

# TJF's DonorFirst FAQ



## **What do I do if I forget my username?**

Please contact our Foundation's Administrative Assistant, Ann Swindell at (757) 965-6106 or [aswindell@ujft.org](mailto:aswindell@ujft.org).

## **What do I do if I forget my password?**

On the **Login** page, click on the link that says "Lost Username/Password." You will be prompted to enter your username or email address, which must match the username or email address the Tidewater Jewish Foundation has on file. Your password will be emailed to you. If your email has changed, please contact Ann Swindell at (757) 965-6106 or [aswindell@ujft.org](mailto:aswindell@ujft.org).

## **How often is the information on DonorFirst updated?**

DonorFirst is updated daily as soon as contribution and grant transactions shown online have been fully processed, and then the fund balance adjusted monthly, with some delay, to reflect receipt of investment changes.

## **Can I make a gift to my fund online?**

We can accept credit card and electronic check gifts to your designated fund(s) online by clicking the "Make a Contribution" link in the Navigation box. This link will take you to our secure server. Visa, MasterCard, Discover and American Express cards are accepted. These cards and the electronic check have varying fees which are deducted from the net amount applied to the fund; however, you will get a separate acknowledgment for tax reporting for the full amount of the contribution.

You can also record pending offline contributions to your fund(s) and then mail a check made payable to the Tidewater Jewish Foundation (5000 Corporate Woods Drive Ste. 200, Virginia Beach, VA 23462; please note the fund name on the memo line of the check.). Instructions for transferring other assets is found on the "Resources" area to the right after you log onto DonorFirst. To donate any other way, please contact Ann Swindell at (757) 965-6106 or [aswindell@ujft.org](mailto:aswindell@ujft.org).

## **How do I know my fund balance?**

Your fund balance is listed on the left side navigation panel under *Your Charitable Accounts*. The fund balance represents the total asset value as of the most recently posted month end, plus or minus any subsequent gifts and grants. This value is unaudited and subject to change. If you have questions about your fund balance, please contact Ann Swindell at (757) 965-6106 or [aswindell@ujft.org](mailto:aswindell@ujft.org).

### **How do I know the amount available to spend from my donor advised or organizational fund?**

Your grantable balance, subject to potential changes in investments, is listed on the left side under *Your Charitable Accounts*. If you have questions about the amount you are able to distribute, then please contact Ann Swindell at (757) 965-6106 or [aswindell@ujft.org](mailto:aswindell@ujft.org).

### **I am a lay leader or staff representative for an affiliate's endowment. How do I access summary statements?**

You will be subscribed to a "group" for downloading these reports.

### **How often will my grant recommendations be processed when I submit them online?**

Grant recommendations are processed after the organization recommended is researched and passes the proper due diligence. If an organization is not approved, you will be notified by the Foundation and it will display as rejected on the right under *Recent Grant Activity*. Grant distribution checks are typically written once a week.

### **What do I do if I want my grant recommendation to be anonymous?**

When making a grant recommendation, select *Anonymous* under the Donor Identity section.

### **What do I do if I want the organization receiving the grant to know my identity?**

When making a grant recommendation if you want your name and fund name given to the organization, then select your name under *Donor Identity*.

### **How can I learn about nonprofit organizations the Foundation has funded?**

The Foundation's annual report generally contains this information, and you may read it by clicking the links on the bottom right of your homepage. If you have a specific area of interest or would like more information on community needs, you can click on the **Community Wish List** on the left side navigation to see funding opportunities within our local agencies. Contact Ann Swindell at (757) 965-6106 or [aswindell@ujft.org](mailto:aswindell@ujft.org) with further inquiries.

### **How can I learn about organizations I may wish to fund?**

On the left side of the screen, type the organization name or federal tax id number in the *Search for Charities* box. If the organization is listed in the Foundation's database or on GuideStar, a

comprehensive national database of over 1.7 million nonprofit organizations, then it will display. You will find detailed information about the organization by clicking on its name. DonorFirst is linked to GuideStar or you may access the site directly by going to [www.guidestar.org](http://www.guidestar.org). You may also call Ann Swindell at (757) 965-6106 or [aswindell@ujft.org](mailto:aswindell@ujft.org).

### **There are so many organizations doing good work in our community. How do I know where to recommend a grant?**

Find more information about funding needs in our community by visiting the **Community Wish List** page.

### **How can I learn more about whether an organization I wish to fund is an eligible grantee?**

Eligible grantees are organizations listed on the Foundation's List of Eligible Organization sheet found on the right hand side under *Account Documents*. You can access *Account Documents* by clicking on your Fund Name under *Your Charitable Accounts*. In addition grants can be made to any domestic public charity that is classified as a supporting organization by the IRS under section 509(a)(3) that can provide a written, reasoned legal opinion that it is either a Type I; Type II or functionally integrated Type III domestic supporting organization

### **How do I change the purpose of a grant recommendation already submitted to the Foundation?**

Please contact us immediately if you wish to change the purpose of a recently submitted grant recommendation. Changes to your grant recommendation should be made with the Foundation and not with the organization that will receive the grant.

### **How do I update my contact information?**

In the upper right-hand corner, click on the "Profile & Settings" link. On the **Profile & Settings** page, you can change your email address, mailing address (home, business or second home) and other personal information such as your name, phone number and profile picture.

### **How do I change my email notification settings?**

When you subscribe to a group, you will receive emails when new information has been posted. If you do not wish to receive these emails, indicate this preference under email notifications. Email notifications can be accessed from the **Profile & Settings** page.