

# HOW TO USE DONOR CENTRAL Organizational Fund Holders

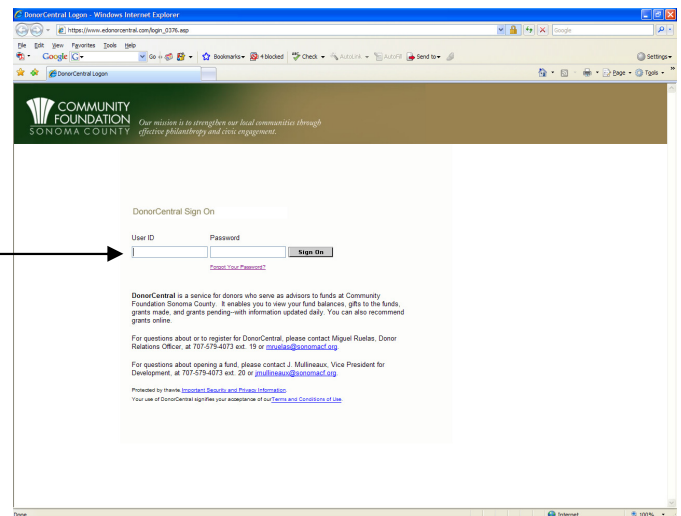
Your online tool for managing your fund at Community Foundation Sonoma County

## Get Started

To log on to Donor Central, start by clicking on the Donor Central link on our homepage, [www.sonomacf.org](http://www.sonomacf.org).

## Enter User Name & Password

**Enter** your user name and password provided in your cover letter.



If you have problems logging in or would like someone to walk you through Donor Central, please contact [Miguel Ruelas](mailto:Miguel.Ruelas@sonomacf.org) at 707.579.4073.x19 or [Mary Peterson](mailto:Mary.Peterson@sonomacf.org) at 707.579.4073.x25.

## Navigating Donor Central

**Available for Grants** reflects your current available funds. This figure is determined using the Community Foundation's spending rule (4 percent of the fair market value of the fund, averaged over the preceding 12 quarters.) If, in your case, the fund allows access to principle, you can recommend grants exceeding this amount, as long as the fund minimum is maintained.

**Change Password** is where you can change your password to a word or number (at least six characters in length) that only you will know and remember.

**Contact Us** provides the contact information for Donor Services and Programs staff, should you have any questions.

**Research a Group** is a searchable database to assist you in researching organizations that the Community Foundation has funded through discretionary grants or donor-advised funds.

**Download Forms** links to the Community Foundation's Grant Recommendation forms.

**Fund Balance** includes combined principal and income balances from the most recently-posted month.

**Fund Summary** provides fund information for the current year and previous years, beginning January 1, 2000.

**Gifts** shows all gifts that have been posted to your fund. If a security is in the process of being transferred, it will not show on the gift history until the Community Foundation has received the shares into your account.

**Grants Paid** shows all approved grants for which a check has been issued. This information is usually posted to the site one or two days after the grant approval. If you have questions about the approval of a grant, please contact us.

**Grants Pending** includes grants that have been recommended but not yet paid.

**Guidestar** is a national database of nonprofit organizations that may be used to better inform your decisions. Organization profiles include information such as its mission, leadership, finances and programs.

**Sign Off** for security purposes when you have concluded your work.

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