

WELCOME TO ARCF DonorCentral

AN ON-LINE GUIDE

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**Thank you for using DonorCentral to access fund information on-line.
Log on to DonorCentral anytime at www.arcf.org.**

WELCOME AND GETTING STARTED

Welcome to ARCF DonorCentral. You will find this on-line tool useful and easy to use in achieving your philanthropic goals. The all capital, bold headings in this Guide correspond with the categories available on the left sidebar menu after logging in to DonorCentral.

How to Begin

First, contact ARCF and request DonorCentral access. You will receive a user name and password via email.

Go to our website at www.arcf.org and click on the DonorCentral Login link at the bottom of the home page.

Now you are ready to log in with your username and password (case sensitive)

To change your password, log in to DonorCentral using your current password listed above. From the sidebar menu, select Change Password.

If you forget your password, click on the “Forgot Your Password” on the sign in page, enter your email address, and it will be emailed to you. Your email address must match the ARCF database. If your email address has changed please update your profile by clicking “**Your Profile Information**” on the left sidebar or by contacting Lisa Duckworth at lduckworth@arcf.org, 501.372.1116 or toll free at 888.220.2723.

FUND SUMMARY

- **Fund Summary** is the first choice available on the sidebar menu. All funds for which you have been given access should appear on the list. If this is the case, scroll down to additional fund summaries. Fund Summary is updated nightly and reflects transactions for the previous business day. To view detail, you may drill down to a list of gifts and grants. Once you have drilled down and are ready to return to the Fund Summary, simply click the “back” icon on your browser toolbar. This will take you back to exactly where you were before drilling down. You may also click on “Return to Fund Summary” at the bottom of the page, but this will return you to the top of the fund summary list which can be an inconvenience if you were in the middle of a long list of summaries.
- **Gifts** to a fund can be viewed for the current or last fiscal year (July 1st through June 30th). Cumulative gifts can be viewed from September 2000 or the date the fund was established, whichever is most recent. Gifts reflected are completed gifts. If you have made a gift recently to a fund and it is not listed, it may be in process.
- **Grants Paid** details all recommended grants from an approved and processed fund to qualified charitable agencies. Please note that for multi-year grants, **Grants Paid** details

only the paid portion of the grant but does not include any future payments (these can be viewed under **Grants Pending**).

- **Grants Pending** includes all grants that have been recommended and approved but not paid. Delays in payment of approved grants may include: the grantee nonprofit has not yet supplied a 501(c)(3) or the equivalent; or the donor-advised fund balance is not adequate to fund the grant. Please note that for multi-year grants, future payments will be reflected in **Grants Pending** until the grant is paid.
- **Fund Statement** is where you can see the current quarterly statement, which is an electronic copy of the statement mailed to the fund representative. You can print the statement or direct DonorCentral to e-mail the statement to you in an attachment by selecting the appropriate buttons. To view the statement, you must have Adobe Acrobat Reader which can be downloaded free by clicking on the Adobe icon on that page.

RECOMMEND A GRANT

- **Make a Grant** allows the option of completing a recommendation form for a new organization or creating a grant recommendation from previous grants.
 - To make a grant recommendation to an organization to which you've never granted select **Recommend a New Grant**.
 - To make a repeat grant recommendation to an organization to which you've previously granted select, **Recommend a Repeat Grant**.

Recommend A New Grant

- After clicking on **Recommend a New Grant** a blank Grant Recommendation Form will appear on the screen.
- **Items that appear in bold text with an asterisk are required information fields.** The grant recommendation form will not process unless all required fields are completed.
- Review your recommendation to ensure that all information is correct and click on the **Continue** key.
- Should you decide to cancel a grant recommendation, please click on **Clear Form**.
- If you would like assistance with your charitable planning or would like to learn more about the many organizations and initiatives that are supported by the Arkansas Community Foundation, please contact us at 501.372.1116 or toll free at 888.220.2723.

On the next page, you will find a sample grant recommendation form with definitions and instructions for each of the available fields.

SAMPLE GRANT RECOMMENDATION FORM

(*Required Information)

*Advisor(s)	Your name
*Your phone number	Your phone number
*Fund Name	Use the drop-down to access other funds you advise
*Payee	The name of the qualified nonprofit agency to which you are recommending a grant
*Amount	The minimum grant is \$250, please use whole dollars
Address 1 Address 2	Mailing address for the organization. It is helpful to include this information if it is the first time you have recommended a grant to this nonprofit agency
*City *State	Location of the nonprofit agency
Zip	Zip Code of the nonprofit agency
Contact Person Contact Title Contact Phone Contact Fax Contact e-mail	Contact information for the nonprofit agency. It is helpful to include this information if this is the first time you have recommended a grant to this nonprofit agency
Fund Anonymous (Yes/No)	Normally, grant recipients are informed of the name of the donor-advised fund in the grant letter. You indicated a preference when you established a fund, but you can change this preference on a grant-by-grant basis by using this feature
Advisor Anonymous (Yes/No)	You indicated a preference when you established a fund, but you can change this preference on a grant-by-grant basis by using this feature
Project Description	The purpose of the grant (e.g. General Operating Support or "To purchase playground equipment"). This is optional.
Designation	Special designation (e.g. "for the Art Department")
Additional Instructions	Additional special instructions
Is the grantee a 501(c)(3)?	ARCF maintains a file of IRS tax exempt determination letters for all grantees
Terms of acceptance	Read the terms and click "I agree" to indicate that you are not receiving any benefits or privileges in connection with a grant recommendation, such as event tickets, registration fees in a tournament and/or cause-related marketing activities

Recommend A Repeat Grant

- **Make a Grant** feature allows the option of creating a grant recommendation from previous grants or completing a recommendation form for a new grantee. To create a grant recommendation to an organization which you've previously granted, select **Recommend a Repeat Grant**.
 - After clicking on **Recommend a Repeat Grant**, a list of grants paid will appear. The most current 10 grants will appear on the first screen. To see subsequent screens, click on **Show Next 10 Grants**.
 - If, you decide to make a repeat grant, click on **Make a Recommendation** next to the grantee to create a new grant recommendation.
 - **Clear Form** will clear out any changes you have made and return the grant form as it first appeared from grant history.
 - **Continue** moves the completed grant recommendation into a holding area. If any required fields have not been completed the grant recommendation will reappear with a note in red regarding the error. Once the missing information has been entered, click **Continue**.
 - You will now see **Your Current Recommendation List** (see below).

GRANTMAKING OPPORTUNITIES

Here you will find a list of grantmaking opportunities. If you would like additional information on these or on other opportunities in your community, please contact the ARCF Program Department.

YOUR CURRENT RECOMMENDATION LIST

Your Current Recommendation List displays grants ready for submission.

- To sort the list, click on the desired sort field: Grantee Organization or Amount.
- To edit a specific grant recommendation click on Edit next to the grant you would like to update. When complete, click on **Update Recommendation** to display the updated grant recommendation in the cart.
- To delete a grant recommendation, click on Delete next to the grant you would like to delete.

- Remember, a recommendation added to the list is not automatically submitted for processing; you must click “submit” to actually send the recommendation to us. Once submitted, the grant recommendation is sent directly to our database for importing and processing.

Submit the Grant Recommendations List

Grant recommendations will remain in the Recommendation Cart until they are deleted or submitted. You may choose to log out and complete the recommendation process at another time.

To send all grant recommendations in the list to ARCF for processing, click on **Submit** at the bottom of **Your Current Recommendation List**

- The **E-Mail** option will send e-mail to the address listed in the window. The e-mail defaults to the primary e-mail listed in ARCF’s database. To edit the e-mail, click in the window. To not receive a confirming e-mail, leave blank. To change the primary e-mail address on your contact information, please contact Lisa Duckworth at 501.372.1116, toll free at 888.220.2723 or at lduckworth@arcf.org. You may also update your email address by clicking on **Your Profile Information** on the left sidebar menu.

Upon clicking **Submit**, a confirmation page will appear. Should you wish to make changes after submission, please contact Sarah Trovato-White at 501.372.1116, toll free at 888.220.2723 or at stwhite@arcf.org.

OTHER ADVISORS

Other Advisors simply shows other persons with online access to the fund.

YOUR PROFILE INFORMATION

Your Profile Information allows you to review your contact information and update it as needed. It is very important that ARCF records are current so that you can receive timely information, and we encourage you to review this section often and update as needed.

GIFTS TO YOUR FUND

Under **Gifts to Your Fund**, you will find information gifting several different types of assets to the Community Foundation. Please contact Heather Larkin at the Foundation if you have any questions or if you would like to gift an asset not listed here.

CONTACT US

- From the **Contact Us** screen you can see a list of key ARCF contacts. We have included their phone numbers and e-mail addresses for your convenience.

DOWNLOAD FORMS

- For your convenience, downloadable forms are available in DonorCentral which include: *Grant Recommendation Form* (if you prefer to mail or fax in your grant recommendations); ARCF's current *Donor Guideline* on gift acceptance and fund administration; a *Stock Transfer Form* to assist you in expediting the transfer of stock to ARCF; and a copy of this on-line guide: *Using ARCF DonorCentral*.

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Thank you for working with the Arkansas Community Foundation and its Local Offices!