



Fundholder Portal Overview

As a Fundholder you have access to the online fundholder portal where you can review information about the funds you manage. Within the portal, you can view the fund balance, fund statements, and more. This convenient tool allows you to stay up to date with your fund's activity from any device, any time.

Returning Users

For all future logins after the initial set up, please visit our website at www.greaterworchester.org and click "Fundholder Login" located on the top right of the page. You will be redirected to the login page for the portal where you can enter your username and password created during the initial set up process.

If you have forgotten your password or have trouble logging in, please contact our office at 508-755-0980 or email donorservices@greaterworchester.org for assistance. Please note the portal will lock you out after five unsuccessful login attempts. If you are locked out of your account, please contact us to regain access.

A screenshot of the login page for the Fundholder Portal. The page has a light gray background. At the top, the word "Login" is centered in a bold, dark blue font. Below it are two input fields: "Username" and "Password". The "Password" field has a small eye icon to its right. Below the input fields is a large, rounded green button with the word "LOGIN" in white, uppercase letters. Below the button are two links: "Login with email" and "Forgot your password?", both in a smaller, blue font.

Initial Login Process & Account Set Up

Greater Worcester Community Foundation will send you a link to access the portal via email. Select the link and you will be prompted to create your own password to the fundholder portal site.

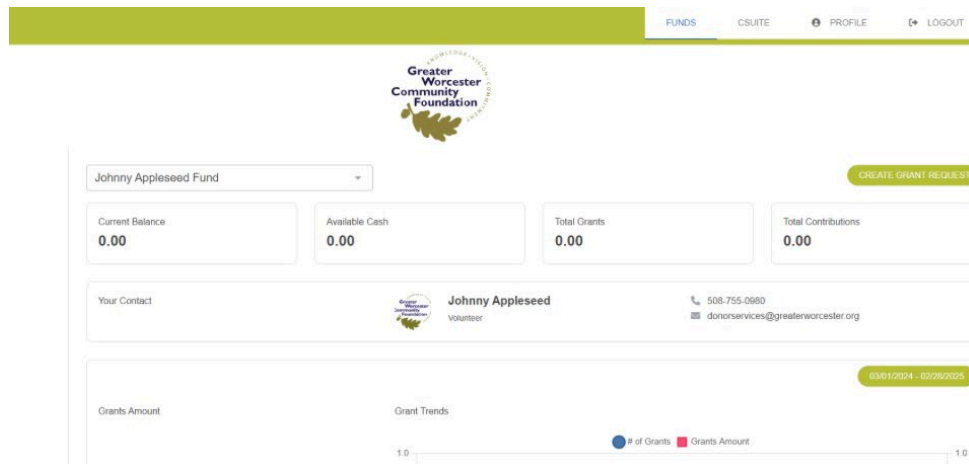
Your username will be the full email address we have on file. Once your password is created go to the Login page, enter your credentials, and log in. We recommend using a unique password with letters, numbers, and/or special characters to keep your account secure.

Portal Features

Once you are logged in, you will see an overview page of your fund. If you serve as a holder for multiple funds, you will see the “Choose Fund” menu and will need to select the fund you wish to review from the dropdown menu.

You can then select the tabs at the top of the page to review the different areas available to you as a Fundholder.

- The “Funds” tab shows the Fund’s Current Balance plus the Spendable balance (if applicable). This area also lists all fundholders, shows recent contributions and recent grants given for the fund as well as provides access to Donor Advised Fund holders to request grant disbursements.



- The “Profile” tab will give you an overview of the information in your account.
- The “Logout” tab will automatically log you out of the portal if selected. Remember to use this tab when you are ready to exit the portal. You will be automatically logged out each night even if you do not logout.

There is a second set of tabs on the left side of the page where you will see more detailed areas available to you as a Fund Holder.

FUND SUMMARY

DONATIONS

GRANTS

GRANT REQUEST

FUND STATEMENTS

DONATE

- The “Fund Summary” tab gives you an overview of the fund including your contact, the fund balance, available cash and more.

The screenshot shows the 'Fund Summary' page for the 'Johnny Appleseed Fund'. At the top, there's a navigation bar with 'FUNDS', 'CSITE', 'PROFILE', and 'LOGOUT'. The fund's logo is displayed. Below the fund name, there's a 'CREATE GRANT REQUEST' button. The current balance and available cash are both listed as 140,306.05. The contact information for Kelly A. Stimson, Vice President of Philanthropic Services, is shown, including a phone number and email address. A 'Recent Grants' section is visible with a filter button and a table with columns for ID, Date, Status, Grantee, and Amount.

- The “Donations” tab shows all contributions or donations to the fund. Clicking on a Contributor’s name, unless anonymous, will bring up their history of contributions.
- The “Grants” tab will show the history of Grants or payments made from the fund.
- The “Grant Request” tab allows you to make Grant Requests from the fund’s assets. This feature is only available to Donor Advised Fundholders.
- The “Fund Statements” tab will show fund statements if they are set up for the fund. Fundholders will be able to view newly created fund statements immediately after they are created as well as past fund statements.

The screenshot shows the 'Fund Statements' page for the 'Johnny Appleseed Fund'. The left sidebar has a menu with 'FUND SUMMARY', 'DONATIONS', 'GRANTS', 'GRANT REQUEST', 'FUND STATEMENTS', and 'DONATE'. The 'FUND STATEMENTS' tab is selected. A note states: 'Note: December 2024 fund statements reflect an estimated balance as the Foundation conducts its annual audit. Once the audit concludes finalized statements will be posted. Thank you for your patience.' Below this, there's a 'Statements' section with a table showing three entries: '2023-01 January Statement', '2024-12 December Statement - DRAFT', and '2024-11 November Statement'. Each entry has a 'View' link. The table also shows the 'Date Range' for each statement. A 'Showing 1 to 3 of 3 entries' message is at the bottom.

- The “Donate” tab allows you to make a gift to your fund. You can also set up a recurring donation using this feature. This will also send you to our Giving hub, where you can learn about the different donations we offer.

Submitting a grant request (Donor Advised Funds only)

As a Fundholder of a Donor Advised Fund you may be able to make Grant Requests from the fund's assets by clicking into the "Grant Request" Tab.

Beginning March 1st, 2024 your mailing contact information will be included in the letter sent to the organization. If you do not wish to have your information included, please indicate so in the notes field.

Grant Request Cart

Here you can add a grant to your cart and review and submit grant requests. The grants will not be processed until you submit the requests. This allows you to come back to it later.

The screenshot shows the 'Grant Request Cart' page. At the top, there's a navigation bar with 'FUNDS', 'GRANTS', 'PROFILE', and 'LOGOUT'. Below the navigation bar is the Greater Worcester Community Foundation logo. The main content area has a sidebar on the left with links: 'FUND SUMMARY', 'DONATIONS', 'GRANTS', 'GRANT REQUEST', 'FUND STATEMENTS', and 'DONATE'. The main area features a dropdown menu for 'Johnny Appleseed Fund' with buttons 'CREATE GRANT REQUEST' and 'CART (0)'. Below this is a table titled 'Grant Request Cart' with columns: 'Grantee', 'Description', 'Attachment', 'Amount', and 'Anonymous'. The table contains two rows: 'Community Leadership Fund' with a description of 'Testing Grant Request' and an amount of '\$ 1,000.00', and 'Creative Worcester County Fund' with a description of 'Demo Grant Request' and an amount of '\$ 500.00'. A 'Total' row shows '\$ 1,500.00'. At the bottom of the table is a button 'SUBMIT GRANT REQUESTS'.

Grantee	Description	Attachment	Amount	Anonymous
Community Leadership Fund	Testing Grant Request		\$ 1,000.00	No
Creative Worcester County Fund	Demo Grant Request		\$ 500.00	No
Total			\$ 1,500.00	

Creating a grant request (Donor Advised Funds)

On the left side of your screen, choose a grantee in one of four ways:

A. Choose from a Previous Grantee from the drop-down menu of organizations you have previously supported.

The screenshot shows the 'Choose from previous Grantees or Funds' section. It has a dropdown menu for 'Johnny Appleseed Fund' with buttons 'CREATE GRANT REQUEST' and 'CART (0)'. Below this is a section titled 'Choose from previous Grantees or Funds' with a sub-header 'Grantees you have given to in the past'. There is a search bar and a list of grantees. The first grantee is 'Community Leadership Fund' with a description 'Creative Worcester County Fund'.

Choose from previous Grantees or Funds

Grantees you have given to in the past

Other foundation funds

Community Leadership Fund
Creative Worcester County Fund

B. Select from a list of other funds held at Greater Worcester Community Foundation.

C. Search for the organization you want to support in Guidestar, the world's largest nonprofit database specializing in reporting on U.S. nonprofit organizations. The more keywords used, the better the search results will be. Once you find the organization you want to support, click "Create Request."

Greater Worcester Community Foundation

FUND SUMMARY

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Johnny Appleseed Fund

CREATE GRANT REQUEST

CART (1)

Use this form to request a new grant from your fund. Select an organization from the drop-down menu or enter a new nonprofit. The Foundation will receive notification of your request and process the grant promptly. The portal will update once the grant has been finalized. A full list of all grants can be found on the Grants tab. Beginning March 1st, 2024 your mailing contact information will be included in the letter sent to the organization. If you do not wish to have your information included, please indicate so in the notes field.

Grant Request > Choose Type > Search

Search for Grantees

Grantee Name

City

State

EIN

SEARCH

D. Enter grantee information manually. Once you enter this information, please select “Submit”.

Johnny Appleseed Fund

CREATE GRANT REQUEST

CART (1)

Use this form to request a new grant from your fund. Select an organization from the drop-down menu or enter a new nonprofit. The Foundation will receive notification of your request and process the grant promptly. The portal will update once the grant has been finalized. A full list of all grants can be found on the Grants tab. Beginning March 1st, 2024 your mailing contact information will be included in the letter sent to the organization. If you do not wish to have your information included, please indicate so in the notes field.

Grant Request > Choose Type > Search

Enter Grantee information manually

Grantee Name *

Street Address *

Apartment, Suite, Building...

City *

State *

Zipcode *

Email

Phone

EIN

* These fields are required.

SUBMIT

Grants are processed once per week. We ask that grant requests be submitted before 5 P.M. on Fridays to be processed and sent out the following week, with the exception of holidays and office closures.

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

- **Grant Details:** In the description box, please provide the grant purpose (e.g. capital campaign, support of a specific program, etc). Please note that if you do not indicate a specific grant purpose, your grant will be earmarked for general support. You can also choose to remain anonymous by checking the “Anonymous” check box below the amount.

If you’d like to attach any information to the grant, please use the attachment section to upload relevant files. Once you have finished entering the grant details, click on “Review” to move forward.

Grant Request

Grantee **Johnny Appleseed Fund**

Additional Grantee Contact ☐

Description 18/255 characters

Amount

Anonymous ☐

Recurring ☐

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

Attachment Description

Additional Notes

- **Review & Submit Request:** Review your grant request for accuracy. If you need to change any details, please select “Edit Request.” Once you are ready, click “Submit Request” to send the grant recommendation to Greater Worcester Community Foundation. You will receive an automated confirmation email once the grant request has been successfully submitted.

Reviewing Grant History (Donor Advised Funds)

To view the most recent grant history for your donor advised fund, select the “Grant Request” tab. Grant Requests still in the “request” status can be canceled from this screen.

You can use the “Status” Column to track the progress of your grant request:

- “Request” – the grant request has been submitted to GWCF staff. If you would like to cancel the pending request before it is processed, click the “Cancel” button or contact us at 508-755-0980.
- “Cancelled” – your grant request has been cancelled.
- “Pending” – GWCF staff are currently processing your grant request.
- “Approved” – your grant request has been processed and approved but has not yet been paid.
- “Paid” - the grant request has been finalized and the payment made to the organization.

Locked Out of your Fundholder 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’re still having trouble, please contact Greater Worcester Community Foundation at 508-755-0980.

Frequently Asked Questions

How often are fund statements posted to the portal?

Fund statements are posted to the portal each month once the month has closed. This process may take 30-60 days as we receive statements from investment managers. While the Foundation completes its yearly audit, all fund statements will be draft, and finalized upon completion of the audit.

How do I change my password?

You may change your password by clicking “Forgot Password” on the login page for the portal. You may also contact staff by calling 508-755-0980. Please note that while our staff can assist you in resetting your password, we cannot access user passwords and cannot look up your current password for you.

I am a Donor Advised Fundholder and have made a grant recommendation. How long does it take for the grant to be processed?

Grant recommendations received before 5 P.M. on Fridays will be processed and sent out the following week, with the exceptions of holidays and office closures. For grant recommendations received after the deadline, they will be held for processing until the following week. If you have any questions about making a grant recommendation from your Donor Advised Fund, please email Kelly Stimson at kstimson@greaterworchester.org. Please note grant recommendations may only be made to 501(c)(3) organizations (including schools, churches, and government entities).

Who do I contact if I am having issues with the portal?

Our staff will be happy to assist you with any issues concerning the donor portal or with any questions you might have. Please reach out to Kelly Stimson at kstimson@greaterworchester.org, Jacob Vazquez at jvazquez@greaterworchester.org or give us a call at 508-755-0980.