



DonorCentral User Guide

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

Login to DonorCentral:

To login to DonorCentral enter your **Blackbaud ID** (i.e., email address*) and **Password**.

If you do not remember your password:

- Click **Forgot Password** above the **Sign In** button to reset your password.
- Enter your email on the **Forgot Your Password** page.
- Once you receive the password reset email from **Blackbaud**, click the **Reset Password** button to begin the process.

Your password must be at least 8 characters and contain at least 3 of the following:

- Capital letter
- Lowercase letter
- Number
- Special Character (!, #, %, etc)

*Contact Beth Colette at bcolette@valleyfoundation.org if you would like to change your email address on file.

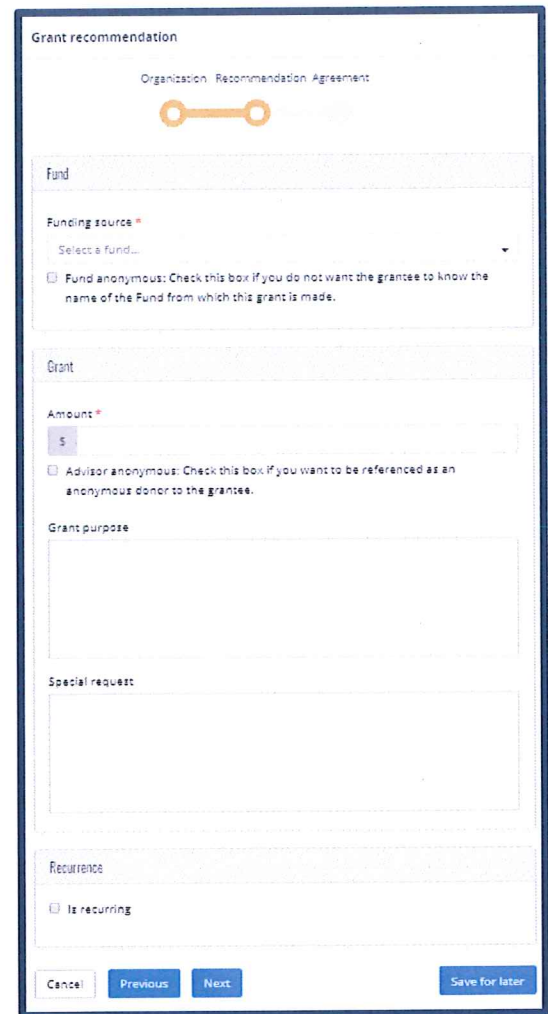
Recommend A Grant:

DonorCentral makes it easy for you to recommend a grant from your fund. You can replicate previous grants you made or, using the Valley Community Foundation's nonprofit database, search for nonprofits and recommend a new grant.

Next Steps:

- Recommend a grant by selecting the **Recommendations** tab, then select **New** on the drop-down from the menu bar at the top to open the **Grant Recommendation** box.
- You can choose an **Existing Organization** by searching for a new recipient already in our database or a prior recipient you have granted to before. You can also add a new organization by checking the box above **Existing Organization**.

- Select **Next**.
- Choose a **Funding Source**. (Check the **Fund Anonymous** box if you do not want the grantee to know the name of your fund.)
- Enter a **Grant Amount**.
- Check the **Advisor Anonymous** box if you want to be referenced as an anonymous donor to the grantee.
- Fill out the **Grant Purpose** and **Special Request** fields.
- Acknowledge the grant recommendation by clicking the **I Agree** box.
- **Submit**.
- If you are not ready to submit your recommendation, click **Save for Later** to store it. To return later and complete it, look for the pending recommendation on your **Home** page under **Unsubmitted Recommendations**.



Grant recommendation

Organization: Recommendation Agreement

Fund

Funding source *

Select a fund...

☐ Fund anonymous: Check this box if you do not want the grantee to know the name of the Fund from which this grant is made.

Grant

Amount *

\$

☐ Advisor anonymous: Check this box if you want to be referenced as an anonymous donor to the grantee.

Grant purpose

Special request

Recurrence

☐ Is recurring

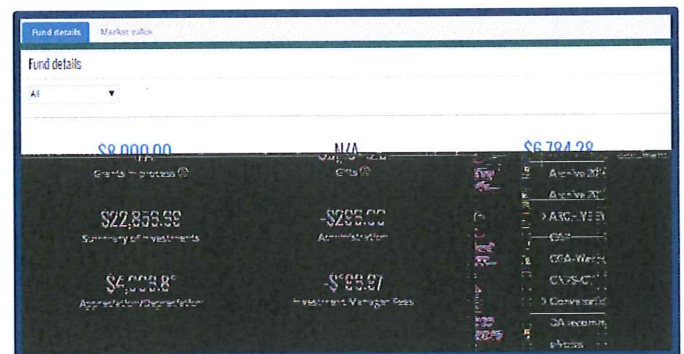
Cancel Previous Next Save for later

View Your Fund Details:

View information about your fund by clicking the **Funds** tab from the menu bar at the top of the DonorCentral **Home** page. The **Funds** section allows you to view your **Fund Details**, **Market Value** and **Fund Statements**.

Next Steps:

- Choose a fund, if necessary, at the top left-hand corner of the **Fund** page.
- On the **Fund Details** tab, click on any of the highlighted numbers for more details about each category.
- Click the **Market Value** tab to view historic fund values, including a chart of the fund's market value by quarter.

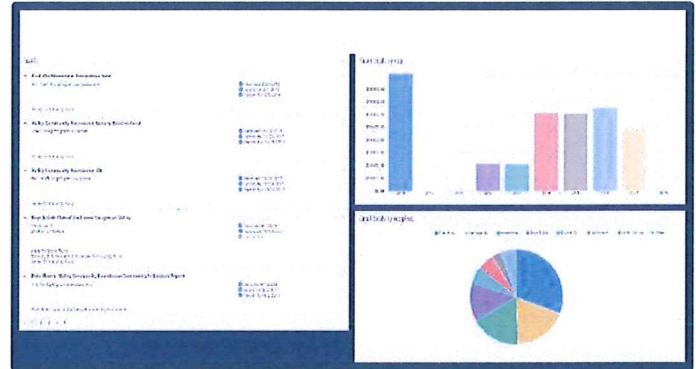


View Your Grant History:

Track your Grant History by clicking the **Grants** tab from the menu bar at the top of the DonorCentral **Home** page. The **Grants** section allows you to view your detailed grant history and charts of grants made by year and by recipient.

Next Steps:

- Click on an organization to view more details about your grant.
- Hover over the **Grant Totals by Year** graph to view total grants awarded for each year.
- Hover over the **Grant Totals by Recipient** graph to view grant amount totals awarded to your top ten grant recipients.



Resources:

Additional information can be found on the **Resources** page. Here you will find Investment Performance for the Perpetual Pool and Intermediate Pool, The Foundation's more recent financial statements and Giving Guidelines, which includes a section on Donor Advised Fund policies.

Need help?



Look for green "?" in the upper right-hand corner to access Blackbaud help.



Hover over the blue "i" in various fields to get a field description.

If you have additional questions or encounter problems, please contact Beth Colette at bcolette@valleyfoundation.org.