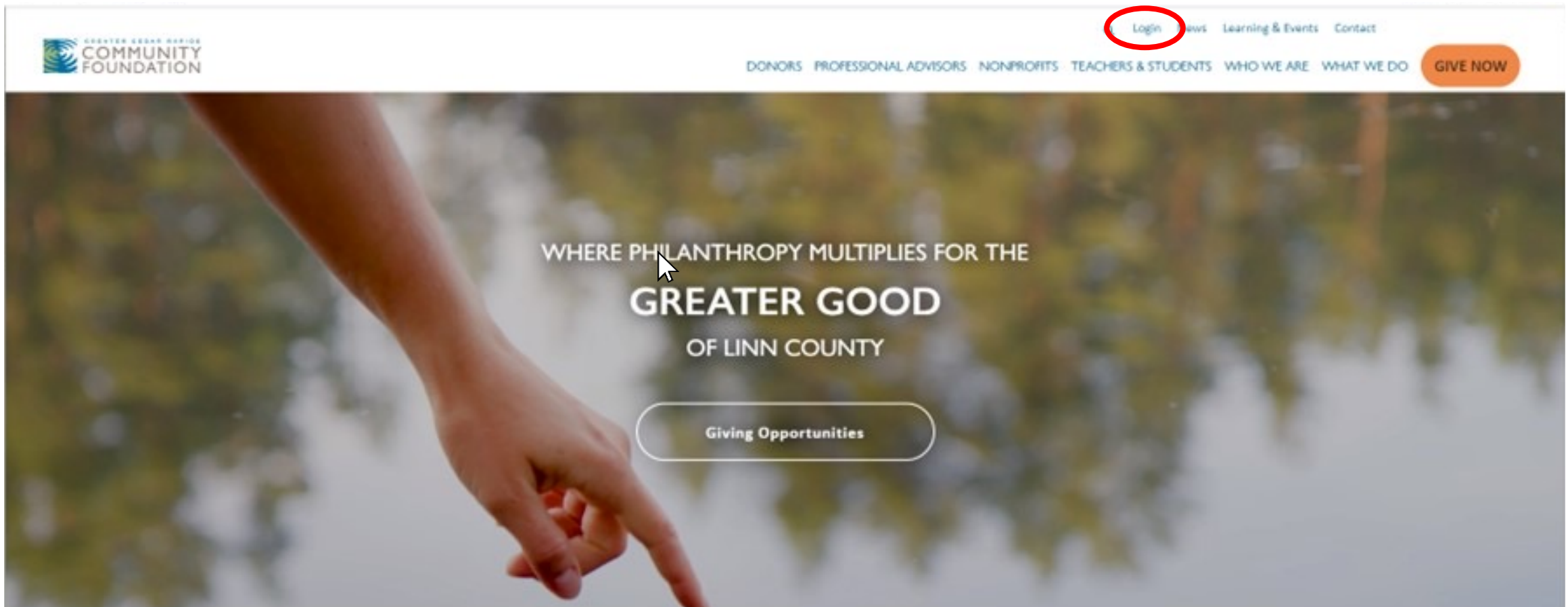


DONOR VIEW INSTRUCTIONS

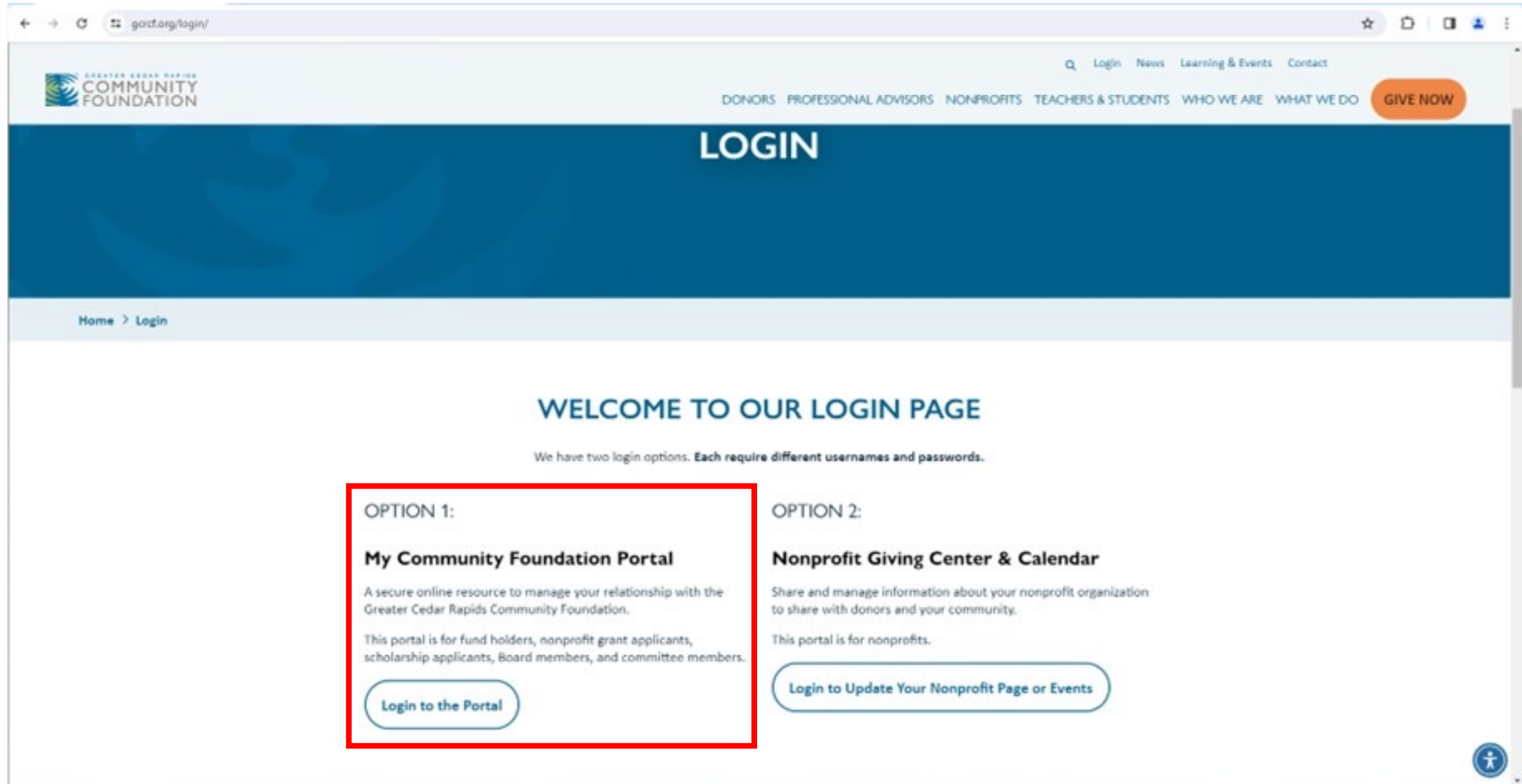


GREATER CEDAR RAPIDS
COMMUNITY
FOUNDATION

Donor View is a free, secure, online tool that allows you to access your fund information 24 hours a day. Through Donor View, you can make contributions to your fund, recommend grants, update your personal information, access fund documents, and view fund activity. To get started, go to gcrf.org and click “Login” at the top of the page.



On the login page, select Option 1: My Community Foundation Portal and Login to the Portal.



WELCOME TO MY COMMUNITY FOUNDATION PORTAL

We are pleased to offer this secure online resource to manage your relationship with the Greater Cedar Rapids Community Foundation.

This portal is for Fund Holders, Nonprofit Grant Applicants, Scholarship Applicants, Board members, Board committee Members, Grant Committee Members, and Scholarship Committee Members.

ACCOUNT LOGIN

User*

Password*

LOGIN

FORGOT PASSWORD

GET STARTED

Request access to create account

You must be registered with the Community Foundation and have a username and password to login. Click or call the appropriate contact below to request access.

Fund Holders

DONOR VIEW

Fund holders can use Donor View to contribute to or make grants from their fund, review fund activity, link to other account details, and

Nonprofit Grant Applicants

GRANTEE VIEW

Nonprofits can use Grantee View to apply for grants online.

Scholarship Applicants

SCHOLAR VIEW

Students can use Scholar View to apply for scholarships online.

Board Members and Board Committee Members

BOARD VIEW

Community Foundation board members and board committee members can review meeting packets, minutes, resources, and


Grant and Scholarship Committee Members

COMMITTEE VIEW

Grant and scholarship committee members can review applications, meeting minutes, and more.


Enter your unique username and password and click “Login.” After your initial login, you will be prompted to reset your password for security purposes.

Once logged in, you will be directed to the Donor View section of the website. If you need to access other portions of the website while logged in, such as the Nonprofit Giving Center, we recommend using a separate internet browser tab. On the left side of the screen, select “Donor View” to view your Donor Dashboard and access other functions of Donor View.



Logout News Events Contact

HOME DONOR VIEW GRANTEE VIEW SCHOLAR VIEW BOARD VIEW COMMITTEE VIEW



DONOR VIEW

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RECOMMEND GRANTS

DONOR VIEW DEMO

Please take a few minutes to watch the [video tutorial](#) on how to use Donor View.

HOW TO READ YOUR MONTHLY STATEMENT

[Click here](#) for an explanation of how to read your monthly statement.

DONOR DASHBOARD

FUND

Id: 10382

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

[Change Account](#)

Last Tran: 12/31/2023

FUND BALANCE

\$1,565.00 (spendable)

[\\$185,065.50](#) (fund balance)

FUND STATEMENTS

[See All Statements](#)

[Open Last Statement \(In Acrobat\)](#)


FUND CONTRIBUTIONS

[\\$182,200.46](#) (as of 2/12/2024)

Amount	Type	Date
\$12,000.00	Physical Check	12/20/2023


[See All Contributions](#)

YOUR DONOR CONTACT:



[Laura Booth](#)
laura.booth@gcrf.org

GRANT HISTORY



32% - O50 Youth Development Programs

24% - K Food, Agriculture & Nutrition

24% - P40 Family Services

9% - C60 Environmental Education

9% - D20 Animal Protection & Welfare

Through the Donor Dashboard, you can view your fund balance, access fund statements, and view the fund's grant history.

On the left, you will also find a link to a document that explains how to read your monthly statement.

If you have multiple funds, toggle between them by clicking "Change Account."

Under "Fund Balance" you will find the fund's total balance, as well as the amount that is available to distribute.

DONOR VIEW

[Fund Activity](#)

[Add to My Fund](#)

[Contribution Activity](#)

[Recommend Grants](#)

[Grant History](#)

[My Profile](#)

[Documents](#)

RECOMMEND GRANTS

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[Laura Booth](#)

laura.booth@gcrf.org

GRANT HISTORY



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9% - C60 Environmental Education

9% - D20 Animal Protection & Welfare

Selecting “Fund Activity” on the left allows you to view activity for a specified date range.

From this page, you can also access fund statements and export fund activity to a pdf or Excel spreadsheet.

If you have multiple funds, toggle between them by clicking “Change Account.”

DONOR VIEW

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FUND ACTIVITY

FUND

Id: 10382

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

Change Account

Last Tran: 12/31/2023

SEARCH

Range

Last 30 Days

FUND ACTIVITY

Section	Amount
Beginning Balance:	\$185,065.50
Contributions:	\$0.00
Grants:	\$0.00
Earnings Allocated to Account:	\$0.00
Community Foundation Fees:	\$0.00
Other:	\$0.00
Unrealized Gains (Losses) Allocated to Fund:	\$0.00
Ending Balance:	\$185,065.50

FUND ACTIVITY DETAIL

ENDING BALANCE: REPORT AS OF 2/28/2024

Description	Qty	Price	Amount
Endowment Pool	974.0956	\$189.99	\$185,065.50
Total			\$185,065.50

Page Size: 10

Go to: 1

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Export to Pdf


Export to Excel

Export Summary to Excel

To make a contribution to your fund, select “Add to My Fund” on the left.

DONOR VIEW

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RECOMMEND GRANTS

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FUND

Id: 10382

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Donor/Primary Advisor

\$185,065.50

[Change Account](#)

Last Tran: 12/31/2023

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\$1,565.00 (spendable)

[\\$185,065.50](#) (fund balance)

FUND STATEMENTS

[See All Statements](#)

[Open Last Statement \(In Acrobat\)](#)


FUND CONTRIBUTIONS

[\\$182,200.46](#) (as of 2/12/2024)

Amount	Type	Date
\$12,000.00	Physical Check	12/20/2023


[See All Contributions](#)

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GRANT HISTORY



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To view contributions, select “Contribution Activity” on the left side of the screen.

A dropdown box allows you to search for contributions within a given date range, or you can select “Advanced Search” to search for a specific contribution or browse contributions by status.

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RECOMMEND GRANTS

CONTRIBUTION ACTIVITY

Id: 10382

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

[Change Account](#)

Last Tran: 12/31/2023

SEARCH

Range

Last 30 Days

[Advanced Search](#)

ADD TO MY FUND

Contributor	Additional Contributors	Description	Type	Qty	Status	Date	Transaction Id	Amount	View Details
No records to display.									

[Export to Excel](#)

[Export to Pdf](#)

Contribution search results can be sorted by contributor, date, and other categories by clicking on the related heading.

If you have multiple funds, toggle between them by clicking “Change Account.”

At the bottom of the page, you will find options for exporting contribution activity to a pdf or Excel spreadsheet.

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CONTRIBUTION ACTIVITY

FUND

Id: 10382

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

[Change Account](#)

Last Tran: 12/31/2023

SEARCH

Range

Last 30 Days

[Advanced Search](#)

ADD TO MY FUND

ContributorAdditional ContributorsDescriptionTypeQtyStatusDateTransaction IdAmountView Details

No records to display.

[Export to Excel](#)

[Export to Pdf](#)

To view grants, select “Grant History” on the left. Use this page to search all grants, or select “Recurring” or “Single Grants” on the left to view only those types of grants.

On each page, a dropdown box allows you to search for grants within a given date range, or you can select “Advanced Search” to search for a specific grant or browse grants by status.

DONOR VIEW

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Single Grants

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GRANT HISTORY

FUND

Id: 10382

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

[Change Account](#)

Last Tran: 12/31/2023

SEARCH

Range

Last 30 Days

[Advanced Search](#)

GRANT PAYMENTS

ID	Charitable Organization	Type	Amount	Status	Created	Actions
732144	Amy's Place Inc.	Single	\$100.00	Entered	2/15/2024	Details
732143	Cooley Morton Ramler Education Academy	Single	\$100.00	Entered	2/12/2024	Details

Page Size:

10

Go to:

1

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[Export to Excel](#)

[Export to Pdf](#)

Grant search results can be sorted by organization, status, and other categories by clicking on the related heading.

If you have multiple funds, toggle between them by clicking “Change Account.”

At the bottom of the page, you will find options for exporting your fund’s grant history to a pdf or Excel spreadsheet.

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GRANT HISTORY

FUND

Id: 10382

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

[Change Account](#)

Last Tran: 12/31/2023

SEARCH

Range

Last 30 Days

[Advanced Search](#)

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Page Size:

10

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<

>

[Export to Excel](#)

[Export to Pdf](#)

Select “My Profile” on the left to view basic personal information.

You can edit your address, contact information, password and secret question by selecting the appropriate tab.

To update the information under the “Personal” tab, contact the Community Foundation at 319-366-2862 or donorservices@gcrcf.org.

DONOR VIEW

Fund Activity

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RECOMMEND GRANTS

MY PROFILE

If you would like to change any of your personal information, please contact us at 319-366-2862 or info@gcrcf.org.

Personal

Addresses

Communications

Change Password

Change Secret Question

Personal Information

Title:

First Name: Jane

Middle Name:

Last Name: Doe

Suffix:

Other

Company: Evergreen Solutions

Job Title: Assistant Regional Manager

Select “Documents” on the left to download the Donor-Advised Recommendation Form and access documents specific to your fund, such as the Fund Agreement.

If you have multiple funds, toggle between them by clicking “Change Account.”

DONOR VIEW

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DOCUMENTS

FUND

Id: 10382

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

Last Tran: 12/31/2023

[Change Account](#)

DOCUMENTS

Please click on a link below to download any document:

 [Donor-Advised Recommendation Form](#)

ACCOUNT DOCUMENTS

Below are documents that are specific to your Fund with the Greater Cedar Rapids Community Foundation. Please click the name of the document to download.

File Name

 [Fund Agreement.docx](#)

Fund holders with a Donor-Advised Fund can recommend a grant by selecting “Recommend Grants” on the left.

Under “My Charitable Organizations,” click the “New Grant” button corresponding to the organization to which you wish to recommend a grant.

DONOR VIEW

[Fund Activity](#)[Add to My Fund](#)[Contribution Activity](#)[Recommend Grants](#)[Grant History](#)[My Profile](#)[Documents](#)[RECOMMEND GRANTS](#)

RECOMMEND GRANTS

This page is the first step in recommending a new grant to a charitable organization.

1. Under "Fund", select the fund using the dropdown menu at the top of the page.
2. Under "My Charitable Organizations", you will find a list of your favorite charitable organizations. If the charitable organization you wish to grant to is not on the list, you can add it by clicking the **Add a Charitable Organization** button.
3. Once you have located the organization you wish to support, click the "New Grant" button.

If you have an endowed fund, the spendable balance will be available online in February. If you would like to recommend a grant now, please contact your donor relations officer at 319.366.2862.

GRANT RECOMMENDATION FORM

We encourage you to submit your grant recommendations online. However, if you need a printed copy of the form, you can download it [here](#).

FUND

Id: 10382

[Change Account](#)

Jane and John Doe Fund

Donor/Primary Advisor

\$185,065.50

Last Tran: 12/31/2023

MY CHARITABLE ORGANIZATIONS

Use this page to maintain a list of your favorite charitable organizations. Click Add a Charitable Organization to add to your list. To remove a charitable organization from your list, click on the X next to its name. To recommend a grant, click the New Grant button next to the charitable organization's name.

ADD A CHARITABLE ORGANIZATION

If you received Endow Iowa tax credits for donations to your fund, your grant recommendation must support charitable organizations and activities within the state of Iowa.

	Charitable Organization	Remove
  NEW GRANT	Amy's Place Inc. 2309 C St SW , Cedar Rapids, IA 52404-3707	
NEW GRANT	Animal Rescue Center 321 Dogwood Dr Cedar Rapids, IA 50402	

After filling out your grant details, be sure to confirm your recommendation on the confirmation page and you will receive an automatic email with your grant details.

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CONFIRM RECOMMENDATION

Charitable Organization: Amy's Place Inc.
2309 C St SW, Cedar Rapids, IA 52404-3707

Grant Amount: single payment for \$0.00

Grant Letter Comments: General Support:

Recommended By: Jane and John Doe Fund & & 2468 Maint St, Cedar Rapids, IA 52404

I attest that this recommendation does not represent payment of a pledge or other personal financial obligations on behalf of the fund representative(s), family members or businesses they control and that no tangible benefit, goods or services, such as membership, dinners, tickets, etc. were or will be received by any individual or entities connected with the Fund (as described above). I understand that this is a recommendation only, and not a direction.

If you received Endow Iowa Tax Credits for donations to your fund, your grant recommendation must support charitable organizations and activities within the state of Iowa.

CONFIRM GRANT RECOMMENDATION

EDIT GRANT

CANCEL



GREATER CEDAR RAPIDS
COMMUNITY
FOUNDATION

At The Greater Cedar Rapids Community Foundation, we are committed to continuously improving the way that we serve our donors and funders. If you have questions that are not addressed in these instructions—or you'd like to identify other designated individuals to access a fund. Please feel free to contact Josie Velles at 319.366.2862 or josie.velles@gcrcf.org during regular business hours.