

**Be The One**



**COMMUNITY  
FOUNDATION**

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**of Sarasota County**

# **Giving Portal User's Guide**

*Updated May 22, 2025*

## Welcome to your Giving Portal!

The Community Foundation of Sarasota County is dedicated to partnering with you to help achieve your philanthropic goals through high quality and user-friendly services.

The Giving Portal is the Community Foundation of Sarasota County's online fund management portal. The portal allows you to access your charitable fund via a secure, password protected platform that is mobile-friendly and easy to use.

You can check your fund balance, view and download fund statements, request and track grants, contribute to your fund and more.

Please use this guide to access your account. If you have any questions or require assistance, contact us at [donorservices@CFSarasota.org](mailto:donorservices@CFSarasota.org), or call 941-955-3000.

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## Initial Log-In for Users

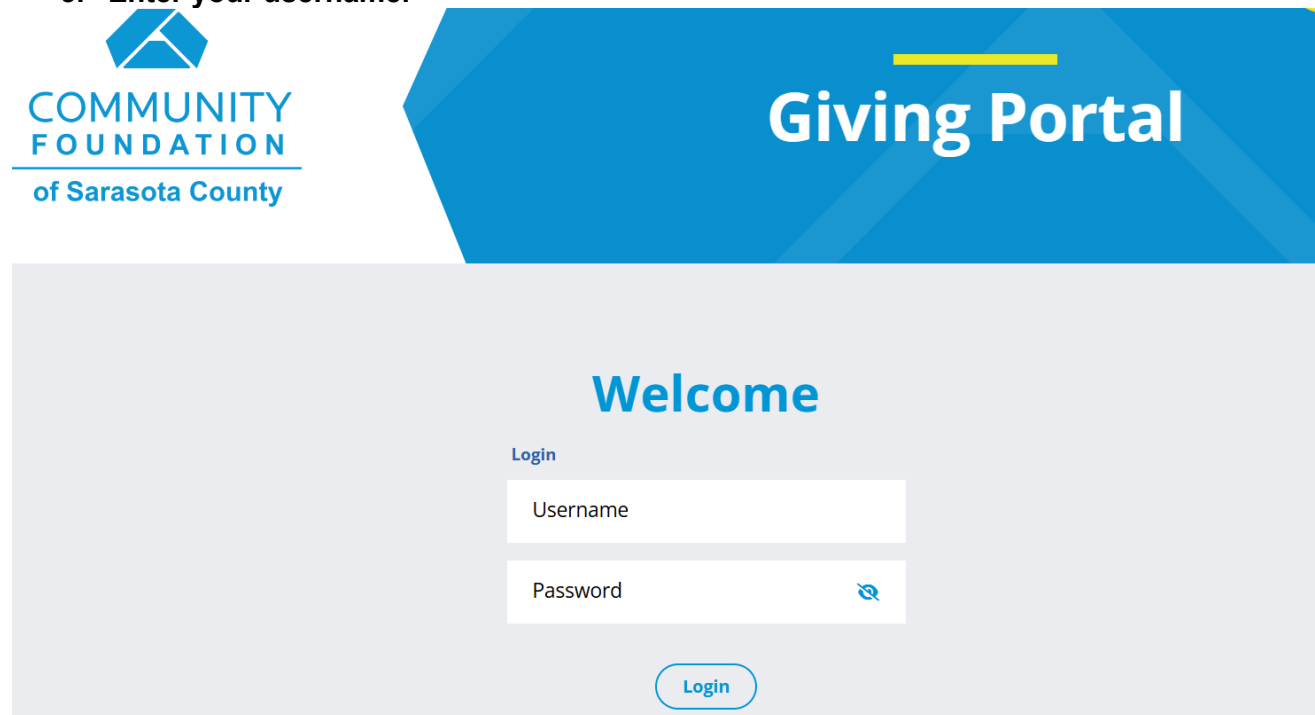
You will receive an email invitation to create your account in the Giving Portal. The email contains a link to the portal and is sent to the primary email address we have on file for you. Note: The email will be sent from “no-reply@fcsuite.com”

1. Click on the link in the email to access the log-in page for the Giving Portal.
2. Enter your primary email address (this is your username). You will then receive an email with a PIN number.
3. Enter the PIN number to log-in to your account.
4. Reset your password by following instructions in the “Managing Your Profile” section.

## Log-In for Returning Users

### Log-in to the Giving Portal

1. Visit the Community Foundation’s website at [www.cfsarasota.org](http://www.cfsarasota.org).
2. Select “Giving Portal” from the top menu.
3. Enter your username.



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# Giving Portal


## Welcome

Login

Username

Password

Login

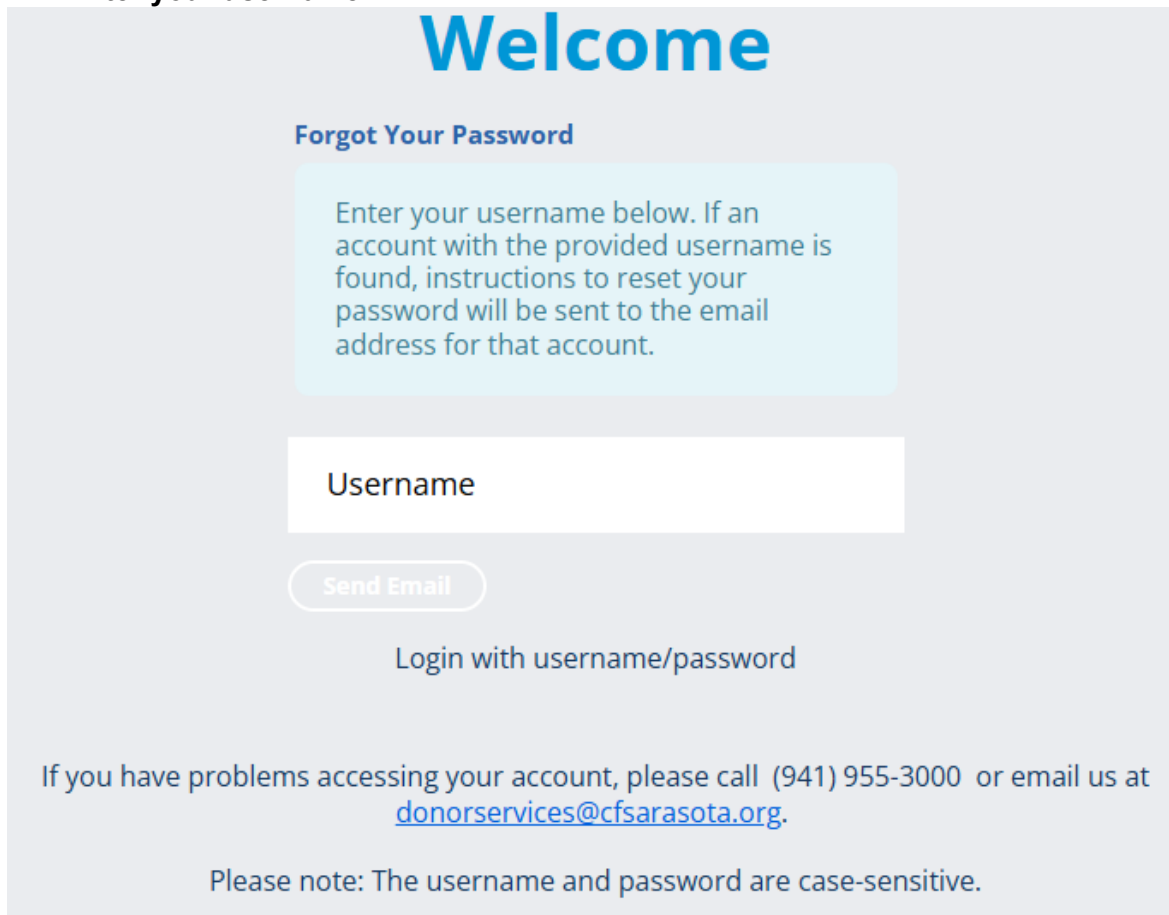
4. Enter your password.
5. Select  to access your Giving Portal account.

### Log-out of the Giving Portal

Select  from the top menu.

### If You Forget Your Password

1. Select “Forgot your password?” from the log-in page.
2. Enter your username.



**Welcome**

**[Forgot Your Password](#)**

Enter your username below. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account.

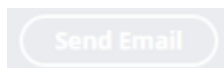
[Send Email](#)

[Login with username/password](#)

If you have problems accessing your account, please call (941) 955-3000 or email us at [donorservices@cfsarasota.org](mailto:donorservices@cfsarasota.org).

Please note: The username and password are case-sensitive.

3. Select



4. You will receive an email with instructions to reset your password.

**NOTE:** After 5 unsuccessful log-in attempts, the portal will lock. If you are locked out, please contact us at [donorservices@CFSarasota.org](mailto:donorservices@CFSarasota.org), or call 941-955-3000.

## Managing Your Profile

Select  from the top menu. This will take you to the [Personal Information](#) page.

### [Personal Information](#)



You can update your address and phone number by selecting

 [Edit Information](#)

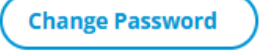

### [Security](#)

Select [Security](#) from the side menu to change your username, password, or to enable 2-step verification.

#### [To reset your username:](#)

1. Select 
2. Enter the new username.
3. Select 

#### [To reset your password:](#)

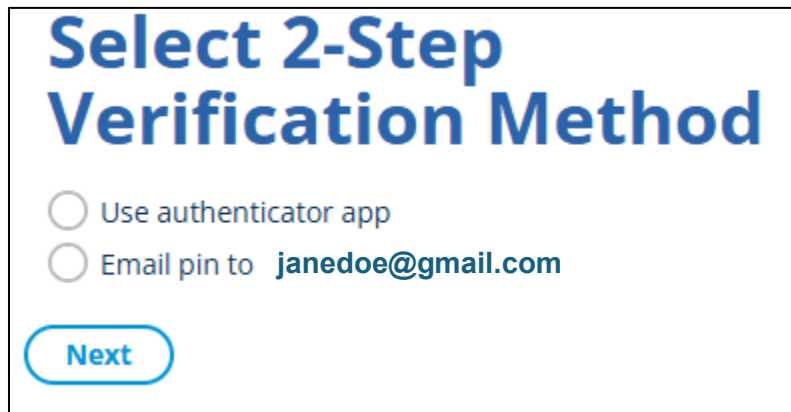
1. Select 
2. Enter the old password.
3. Enter the new password.
4. Enter the new password again to confirm.
5. Select  to update your password.



You can reset your credentials anytime by returning to the [Security](#) menu and following the steps above.

### To enable 2-step verification:

2-step verification is a security measure that adds an extra layer of protection to your online account by requiring a second verification step in addition to your password.


1. Select  for 2-step verification.



2. Select your preference to use an authenticator application or request a PIN number be sent to your primary email address.
3. Select 
4. Enter the number you received.
5. Select  to enable 2-step verification.



**NOTE:** If you wish to disable 2-step verification, please contact us at [donorservices@CFSarasota.org](mailto:donorservices@CFSarasota.org).

### Contact Preferences - Opt-Out

You may choose not to receive emails, phone calls, or direct mail from the Community Foundation. Select  and check the boxes corresponding to your opt-out preferences.

## Interest Types

Let us know what interests you support.

1. Select  and check the boxes that correspond to your interests.
2. Select  to save your selections.

## Managing Your Fund

Select  from the top menu.

The Fund Summary page is the homepage which shows the current balance, available balance, and graphs for the gift and grant activity. Contact information for your representative at the Community Foundation is listed should you have any questions.

### Helpful Hint:

- If you have multiple funds, you can select which fund to review using the drop-down menu at the top.

Fund details may be viewed using the following menu.



**Fund Summary** – lists the balance, total grant and gift amounts, and supporting graphs.

**Helpful Hints:**


- Click the date button at the top right of the graphs to update the view for a specific range of dates.
- Place your cursor over the pie chart or graph to view details.

**Gifts To My Fund** – lists contributions/donations to your fund. Click on a line to view gift details. You can filter by date and export a list.


**Grants** – to view grant summary, grant history and any recurring grants requested.

**Grant Summary** – shows the total number of grants and amount to a Grantee. Click on a line to view details in the Grant History section for the specific Grantee.

**Grant History** – lists the grants made by date. You can filter by date and export a list.

You have the option to copy a previous grant by selecting  and editing the request before adding it to your cart.

**Recurring Grants** – lists the details for any recurring grants requested.

**Grant Status** – (*\*for users with grant-making capability*) - shows the details for grants requested and the status. This will also display the Grant Request Cart for requests not yet submitted. To submit a grant request, select 

followed by 

**Fund Statements** – quarterly fund statements are available once published to the portal.

**Explore Funding Opportunities** – You can contribute to your Fund, or another fund managed at the Foundation.

**Important:** Your Fund is only visible to you through your portal access. Other users do not see your Fund.

## Recommend a Grant

For users with grant-making capability, you may recommend a grant by selecting

Create Grant Request

from any page.

Choose from three (3) options to recommend a grant:

Previous Grantee Or Fund

Search Grantee

Manual Grantee

### A. To grant to an organization or Fund that you previously supported:

1. Select 

Previous Grantee Or Fund
2. Click inside the box and an alphabetical list will appear from which you may choose a previous grantee or Fund.
3. Select the organization or Fund.
4. Complete the Grant Request form.
  - a. Enter the purpose of the grant in the “Description” box.
  - b. Enter the amount of the grant.
  - c. You have the option to make the grant anonymous and to make the grant recurring. You can also attach a file or provide additional notes for our staff.
5. Check the box at the bottom of the form.
6. Select 

Add To Cart

You will be redirected to the Grant Request Cart where you may review, edit or delete your grant request.
7. Select 

Review Grant Requests
8. Select 




Submit Grant Requests

 when you are ready to submit the grant request.
9. Select 



Continue

 and you will be redirected to the Grant Status page.

**B. To search the database for an organization:**

1. Select 
2. Enter the name of the organization.
3. Select 
4. Select  next to the organization name.
5. Complete the Grant Request form.
  - a. Enter the purpose of the grant in the “Description” box.
  - b. Enter the amount of the grant.
  - c. You have the option to make the grant anonymous and to make the grant recurring. You can also attach a file or provide additional notes for our staff.
6. Check the box at the bottom of the form.
7. Follow Steps 6-9 in Section A.


**C. To manually enter a new organization:**

1. Select 
2. Enter the required fields for the new organization’s name, street address, city, state, and zip code.
3. Select 
4. Complete the Grant Request form.
  - a. Enter the purpose of the grant in the “Description” box.
  - b. Enter the amount of the grant.
  - c. You have the option to make the grant anonymous and to make the grant recurring. You can also attach a file or provide additional notes for our staff.
5. Check the box at the bottom of the form.
6. Follow Steps 6-9 in Section A.

**D. To copy a previous grant:**

1. Select **Grants** from the side menu.
2. Select **GRANT HISTORY**.



3. Locate the previous grant that you'd like to copy.
4. Select  **Copy**
5. The Grant Request form will have the same information as the previous grant.
6. Make any desired changes to the grant.
7. Check the box at the bottom of the form.
8. Follow Steps 6-9 in Section A.

## Contributing to your Fund

Select [Explore Funding Opportunities](#) from the side menu and select your Fund.

You can make a secure gift to your Fund or donate to another fund managed at the Community Foundation of Sarasota County.

### Suncoast Disaster Recovery Fund

To provide recovery support to the Suncoast Region in response to a natural disaster. The fund will allow investments in long-term, long-range programs to sustain our agencies after initial emergency relief is provided.

#### Donate

☒ One-time Donation Amount

☐ \$25

☐ \$50

☐ \$75

☐ \$100

☐ \$150

☐ \$250

☐ Other Amount

\$

☐ Recurring Donation Amount

Additional Notes

#### Tribute Information (optional)

☐ Donation in Memory or Honor

[Donate](#)

## Granting Guidelines for Your Donor Advised Fund

### Contributions to Your Fund

Contributions to your donor advised fund are tax deductible. You receive an acknowledgement letter from the Community Foundation of Sarasota County when you contribute to your Fund.

### Contributions From Your Fund

Grants must be intended exclusively for charitable purposes. The following guidelines will assist you in determining what you may support with your donor advised fund and when to utilize funds from another source.

Please note, all grant checks are mailed to the recipient organizations by the Community Foundation. Grant checks may not be delivered to organizations by the donor.

The Internal Revenue Service (IRS) prohibits donors, fund advisors and any of their family members from receiving more than incidental benefits associated with a grant.

Examples of incidental benefits are: coffee mug, key chain, calendar, poster, intangible religious benefits.

Examples of non-incidental benefits include: school tuition, scholarship to specific individuals, certain dues or membership fees, cost to attend a charitable event, to satisfy a financial obligation of an individual or entity.

### Pledges

IRS regulations prohibit donors from fulfilling a legally binding obligation from their donor advised fund. Therefore, donors may not recommend a grant to fulfill a pledge. However, a donor may pay a commitment for a gift from a donor-advised fund.

Donors may recommend that a grant be paid out over multiple years.

### Events

**Note:** A bifurcated grant is when a donor uses a donor advised fund to pay for the deductible portion of an event and then pays for the non-deductible portion with other funds such as personal check or cash. The Community Foundation does not permit bifurcated grants from donor advised funds.

There are two options to recommend a grant associated with an event.

- Option 1 - To attend the event AND make an additional contribution to the event:

You may recommend a grant from the donor advised fund with the following purpose specified:

*“Donor has paid the full price of the tickets separately and this is an additional donation.”*

Pay for the full price of admission to the event using funds from another source other than your donor advised fund.

- Option 2 - To purchase a table/ticket and donate back to the charity (but not attend the event):

You may recommend a grant from the donor advised fund with the following purpose specified:

*“Donor will not attend the event and has requested that the table/tickets be donated back to the charity.”*

### Memberships

Membership fees, dues, club fees or other similar charges cannot be recommended from a donor advised fund. Membership fees or dues to houses of worship where the only return benefits are intangible religious benefits under federal tax law may be paid from donor advised funds.

### To Learn More

- Contact your advisor or financial professional.
- Call or email your representative at the Community Foundation of Sarasota County.

*This information is not intended to be a substitute for specific individualized tax, legal or investment planning advice. Where specific advice is necessary or appropriate, the Community Foundation of Sarasota County recommends consultation with a qualified tax advisor or CPA.*



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[www.CFSarasota.org](http://www.CFSarasota.org)

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Confirmed in compliance with National  
Standards for U.S. Community Foundations