Mt. Pleasant Area community foundation

For **good.** For **ever.**

Instructions on How to Access and Use the Fund Advisor Portal

Setting Up and Logging In

The fund advisor portal is accessible via the Community Foundation's website:
https://www.mpacf.org/fundmanager. Click the "Go to Portal" button, and you will be redirected to the portal where you may enter your credentials (username and password). Please contact info@mpacf.org or (989) 773-7322 for any questions related to your portal account.

Upon signing your fund agreement, an email will be sent to you inviting you to set up an account. If this email is missed, you can request a new email sent or you can simply go to the portal and click the "Forgot Password?" link and follow the prompts to create a password of your choice.

MPACF will not have access to your password. The fund portal will lock you out after five unsuccessful login attempts, at which time you will need to contact MPACF to reset.

Your username will be the email address we have on file for you. Email addresses can be updated by contacting a staff member. Please allow 24 hours for the change to take effect.

Portal Features

Once you are logged in, your homepage will appear. If you manage multiple funds, you will see a Choose Fund menu. Select the fund you wish to review. The tabs at the top of the page display different features available to you as a fund manager.

- Home: Overview of fund. Greater detail in subsequent tabs.
  - Current Balance: This number reflects the current value (investments) of the fund. Not included on this page is the principal balance, which reflects the total based on gifts donated to the fund. This number can be obtained by contacting an MPACF staff member.
  - Spendable Balance: This is a cumulative total of what spendable amount is available to you. Not only will it include the calculation for the current calendar year, but it will also include amounts from previous years if it was never spent. A breakdown of your spendable allocation can be provided by an MPACF staff member.
- Choose Fund: Appears if you are an advisor to multiple funds and allows you to move back and forth between said funds.
- Contributions: All donations made to the fund. Clicking on a contributor's name will bring up their address (if known). Every donation made to MPACF receives an acknowledgement letter. We encourage you to also send thank you notes for donations made to your fund.
- Grants: The history of grants awarded from the fund including date, organization name, purpose and amount.
- Statements: The fund's statements. Click "view" next to the statement you wish to review, and a PDF will be generated.

- Documents: Shows documents related to the fund. Ex. Signed fund agreement, amendments to the fund. Click on the filename to open a document.
  - *Our staff is working to upload fund files. We expect to have this project completed by the end of summer 2024. If you notice your fund's documents are not up to date, please reach out to a staff member so we can make the appropriate updates.*
- Donate: Opens a new window to our donation portal so you can make a gift to the fund or share the link with others so they can make a donation.
- Logout: Clicking "Logout" will automatically log you out of the Donor Portal. If you do not log out this way, you will be logged out automatically after a certain period.

FOR DONOR ADVISED, DESIGNATED AND AGENCY FUNDS ONLY
Submitting a "Grant Recommendation/Request"
To recommend a grant from a donor advised fund, or to request a grant from a designated or agency fund, click the Grant Recommendations/Requests tab.

1. Choose a grantee by one of the following options:
   A. "Grantees you have given to in the past": From the drop-down menu, if applicable, select an organization you've given to in the past.
   B. "Other foundation funds": Do not use.
   C. "Search for other grantees": Name = organization name, City and State. Click submit. Choose correct organization by hitting "create request". *(Do not select a name if the last word is "fund".)*
   D. "Enter grantee information manually": enter name, address, and phone number.

2. Once you've selected the correct fund you'll be redirected to a new page. In the description field, please provide the grant purpose and any special handling. Keep in mind if you do not designate a specific purpose, the grant will be earmarked for general support. Donor advised fund managers can also choose to remain anonymous by selecting the "Anonymous" checkbox. Once you are finished entering this information, click "Review".
   - Notes regarding amount requested:
     - A $50 minimum is required for each grant recommendation/request.
     - Any amount requested over the approved spendable for a given calendar year must be approved by the MPACF board. The board meets during even months of the year, typically the fourth Thursday. Please confirm with an MPACF staff member on the best timing for your request.

3. Upon clicking "Review" if everything looks accurate hit "submit request". If further edits are needed, click "edit request". Once you submit the recommendation/request, you will receive an automated confirmation email and our staff will be notified.

Note: Grant requests from Designated and Agency Funds may only be directed to the organization for which the fund was established. Descriptions of the grant's purpose are strongly suggested so grant publicity may be specific and accurate.