DonorCentral Quick Start Guide

DonorCentral is Vermont Community Foundation’s online fund management system. From here you can access detailed fund information, including your fund balance and fund statements, review the gifts and grants you have made, and recommend new grants.

In DonorCentral, you can view information related to your fund at a glance on your “Home” tab or browse other sections via the additional tabs at the top of your screen.

If you need assistance or have any questions, please contact Jane Kimble at jkimble@vermontcf.org.

ACCESS DONORCENTRAL

There are two ways to access DonorCentral at any time.

- go to vermontcf-daf.donorcentral.com

  or

- go to vermontcf.org and click on DonorCentral in the top right-hand section of any page on our website. Then click on the login button for Donor Advised Fund accounts on the right-hand side of the page (as shown in the screenshot on the following page of this guide).
SETTING UP YOUR ACCOUNT

You will receive an email from DonorCentral directly. In the email from DonorCentral, you will be asked to create a Blackbaud ID so you can access DonorCentral. Your Blackbaud username will be the email that you have given the Community Foundation for your fund. At that time, you will also choose a password.

For security, your password will need to have:
- 8 or more characters
- At least 2 of the following: Capital letters, Numbers, or Special Characters (such as one of these: ! @ # $ %)

Once you establish your Blackbaud ID, you will receive an email from Blackbaud—the developer of DonorCentral—asking you to confirm your email address.

FORGOTTEN PASSWORD

If you have forgotten your password, click on “Forgot password?” on the DonorCentral login page and enter the email address associated with your fund. A temporary password will be emailed to you. It is important that you use the email address that you gave to the Community Foundation to associate with your fund.

If you still cannot log on, please contact philanthropy@vermontcf.org.
RECOMMEND A GRANT

DonorCentral makes it easy for you to recommend a grant from your fund(s). You can replicate previous grants or search a wide range of nonprofits to recommend a new grant.

1. On your home page from the View Your Fund Details section, click on Recommend a Grant.

2. You may also select Recommendations in the top menu of your screen, then click New.
3. The **Grant Recommendation** screen appears.

4. Select an organization by selecting a prior recipient or searching for an organization.

If the organization does not show in DonorCentral yet, check the Add a New Organization box to create grant recommendation for this “new” organization.
5. Select Next and it will take you to the Recommendation tab

a. In the Fund section of the grant recommendation, select the fund for this recommendation in the Funding Source field.

b. In the Grant section of the grant recommendation, enter the recommended Amount and Grant Purpose.
6. Select **Next** and it will take you to the **Agreement** tab.

   a. Acknowledge the grant recommendation requirements by selecting the **I Agree** box.

   b. If necessary, at any time in the process click **Save for Later** to store your grant recommendation without submitting. To return later and complete it, look for it in the **Unsubmitted Recommendations** tile on the Home page.

   c. **If you are ready to recommend a single grant** click **Submit**.

   d. **If you are recommending multiple grants** at the same time, click on **Save for later** to create a grant recommendation list. **Unsubmitted recommendations** will appear on the Home page and you will be able to **Submit all** from there.
VIEW YOUR FUND INFORMATION

DonorCentral offers easy access to comprehensive information about your fund(s), allowing you to view, print, and email fund statements. To view fund information, select your fund on the Home page View Your Fund Details tile or click on Funds in the top menu of your screen.

This screen displays the fund name, description, and other details.

To view information on multiple funds, choose Select Funds.

VIEW GIFT AND GRANT HISTORY

For a gift or grant history, click on the amount total. Then, the gift or grant history will display. You can also export the history to Excel.

To see an explanation of each item, hover your mouse cursor over the small blue information bubbles.
EXPLORE GRANT OPPORTUNITIES

Vermont Community Foundation will highlight specific grant opportunities on the Home page Explore Opportunities tile to channel generosity where it is needed throughout our region.

For more information about creating a grant recommendation, see the Recommend a Grant section above.

QUESTIONS?

If you need assistance or have any questions, please contact philanthropy@vermontcf.org.