



Cumberland Community  
Foundation, Inc.

## **MyCCF Guide**

If you have questions or need assistance with your login name, password, or access to your fund, please contact Donor Services Manager, Cameron Sims, at [Cameron@CumberlandCF.org](mailto:Cameron@CumberlandCF.org) or 910-483-4449 ext. 107.

*Office hours are Monday–Thursday from 9:00 a.m. to 5:00 p.m. and Friday from 9:00 a.m. to 1:00 p.m.*

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## What is MyCCF?

[MyCCF](#) is a convenient new way for donors and fund advisors to access their funds 24/7 via a secure, password-protected website.

Through the MyCCF site all fundholders can:

- Check a fund balance
- View all contributions to the fund
- View the grantmaking history of the fund
- View, download, and print fund statements
- Donate to their fund

Fundholders and/or advisors of donor advised funds will also be able to:

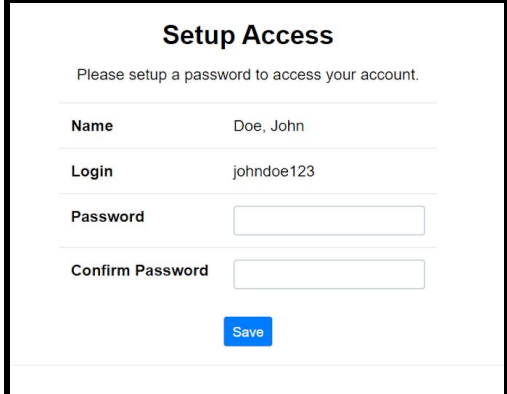
- Request a grant distribution to be made to a nonprofit organization
- Request a grant distribution to be made to another fund at CCF

## Initial Login Process and Creating Your Account

You will receive an email from Cumberland Community Foundation with a custom invitation link to create your MyCCF account. Your Login will be the email address we have on file for you. If you would like to change your login name for any reason, please contact our Donor Services Manager at 910-483-4449 ext. 107 or [cameron@cumberlandcf.org](mailto:cameron@cumberlandcf.org).

Once you click on the invitation link in the email you will be prompted to create a password of your choice. Simply input a password, save it, and you will be able to access the system.

Should you ever need to reset your password you can simply click on **Forgot Password?** on the login screen OR contact us at the Foundation to receive an email that will allow you to reset your password.



**Setup Access**

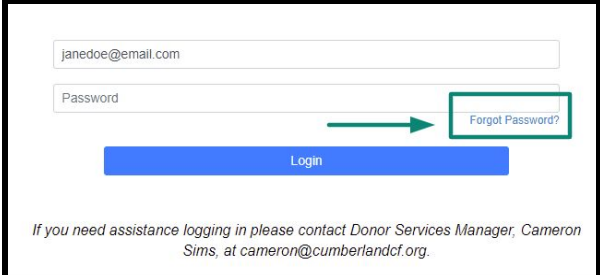
Please setup a password to access your account.

Name	Doe, John
Login	johndoe123
Password	<input type="password"/>
Confirm Password	<input type="password"/>

[Save](#)

## Returning Users/ Accessing Your Account Going Forward

To access the [MyCCF site](#) visit Cumberland Community Foundation's website at [www.cumberlandcf.org](http://www.cumberlandcf.org) and click **MyCCF** on the top navigation bar. You will be redirected to a login page where you will enter your unique login name and password. Should you ever need to reset your password you can simply click on **Forgot Password?** on the login screen OR contact us at the Foundation to receive an email that will allow you to reset your password.



janedoe@email.com

Password

[Forgot Password?](#)

[Login](#)

If you need assistance logging in please contact Donor Services Manager, Cameron Sims, at [cameron@cumberlandcf.org](mailto:cameron@cumberlandcf.org).

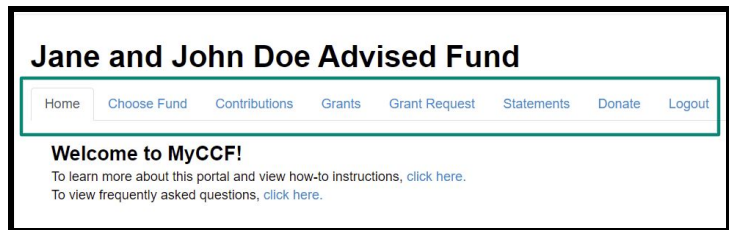
While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up. If you forget your login name, the Foundation can assist you in looking that up.

Note: The MyCCF site will lock you out after five unsuccessful login attempts. If you are locked out, please contact the Foundation.

## Navigating the MyCCF Site

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

*Please note: If you serve as a contact for multiple funds, you will see the **Choose Fund** menu once you have successfully signed in to the MyCCF system. Choose the particular fund with which you wish to interact. If you are listed as an advisor for only one fund, you will go directly to the **Home** tab for the fund.*



### Home

Your homepage is a quick snapshot of your fund’s most recent activity. It will show your fund’s current balance\*, all fund advisors, recent contributions, and recent grants.

*\*Please note: If your fund is invested, the fund balance listed may not include the most recent investment and administrative activity.*

**Jane and John Doe Advised Fund**

Home Choose Fund Contributions Grants Grant Request Statements Donate Logout

**Welcome to MyCCF!**  
To learn more about this portal and view how-to instructions, [click here](#).  
To view frequently asked questions, [click here](#).

**Current Balance: \$28,600.00**

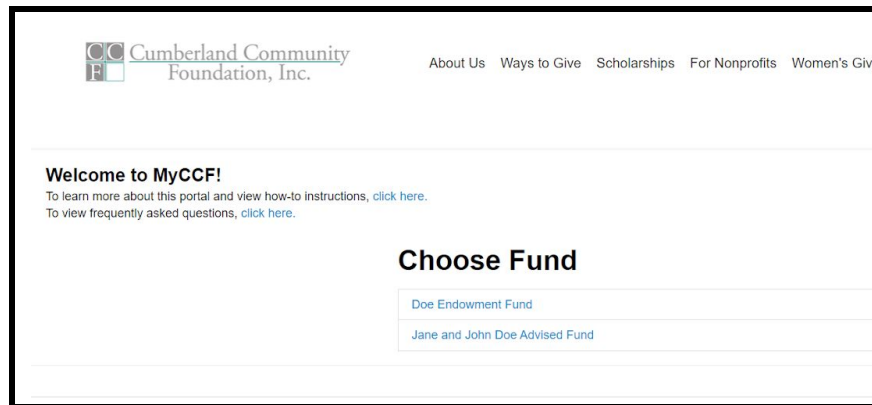
**Available Cash: \$25,750.00**

Fund Advisors are: Doe, Jane and John; Doe, Jane; Doe, John

Recent Contributions				Recent Grants				
Date	ID	Contributor	Amount	Date	ID	Status	Recipient	Amount
05/06/2020	48833	Doe, Jane and John	20,000.00	05/19/2020	28825	Paid	Friends of the Cumberland County Public Library, Inc.	1,500.00
05/06/2020	48835	Doe, Jane and John	3,500.00	05/19/2020	28826	Approved	The Gilbert Theater Endowment - Designated :: Agency Designated	100.00
05/06/2020	48836	Doe, Jane	5,000.00	05/19/2020	28827	Pending	Cumberland County Schools-Cape Fear High School	850.00
05/06/2020	48837	Doe, John	4,000.00	04/01/2020	28822	Paid	Fayetteville Urban Ministry Endowment Fund - Designated :: Agency Designated	1,000.00
				04/01/2020	28820	Paid	Cape Fear Regional Theatre at Fayetteville, Inc.	300.00

## Choose Fund

This tab is only visible if there are other funds to select and view. Use this feature when you are ready to switch to another fund for review.



## Contributions

This tab contains a list of all donations received to the fund. Online gifts should be posted to this list very quickly; however, gifts received via check/donor advised funds will take a few business days to show on the portal. Donor names are shared here unless the contribution was made anonymously. Clicking on a contributor's name will bring up their history of contributions to the fund and contact information.

Note that you can also export this contribution list into an Excel spreadsheet by clicking on the **Export** option that appears in the top menu bar when you are in the **Contributions** tab.

The screenshot shows the 'Jane and John Doe Advised Fund' Contributions page. The top navigation bar includes 'Home', 'Choose Fund', 'Contributions', 'Grants', 'Grant Request', 'Statements', 'Donate', 'Logout', and 'Export'. The 'Contributions' tab is highlighted with a green box, and a green arrow points to it from the left. The 'Export' button is also highlighted with a green box, and a green arrow points to it from above. Below the navigation bar, there is a 'Welcome to MyCCF!' message with links for 'To learn more about this portal and view how-to instructions, click here.' and 'To view frequently asked questions, click here.'. The main heading is 'Contributions', and there is a table of contributions.

Date	ID	Contributor	Description	Type	Amount
05/20/2020	48871	<a href="#">Doe, Jane and John</a>		Check	2,000.00
05/20/2020	48870	<a href="#">Doe, Jamie</a>	In honor of Jane and John's 50th Wedding Anniversary	Check	500.00
05/06/2020	48833	<a href="#">Doe, Jane and John</a>	Initial gift to open fund	Cash	20,000.00
05/06/2020	48835	<a href="#">Doe, Jane and John</a>	Transfer of ZYX stock	Public Security	3,500.00
05/06/2020	48836	<a href="#">Doe, Jane</a>	IRA Charitable Rollover	Check	5,000.00
05/06/2020	48837	<a href="#">Doe, John</a>	IRA Charitable Rollover	Check	4,000.00

## Grants

This tab contains a list of all grant distributions from the fund, as well as a summary of all grantees that have received grants from the fund.

Under **Grantee Summary**, you can click on a grantee to view a list of all grants that have been distributed to that organization from your fund.

Note that you can also export this contribution list into an Excel spreadsheet by clicking on the **Export** option that appears in the top menu bar when you are in the **Grants** tab.

**Jane and John Doe Advised Fund**

Home Choose Fund Contributions **Grants** Grant Request Statements Donate Logout **Export**

Welcome to MyCCF!  
To learn more about this portal and view how-to instructions, [click here](#).  
To view frequently asked questions, [click here](#).

### Grantee Summary

Grantee	Grants	Amount
Better Health of Cumberland County, Inc.	1	250.00
Cape Fear Regional Theatre at Fayetteville, Inc.	1	300.00
Child Advocacy Center, Inc.	1	100.00
Cumberland Community Foundation	3	1,650.00

### Grants

Date	ID	Status	Recipient	Description	Amount
04/01/2020	28820	Paid	Cape Fear Regional Theatre at Fayetteville, Inc.	for children's summer programs.	300.00
04/01/2020	28819	Paid	Better Health of Cumberland County, Inc.	for general use	250.00
04/01/2020	28821	Paid	Child Advocacy Center, Inc.	for the special project fundraiser.	100.00

## Grant Request

This tab is only available for donor advised funds. This is the page donor advisors will use to request a grant distribution from the fund to a charitable organization and to note the status of any recent grant requests. Detailed instructions for how to initiate a grant request through MyCCF can be found in the [Grant Request section](#) of this guide.

**Jane and John Doe Advised Fund**

Home Choose Fund Contributions Grants **Grant Request** Statements Donate Logout

Welcome to MyCCF!  
To learn more about this portal and view how-to instructions, [click here](#).  
To view frequently asked questions, [click here](#).

There are several ways to request a grant distribution from your fund. Choose a Grantee in one of four ways:

- 1. Choose from Previous Grantees.**  
Choose the organization you want to support from the drop-down list of organizations you have previously supported under the section "Grantees you have given to in the past".  
*Note: This only contains grantees you have given to since January 2019.*  
OR
- 2. Choose Other Foundation Funds.**  
Choose an endowment fund you want to support from the drop-down list of funds at Cumberland Community Foundation. If you have given to this fund since January 2019, you can look in the dropdown list contained under "Foundation funds you have given to in the past," otherwise, you can look for the fund under the drop-down list of "Other foundation funds."  
OR
- 3. Search for Other Grantees**  
Under this section, enter the name of the organization you would like to support and click **Search**.  
This will first search the list of current grantees entered in the CCF database in the tab called "Cumberland Community Foundation." If you do not see the organization you are looking for, click **Grant Request**.

### Grants

Date	Status	Recipient	Description	Amount
04/01/2020	Paid	Cape Fear Regional Theatre at Fayetteville, Inc.	for children's summer programs	300.00
04/01/2020	Paid	Better Health of Cumberland County, Inc.	for general use	250.00
04/01/2020	Paid	Child Advocacy Center, Inc.	for the special project fundraiser	100.00
04/01/2020	Paid	Cumberland Community Foundation	for the Fayetteville Urban Ministry Endowment Fund.	1,000.00
04/01/2020	Paid	Cumberland Community Foundation	for Summertime Kids Annual Fund 2020.	150.00
04/01/2020	Paid	Cumberland Community Foundation	to support the relief efforts as a result of COVID-19.	500.00

## Statements

This tab will show financial statements for the fund. A December 31 statement is posted in January for all funds. Statements for agency endowments are posted for that organization's fiscal year end. Other statements are available upon request. 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.

Home Choose Fund Contributions Grants Grant Request **Statements** Donate Logout

**Welcome to MyCCF!**  
To learn more about this portal and view how-to instructions, [click here](#).  
To view frequently asked questions, [click here](#).

### Statements

Statement	Date Range	Status	
2019	01/01/2019 - 12/31/2019	Final	<a href="#">Print</a>
2018	01/01/2018 - 12/31/2018	Final	<a href="#">Print</a>

## Donate

This will take you to our online Donation Portal, which is where you can donate to your own fund(s) via credit/debit card online and browse other funds that CCF manages. *(NOTE: Though you will be able to see your own fund listed here, your donor advised fund is not visible to others unless you have asked CCF to make it public.)*

When donating online, you will be asked if you would like to add 3.0% to your donation to cover the processing fees that our third-party card processor charges.

To return to the MyCCF Portal, click **Home** at the top.

Home Donate To A Fund Logout

**Welcome to MyCCF!**  
To learn more about this portal and view how-to instructions, [click here](#).  
To view frequently asked questions, [click here](#).

### Making a Gift Online

To make your gift online, you can either select from the funds listed below, use the Search feature at the bottom of the page to find a fund, or click on "show all funds list" to view an expanded list of public funds. Once you complete your gift, you will receive an email notification of the donation and a second email with your tax receipt attached.

Please note, this is not a comprehensive list of all funds managed by CCF. If you do not see the fund you are interested in donating to please contact us. If you have questions or need assistance, please contact (910) 483-4449 or email [cameron@cumberlandcf.org](mailto:cameron@cumberlandcf.org). *Thank you for making an investment in your community!*

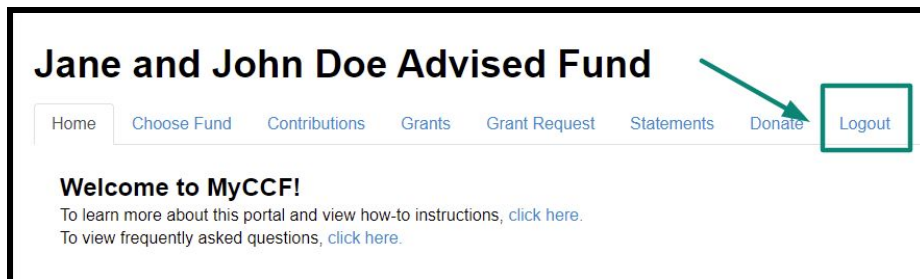
Federal Tax ID: 58-1406831

### Donate To Fund

Fund Name	Description
<b>Funds that support special projects</b>	
<a href="#">CCS Fund for Student Emergency Needs</a>	This fund was created to support the emergency needs of students of Cumberland County Schools, including but not limited to tools necessary to learn at home (Chromebooks, internet access, mobile hot spots in neighborhoods), emergency assistance for food and clothing, and other support for students in need.

## Logout

For security reasons and donor privacy please always be sure to log out when you are finished reviewing your fund(s) in the MyCCF site. If you forget to logout, you will be automatically logged out at midnight.



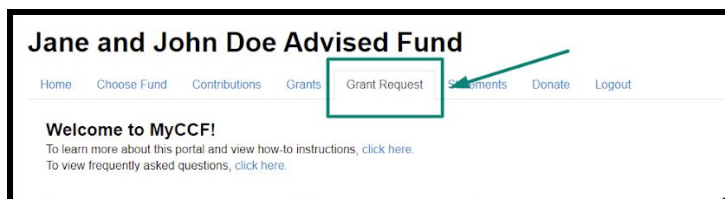
## Email Alerts

You will be notified of each donation and grant paid from your fund via email alerts. These alerts can be cancelled at any point by contacting CCF staff. These alerts are not retroactive, so you will not be notified of past grants or donations.

## Grant Requests

To recommend a grant from your fund, click the **Grant Request** tab. Recommending a grant is a three-step process:

1. Choose a Grantee
2. Enter the Grant Details
3. Review and Submit the Request



### STEP 1. Choose a Grantee in one of four ways:

#### A. Choose from Previous Grantee

Choose the organization you want to support from the drop-down list of organizations you have previously supported under the section “Grantees you have given to in the past.”

*Note: This only contains grantees you have given to since January 1, 2019.*



OR

### B. Choose Other Foundation Funds

Choose an endowment fund you want to support from the drop-down list of public funds at Cumberland Community Foundation. If you have given to this fund since January 1, 2019, you can look in the drop-down list contained under “Foundation funds you have given to in the past,” otherwise, you can look for the fund under the drop-down list of “Other foundation funds.”

**Choose from previous Grantee**

Grantees you have given to in the past

Foundation funds you have given to in the past

Other foundation funds

OR

### C. Search for Other Grantees

Under this section enter the name of the organization you would like to support and click **Search**.

**Search for other Grantees**

Name  [Search](#)

or

This will first search the list of current grantees entered in the CCF database in the tab called **Cumberland Community Foundation, Inc. Results**. If you see the organization listed here, **Create Request**.

**Grantee Search Results for "Fayetteville Symphony Orchestra"**

[Cumberland Community Foundation, Inc. Results](#) [Guidestar Results](#)

Name	City / State	EIN
<a href="#">Create Request</a> Fayetteville Symphony Orchestra Endowment - Designated		
<a href="#">Create Request</a> Fayetteville Symphony Orchestra, Inc.	Fayetteville, NC	58-1393271
<a href="#">Create Request</a> Marion Cusack Vonnegut & Norbert Josef Vonnegut Memorial Endowment for Fayetteville Symphony Orchestra		

1 - 3 of 3

If you are unable to find the organization listed under CCF Results, click **Guidestar Results** to search Guidestar, an online database of nonprofit organizations. Once you find the organization you want to support, click **Create Request**. In the case of multiple Guidestar results, a good way to ensure you are selecting the correct organization is to review the location and/or the EIN number located in the right-hand columns. The EIN number can usually be found on an organization’s website or by asking a staff member of the organization.

**Grantee Search Results for "Playworks"**

Cumberland Community Foundation, Inc. Results **Guidestar Results**

Name	City / State	EIN
<a href="#">Create Request</a> Playworks Education Energized	Oakland, CA	94-3251867
<a href="#">Create Request</a> Parrish Playworks	PARRISH, FL	46-5477421
<a href="#">Create Request</a> Playworks	Minneapolis, MN	41-1490953
<a href="#">Create Request</a> PLAYWORKS COMPANY INC	Philadelphia, PA	22-2657502
<a href="#">Create Request</a> Playworks	SEATTLE, WA	94-3057801

1 - 5 of 5

OR

#### D. Enter Grantee Information Manually

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

*Note: Please only enter grantee information manually if you are unable to find the organization after trying the methods above, as this will help ensure that we do not duplicate existing organizations in our database.*

**Enter Grantee information manually**

Name \*

Address \*

City

State

Zipcode \*

Phone \*

Email

\* required information

[Submit](#)

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including grant description and amount.

## **STEP 2. Enter Grant Details:**

*Note: All fields on this page are optional with the exception of **Amount**- which is required.*

In the **Description** field please provide the grant purpose, if it is not for general support. If you are making your grant in honor of/in memory of a loved one, you should also make note of that in this field and provide the contact information for the individual(s) who should receive an acknowledgement card from the grantee organization.


Enter the **Amount**. This field is required. *Note: A \$50 minimum is required for each grant request.*

You can choose to remain anonymous by selecting the **Anonymous** checkbox.

You can choose to create a recurring grant by selecting the **Recurring** checkbox and noting the frequency of the recurrence (choice of Monthly, Quarterly, Semi-Annually, or Annually) and how many times you would like the gift to recur. (If you leave the number of recurrences blank, the grant will take place indefinitely, or until you notify CCF to stop.)

If you would like to upload accompanying documents for the grant, you can use the **Attachment** feature. Attaching a file is completely optional —some prefer to include information provided by the grantee organization that might give additional detail about the grant, like a letter or a flyer. Anything typically mailed in the past along with a form should be attached here.

### New Grant Request

<b>Grantee</b>	Friends of the Cumberland County Public Library, Inc.
<b>Description</b>	<div style="border: 1px solid #ccc; padding: 5px;">to support the children's program.  In honor of Jamie Doe. Please send acknowledgement to: Jamie Doe, 125 Sesame Street, Fayetteville, NC 28303.</div> <small>145/255 characters</small>
<b>Amount</b>	<input type="text" value="1,500"/>
<b>Anonymous</b>	<input type="checkbox"/>
<b>Recurring</b>	<input type="checkbox"/>
<b>Attachment</b>	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)
<b>Attachment Description</b>	<input type="text"/>
<b>Instructions to CCF Staff (If needed)</b>	<div style="border: 1px solid #ccc; padding: 5px;">Please mark to the attention of the Library Director.</div>
<input type="button" value="Review"/> 	

There is also a field where you can provide more detailed **Instructions to CCF Staff**, if needed.

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

### **STEP 3. Review and Submit Request:**

Review your grant request details and click **Submit Request**. If something is incorrect, you can click **Edit Request** to make corrections. Once submitted, grant requests are processed on a weekly basis. Each week all grant requests received by noon on Thursday will be processed and mailed out on Friday, unless CCF offices are closed in observance of a holiday, etc.

#### **Review New Grant Request**

<b>Grantee</b>	Friends of the Cumberland County Public Library, Inc.
<b>Description</b>	to support the children's program. In honor of Jamie Doe. Please send acknowledgement to: Jamie Doe, 125 Sesame Street, Fayetteville, NC 28303.
<b>Amount</b>	\$ 1,500
<b>Anonymous</b>	No
<b>Instructions to CCF Staff (if needed)</b>	Please mark to the attention of the Library Director.

I, the Advisor, recommend these grants from the above named fund. I understand that the recommended grant distributions cannot represent the payment of a legal obligation of a Donor or Advisor, nor can a Donor or Advisor, nor any related parties, receive any personal benefit from the charitable distribution (such as membership benefits, dues, event tickets, goods bought at auctions, etc.), nor can a Donor or Advisor or related parties receive grants, loans, compensation, or similar payments from a donor advised fund. In addition, I understand that approval of these distributions is contingent upon the final recommendation of the Board of Directors of Cumberland Community Foundation, Inc.

**By clicking "Submit Request", I am agreeing to the statement above.**

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

## Grant Request History

To review your most recent grant history, click the **Grant Request** tab and look at the right-hand side of the screen. Here there is a table displaying your most recent grant requests.

Under the **Status** column you will see the status 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 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 or Completed** means that the grant request has been approved and a check has been paid out to the organization.

Date	Status	Recipient	Description	Amount	
05/19/2020	Request	City of Fayetteville/Fayetteville /Cumberland Parks and Recreation	for facility improvements.	2,000.00	
05/19/2020	Pending	Cumberland County Schools-Cape Fear High School	for purchase of student materials for the 2020-2021 academic year.	850.00	
05/19/2020	Paid	Friends of the Cumberland County Public Library, Inc.	to support the children's program. In honor of Jamie Doe. Please send acknowledgement to: Jamie Doe, 125 Sesame Street, Fayetteville, NC 28303.	1,500.00	
05/19/2020	Approved	Cumberland Community Foundation	for the Gilbert Theater Endowment fund.	100.00	
04/01/2020	Paid	Cumberland Community Foundation	for the Fayetteville Urban Ministry Endowment Fund.	1,000.00	
04/01/2020	Paid	Cumberland Community Foundation	for Summertime Kids Annual Fund 2020.	150.00	
04/01/2020	Paid	Cumberland Community Foundation	to support the relief efforts as a result of COVID-19.	500.00	
04/01/2020	Paid	Cape Fear Regional Theatre at Fayetteville, Inc.	for children's summer programs.	300.00	

