

Donor Guide to Online Services

Secure online access to fund-specific information for fund advisors

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

Table of Contents

Welcome to DonorCentral	3
Logging on to DonorCentral	4
View your fund summary.....	5
Recommend A Grant.....	6
View your profile information	8
Change your password.....	9
Contact us.....	10

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

Welcome to DonorCentral

DonorCentral is an exciting online service available to our fund advisors. With DonorCentral, fund advisors get secure online access to fund-specific information updated daily including fund balance, grant history, gifts made to the fund, and pending grants. In addition, the latest quarterly fund statement is available for download.

Thanks to fund advisors like you, over \$1 million has been granted to nonprofit organizations through DonorCentral alone!

We will contact you by email quarterly once your fund statement is available—the last week of the month following the end of the quarter. We think that you will find this secure online service to be a welcome feature giving you access to your fund information wherever you are, whenever you need it.

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

Logging on to DonorCentral

To log on to DonorCentral, launch your Internet browser (for example, Internet Explorer) and go to our website at www.berkshiretaconic.org. Then, click **Donor Login** on the top right-hand side of the page.

Enter your **User ID** and **Password** on the DonorCentral welcome screen and click **Sign On**.

NOTE: You should have received a letter with your User ID and password when your fund was set up, or when you became the fund advisor. If you did not receive this information or misplaced it, please contact Carrie Colodner, Philanthropic Services Associate, at 413.229.0370 x 118 or ccolodner@berkshiretaconic.org. If you have your User ID, but have forgotten your password, you can click **Forgot Your Password?**

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

View your fund summary

From the DonorCentral main screen, you can navigate to your fund summary to view your fund's balance, grant and gift history as well as the most recent quarterly fund statement. To do this, click the **Fund Summary button** on the left or the **Fund Summary link** in the center of the window.

A summary of your fund information is displayed. To view the specifics for any area, click See Details. To view the most current quarterly fund statement (date range displayed accordingly), click **Get Statement**. To have the statement emailed to you select **Email fund statement to** and enter in your email address, then click **Get Statement**.

NOTE: Fund summary data is updated nightly to reflect the latest gifts and grants. Investment earnings are updated monthly and new fund statements are updated quarterly.

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

Recommend a grant

You can make a grant suggestion one of three ways.

1. You can give to an organization you have given to in the past
2. You can support an organization you have NOT given to in the past
3. You can also search organizations in our database

NOTE: IRS law precludes the following grants being made from a donor-advised fund:

- Grants to organizations without a current IRS nonprofit designation, i.e. 501c3 number
- Grants to private non-operating foundations
- Grants to individuals
- Grants to political candidates or organizations
- Grants to fulfill personal pledges
- Grants which result in the donor deriving a material benefit (tickets to an event, salary, or other material support)

If you have any questions about whether a grant meets IRS regulations, please contact us at grants@berkshiretaconic.org.

To give to an organization you have given to in the past, click **Recommend a Grant**.

Then, click **View a list**

A list of organizations you have supported in the past is displayed along with the date of the recommendation and the amount. You can view more information about the recommendation by clicking the **Grantee name**. To make a grant directly, click **Make a Grant**.

When you click Make a Grant, a recommendation form appears, pre-filled with the grantee name, address and other information entered from the previous grant. You can either modify the information, or keep as is. When done, review the acceptance. If you select, **I agree**, you may then click **Continue** and your recommendation will be submitted for review and approval to our programs department.

To support an organization you have NOT given to in the past, click **Recommend a Grant**.

Enter the name of the organization and click the **Search button**.

You can choose to make a grant from one of the organizations displayed in the **Results** list by clicking **Make a Grant**. If the organization is not listed, click **Fill out a blank recommendation form**, complete the form and submit.

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

You can also search organizations in our database by clicking **Research A Group**.

You can then search for organizations by name, program or region.

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

View your profile information

To view your profile information, click **My Profile Information**.

You can then review the contact information we have for you in our records. Should any of it require correction, click **Edit** and update it accordingly. This information will be sent to us so that we can correct our internal records.

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

Change your password

To change your password, click **Change Password**.

The Change Password page appears. In the **Enter Old Password field**, enter your current password. In the **Enter New Password** and **Confirm New Password** fields, enter your new password.

NOTE: Passwords must be between six and twenty characters long. You can use any combination of letters and numbers. Keep in mind that passwords are case-sensitive.

When done, click **OK**.

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org

Contact us

We are here to help. If you have a question and need to reach us, click **Contact Us**.

A list of contact names and options appears. You can choose to email or call any of us with your specific question and we would be very happy to assist.

Berkshire Taconic Community Foundation

800 North Main Street, PO Box 400, Sheffield, MA 01257-0400

T: 413.229.0370 F: 413.229.0329 info@berkshiretaconic.org www.berkshiretaconic.org