

My TDF Login

FAQs about The Dallas Foundation's Online Portal





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The Dallas Foundation's online portal was designed so that fund advisors have secure, 24/7 access to monitor their fund and recommend grants using an intuitive online platform. Our staff has worked diligently to ensure My TDF Login's ease-of-use and functionality, but we know that any change can be challenging to navigate. As you explore the portal, we anticipate that you may still have questions and have tried to anticipate many of those in this document.

About the Foundation

The Dallas Foundation brings together people, ideas, and investments in Greater Dallas so individuals and families can reach their full potential. Working closely with our donor partners, we share our expertise, leadership, and the opportunity to co-invest in solutions that match their interests and make a meaningful difference. We also support programs that benefit children ages birth to three as well as the civic priorities of Dallas, and prioritize partnerships that reduce intergenerational poverty and meet today's pressing needs while positioning Greater Dallas for a brighter, more equitable tomorrow.

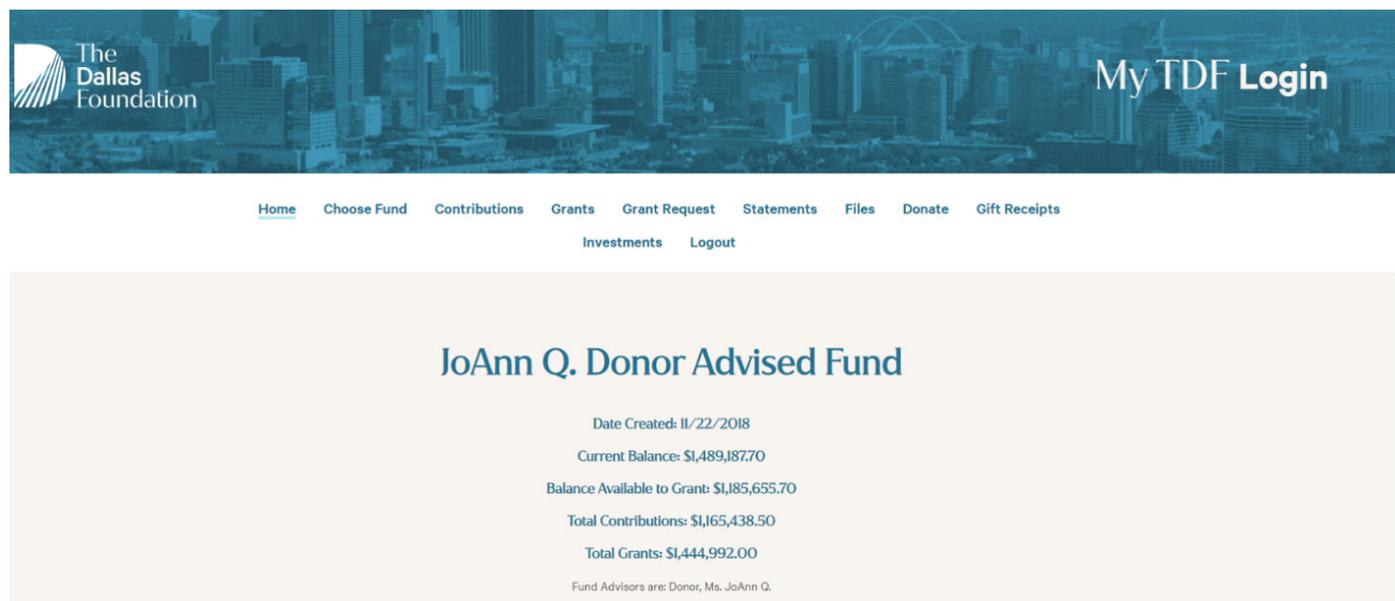
#HereforGood

GENERAL FAQS

Where do I find my fund balance?

The **Home** tab of the portal displays the current fund balance as well as the balance available to grant. You will also see the date the fund was established, total contributions to the fund and total grants made from the fund. Just below the spendable balance you will see the names of fund advisors for the fund.

If there is a difference between the spendable balance and the current fund balance, that is due to scheduled grant payments. Please note that there is a new minimum fund balance of \$2,500 to ensure funds do not go into arrears.



The screenshot shows the My TDF Login portal for The Dallas Foundation. The header includes the Dallas Foundation logo and a navigation menu with links: Home, Choose Fund, Contributions, Grants, Grant Request, Statements, Files, Donate, Gift Receipts, Investments, and Logout. The main content area displays the following information for the JoAnn Q. Donor Advised Fund:

JoAnn Q. Donor Advised Fund
Date Created: 11/22/2018
Current Balance: \$1,489,187.70
Balance Available to Grant: \$1,185,655.70
Total Contributions: \$1,165,438.50
Total Grants: \$1,444,992.00
Fund Advisors are: Donor, Ms. JoAnn Q.

How do I make a grant?

After logging in to My TDF Login and selecting the fund you from which you want to recommend this grant, there are four ways you can start the grant recommendation process:

From the **Grant Request** tab, you may:

- **Choose a previous Grantee** from one of the drop-down menus,
- **Search for other Grantees** by typing keywords that allow Guidestar, an information service specializing in reporting on U.S. nonprofit organizations, to search for organizations containing those keywords. The more keywords you provide, the better the search results will be.
- **Enter Grantee information** manually

JoAnn Q. Donor Advised Fund

Begin a new grant request using one of the options below. Please review the request, then click "Submit." Once you complete the grant request, The Dallas Foundation will receive notification and process your grant.

Please note that you may check the status of grants recently processed from your fund in the right hand column of this page.

Choose from previous Grantee

Grantees you have given to in the past

Other foundation funds

or

[Search for other Grantees](#)

Grants

Date	Status	Recipient	Description	Amount	
04/07/2022	Pending	Dallas Animal Services		32.00	
04/06/2022	Request	City Tots	annual toy drive	1,000.00	Cancel
04/04/2022	Request	(1001) The Community Impact Fund	Donation	1,500.00	Cancel
04/04/2022	Request	Elementary School PTA	Annual fundraising campaign	50,000.00	Cancel
04/04/2022	Request	Dallas Area Habitat for Humanity	General operating fund	1,000.00	Cancel
04/04/2022	Pending	Dallas Animal Services	In support of new facility.	250,000.00	
04/04/2022	Approved	Friends of KERA	Annual fund	5,000.00	
11/30/2021	Complete	Coastal Land Trust	In honor of Julia A. Donor	20,000.00	
09/14/2021	Complete	University Foundation	Dooley Family Program Ex	1,000.00	

From the **Grants** tab, you may also choose to **copy** a previous grant in the bottom section entitled Grants.

Once you select the grantee, the system will automatically move to a screen where you can add:

- a **description** to let the grantee know how grant is to be used;
- the **amount**;
- whether you want the grant to remain **anonymous**;
- if you want to make this a **recurring** gift; *If you choose to make a recurring gift, you will need to add when you would like this to begin, how often you would like this to go out and how many occurrences you would like to make. By entering a number in the Number of Recurring box, the total of the indicated payments will be taken from your fund balance. By leaving the number of occurrences blank, only individual payments will be taken from your fund balance at the time of payment. For this option, payments will continue to distribute based on your specifications until you contact The Dallas Foundation to stop the payments.* If you do not want this to be a recurring gift, please skip this step.
- any additional **notes** you want our staff to see before processing your grant request.

Please **review** the request, then click **“Submit.”**

You will now see your request appear in the list of grants on the right-hand side of the Grant Request page.

When will my grant be processed?

Grants are processed on a weekly basis. Grants requested by Monday will be sent out via ACH the following Monday. If payment cannot be remitted via ACH, a check will be processed.

Payments made via ACH generally take 5 -7 business days to reach the grantee; delivery of grants paid by check are dependent upon the postal service and a range of factors beyond our control.

You will receive an email confirmation **once the grant has been submitted for payment**, but you are always able to check the status of a grant via the portal.

How can I check the status of a grant?

The **Grant Request** tab will also show a list of grants *requested* to be paid along with their current status. Grant requests still in the *Request* stage can be cancelled from this screen by clicking the Cancel button.

Home Choose Fund Contributions Grants **Grant Request** Statements Files Donate Gift Receipts
Investments Logout

JoAnn Q. Donor Advised Fund

Begin a new grant request using one of the options below. Please review the request, then click "Submit." Once you complete the grant request, The Dallas Foundation will receive notification and process your grant as quickly as possible. We will notify you once the grant has been completed.

Please note that grants recently processed from your fund are listed in the right hand column of this page.

Choose from previous Grantee

Grantees you have given to in the past

Other foundation funds

or

Search for other Grantees

Grants

Date	Status	Recipient	Description	Amount	
04/07/2022	Pending	Dallas Animal Services		32.00	
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04/04/2022	Request	Elementary School PTA	Annual fundraising campaign	50,000.00	Cancel
04/04/2022	Request	Dallas Area Habitat for Humanity	General operating fund	1,000.00	Cancel
04/04/2022	Pending	Dallas Animal Services	In support of new facility.	250,000.00	
04/04/2022	Approved	Friends of KERA	Annual fund	5,000.00	
11/30/2021	Complete	Coastal Land Trust	In honor of Julia A. Donor	20,000.00	
09/14/2021	Complete	University Foundation	Dooley Family Program Ex	1,000.00	

Once a grant recommendation has been paid, the grant will appear in the Grants tab, which is organized first by a Grant Summary of all grants paid to each organization, then an individual listing of all grants made from the fund over the past five years.

Please note: the **Grant Date** shown is the date the grant request was submitted by the fund advisor and will not change as the status of the grant changes.

What if my grant history includes information that I don't understand or appears incorrect?

If you see anything in your grant history that is not accurate or needs further clarification, please contact Theresa Jones at tjones@dallasfoundation.org or Diana Guerrero at dguerrero@dallasfoundation.org. Similarly, if you have specific questions about your past grantmaking or want to receive a summary report of grant activity to date, please send Theresa or Diana an email outlining your request.

Please note that interfund grants, or grants made from your fund to another fund held at The Dallas Foundation, made prior to May 2020 may appear as a grant to "Dallas Foundation Projects." We recommend initiating any new grants to other funds at The Dallas Foundation using the "Other Foundation Funds" drop down selection tool located under the Grant Request tab.

Where can I find my fund statement?

The **Statements** tab will store all fund statements beginning with the April 2022 fund statement. Fund statements generated prior to this time will be found under the **Files** tab, once our team has completely transitioned from the previous technology platform. If you need an historical fund statement in the interim, please email support@dallasfoundation.org.

Can I download a list of my grantees or contributions?

You may use the **Export** tab to download all transactions from the Contributions or Grants tabs. Doing so will generate and download a csv file.

How do I find the current investment allocation for my fund?

Information about the investment pool(s) you have selected can now be found on your monthly fund statement.

My version of My TDF Login has tabs entitled Vendor Payables and Non-deductible Portion. What should I expect to see there?

Community Fund partners of The Dallas Foundation also have sight into other expenses paid from the fund; these will be listed under the Vendor Payables tab.

The Non-deductible Portion tab displays dollars received into the fund which are not tax deductible. While these funds are listed separately from total donations, they are reflected in your fund balance.

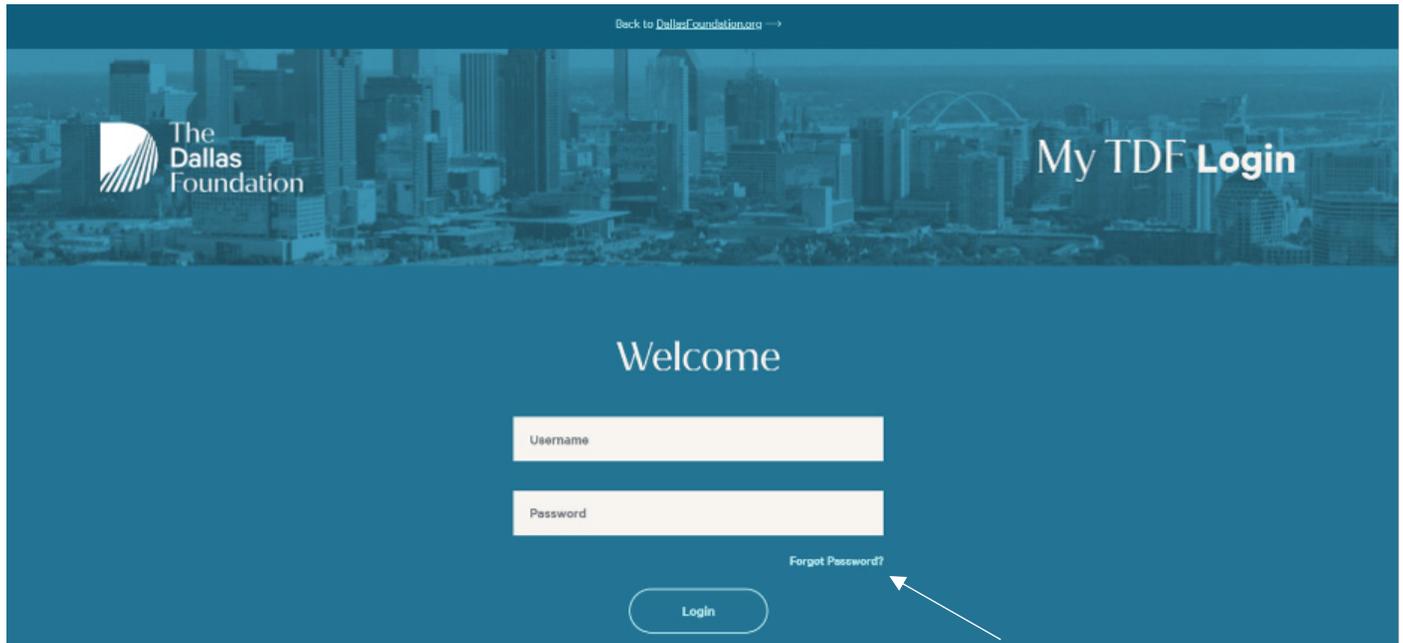
I don't want to use the portal. Is there another way to access my fund?

If you wish to bypass the portal, please allow our team to assist you with processing grants from your fund, providing historical data or grant status. Please send your request to mail@dallasfoundation.org.

UPDATES, MAINTENANCE AND QUESTIONS

What if I forget my password?

On the login page, click “Forgot Password.” Enter the username of your account, which is the email address The Dallas Foundation has associated with your profile and click Reset Password. Check your email for password assistance. For security reasons, Dallas Foundation staff will not be able to reset your password for you, but we can help you navigate the process if you need assistance.



How do I manage my contact information?

To change your contact information, or to add or remove advisors from the fund, please contact your fund steward. Your fund steward, along with their contact information, is listed on the home page of My TDF Login, directly under your fund name.

Who do I contact if I have additional questions?

For other questions or assistance, please contact:

- Donor Advised Fundholders, please contact donorservices@dallasfoundation.org.
- Community Fundholders, please contact **Christi Saylor**, Director of Community Funds, at 214-694-2524 or csaylor@dallasfoundation.org.
- All other Fundholders, please contact **Brittani Trusty**, Director of Community Impact, at 214-694-2514 or btrusty@dallasfoundation.org.
- Or for general assistance, support@dallasfoundation.org.



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