

# Navigate to the fundholder portal

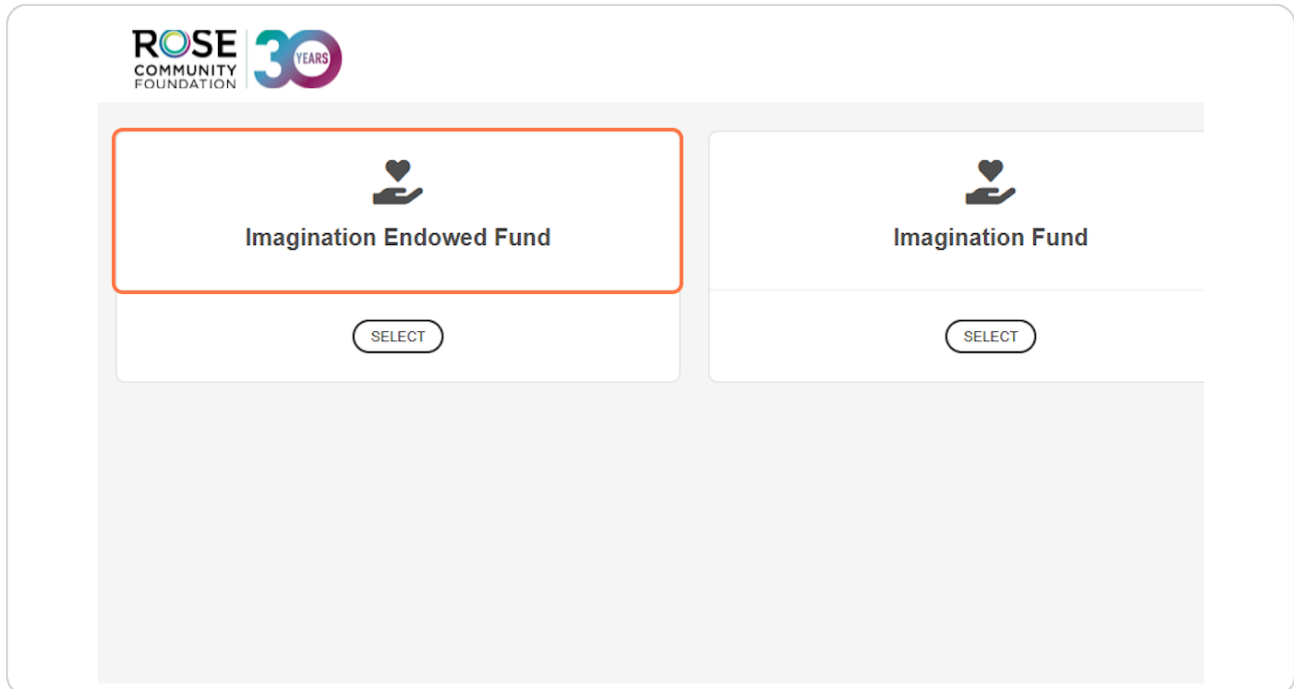
17 Steps 

<http://rcfdenver.fcsuite.com/erp/portal>

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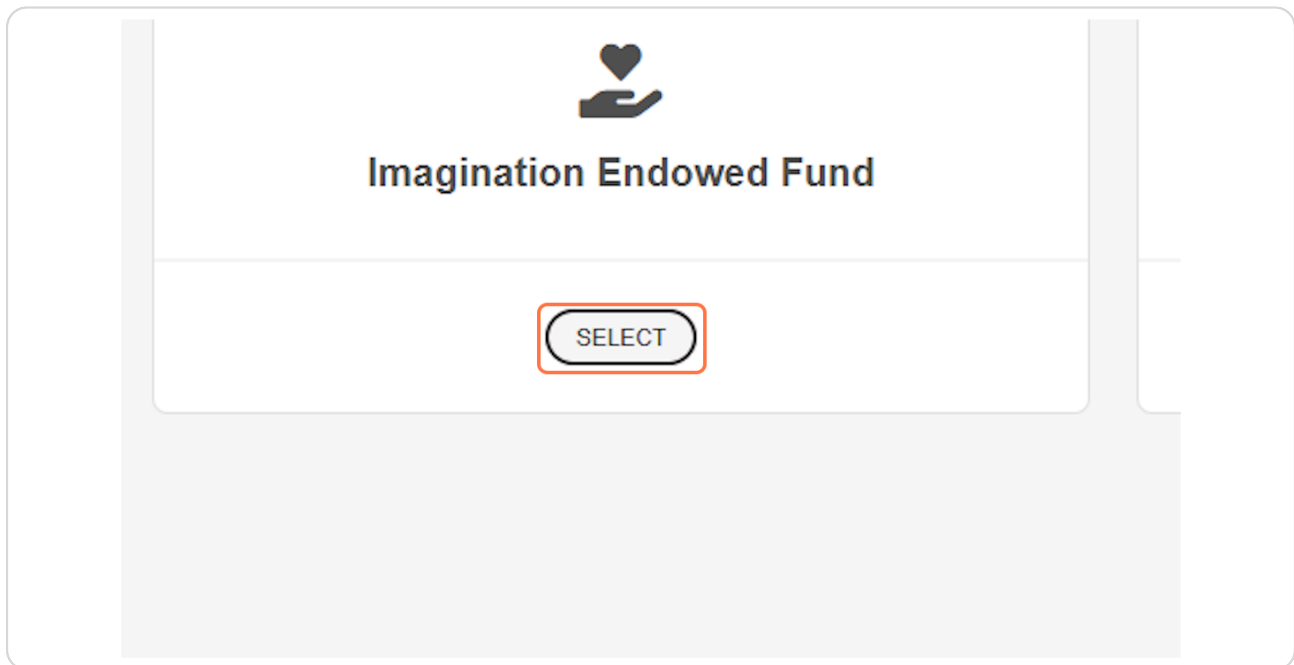
## STEP 1

**Find relevant fund (if your organization has multiple funds with Rose Community Foundation, they will all be listed on the home screen after logging in)**



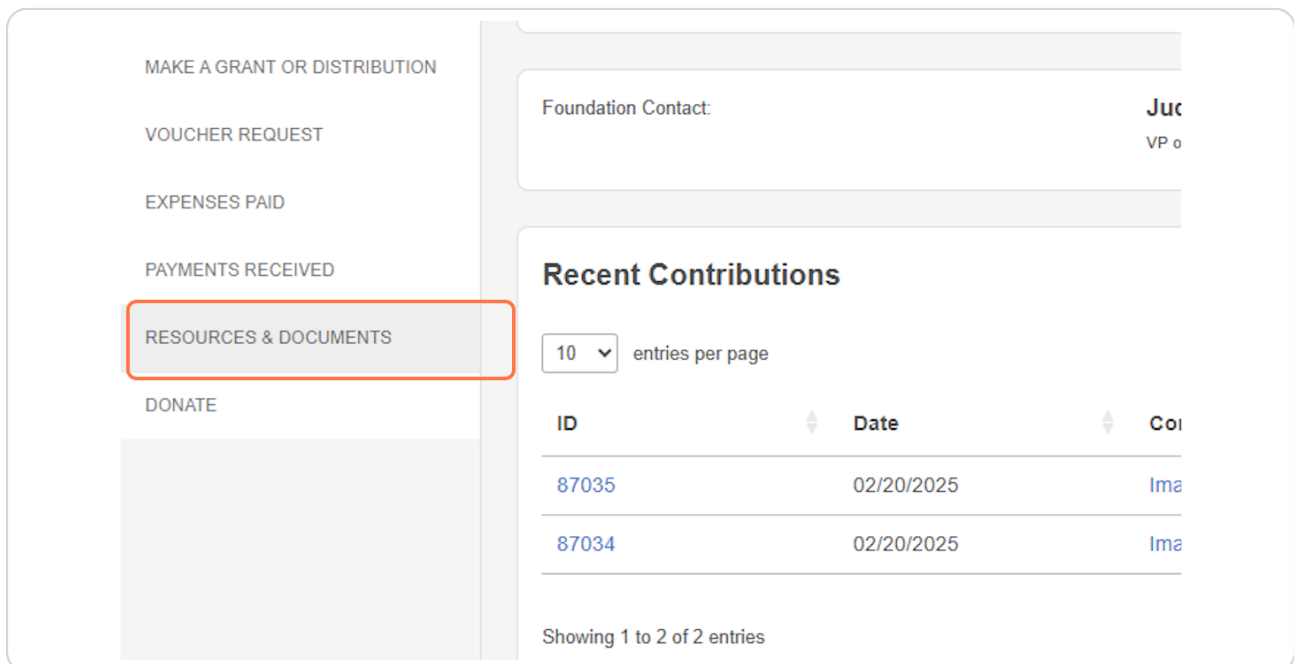
## STEP 2

Choose fund, click SELECT



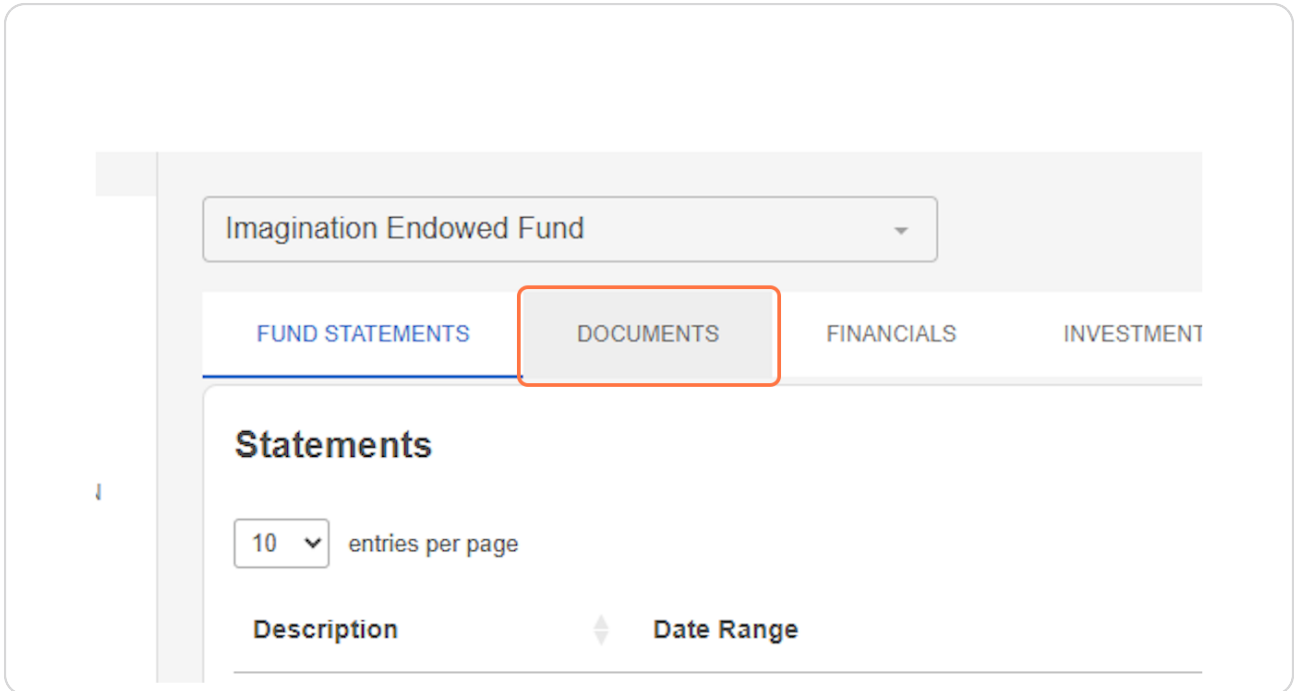
## STEP 3

Click on RESOURCES & DOCUMENTS to access the Distribution Request form



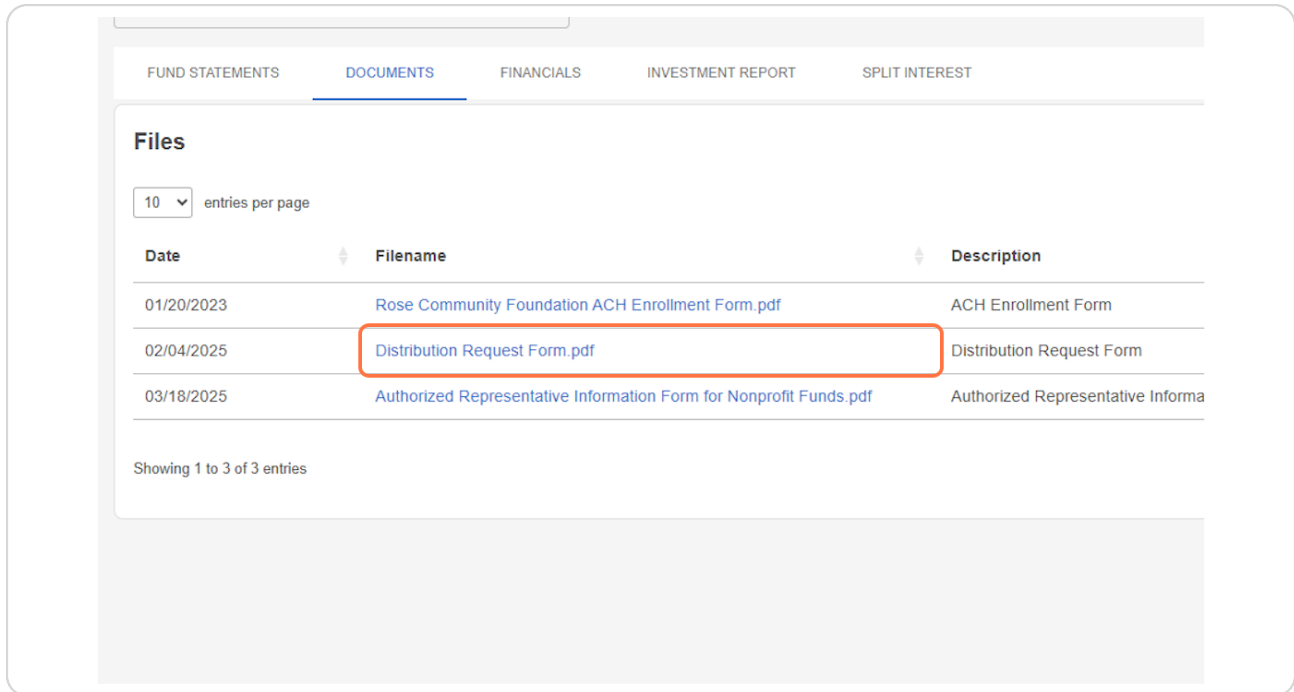
STEP 4

**Click on DOCUMENTS**



## STEP 5

**Click on Distribution Request Form.pdf Download form and fill out necessary information, including signatures where required.**




The screenshot displays a web interface with a navigation menu at the top containing 'FUND STATEMENTS', 'DOCUMENTS', 'FINANCIALS', 'INVESTMENT REPORT', and 'SPLIT INTEREST'. The 'DOCUMENTS' tab is active. Below the navigation is a 'Files' section with a dropdown menu set to '10 entries per page'. A table lists three documents:

Date	Filename	Description
01/20/2023	Rose Community Foundation ACH Enrollment Form.pdf	ACH Enrollment Form
02/04/2025	Distribution Request Form.pdf	Distribution Request Form
03/18/2025	Authorized Representative Information Form for Nonprofit Funds.pdf	Authorized Representative Informa

Below the table, it states 'Showing 1 to 3 of 3 entries'.

## STEP 6

All distributions **MUST** be approved and signed by the Primary Fund Advisor to process the request.



**ROSE**  
COMMUNITY  
FOUNDATION

**Distribution Request Form**

Nonprofit Endowed Fund  
 Nonprofit Designated Fund

We request that Rose Community Foundation make a distribution from the following fund(s). *If requesting distributions from more than one fund, please separate fund names with commas.*

From (Fund(s) name): \_\_\_\_\_

To (Organization name): \_\_\_\_\_

Amounts: \_\_\_\_\_

By signing this form, I/we acknowledge that this distribution will be used in accordance with the fund's purpose and the Nonprofit's current spending policy. I/we acknowledge that the request must be reviewed and approved by Rose Community Foundation before being processed.

**Instructions:** to sign, use the Adobe Fill & Sign feature or print the form, sign manually, and scan. Request your distribution via the Fundholder Portal ([cf.funder.org/login](http://cf.funder.org/login)) by clicking on the "Make a Grant or Distribution" tab. Upload this document as an attachment for each distribution you are requesting.

**ACH Enrollment:** To pay our partners quickly and efficiently, Rose Community Foundation prefers to transmit funds via ACH. The instructions for ACH enrollment can be found on the Documents tab of the Fundholder Portal.

**Executive Director/CEO**

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Board Chair (Only required if nonprofit endowed fund balance is going below Historic Dollar Value)**

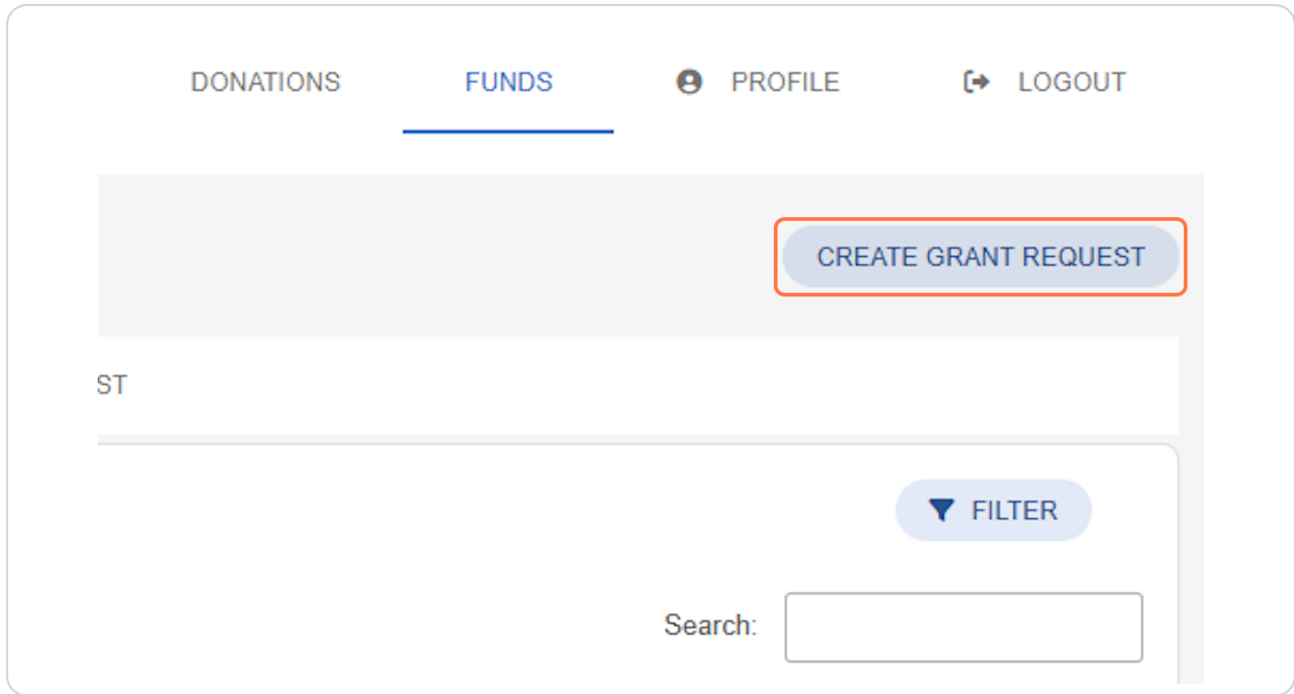
\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## STEP 7

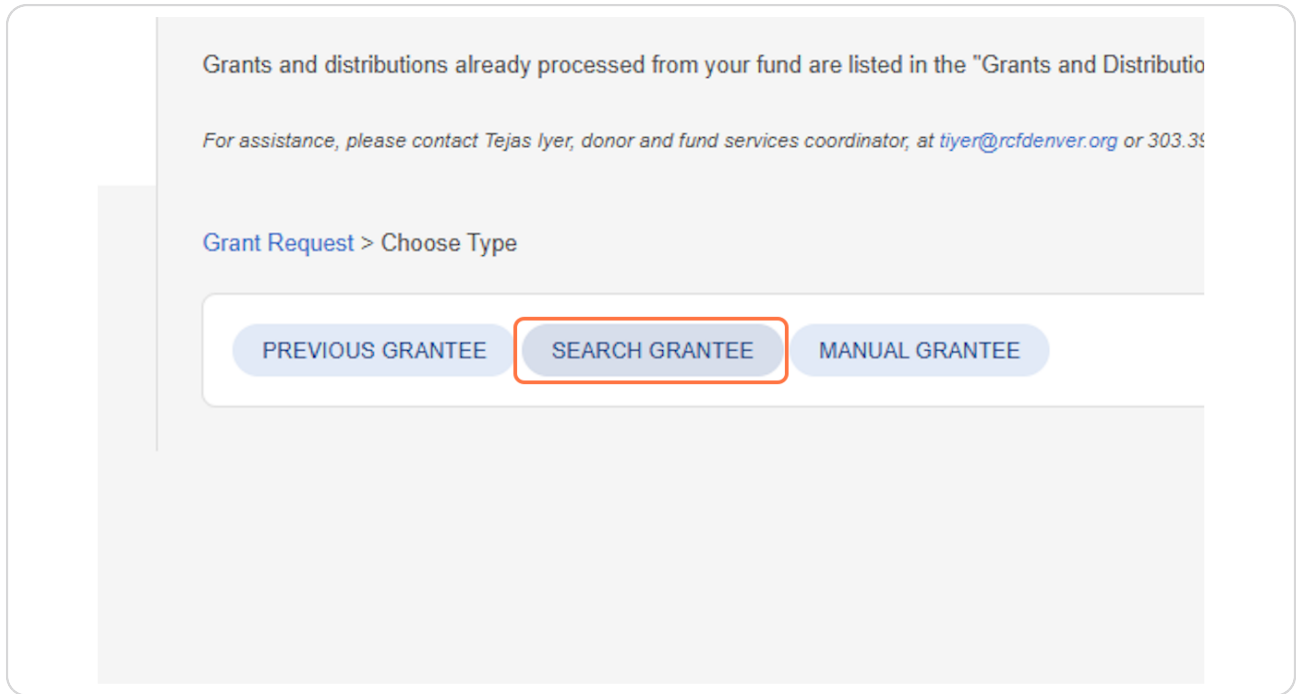
After downloading and completing the form, click on **CREATE GRANT REQUEST** to create the Distribution request in the portal



The screenshot shows a web interface with a navigation bar at the top containing 'DONATIONS', 'FUNDS' (underlined), 'PROFILE' (with a user icon), and 'LOGOUT' (with an external link icon). Below the navigation bar is a light gray header area with a blue button labeled 'CREATE GRANT REQUEST' highlighted by a red rectangular border. The main content area is partially visible, showing the letters 'ST' on the left and a blue button labeled 'FILTER' with a downward arrow icon on the right. At the bottom right, there is a search field with the label 'Search:' and an empty input box.

## STEP 8

**Select your organization from "Previous Grantee" or search for it if it does not appear under Previous Grantee**



Grants and distributions already processed from your fund are listed in the "Grants and Distributions" section.

*For assistance, please contact Tejas Iyer, donor and fund services coordinator, at [tiyer@rcfdenver.org](mailto:tiyer@rcfdenver.org) or 303.351.1234.*

Grant Request > Choose Type

PREVIOUS GRANTEE SEARCH GRANTEE MANUAL GRANTEE

The screenshot shows a web interface with a light gray background. At the top, there is a text block with two lines of text. The second line is italicized and includes an email address and a phone number. Below this is a breadcrumb trail "Grant Request > Choose Type". Underneath the breadcrumb is a horizontal row of three rounded rectangular buttons: "PREVIOUS GRANTEE", "SEARCH GRANTEE", and "MANUAL GRANTEE". The "SEARCH GRANTEE" button is highlighted with a red rectangular border.

## STEP 9

**Only an organization name is required for the search. Searching by EIN is optional.**

GRANT REQUEST

GRANTS PAID

GRANTS RECEIVED

GRANTS & DOCUMENTS

HOME

### Agency Endowed and Designated Funds

To request a distribution, use the "Previous Grantee" button located at the bottom of this page to select your organization. If you do not see your organization, enter the distribution request amount and attach the signed Distribution Request Form, which you can download on the Documents tab. The Distribution Request Form is generally the nonprofit's executive director. A distribution that would take an endowed fund's balance below Historic Dollar Value must additionally be approved by the Board of Trustees.

To pay our partners quickly and efficiently, Rose Community Foundation prefers to transmit funds via ACH. The instructions for enrollment can be found in the "ACH Payments" tab of the portal.

Grants and distributions already processed from your fund are listed in the "Grants and Distributions" tab of the portal.

For assistance, please contact Tejas Iyer, donor and fund services coordinator, at [tyer@rcfdenver.org](mailto:tyer@rcfdenver.org) or 303.398.7459. You can also find answers to frequently asked questions in the "FAQ" tab of the portal.

[Grant Request](#) > [Choose Type](#) > [Search](#)

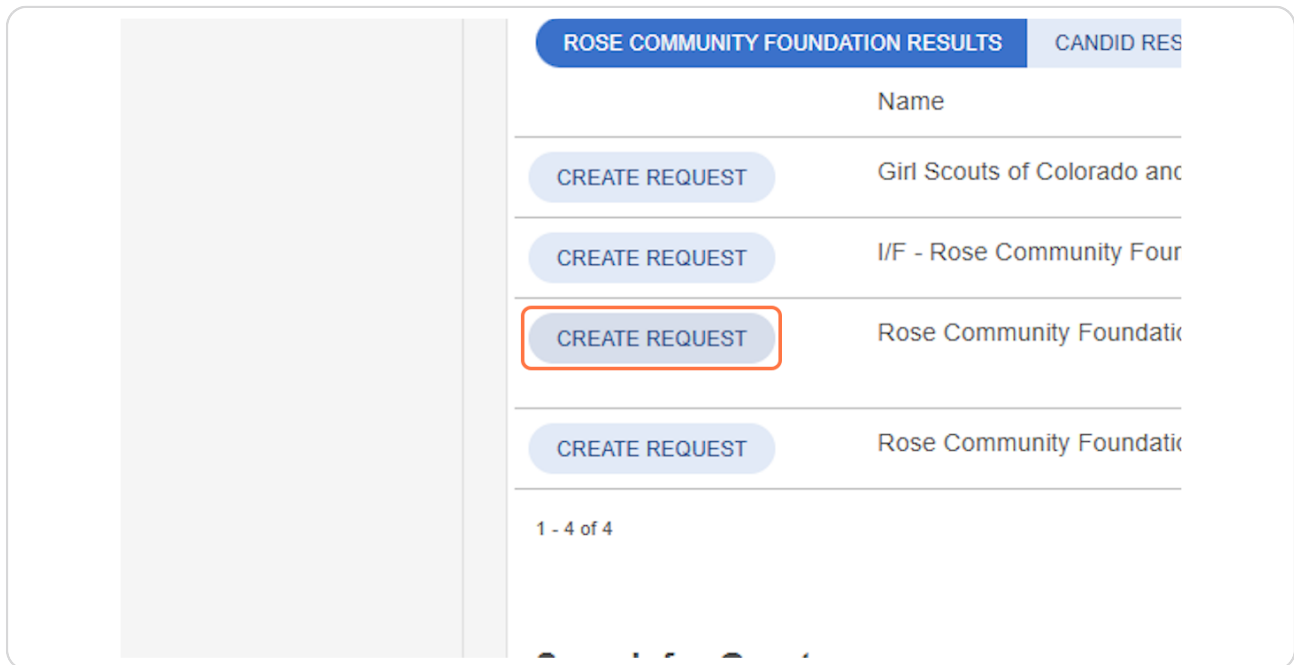
### Search for Grantees

Grantee Name



## STEP 10

**After finding your organization on the list, click on CREATE REQUEST**

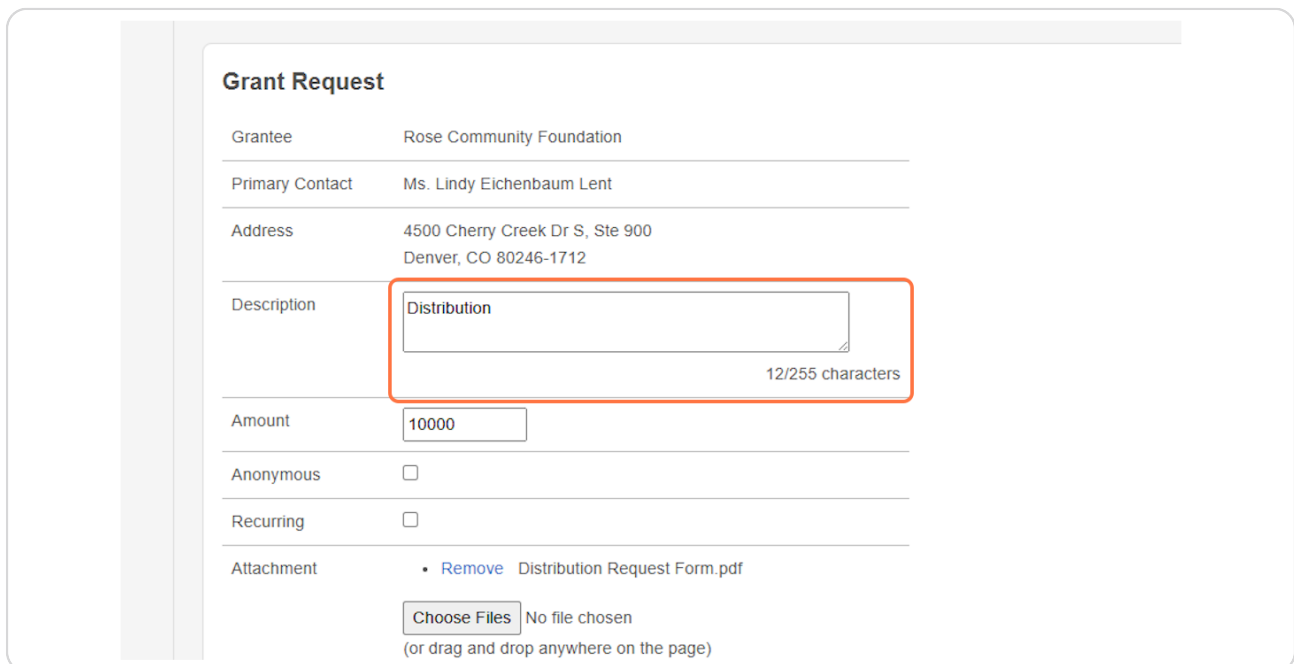


The screenshot shows a search results page with a blue header bar containing "ROSE COMMUNITY FOUNDATION RESULTS" and "CANDID RES". Below the header is a table with a "Name" column. The table lists four entries, each with a "CREATE REQUEST" button. The third entry, "Rose Community Foundat...", has its "CREATE REQUEST" button highlighted with a red rectangular box. Below the table, it indicates "1 - 4 of 4" results.

Name
Girl Scouts of Colorado and
I/F - Rose Community Four
Rose Community Foundatik
Rose Community Foundatik

## STEP 11

**Type "Distribution" in the description, or other details if necessary.**



The screenshot shows the "Grant Request" form. The "Description" field is highlighted with a red rectangular box and contains the text "Distribution". The "Amount" field contains "10000". The "Attachment" section shows a file named "Distribution Request Form.pdf" with a "Remove" link. Below the attachment section, there is a "Choose Files" button and the text "No file chosen (or drag and drop anywhere on the page)".

**Grant Request**

Grantee: Rose Community Foundation

Primary Contact: Ms. Lindy Eichenbaum Lent

Address: 4500 Cherry Creek Dr S, Ste 900  
Denver, CO 80246-1712

Description: Distribution (12/255 characters)

Amount: 10000

Anonymous:

Recurring:

Attachment: [Remove](#) Distribution Request Form.pdf

[Choose Files](#) No file chosen  
(or drag and drop anywhere on the page)

**STEP 12**

**Type the amount requested for distribution**

Address	4500 Cherry Creek Dr S, Ste 900 Denver, CO 80246-1712
Description	<input type="text"/> 0/2
Amount	<input type="text" value="1000"/>
Anonymous	<input type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)

### STEP 13

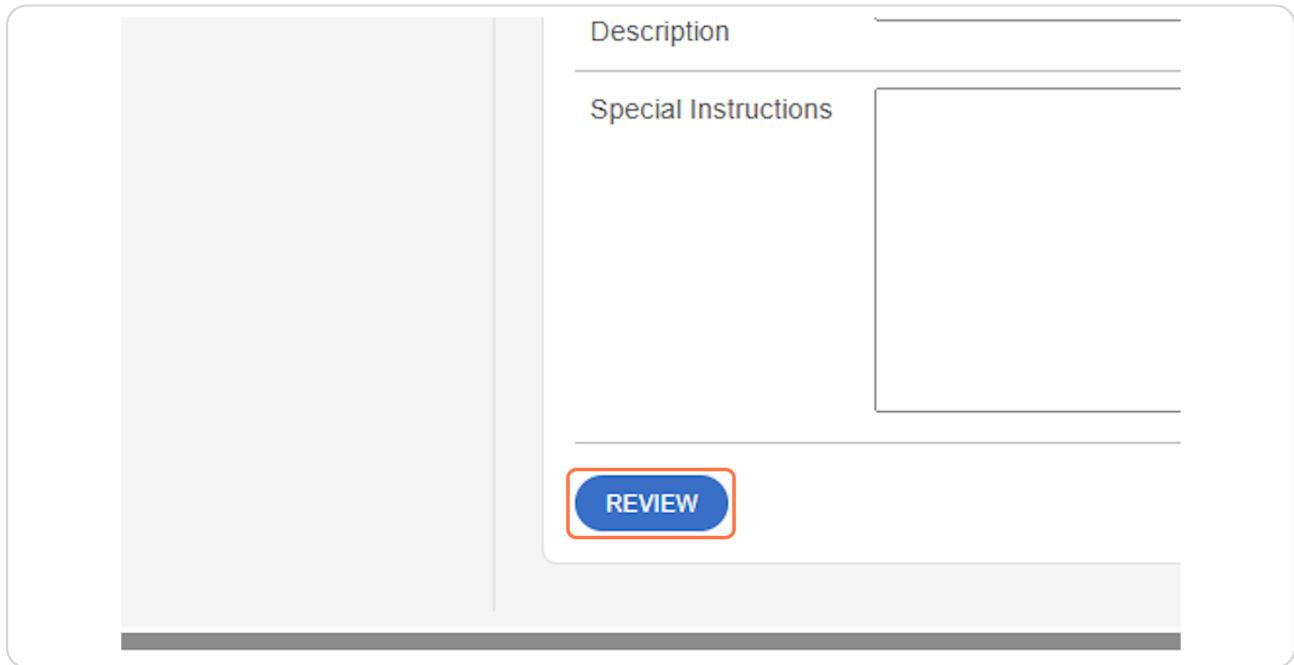
Click on "Choose Files" to attach the completed distribution request form. All distributions **MUST** have a distribution form approved and signed by the Primary Fund Advisor to process the request.

The screenshot shows a web form with the following fields and options:

- Description:** A text input field containing the word "Distribution". A character count "12/255 characters" is displayed to the right.
- Amount:** A text input field containing the number "10000".
- Anonymous:** A checkbox that is currently unchecked.
- Recurring:** A checkbox that is currently unchecked.
- Attachment:** A section containing a list of files. One file is listed: "Distribution Request Form.pdf" with a "Remove" link to its left. Below the list is a "Choose Files" button and the text "No file chosen (or drag and drop anywhere on the page)". This entire section is highlighted with a red rectangular box.
- Attachment Description:** A text input field.
- Special Instructions:** A large text area for providing additional information.

## STEP 14

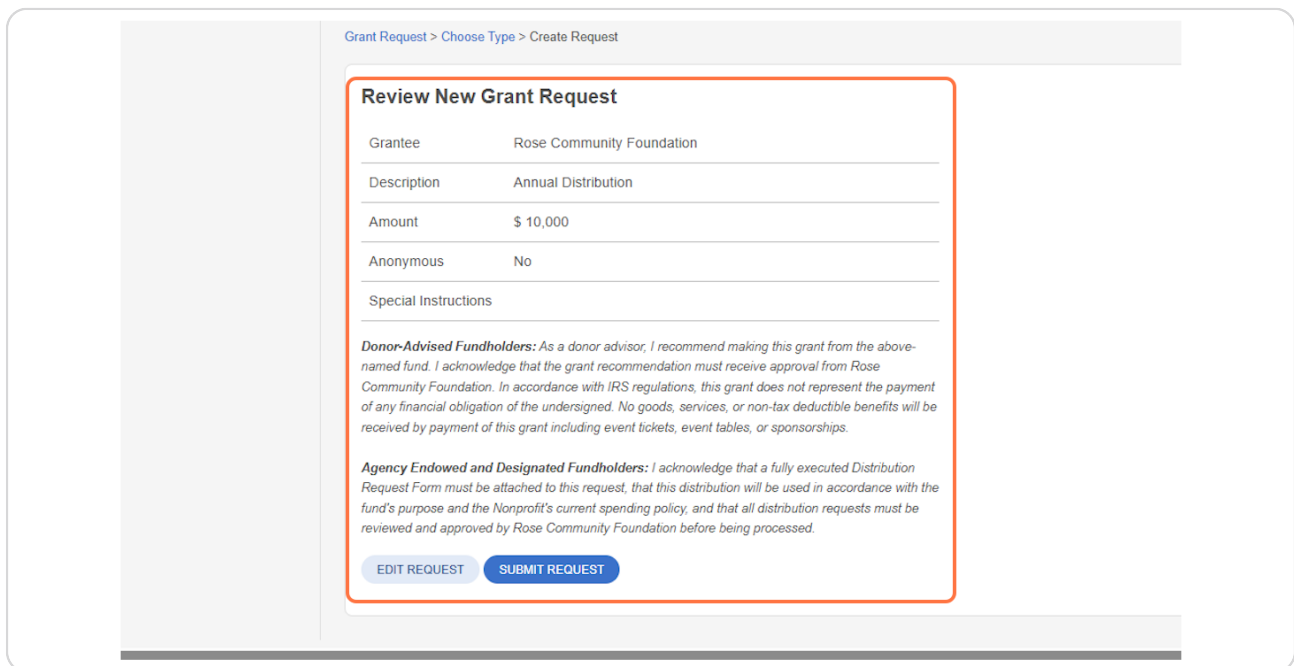
Click on Review to confirm details



A screenshot of a web form. On the right side, there are two text input fields. The top one is labeled "Description" and the bottom one is labeled "Special Instructions". Below these fields, a blue button with the word "REVIEW" in white capital letters is highlighted with a red rectangular border.

## STEP 15

Click on Review to ensure the details are correct.



A screenshot of a web page showing a "Review New Grant Request" form. The breadcrumb trail at the top reads "Grant Request > Choose Type > Create Request". The form is enclosed in a red border and contains the following details:

Grantee	Rose Community Foundation
Description	Annual Distribution
Amount	\$ 10,000
Anonymous	No
Special Instructions	

**Donor-Advised Fundholders:** As a donor advisor, I recommend making this grant from the above-named fund. I acknowledge that the grant recommendation must receive approval from Rose Community Foundation. In accordance with IRS regulations, this grant does not represent the payment of any financial obligation of the undersigned. No goods, services, or non-tax deductible benefits will be received by payment of this grant including event tickets, event tables, or sponsorships.

**Agency Endowed and Designated Fundholders:** I acknowledge that a fully executed Distribution Request Form must be attached to this request, that this distribution will be used in accordance with the fund's purpose and the Nonprofit's current spending policy, and that all distribution requests must be reviewed and approved by Rose Community Foundation before being processed.

At the bottom of the form, there are two buttons: "EDIT REQUEST" (light blue) and "SUBMIT REQUEST" (dark blue).

## STEP 16

Click on Submit Request to finalize.

Special instructions

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**Donor-Advised Fundholders:** *As a donor advisor, I recommend making this grant from named fund. I acknowledge that the grant recommendation must receive approval from Community Foundation. In accordance with IRS regulations, this grant does not represent any financial obligation of the undersigned. No goods, services, or non-tax deductible received by payment of this grant including event tickets, event tables, or sponsorships.*

**Agency Endowed and Designated Fundholders:** *I acknowledge that a fully executed Request Form must be attached to this request, that this distribution will be used in accordance with the fund's purpose and the Nonprofit's current spending policy, and that all distribution requests must be reviewed and approved by Rose Community Foundation before being processed.*

EDIT REQUEST   **SUBMIT REQUEST**

## STEP 17

### Questions

For any other questions, please reach out to:

Jill Henden, Director of Nonprofit Funds and Legacy Giving

[jhenden@rcfdenver.org](mailto:jhenden@rcfdenver.org)

303.398.7452