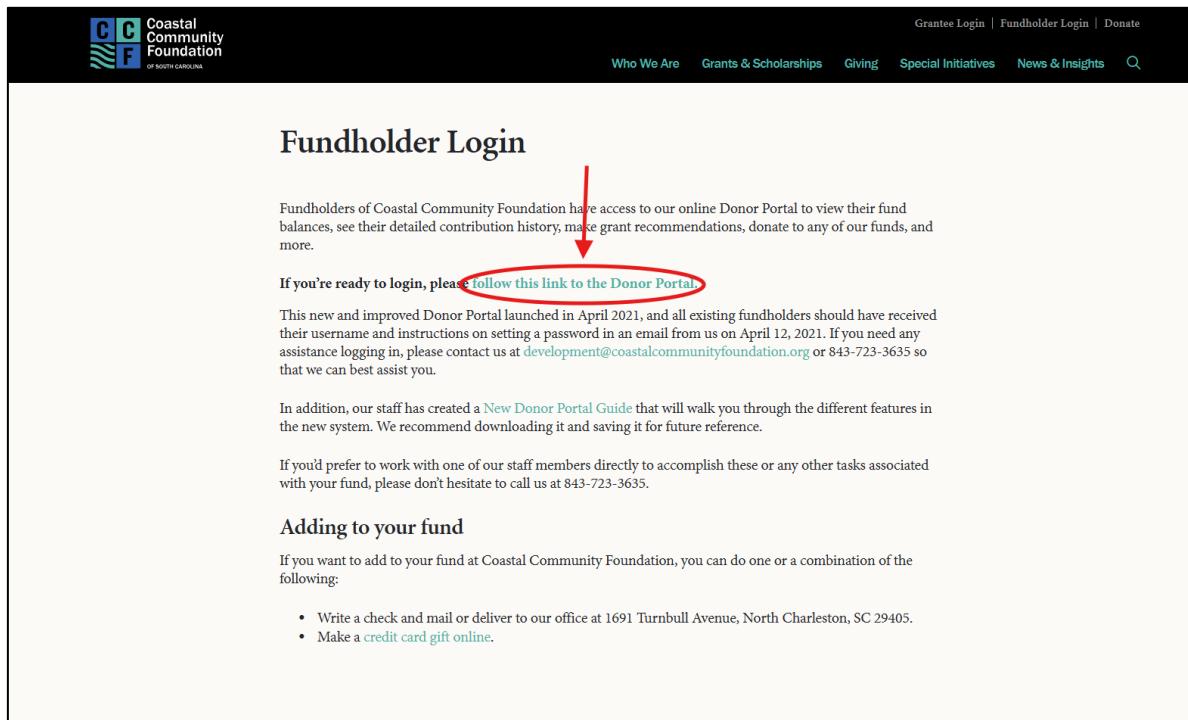
Note: We recommend you bookmark this URL and make note of your new username and password in a safe place for your records.

Logging into the Portal After Setup

To log in after setting up your account in the future, navigate to our website at <http://www.coastalcommunityfoundation.org> and select Fundholder Login on the top right-hand side of the homepage (circled in red). Be careful to select Fundholder Login, not the Grantee Login.



Once you click Fundholder Login, you will be directed to the below landing page where this guide and a Portal walkthrough video are linked. We highly encourage you to watch the video. You will click “follow this link to the portal” to login.



Fundholders of Coastal Community Foundation have access to our online Donor Portal to view their fund balances, see their detailed contribution history, make grant recommendations, donate to any of our funds, and more.

If you're ready to login, please [follow this link to the Donor Portal](#).

This new and improved Donor Portal launched in April 2021, and all existing fundholders should have received their username and instructions on setting a password in an email from us on April 12, 2021. If you need any assistance logging in, please contact us at development@coastalcommunityfoundation.org or 843-723-3635 so that we can best assist you.

In addition, our staff has created a [New Donor Portal Guide](#) that will walk you through the different features in the new system. We recommend downloading it and saving it for future reference.

If you'd prefer to work with one of our staff members directly to accomplish these or any other tasks associated with your fund, please don't hesitate to call us at 843-723-3635.

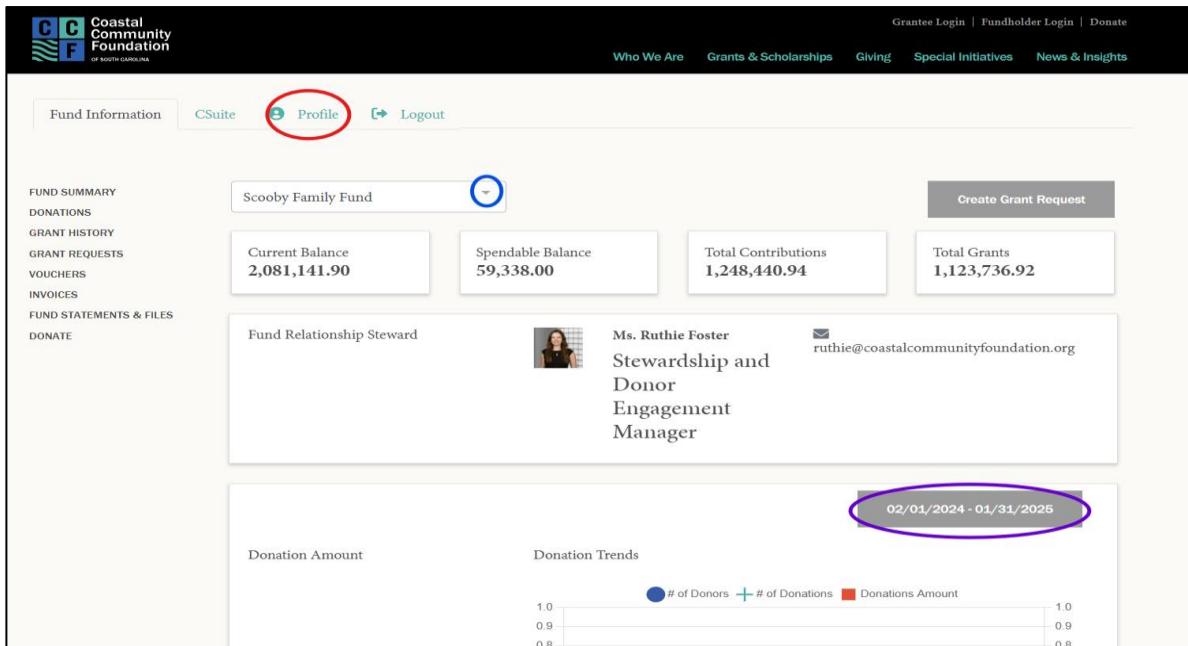
Adding to your fund

If you want to add to your fund at Coastal Community Foundation, you can do one or a combination of the following:

- Write a check and mail or deliver to our office at 1691 Turnbull Avenue, North Charleston, SC 29405.
- Make a [credit card gift online](#).

Tab Selections

Once you have logged in, you can select the tabs on the left of the page to review the different areas available to you as a Fund Advisor. As a reminder, depending on the type of fund that you manage at the Foundation, not all the following tab selections may be available to you. For reference, here is what the tab selections may look like on your screen:



Fund Information CSuite [Profile](#) Logout

FUND SUMMARY

DONATIONS

GRANT HISTORY

GRANT REQUESTS

VOUCHERS

INVOICES

FUND STATEMENTS & FILES

DONATE

Scooby Family Fund

Current Balance: 2,081,141.90

Spendable Balance: 59,338.00

Total Contributions: 1,248,440.94

Total Grants: 1,123,736.92

Fund Relationship Steward: Ms. Ruthie Foster, Stewardship and Donor Engagement Manager

ruthie@coastalcommunityfoundation.org

02/01/2024 - 01/31/2025

Donation Amount

Donation Trends

of Donors + # of Donations ■ Donations Amount

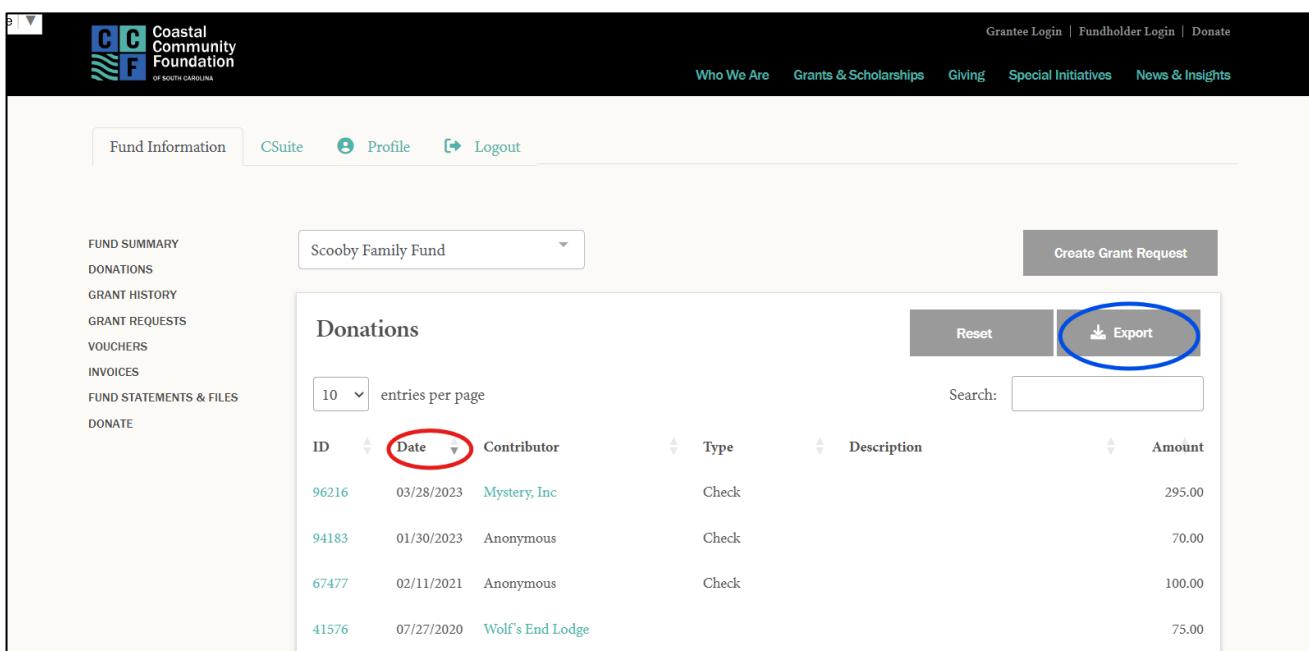
1.0	1.0
0.9	0.9
0.8	0.8

Fund Summary Tab

- Displayed on the Fund Summary Tab is your fund name, current balance updated in real time*, spendable balance, total contributions, and total grants. If you have multiple funds with CCF you could change these using the dropdown menu (circled in blue). Your fund relationship steward is also listed on this summary page. If you need to directly contact us, our photo and contact information are available here. *Please note that investment returns administrative fees are posted quarterly.
- Also listed on this page are both donation and grant trends. If you click the grey date range box (circled in purple), you can create custom date ranges for this data.
- If you click Profile (circled in red) you can update personal information such as your address, phone number, username, password, and interest types.

Donations Tab

- The Donations Tab lists gifts received into the fund. You will be able to see the donation ID, the date of the donation, the donor, the donation type, and the amount. Anything in colored font is clickable for more information.
- If you would like to sort donations by date, you can click on the Date header (circled in red) and the donations will be sorted. You can also utilize the search bar to manually search for a specific donation. This information is exportable as a CSV file, and you can download it by clicking the Export button (circled in blue).



The screenshot shows the CCF portal interface. At the top, there is a navigation bar with links for Grantee Login, Fundholder Login, and Donate. Below the navigation bar, there are links for Who We Are, Grants & Scholarships, Giving, Special Initiatives, and News & Insights. The main content area has a sidebar on the left with links for Fund Information, CSuite, Profile, and Logout. The main content area displays a 'FUND SUMMARY' for the 'Scooby Family Fund'. A 'Create Grant Request' button is visible. Below this, a 'Donations' table is shown with 10 entries per page. The table includes columns for ID, Date, Contributor, Type, Description, and Amount. The 'Date' column header is circled in red, and the 'Export' button is circled in blue. The table shows the following data:

ID	Date	Contributor	Type	Description	Amount
96216	03/28/2023	Mystery, Inc	Check		295.00
94183	01/30/2023	Anonymous	Check		70.00
67477	02/11/2021	Anonymous	Check		100.00
41576	07/27/2020	Wolf's End Lodge			75.00

Grant History Tab

- The Grant Summary page summarizes information by grantee, organizations that have been granted money from the fund. If you click the Grant History button (circled in red), you will be taken to the fund's overall grant history.

Grantee	Grants	Amount
Communities In Schools of South Carolina	19	\$124,000.00
Wings for Kids	15	\$102,103.00
Reading Partners	9	\$71,500.00
Pattison's Academy	7	\$58,500.00

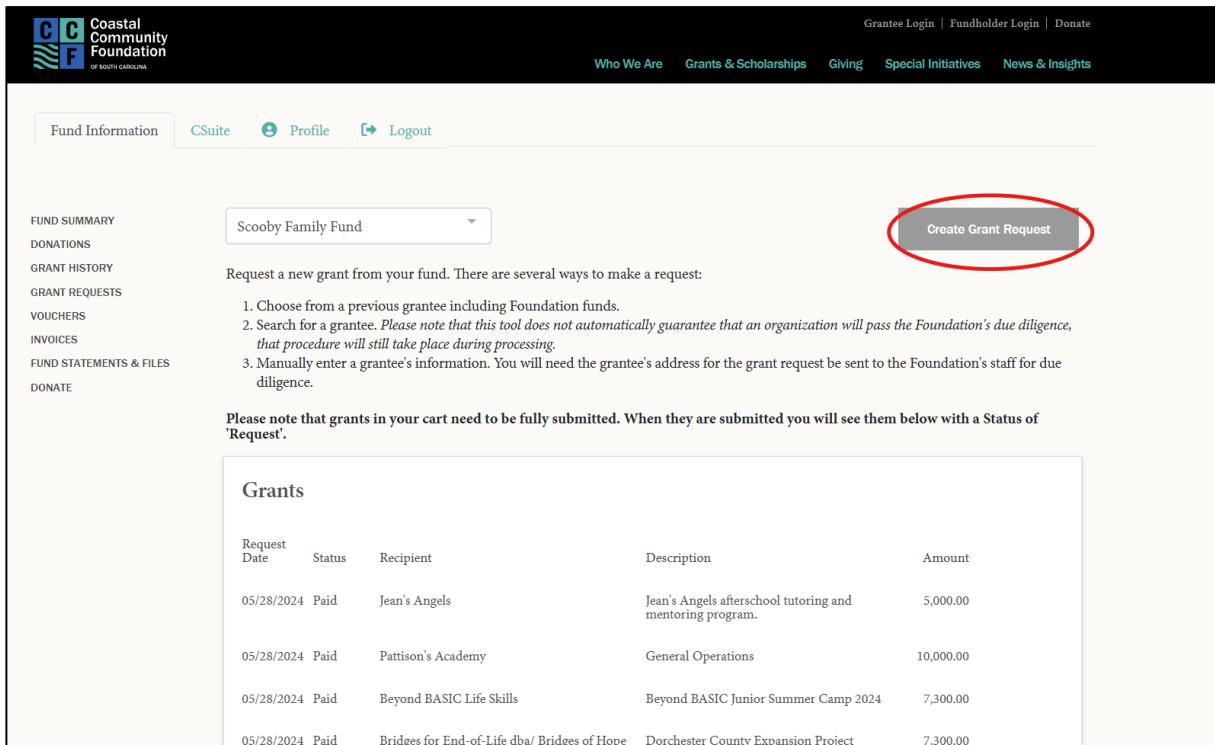
- Here, you can see the grant ID, the grant date, the grant status, the grantee, the grant description, and the grant amount. You can sort the grants by clicking the headers (circled in red) and can utilize the search bar to search for specific grants. This information is exportable as a CSV file, and you can download by clicking the Export button (circled in blue). If you click copy, that will automatically copy the grant into your cart. The Reoccurring Grants tab (circled in purple) lists any reoccurring grants you might have.

ID	Date	Status	Grantee	Description	Advisor	Amount
79250	05/28/2024	paid	Spectrum Sailing	General Operations		7,500.00
79245	05/28/2024	paid	Hispanic Alliance of SC	Student Dreamers Alliance - Investing in Hispanic Youth		10,000.00

- Status indicators may appear throughout the grantmaking process and are listed below. Please contact the Foundation if you have questions about the status of a grant. Most grants are processed in 5-7 business days, unless they need additional approval by our Grantmaking and Community Leadership Committee, which meets monthly.
- Grant Status Breakdown:
 - Request means that your grant request has been sent to our staff.
 - 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.

Grant Request Tab

- When you click the Grant Request tab, you will see three ways to make a grant request. You can choose from a previous grantee, you can search for a grantee, or you can manually enter a grantee. To make a grant request, you click the Create Grant Request button (circled in red).



The screenshot shows the Coastal Community Foundation website's 'Fund Information' page. The 'Create Grant Request' button is highlighted with a red oval.

Header: Coastal Community Foundation of South Carolina, Grantee Login | Fundholder Login | Donate, Who We Are, Grants & Scholarships, Giving, Special Initiatives, News & Insights.

Left Sidebar: Fund Information, CSuite, Profile, Logout.

Fund Summary: Scooby Family Fund.

Grant Requests: Request a new grant from your fund. There are several ways to make a request:

1. Choose from a previous grantee including Foundation funds.
2. Search for a grantee. *Please note that this tool does not automatically guarantee that an organization will pass the Foundation's due diligence, that procedure will still take place during processing.*
3. Manually enter a grantee's information. You will need the grantee's address for the grant request be sent to the Foundation's staff for due diligence.

Note: Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grants Table:

Request Date	Status	Recipient	Description	Amount
05/28/2024	Paid	Jean's Angels	Jean's Angels afterschool tutoring and mentoring program.	5,000.00
05/28/2024	Paid	Pattison's Academy	General Operations	10,000.00
05/28/2024	Paid	Beyond BASIC Life Skills	Beyond BASIC Junior Summer Camp 2024	7,300.00
05/28/2024	Paid	Bridges for End-of-Life dba/ Bridges of Hope	Dorchester County Expansion Project	7,300.00

- Once you click Create Grant Request, you will be directed to the screen below where you can select how you would like to make your grant request (The three options circled in red).

- If you click Previous Grantee, you can select from previous grantees or other funds at CCF. Options will populate from a dropdown menu when you click the text boxes.

- If you click Search Grantee, you can input information such as the Grantee Name, City, State, or EIN number and a list will be generated when you click Search.

Fund Information CSuite Profile Logout

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GRANT HISTORY
GRANT REQUESTS
VOUCHERS
INVOICES
FUND STATEMENTS & FILES
DONATE

Scooby Family Fund

Create Grant Request

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Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request > Choose Type > Search

Search for Grantees

Grantee Name
City State
EIN

Search

- Lastly, you have the option to manually enter a grantee if you have their required information indicated by the asterisks below.

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Scooby Family Fund

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Grant Request > Choose Type > Search

Enter Grantee information manually

Grantee Name *
Street Address * Apartment, S...
City * Sta... Zipcode *
Email Phone
EIN

* These fields are required.

Submit

- Regardless of how you select your grantee, you will be taken to the below page where you fill out the grant request. You will input information such as the description, the amount (grants must be over \$200), whether you would like to remain anonymous, whether you want the grant to be recurring, and additional notes. Once you have finished filling out the grant request, you will click Add to Cart.

Grant Request

Grantee Angel Oak Elementary School

Additional Grantee Contact

Description General Operating 18/255 characters

Amount 1,000

Anonymous

Recurring

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

Attachment Description [Redacted]

Additional Notes [Redacted]

Add To Cart

- Once you add the grant to your cart, you will be able to see it below in the Grant Request Cart. Your next step is to click Review Grant Requests (Circled in red).

Fund Information [CSuite](#) [Profile](#) [Logout](#)

FUND SUMMARY

Scooby Family Fund [Redacted]

Create Grant Request **Cart (1)**

GRANT HISTORY

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DONATE

Request a new grant from your fund. There are several ways to make a request:

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Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request Cart

Recipient	Description	Amount
Angel Oak Elementary School	General Operating	1,000.00

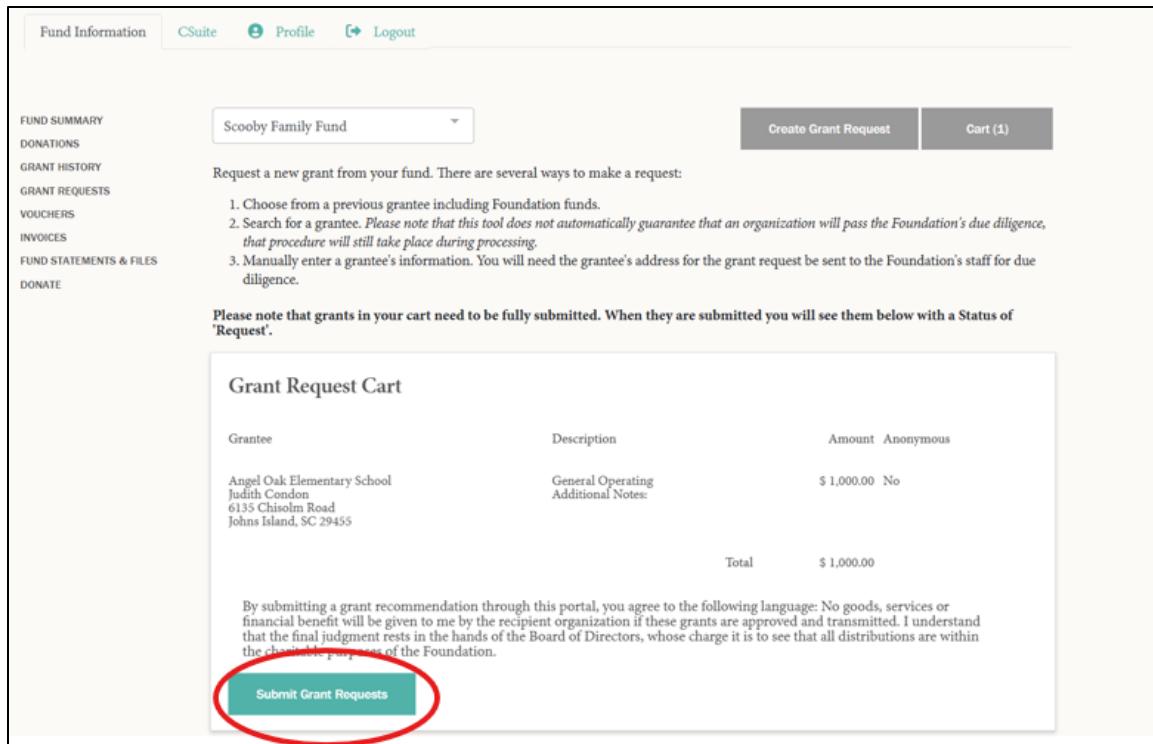
Review Grant Requests [Redacted]

Delete **Edit**

Grant Request Total: 1,000.00

Grants

- The final step is to review the compliance language listed below and click Submit Grant Requests (circled in red).



Fund Information CSuite Profile Logout

FUND SUMMARY Scooby Family Fund Create Grant Request Cart (1)

DONATIONS GRANT HISTORY GRANT REQUESTS VOUCHERS INVOICES FUND STATEMENTS & FILES DONATE

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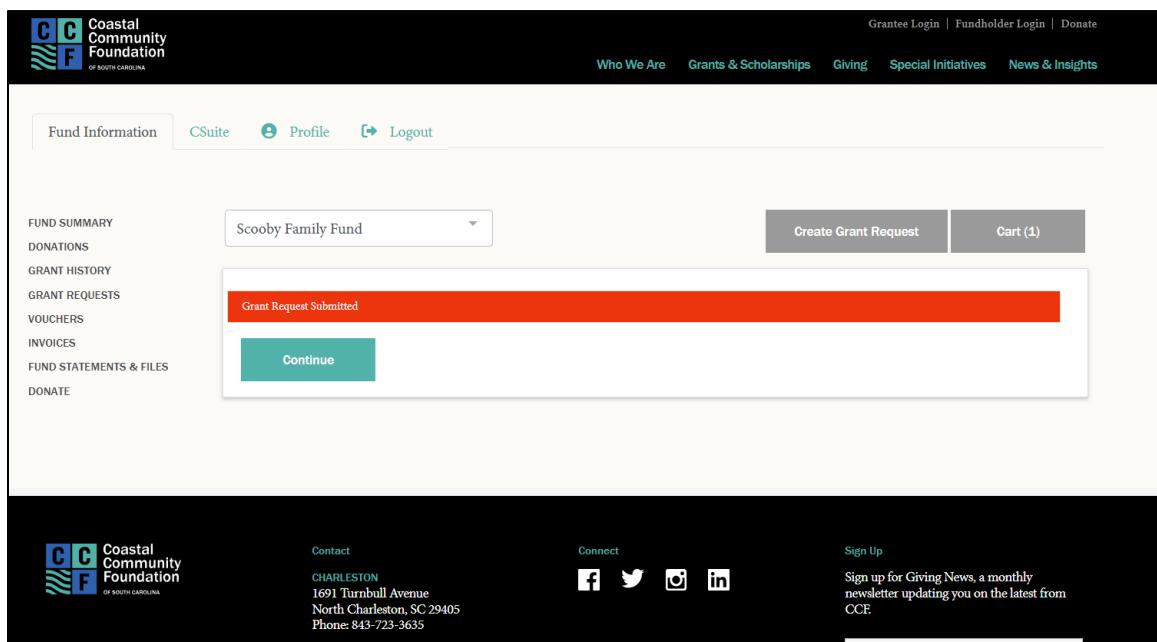
Grant Request Cart

Grantee	Description	Amount	Anonymous
Angel Oak Elementary School Judith Condon 6135 Chisolm Road Johns Island, SC 29455	General Operating Additional Notes:	\$ 1,000.00	No
		Total	\$ 1,000.00

By submitting a grant recommendation through this portal, you agree to the following language: No goods, services or financial benefit will be given to me by the recipient organization if these grants are approved and transmitted. I understand that the final judgment rests in the hands of the Board of Directors, whose charge it is to see that all distributions are within the charitable purposes of the Foundation.

Submit Grant Requests

- Once you submit your grant request, you are finished when you see the red Grant Request Submitted memo below.



Fund Information CSuite Profile Logout

FUND SUMMARY Scooby Family Fund Create Grant Request Cart (1)

DONATIONS GRANT HISTORY GRANT REQUESTS VOUCHERS INVOICES FUND STATEMENTS & FILES DONATE

Grant Request Submitted

Continue

CCF Coastal Community Foundation
OF SOUTH CAROLINA

Contact
CHARLESTON
1691 Turnbull Avenue
North Charleston, SC 29405
Phone: 843-723-3635

Connect
   

Sign Up
Sign up for Giving News, a monthly newsletter updating you on the latest from CCF.

Fund Statements and Files Tab

- In the Fund Statements and Files tab, you can access your past fund statements by clicking View (Circled in red). You can click “Date Range” (Circled in blue) to sort by newest to oldest, or you can utilize the search bar to search for a specific date. If you click on files (Circled in purple), you will see files applicable to your fund, such as your fund agreement.

CCF Coastal Community Foundation
of South Carolina

Grantee Login | Fundholder Login | Donate

Who We Are Grants & Scholarships Giving Special Initiatives News & Insights

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Scooby Family Fund

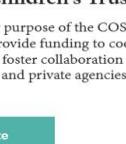
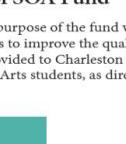
Statements

entries per page

Description	Date Range	
CCF Fund Statements - 9/30/2024	07/01/2024 - 09/30/2024	<input style="border: 2px solid #000; border-radius: 50%; width: 20px; height: 20px;" type="button" value="View"/>
CCF Fund Statements - 6/30/2024	04/01/2024 - 06/30/2024	<input type="button" value="View"/>
CCF Fund Statements -	01/01/2024 - 03/31/2024	<input type="button" value="View"/>

Donate Tab

- The Donate tab allows you to contribute to any listed funds at the Foundation, including your own. By clicking this tab, you will be redirected to our website's donation page and invited to select the fund you want to contribute to or search for any of the funds at the Foundation.

 <h3>Combahee Raid Exhibit Fund</h3> <p>The purpose of this fund is to support the development of an exhibit sharing the story of the Combahee River Raid. Click To Learn More</p> <p>Donate</p>	 <h3>COSY Children's Trust</h3> <p>The primary purpose of the COSY Children's Trust is to provide funding to coordinate services and foster collaboration among government and private agencies to improve t...</p> <p>Donate</p>	 <h3>Friends of SOA Fund</h3> <p>The primary purpose of the fund will be to provide grants to improve the quality of education provided to Charleston County School of the Arts students, as directed by the...</p> <p>Donate</p>
 <h3>Lowcountry African American Giving Circle Founding Donor Endowment</h3> <p>The Lowcountry African American Giving Circle (LAAGC) is an effective, sustainable network of donors. Our financial resources, time and talent will support initiatives,...</p> <p>Donate</p>	 <h3>Lowcountry African American Giving Circle General Membership Fund</h3> <p>The Lowcountry African American Giving Circle (LAAGC) is an effective, sustainable network of donors. Our financial resources, time and talent will support initiatives,...</p> <p>Donate</p>	 <h3>Scooby Family Fund</h3> <p>To benefit CCF's service area in any charitable area, according to Blackbaud's Grants Committee's recommendation. The initial focus areas are education, the disadvantaged, and t...</p> <p>Donate</p>

Logging Out of the Portal

Remember to use the Logout tab to close the Portal securely. You will be automatically logged out each night regardless, so we recommend that you make note of your username and password in a safe place for your records.

Locked Out of your Donor Portal?

If you are locked out of your account, click “Forgot Password” on the login page. Enter your username and click the “Reset Password” button. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account. If you are still having trouble, please contact the Philanthropy Manager at 854-222-3468 or by email at sarah@coastalcommunityfoundation.org

FAQs

- **How will I know if I submitted a grant successfully?**

You can check the status of the grant in the portal, on the Grants tab.

- **How long does it take to process a grant recommendation?**

Grant recommendations received by Monday at 11:59 AM will be in the queue for due diligence review and processing the following Friday. Occasionally it is necessary to adjust this timeline due to holidays or other one-time occurrences. You can always check the status of a grant in the Portal.

- **Why can't I recommend a grant?**

Not all fund types have the same permissions. Contact your Relationship Steward or Fund Contact to inquire.

- **What do I do if I forgot my Fund Contact's information?**

Your fund relationship steward is listed at the top of the Fund Summary tab.

- **I've lost my password. What should I do?**

For security reasons, the Coastal Community Foundation does not have the ability to access your password. You can reset your password on the donor portal login page. If you still need assistance, please email sarah@coastalcommunityfoundation.org or call 854-222-3468 for assistance.

- **I do not understand how to navigate the portal. Where can I get help?**

If you still have questions, reach out to the Philanthropy Manager at 854-222-3468 or by email at sarah@coastalcommunityfoundation.org