DonorCentral Handbook

www.stlgives.org   Click on My Fund to log in

The St. Louis Community Foundation's DonorCentral provides you online access to your fund activity and history. Depending on the parameters of your fund(s), you can view your latest fund balance, review gifts into and distributions out of the fund, access fund statements, make grant recommendations, and review history.

Questions? Contact DonorCentral@stlgives.org or Wendy Witte at 314-880-4962.

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Getting Started—Confirm your access, set a new password and log in

To access DonorCentral, click **My Fund** in the upper right hand corner of www.stlgives.org, the website of the St. Louis Community Foundation. Click on the LOG IN TO DONOR CENTRAL button to reach the login page. Enter your email address and password.

If this is your first visit, click the **Forgot password?** link to set up your password. Following the requirements outlined on this page, set up your password. Once the password is confirmed, the login page appears.

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

The dark navigation bar near the top of the DonorCentral page provides several ways to access your fund:

Dashboard   Fund Info   Grant History   Recommendation ▼

Recommend a Grant (Donor Advised Funds)

DonorCentral makes it easy for you to recommend a grant from your Donor Advised Fund. You may replicate previous grants you have made or, using the Foundation's nonprofit database, research charities to recommend a new grant. If you identify an organization not yet in the database, you can easily add it.

Replicate and/or Modify a Previous Grant
Your grant history at the Community Foundation provides a great starting place.

1. Click the **Grant History** tab to view your previous grants. If your Donor Advised Fund isn't visible, click the **Filters** button to select it. Click **Apply Filters**.

2. Use the **Filters** button to restrict your search by Date Range and/or Charity name to search for the grant you wish to replicate. Click **Apply Filters**.


Click round button to recommend again

3. To recommend a selected grant again, click on the round button with three dots to the left of the name of the organization. Select **Recommend Again**. The **Charity search** field will contain the name of the name of the organization you selected. Click **Next**. Previous values will populate the recommendation form; you may leave them the same or modify any detail. Click **Next**. Read the important agreement and check the **I Agree** box.

Click the **Submit** button to complete the process.

Recommend a New Grant
1. From the **Dashboard** tab, in the **View your fund information** tile, click in the *Find* field to locate the fund from which you want to recommend a new grant. All funds with which you are associated will be listed. Select your Donor Advised Fund.

2. Click on **Recommend a grant**. The Grant Recommendation screen appears.

   Note: You may also start from the **Recommendation ▼** tab by selecting **New Recommendation**.
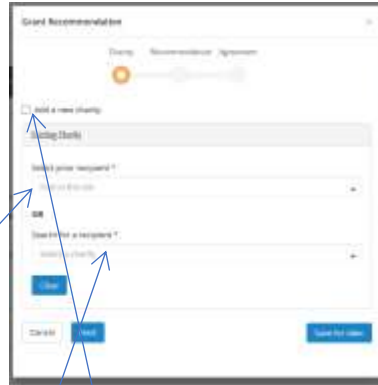
3. Find a nonprofit by searching for it in the **Select prior recipient** field or **Search for a recipient** field.
   - Click the **Find in this list** field to see your previous grant recipients.
   - Enter a search word in the **Select a charity** field to find a new organization to support.
   - Click on the name to select.

   Search tips: type key words—art museum—rather than the whole name so that you will see all the options already in the database. If St. Louis is part of the name, try spelling out Saint, too.

   If the nonprofit isn't in our database yet, check the **Add a new charity** box to create a new option.

   Click **Next**.

4. In the **Fund** section, your fund should be the **Funding Source**. If you have more than one fund, select the Donor Advised Fund you wish to use by clicking on the ▼ or in the **Select a Fund…** area and clicking on your fund.

   If you click the **Fund anonymous** box, the fund will be identified as *Anonymous Fund* on the check instead of your fund name and your fund's name will not be included in the cover letter.
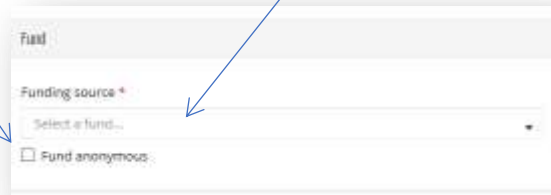
5. In the **Grant** section, you enter the amount, opt for anonymity, restrict purpose, arrange for **Multi-year Distributions** and make special requests:

   Your recommended grant amount (required)

   If you are interested in advisor anonymity, check one option

   Grant purpose (unrestricted support may leave this blank)

   Check the **Multi-year Distribution** box if you would like to pay a large grant over a period of years. The full amount of the commitment will be announced to the organization as well as the schedule of distributions. Subsequent annual distributions will be sent automatically. The full amount will be booked against your fund but the undistributed amount will remain invested.
   Use the **Special request** field to tell us the distribution terms you prefer.

6. **Recurrence**: To recommend a recurring grant, check the **Is recurring** box to reveal needed fields, and fill in
   - Start date—at least two days in the future (required),
   - End date (leave blank if you want this grant to continue indefinitely),
   - Frequency* (required), and
   - Notes

> ***Frequency ideas: 30 days for a grant you want sent automatically every month; 90 for a quarterly distribution; and 365 for a grant to go out about the same time annually**

Note: You may modify the parameters at a later date by clicking the **Recommendation ▾** tab and then clicking **View/Modify Recurring Recommendations**.

Customization: Customize your preferences for the letter that will accompany the check.
   - Names—the default for your name(s) is formal (Mr. and Mrs. George Washington) but we are happy to customize (Georgie and Marty Washington, the Washington Family, Martha Washington, or name the grandkids as the donor).
   - Address for thank you notes—the default is to tell the organization to send notes to your home address. If you click this box, the Foundation's address may be used instead, but please understand that we forward any letters we receive only twice annually.

   Click **Next**.

7. Read the Important **Agreement** and check the **I agree** box.

   Click **Submit** or **Save for later** if you want to submit a batch of grants at one time or hold the grant for later submission. See next page for more detail.

Save Recommendation for later submission or to Batch Submit—At any time in the process, click **Save for Later** to store your grant recommendation without submitting.

To submit several grants at the same time or return later and submit, look in the **Dashboard** tab at **Unsubmitted recommendations**. Submit multiple recommendations at one time and receive one email confirmation for the batch.

Click nonprofit's name to view or edit grant details

Click boxes beside the names to submit several together.

Submit or delete one in the list by clicking the word below the nonprofit's address.

Not ready means there is key information missing in the recommendation. Click on the name to review and update.

Review number and amount total, then click Submit

This section lists all the recommendations that you've saved but not yet submitted. You can view or edit the details of a saved recommendation by selecting the charity's name in the list to open its grant recommendation form.

To choose multiple recommendations to submit, select the checkbox beside each recommendation you want to submit or — if you want to submit all the recommendations — select **Select all/none**. When you select or clear any of the recommendations, the information below the list is updated — you'll see how many recommendations you've selected and their combined total. Select **Submit** at the bottom of the tile to submit the batch of recommendations and review the submission confirmation message. When you close the message, the submitted recommendations no longer display in the tile.

You can submit a single recommendation by selecting **Submit** below the charity's address. To delete a recommendation, choose **Delete**.

A **Not ready** status displayed for a recommendation indicates that it needs attention — there is a missing required field or an invalid amount — when you saved the recommendation. For recurring recommendations, this may also occur if the start date is in the past or after the end date. You will not be able to submit a **Not ready** recommendation until you've corrected the issue by editing the grant recommendation.

View your Fund Information

DonorCentral offers easy access to comprehensive information about your fund(s) and allows you to view, print, and email fund statements. To view fund information, you can click either the **Fund Info** tab or the **Dashboard** tab.

- From the **Dashboard** tab, under **View your fund information** click in the *Find* field, then click the name of the fund you want to view. Once it displays, click 'See more fund information'. This takes you to the **Fund Info** tab.

- From the **Fund Info** tab, click in the *Find* field at the top and click on the desired fund.

The fund name and ID, Market value, and Spendable balance display in the top section.
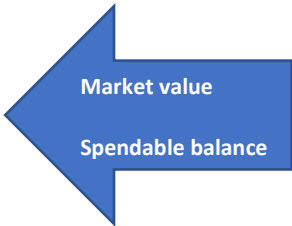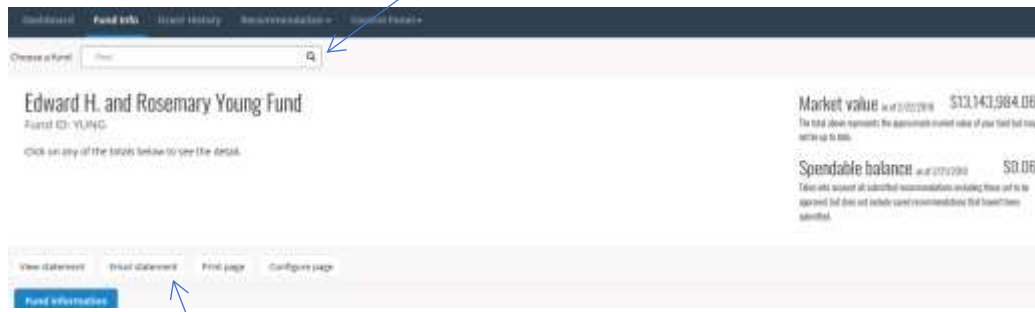
Fund Statements—Beginning with 2018 information (available about April 15), the most recent fund statement may be viewed, emailed, and printed by clicking on buttons at the bottom left of this section.

In the **Fund Information** section:

- the Period may be selected to include All, This Month, This Quarter, This Year, or Last Year
- Click one of the totals to display all related records and details in the grid below.
- From the displayed section, you may:
  - Click the columns icon ⊞ to select which columns of information you wish to see by checking/unchecking the option boxes.
  - Search for specific organizations and details by typing in the *Find in this list* box
  - Export a report by clicking the **Export** button to pull information into a spreadsheet.
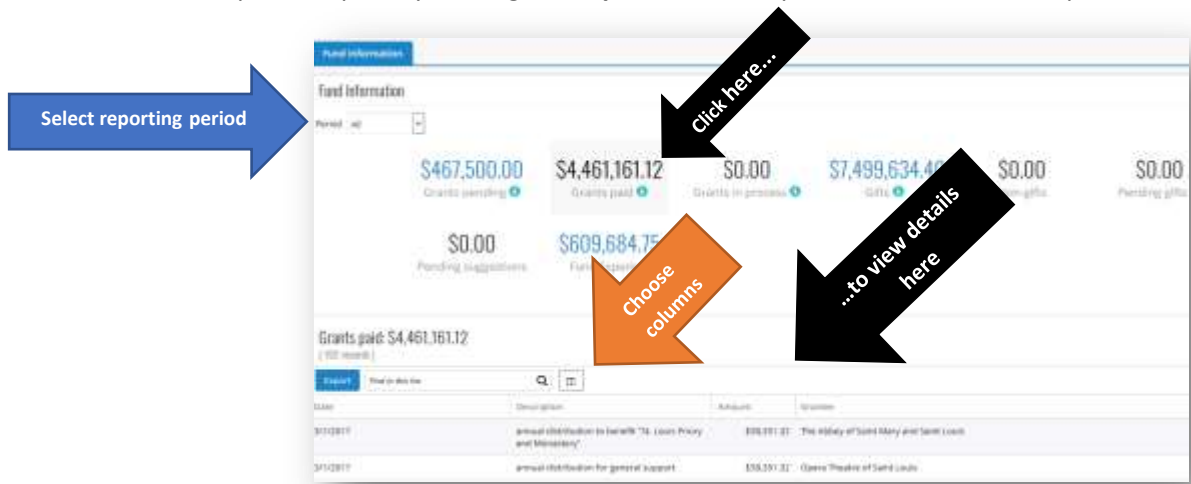
- Hover over the information bubble ⓘ to learn more about the data.

<u>View Grant History</u>

By default, information on the Grant History page will include all of your associated funds.
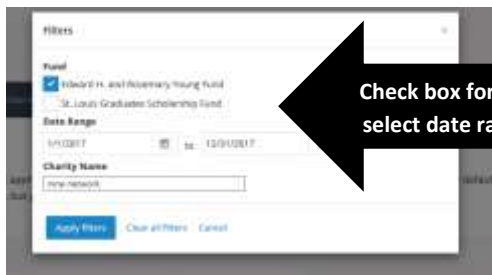
Check box for Fund you wish to view, select date range or specify a charity

Click the Filters button to reveal the Filter field:

Access from Grant History tab

Click question mark for help

Grant History

Grant recommendations that have been submitted but not yet approved will appear below in their own section but are not included in the totals on the right. By default, the information shown represents all of your associated funds, but you can filter by fund, time-frame, or charity by clicking the Filters button.

Granted $4,461,161.12

Paid $4,461,161.12

Grants   192

▼ Filters   Filter: Funds: Edward H. and Rosemary Young Fund

Grants

Click name to see grant details

The Abbey of Saint Mary and Saint Louis
500 South Mason Road   ☑ Rece...
St. Louis, MO 63141-8500   9/25/2008
                            ☑ Approved
                            2/24/2017

$38,3...
Ed...

Click circle to view details or recommend again

...... Louis
210 H... ue   ☑ Received
St. Louis, M... 19-3236 9/25/2008
                        ☑ Approved
                        2/24/2017
                        ☑ Paid in full
                        3/1/2017
$38,351.32
Edward H. and Rosemary...

Click arrow to expand or collapse section

Saint Louis Symphony Orchestra
Powell Symphony Hall   ☑ ...ceived
718 North Grand Blvd.   9/25/2008
St. Louis, MO 63103   ☑ Approved
                          2/24/2017
                          ☑ Paid in full
                          3/1/2017
$38,351.32
Edward H. and Rosemary Young Fund

Salvation Army of Missouri and Southern Illinois
1130 Hampton Avenue   ☑ Received
St. Louis, MO 63139   9/25/2008

Grant totals by year

$400,000
$350,000
$300,000
$250,000
$200,000
$150,000
$100,000
$50,000
$0
   2009 2010 2011 2012 2013 2014 2015 2016 2017 2018

Hover over year column to see total

Grant totals by recipient

● Missouri Hi... ● Washington ... ● Opera Theat...
● St. Louis M... ● Catholic Ch... ● Saint Louis...
● Saint Louis... ● Other

Hover over slices for organization total

If you have pending grants, a section will appear below this section that provides details about the status.
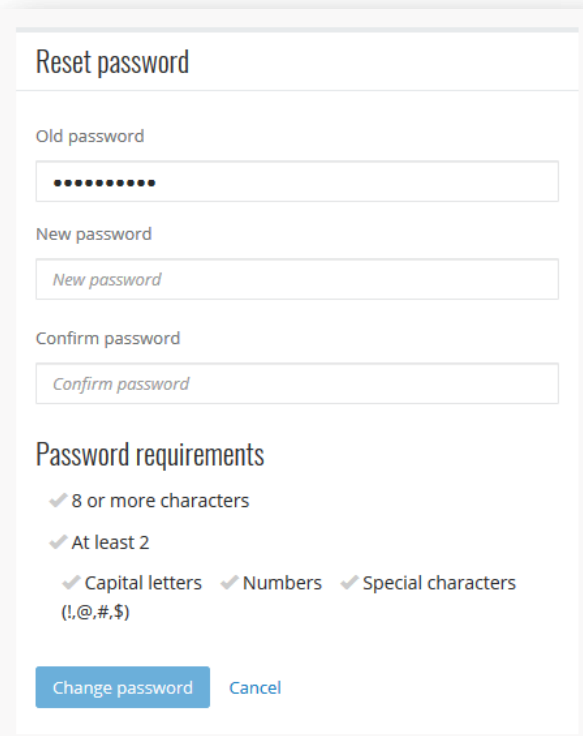
Reset Password

1. At the top right corner of the page, click the ▾ to the right of "Welcome, <user name>" and click **Reset password**.

   DonorCentral does not limit login attempts; users are not locked out after several attempts with an incorrect password.

2. When the Reset password screen appears, enter the requested information.

3. Click **Change password**.