

Donor Connect Quick Start Guide

Donor Connect is the Community Foundation's online portal providing you access to your fund(s) information. From here you can view your latest fund balances, get fund statements, make grant recommendations, and review your history.

Logging in

You will receive an email with a link to the Donor Connect login page. When logging in for the first time, you have two options for setting up your account.

- **Blackbaud ID:** If you would like to use the default login credentials, select **Don't have a Blackbaud ID? Create a new one** and provide the required information.
- **Sign in with Google:** If you utilize Google services and want Google to manage your login credentials, select **Sign in with Google**.

Whichever option you choose, this will be the only way you log into Donor Connect. Please ensure that for either option you provide the email address that is associated with your fund.



Please contact Charles Case, Customer Support Officer at the Community Foundation, by phone (804) 409-5636 or email ccase@cfrichmond.org with questions about Donor Connect.

Sign in to continue

Blackbaud ID

email address e.g. name@domain.org

Password

Forgot password?

Remember my email

Sign in



Sign in with Google

[Don't have a Blackbaud ID? Create a new one](#)

Recommend a Grant

Donor Connect makes it easy for you to recommend a grant from your fund(s). You can replicate previous grants you made or, using the Foundation's nonprofit database, research charities and recommend a new grant.

1. If you have multiple funds: From the Home tab, click the **Find your fund** field. Select the fund from the drop down to which you want to add a new grant recommendation. Then select **Recommend a grant**.
2. For a single fund: Select **Recommend a grant**.

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3. Select a grantee by searching for it in the **Grantee organization search** field. If you wish to grant to a previous grantee, click on **select prior recipient** to see a dropdown list of your previous grantees.

If the grantee does not populate, click the checkbox **Can't find your grantee?** (at the top of the form) to add the details of the organization.

4. Click **Next**.

The screenshot shows a 'Grant recommendation' form with a progress indicator at the top. The progress bar has three steps: 'Grantee Organization' (highlighted with an orange circle), 'Recommendation', and 'Agreement'. Below the progress bar, there is a checkbox labeled 'Can't find your grantee? Check box to add a new organization.' Below this is a section titled 'Search Existing Grantee Organizations' containing a dropdown menu labeled 'Select prior recipient *' with the text 'Find in this list'. Below that is an 'OR' section with a dropdown menu labeled 'Grantee organization search *' with the text 'Search'. A 'Clear' button is located below the search dropdown. At the bottom of the form, there are two buttons: 'Next' and 'Save for later'.

5. If you have multiple funds and need to change the funding source, select the fund you want used for this recommendation by clicking on **Funding source**. If you prefer for your fund to remain anonymous click on **Fund anonymous**.

The screenshot shows the 'Grant recommendation' form with the progress indicator updated. The 'Grantee Organization' step is now greyed out, and the 'Recommendation' step is highlighted with an orange circle. Below the progress bar, there is a section titled 'Your Fund' containing a dropdown menu labeled 'Funding source *' with the text 'Select a fund...'. Below the dropdown menu is a checkbox labeled 'Fund anonymous'.

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6. Enter the recommended Amount, Grant purpose, and any Special request. If you do not want your names shared with the grantee, click **Advisor anonymous**.
7. To recommend a multi-payment grant, please specify payment schedule in the multi-payment grant schedule field. Please note the grant total should reflect the sum of all payments.
8. After all details of the grant have been entered, click **Next**.

Grant Recommendation

Amount (minimum grant is \$100) *

\$

Number of payments *

Advisor anonymous

Grant purpose

Special recognition or requests

9. Acknowledge the grant recommendation requirements by checking the **I agree** box, and then select **Review**.

Grant recommendation ✕

Grantee Organization Recommendation Agreement

We acknowledge that the above recommendations do not represent the payment of any pledges or other obligations we have made, nor do we expect any personal benefits from this charitable distribution. We understand that the final judgment rests with the Board of Governors whose charge is to see that all distributions affirm the charitable purposes for which the fund was created and are within the broad charitable purposes of The Community Foundation, Inc.

I agree

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10. Click **Submit** if you are finished making grant recommendations.

At any time in the process click **Save for later** to store your grant recommendation without submitting. To return later and complete it, click on **Home** to view and/or submit your unsubmitted recommendations.

View Fund Information

Donor Connect offers easy access to comprehensive information about your fund(s), allowing you to view, print, and email fund statements. To view fund information, you may select either the Funds tab or the Home tab at the top of the page.

- **If you have multiple funds:** From the Home tab, in the 'Find Your fund' section, enter the name of the fund you want to view. Once it displays, select **See more fund details**. This takes you to the Funds tab.
- **If you have multiple funds:** From the Funds tab, select **Choose a fund** and select the fund from the dropdown menu.

View Grant History

Donor Connect provides a full history of your grantmaking. You can see the status of grant recommendations, see details of individual grants, and breakdown your grantmaking by year and recipient. To view grants information, you may select either the Grants tab or the Home tab at the top of the page.

- **From the Grants tab:** This page details your full history of grantmaking. To see details of individual grants, select the **three dots** to the left of each grantee and then select **View details**.
- **From the Home tab:** Scroll down to the 'See your grants' section. This area shows your ten most recent grant recommendations. Select **See detail** on an individual grant to view more information on a grantee and any grant purposes or special recognition. You can also select **See full history** to take you to the Grants page.

If you have any questions, please contact Charles Case, Customer Support Officer at the Community Foundation for a greater Richmond, at 804-409-5636 or customersupport@cfrichmond.org. Thank you!