



Donor Central

QUICK START GUIDE

WHAT IS DONOR CENTRAL?

Donor Central is an online portal for fund advisors, making the process of managing your fund even easier.

- View detailed financial data and download fund statements.

- Submit grant recommendations.*

- Receive up-to-date information regarding donor education and community events, philanthropic news, and funding opportunities.

This quick start guide will provide you with the tools you need to get started.

*Online grant recommendations can only be made on Donor Central by fund advisors with Donor-Advised Funds. If you do not know what type of fund you have, please contact The Community Foundation at 202-955-5890 or donorservices@thecommunityfoundation.org.

SETTING UP YOUR NEW DONOR CENTRAL ACCOUNT

Before you start using Donor Central, you must create a password and log in to confirm your information, using the email address associated with your fund as the username.

Note: Please do not use the “login with Google” option, as the “create a Blackbaud ID” option is more secure.

If you have any questions, or your email address is not accepted, please contact The Community Foundation at 202-955-5890 or donorservices@thecommunityfoundation.org.

NAVIGATING YOUR DASHBOARD

1 Fund Summary

The summary displays the spendable balance of your fund and provides quick links to your fund information and most recent fund statement.

2 Grant History

Clicking on the left and right arrows in this section will show your last ten grant recommendations.

3 Explore

Click on the left and right arrows in the Explore Opportunities Section to learn more about collaborative funding efforts and events open to Greater Washington Community Foundation fund holders.

RECOMMENDING A GRANT

*Please note: only fund advisors of Donor-Advised Funds are permitted to make grant recommendations on Donor Central.

4 Navigate to the Fund Summary section of your Dashboard, and click on the "Recommend a Grant" button.

Choose your grantee

If you cannot find your grantee organization using steps 5 or 6, please continue to step 7 to add the grantee to our database.

5 For Prior Grantees

Click in the "Select prior recipient" box and choose the grantee organization from the dropdown menu.

6 For New Grantees

Click in the "Search for a recipient" box and start typing the name of the grantee organization. Donor Central will provide a list of results that you can choose from to populate this field.

The screenshot shows the DonorCentral dashboard interface. At the top, there is a navigation bar with links for Home, Funds, Grants, Recommendations, Control panel, and Advisor view. The main content area is divided into several sections:

- Welcome to DonorCentral!**: A central message with a sub-message: "With DonorCentral, you can view your latest fund balances, get fund statements and make grant recommendations as well as review your history."
- View your fund details**: A search bar for funds.
- Sample Fund**: A card showing a spendable balance of \$1,632.70. It includes a "Recommend a grant" button (callout 4), a "See more fund details" link, and a "View latest fund statement" link for the period 1/1/2018 - 03/31/2018. A red box and callout 1 highlight the "Recommend a grant" button.
- See your grant history**: A section for reviewing grant recommendations, including pending, approved, and paid grants. It includes a "See full history" link and a carousel of grant cards for "Your Public Radio Corporation/WYPR-FM", "Doctors Without Borders USA, Inc.", and "Civic Leadership Fund". Callout 2 points to the "See full history" link.
- Explore**: A section for funding opportunities and upcoming events. It includes a "Need Assistance?" card with a "Contact Donor Services" button and a photo of Emily Davis (callout 3), a "Celebration of Philanthropy" event card for March 25, 2019, and a "Funding Opportunity" card for "THE RESILIENCE FUND". Callout 5 points to the "Need Assistance?" card.

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Grant Recommendation

Charity Recommendation Agreement

Add a new charity **7**

Existing Charity

Select prior recipient * **5**

Find in this list

OR

Search for a recipient * **6**

Select a charity

Clear

Cancel Next Save for later

7 Entering New Grantees

Click the “Add a new charity” check box at the top of the window and add as much information as possible about the grantee you wish to support. You do not need to know all of the organization’s contact information, but we do need the name of the grantee, and the city and state.

Complete the Recommendation

8 Selecting Funding Sources

Your fund should automatically populate in this field. If you are the advisor on multiple funds, please use the dropdown menu to select the fund you would like to grant out of for this recommendation. If you wish the grant to remain anonymous, please click the “Fund anonymous” checkbox.

9 Setting Grant Amount and Other Instructions

Please enter the dollar amount you wish to grant, and remember - the minimum amount is \$250.

If you would like your name as advisor to remain anonymous, please click the “Advisor anonymous” checkbox. You can also add a line to specify the purpose of the grant, or give special instructions to the Grants Management team at the Greater Washington Community Foundation.

10 Recurring Grants

An additional option in Donor Central is to make your grant recurring. By clicking the “Is recurring” checkbox, you can make this grant recommendation repeat annually for a set number of years. When a recurring grant is made, the total amount will be encumbered, making those grant dollars unavailable to spend.

Questions?

Contact the Greater Washington Community Foundation at 202-955-5890 or by email at donorservices@thecommunityfoundation.org.

Grant Recommendation

Charity Recommendation Agreement

Fund

Funding source * **8**

Sample Fund

Fund anonymous

Grant

Amount * **9**

\$ 250

Advisor anonymous

Grant Purpose - to be included in the grant letter

Special Instructions

Recurrence

Is recurring **10**

Cancel Previous Next Save for later

