If you have questions or need assistance with your login name, password, or access to your fund, please contact Donor Services Manager, Maddie Kellogg, at Maddie@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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*For assistance contact us at Maddie@CumberlandCF.Org or call 910-483-4449 ext. 107.*
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 Maddie@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.

Returning Users/ Accessing Your Account Going Forward

To access the MyCCF site visit Cumberland Community Foundation’s website at 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.

For assistance contact us at Maddie@CumberlandCF.Org or call 910-483-4449 ext. 107.
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.
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.
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.

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.
**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.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Date Range</th>
<th>Status</th>
<th>Print</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>01/01/2019 - 12/31/2019</td>
<td>Final</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>01/01/2018 - 12/31/2018</td>
<td>Final</td>
<td></td>
</tr>
</tbody>
</table>

**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.
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.
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.”

OR

C. 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, Inc. Results. If you see the organization listed here, Create Request.
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"

<table>
<thead>
<tr>
<th>Name</th>
<th>City / State</th>
<th>EIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Playworks Education Energized</td>
<td>Oakland, CA</td>
<td>94-3551887</td>
</tr>
<tr>
<td>Create Request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parish Playworks</td>
<td>PARRISH, FL</td>
<td>46-5477421</td>
</tr>
<tr>
<td>Create Request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Playworks</td>
<td>Minneapolis, MN</td>
<td>41-1490953</td>
</tr>
<tr>
<td>Create Request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLAYWORKS COMPANY INC</td>
<td>Philadelphia, PA</td>
<td>22-2657502</td>
</tr>
<tr>
<td>Create Request</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Playworks</td>
<td>SEATTLE, WA</td>
<td>94-3557501</td>
</tr>
</tbody>
</table>

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.

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.

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.
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.

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

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