



## How to use Manage My Fund

Your personal online tool for managing the fund(s) you establish at the Community Foundation of Greater Des Moines.



- Giving
- Building Community
- Nonprofit Resources
- Grants
- Why a Community Foundation?

Give Now My Community Foundation Login News & Events About Us Professional Advisors Affiliates search GO

Join us at our nonprofit staff and board training sessions.

**@nTrack**

**BOARD LAUNCH >>>**

LEARN MORE AND REGISTER →

### Recent News

### Quick Links

Log In

## Login

### Welcome to My Community Foundation

We are pleased to offer My Community Foundation as a secure online resource to manage your relationship with the Community Foundation of Greater Des Moines.

#### Account Login

User

Password

Login

[Forgot Password](#)

#### Get Started

**Fund Advisors**  
Manage My Fund

**Board & Committee Members**  
Board and Committee View

**Nonprofits**  
Manage My Grants

Current fund advisors with the Community Foundation can use Manage My Fund to contribute to or make grants from their fund, review fund activity, link to other account details and review online fund

Community Foundation board and committee members can review meeting packets, minutes shared resources and more through CommitteeView.

Nonprofits may use Manage My Grants to apply for Capacity Building and Leadership Grants online. Grant Administrators may log in above.

#### Contact Us

**Community Foundation of Greater Des Moines**  
1915 Grand Avenue  
Des Moines, IA 50309

Phone: (515) 883-2626  
Fax: (515) 309-0704

Business Hours: Monday through Friday from 8 a.m. to 5 p.m.

### Getting Started

To log on to Manage My Fund, click My Community Foundation on the homepage of the Community Foundation's website at [www.desmoinesfoundation.org](http://www.desmoinesfoundation.org).

### Entering Your User Name and Password

Enter the user name and password you received from the Community Foundation via email or mail.

If you need this information, contact the Community Foundation at 515-447-4206. The first time you sign on you will be prompted to change your password.

Then click log in.

## Manage My Fund Donor Dashboard

This page explains all you can do while logged on to Manage My Fund.

You can:

- \* view your fund activity
- \* review your fund contributions
- \* recommend grants
- \* research an extensive database of nonprofit organizations supported through the Community Foundation
- \* review the list of grants you want to recommend
- \* update your profile information
- \* access electronic fund statements and choose to receive notifications via email when statements are available through Manage My Fund.

## Fund Activity

On this page you can view:

- \* gifts to your fund
- \* grants paid from your fund
- \* grant recommendation(s) pending (submitted but not yet made)
- \* total market value

You can also download previous fund statements and export them as either Excel or Pdf documents.

### Donor Dashboard

- Fund Activity
- Contribution Activity
- Recommend Grants
- All Grant History
- Single Grants
- Recurring Grants
- Fund Relationships
- My Documents
- Give to My Fund
- My Profile

## Donor Dashboard

If you represent more than one fund at the Community Foundation, please select a fund from the fund selector drop-down to begin.

### Fund

Doe Family Fund  
Community Foundation of Greater Des Moines

### Fund Balance

\$217,050.87 (Available to Spend)  
\$218,050.87 (Market Value)

### Grant History Dashboard



This pie chart represents the 4 areas where you have granted the most dollars. All grants outside the top four areas are accounted for in the "other" segment. You may click each segment of the pie chart to view grants made in those areas.

### Statements

- [Open Last Statement \(In Acrobat\)](#)
- [See All Fund Activity and Statements](#)

### Contact Me

Your Donor Relations Contact



[Bergetta Beardsley](#)  
(515) 447-4207  
[beardsley@desmoinesfoundation.org](mailto:beardsley@desmoinesfoundation.org)



[Thomas Biedenfeld](#)  
(515) 447-4219  
[biedenfeld@desmoinesfoundation.org](mailto:biedenfeld@desmoinesfoundation.org)

### Go Green

Check here - if you would like to be notified by email when your statement is available online.  
You are currently receiving statements by mail.

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### Fund Activity

Fund: Smith Family Charitable Fund

Smith Family Charitable Fund Fund Id 40770  
Community Foundation of Greater Des Moines

Search Fund Activity [Give to My Fund](#)

Fund Activity from: Last 30 Days

[Advanced Search](#)

**Fund Activity Summary**

Below is a summary of your fund's activity based on the time period selected.

Beginning Balance:	\$458,176.32
Contributions:	\$53,000.00
Grant Distributions:	(\$5,250.00)
Earning Allocated to Fund:	\$0.00
Administrative Fees:	\$0.00
Other Activity:	\$0.00
Change in Market Value:	\$0.00
<b>Ending Balance:</b>	<b>\$505,926.32</b>

**Fund Activity Detail**

Ending Balance: Report from 10/21/2013 to 11/20/2013

Description	Amount
Cash	\$47,750.00
Long-Term Growth Portfolio	\$456,984.59
Money Market Portfolio	\$1,191.73
<b>Total</b>	<b>\$505,926.32</b>

[Get Acrobat Reader](#)

## Contribution Activity

This is an example of a page showing detailed contribution activity.

Donor Dashboard

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### Contribution Activity

Fund: Smith Family Charitable Fund

Smith Family Charitable Fund   Fund Id 40770  
 Community Foundation of Greater Des Moines

Contribution Activity Search

Duration: Last 30 Days   [Advanced Search](#)

Contribution Activity Details

Donor	Desc	Type	Status	Trans ID	Date	Amount	Gift Receipt	Receipt Sent
Miscellaneous Donor	Apple Inc.	Stock	Approved	46006	11/15/2013	\$54,250.00		
Miscellaneous Donor	Cash	Wire	Posted	46007	11/15/2013	\$3,000.00		
Miscellaneous Donor	Cash	Wire	Posted	46013	11/15/2013	\$50,000.00		

[Export to Excel](#)   [Export to Pdf](#)   [Export to Excel](#)

In this view of cumulative gifts to your fund, you can find detailed information on gifts including:

- \* **date** of the gift
- \* **name** of the donor
- \* **description** of the gift
- \* **amount** of the gift

This page also indicates when a gift receipt was sent. Below the contribution activity are links allowing you to export contribution activity into an Excel or Pdf document.

### Give to My Fund

Please select a fund from the drop-down fund selector and choose the fund you would like to make a credit card contribution to.

**Fund**

Smith Family Charitable Fund

Smith Family Charitable Fund   Fund Id 40770  
 Community Foundation of Greater Des Moines

**Donation Details**

Total Amount: \$0.00

Description: Smith Family Charitable Fund

**Contributor Information**

First Name: Sara

Middle Name:

Last Name: Bonney

Company Name:

Select: 1915 Grand Avenue, Des Moin

Mailing Address: 1915 Grand Avenue  
 Des Moines, IA 50309

Use Same Address For Billing Address

Phone Number:

Cell Phone Number:

Email Address: bonney@desmoinesfoundation.org

**Please notify this person of this gift**

Name:

Address:

City, State, Zip:

## Giving to a Fund

Start by clicking **Give to My Fund**.

Your information will automatically populate in many of the required fields, but you do have the opportunity to change or update information as necessary.

After determining and entering the amount you would like to contribute to the fund select **Submit**.

The next screen will ask you to enter the method of payment you will be using to make your contribution. Once you select **Submit** on this screen your gift is complete.

**Add a Grantee Organization**

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**Fund**  
Smith Family Charitable Fund  
Smith Family Charitable Fund Fund Id 40770  
Community Foundation of Greater Des Moines

**Search Grantee Organizations**  
Grantee Name:     
 Pre-approved Grantees Only

**Your Results**

Grantee Organization Name	Address	Tax ID	Actions
<a href="#">Community Foundation of Greater Des Moines</a>	1915 Grand Avenue Des Moines, IA 50309		<a href="#">Add to My Grantee List</a>
<a href="#">Above &amp; Beyond Cancer, Inc.</a>	809 W Hill Street, Suite D Charlotte, NC 28208	45-3951308	<a href="#">Add to My Grantee List</a>
<a href="#">Bravo Greater Des Moines, Inc.</a>	700 Locust Street, Suite 100 Des Moines, IA 50309	20-3598346	<a href="#">Add to My Grantee List</a>
<a href="#">Community In Schools of Iowa</a>	1620 Pleasant Street, Suite 242 Des Moines, IA 50314		<a href="#">Add to My Grantee List</a>
<a href="#">Des Moines Social Club</a>	PO Box 93301 Des Moines, IA 50393	32-0225243	<a href="#">Add to My Grantee List</a>
<a href="#">Free Clinics of Iowa</a>	PO Box 12099 Des Moines, IA 50312	42-1428706	<a href="#">Add to My Grantee List</a>
<a href="#">Greater Des Moines Public Art Foundation</a>	c/o Rowe Consulting, LC 418 6th Avenue, Suite 903 Des Moines, IA 50309	20-1282095	<a href="#">Add to My Grantee List</a>
<a href="#">Hawthorn Hill</a>	3001 Grand Avenue Des Moines, IA 50312-4206	42-1258470	<a href="#">Add to My Grantee List</a>

## Research an Organization

To find out more information about the array of nonprofit organizations supported through the Community Foundation, click **Recommend a Grant** and then **Search Grantee Organization**.

This example shows results you'll find when you type in an organization name. Click on the name to view:

- \* contact information
- \* a link to the website
- \* the organization's tax ID number

If you choose to support a group from your search, click **Recommend a Grant**.

**Grant Entry**

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I would like to recommend a grant to:  
Orchard Place  
Address 2118 Grand Avenue, Des Moines, IA 50312

**Recommended Grant Amount:**  
 As a Single Payment  
 As a Recurring Payment

Balance (\$5,250.00)  
**Warning: Available Balance is negative.**  
Amount \$0.00

**Other Grant Recommendation Details:**  
Grant Purpose: Grant Distribution  
 Please make this Grant Recommendation anonymous.

**Special Instructions to Community Foundation Staff:**

## Grant Entry

You'll see this form every time you choose to recommend a grant. If you recommend a grant to a nonprofit in our database, the information will be complete. When granting to nonprofits that are not in our database, please fill out the entire form.

On the form you can select if you would like to recommend the grant as a single or recurring payment. The fund balance available for granting is listed for your reference to assist you in selecting the recommended grant amount. This screen also allows you the opportunity to make your grant recommendation anonymous or write special instructions for the Community Foundation staff.

Select **Submit** to complete the grant recommendation.