

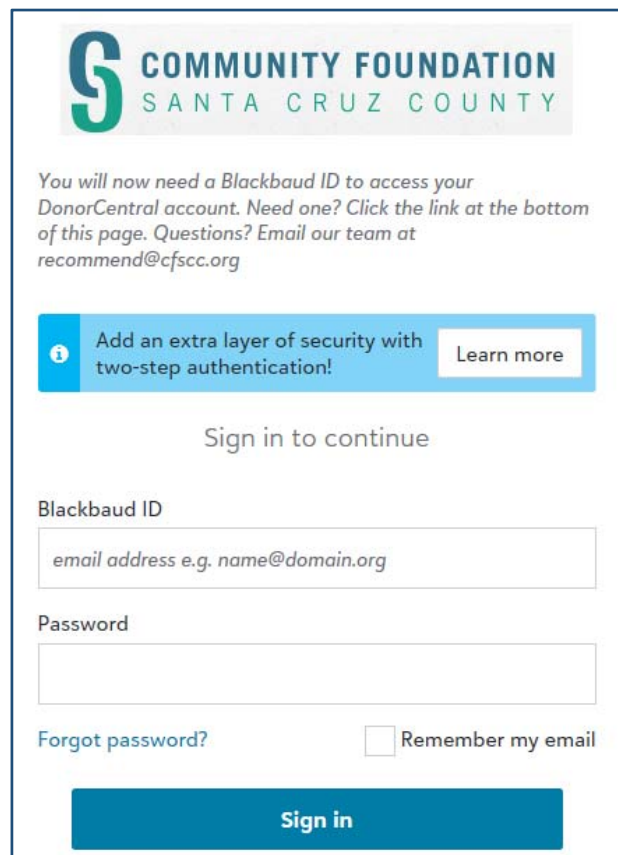
DonorCentral Quick Start Guide

<https://cfsc.donorcentral.com>

DonorCentral is the Community Foundation's online portal providing access to information about your fund(s). From here you can view your latest fund balance, get fund statements, make grant recommendations, and review your fund's giving or granting history.

Getting Started

You will receive an email with an invitation to set up your new user account, now called a "Blackbaud ID." Follow the link in the email to set up your password. Once the password is confirmed, the login page appears:



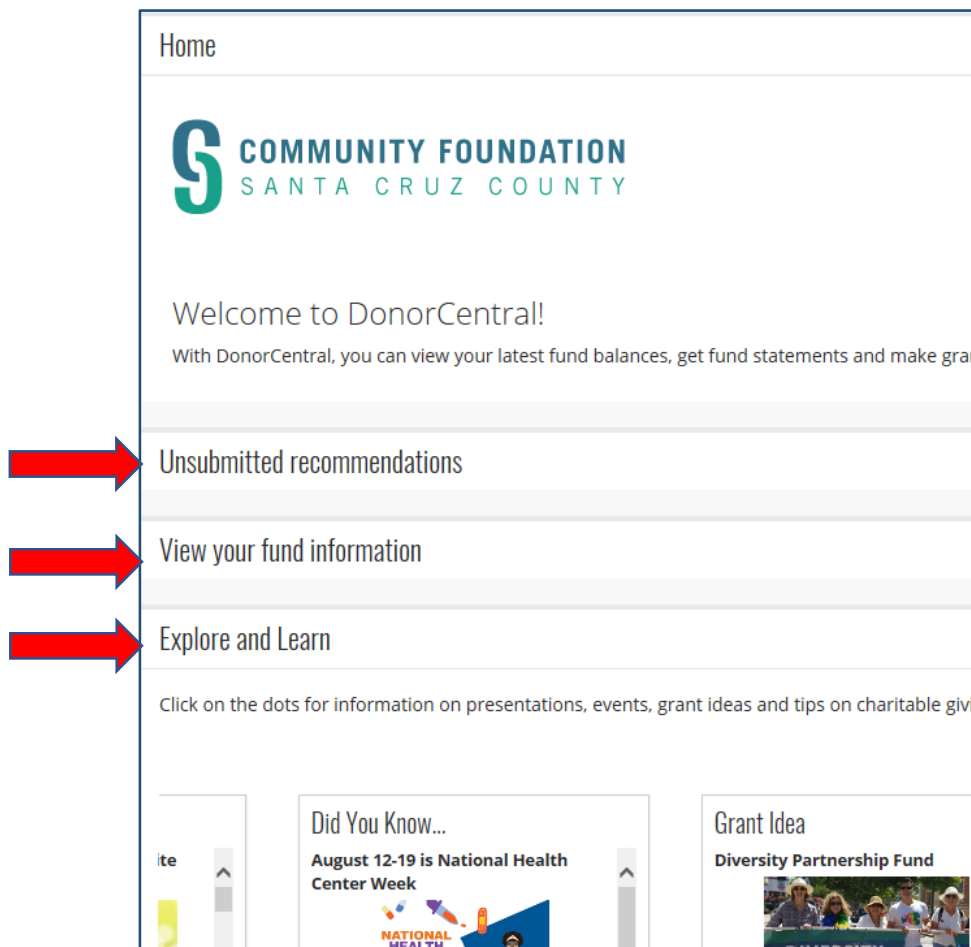
The screenshot shows the DonorCentral login interface. At the top is the Community Foundation Santa Cruz County logo. Below the logo is a message: "You will now need a Blackbaud ID to access your DonorCentral account. Need one? Click the link at the bottom of this page. Questions? Email our team at recommend@cfsc.org". A blue banner with a white 'i' icon contains the text "Add an extra layer of security with two-step authentication!" and a "Learn more" button. Below this is the text "Sign in to continue". There are two input fields: "Blackbaud ID" with a placeholder "email address e.g. name@domain.org" and "Password". Below the password field is a "Forgot password?" link and a checkbox labeled "Remember my email". At the bottom is a large blue "Sign in" button.

Using your email address and newly created password, log into DonorCentral.

Home Page

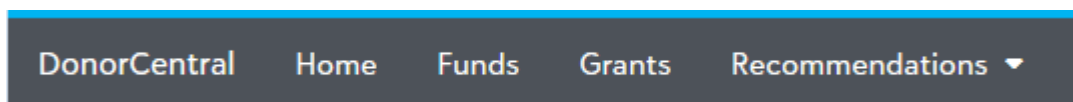
When you log into DonorCentral, the first page you see will be your Home page. From the Home page, you can:

- Access your fund information (Click on “View your fund information”)
- See any partially completed recommendations that you have saved (if there are any, the “Unsubmitted recommendations” section will appear on the Home page)
- Explore and Learn about presentations, events, funding opportunities and tips on giving



Navigation Bar

At the top of all pages, you will see a dark blue navigation bar. This is a quick way to move from one function of DonorCentral to another. From here, you can view your fund information, grant history or recommend a grant.



Recommend a Grant

DonorCentral makes it easy for you to recommend a grant from your fund(s). You can replicate previous grants you've made or research nonprofits and recommend a new grant, using the Foundation's grantee database.

Step 1 – Find the drop-down in the navigation bar labeled “Recommendations.” Use this drop-down to select “New”. This will open up the grant recommendation form.

Step 2 – Select Nonprofit Grantee

- In the recommendation form, select a nonprofit from a drop down list of your **previous grantees** or use the **Search our nonprofit database** field to look for the nonprofit to which you would like to make a grant.

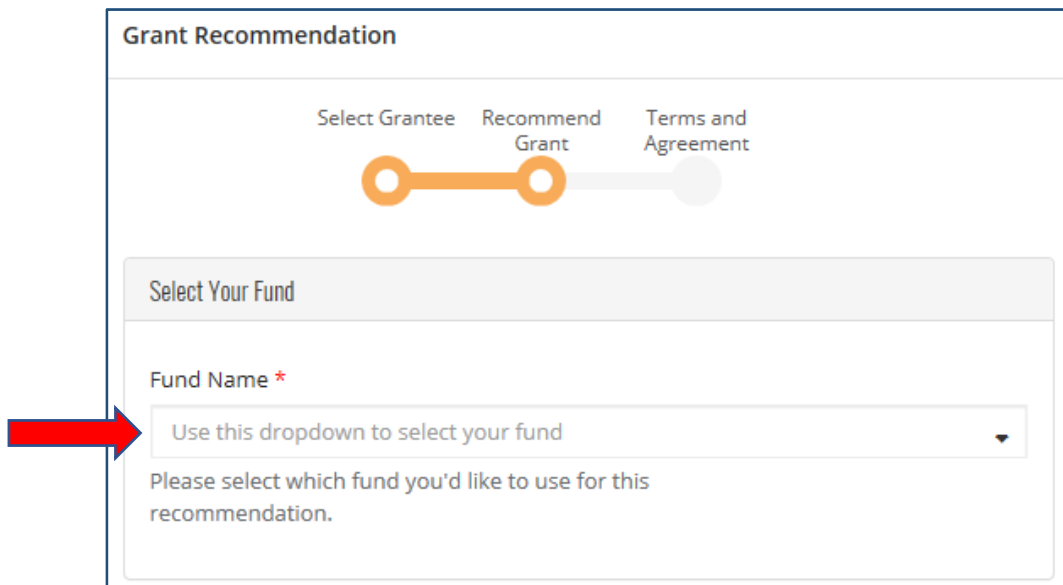
TIP: For the best results, search on the most unique word in the nonprofit's name (e.g. for “Pajaro Valley Shelter Services” search on the word “shelter.”)

- If the nonprofit you are looking for does not come up in your search, check the **Add a new nonprofit** box. A blank form will appear. Enter as much the information for the nonprofit as you know. Our team will collect the rest of the information needed and reach out to you if necessary.
- Select **Next** at the bottom left of the recommendation form. If at any time you wish to save your progress and exit the recommendation form, use the **Save for later** button at the bottom right of the form. You can come back to finish the recommendation at any time.

The screenshot shows a web form titled "Grant Recommendation" with a progress indicator at the top showing three steps: "Select Grantee" (active), "Recommend Grant", and "Terms and Agreement". The main section is "Select Nonprofit Grantee". It contains two search options: "Select from your previous grantees" with a dropdown menu, and "Search our nonprofit database" with a text input field. Below the search fields is a "Clear" button and a checkbox labeled "Add a new nonprofit". At the bottom, there are three buttons: "Cancel", "Next" (circled in red), and "Save for later". Three red arrows point to the search dropdown, the search input field, and the "Add a new nonprofit" checkbox.

Step 3 – Select Your Fund

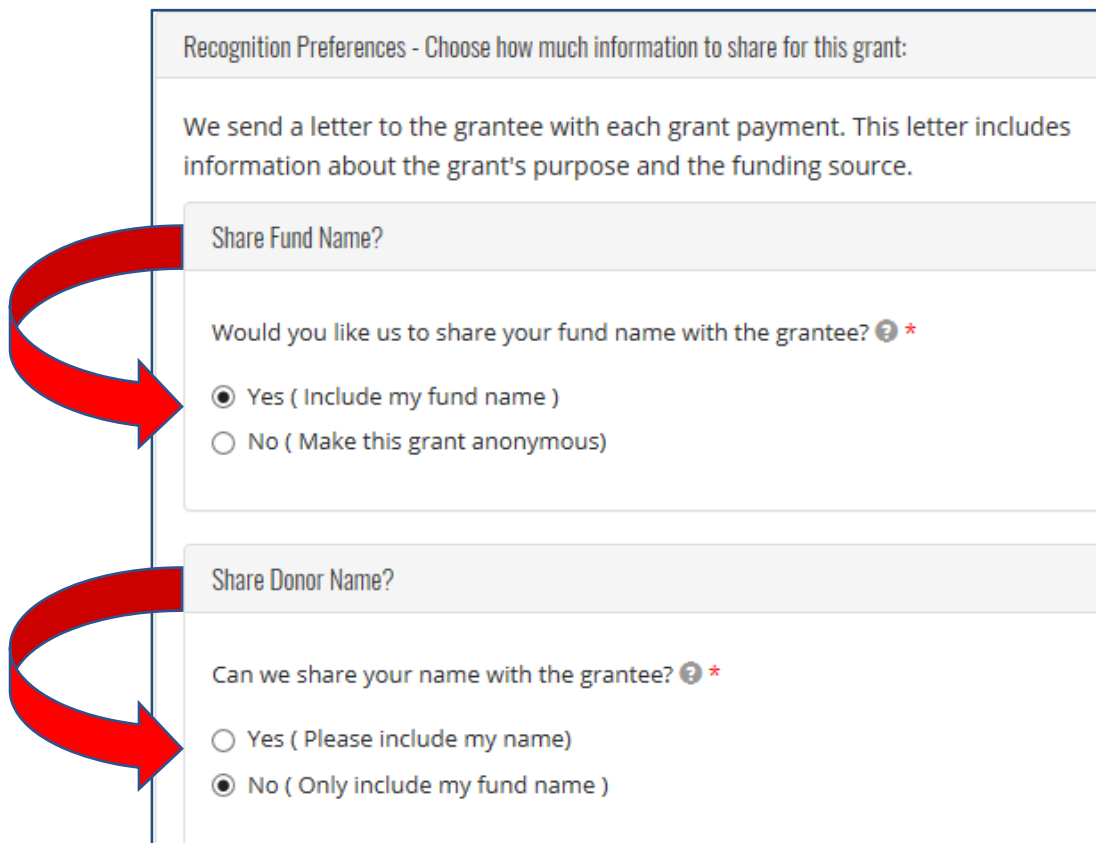
Use the dropdown menu to select the fund you want to use for this recommendation.



The screenshot shows a 'Grant Recommendation' form with three steps: 'Select Grantee', 'Recommend Grant', and 'Terms and Agreement'. The 'Recommend Grant' step is active. Below the progress bar is a section titled 'Select Your Fund'. It contains a label 'Fund Name *' and a dropdown menu with the text 'Use this dropdown to select your fund'. Below the dropdown is the instruction 'Please select which fund you'd like to use for this recommendation.' A red arrow points to the dropdown menu.

Step 4 – Recognition Preferences

You can choose how much of your information you would like the Foundation to share with the grantee. This selection may be made on a grant-by-grant basis.



The screenshot shows the 'Recognition Preferences' section with the heading 'Recognition Preferences - Choose how much information to share for this grant:'. It includes an introductory paragraph: 'We send a letter to the grantee with each grant payment. This letter includes information about the grant's purpose and the funding source.' There are two sections: 'Share Fund Name?' and 'Share Donor Name?'. The 'Share Fund Name?' section has the question 'Would you like us to share your fund name with the grantee?' and two radio button options: 'Yes (Include my fund name)' (selected) and 'No (Make this grant anonymous)'. The 'Share Donor Name?' section has the question 'Can we share your name with the grantee?' and two radio button options: 'Yes (Please include my name)' and 'No (Only include my fund name)' (selected). Two red arrows point to the 'Share Fund Name?' and 'Share Donor Name?' sections.

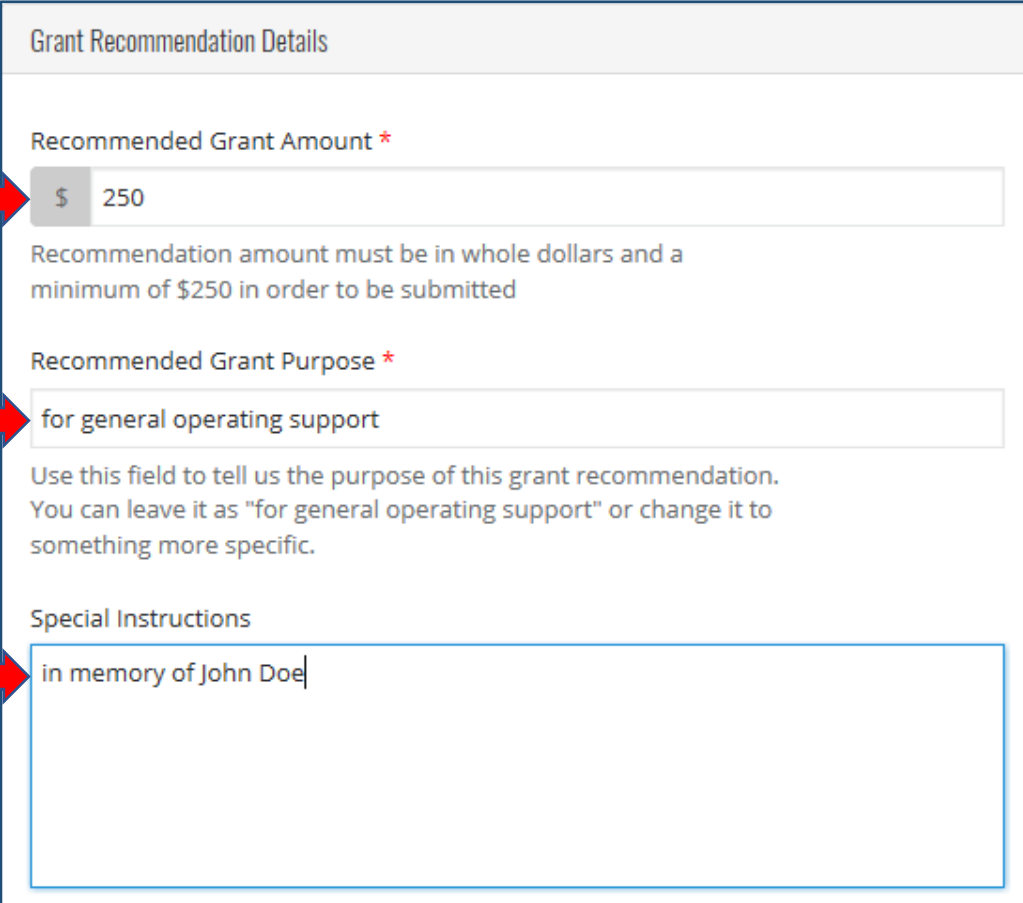
Step 5 –Grant Recommendation Details

Enter the recommended **Grant Amount** (must be \$250 or more), **Grant Purpose**, and any **Special Instructions**.

The Grant Purpose is how the grant money is to be used. It can be for general operating support as in the screen shot below, or it can be for a particular program (e.g. “to support the youth in transition housing program”). The Grant Purpose will appear in the grantee’s award notification. Typically, the grantee award notification will go to the Executive Director of the nonprofit.

Special Instructions may include things like:

- “in memory of _____, ” or
- “please notify Marty Garcia, director of the program, that this grant is coming.”



The screenshot shows a form titled "Grant Recommendation Details" with three main sections. Each section has a red arrow pointing to its input field:

- Recommended Grant Amount ***: The input field contains "\$ 250". Below it, a note states: "Recommendation amount must be in whole dollars and a minimum of \$250 in order to be submitted".
- Recommended Grant Purpose ***: The input field contains "for general operating support". Below it, a note states: "Use this field to tell us the purpose of this grant recommendation. You can leave it as 'for general operating support' or change it to something more specific."
- Special Instructions**: The input field contains "in memory of John Doe".

Step 6 – Grant Recommendation Terms and Donor Confirmation

Read the Grant Recommendation Terms. Confirm that the recommendation meets the terms laid out by clicking the box next to “Donor Confirms”

Select Grantee Recommend Grant Terms and Agreement

Grant Recommendation Terms:

All grant recommendations must be approved by the Community Foundation Santa Cruz County Board of Directors. In accordance with IRS regulations, no goods or services or non-tax deductible benefits may be received by the donor in exchange for this grant (Includes dinners, tickets, etc.). The Foundation cannot approve recommendations for grants to individuals.

Donor Confirmation:

By checking the box below, I confirm that this recommendation adheres to the terms listed above.

Donor Confirms

If you have questions about the grant recommendation terms, please email our team at Recommend@cfsc.org or call Robin Larsen at 831.662. 2061, Danu Schoeck at 831.662.2063 or Alexa Klingler at 831.662.2062.

Cancel Previous **Submit** **Save for later**

Final Step - SUBMIT or SAVE FOR LATER

Ready to make the recommendation? Hit **Submit!** Congratulations! You’re done! You will receive a confirmation email shortly.




Want to save your progress and complete it later? Select **Save for Later**. Your recommendation in progress will appear on the Home page in the “Unsubmitted recommendations” section. You can return to it at any time.

After you have submitted your grant recommendation, DonorCentral sends a copy of your confirmation email to the Foundation. If we have any questions about the information you have submitted, we will contact you to clarify.

Once your grant recommendation is submitted, it typically takes 5-7 business days or less to process it and send payment.

Questions? We're here to help!

Please email our team at **Recommend@cfsc.org** or call our staff:

		
<p>Robin Larsen 831.662.2061</p>	<p>Danu Schoeck 831.662.2063</p>	<p>Alexa Klingler 831.662.2062</p>