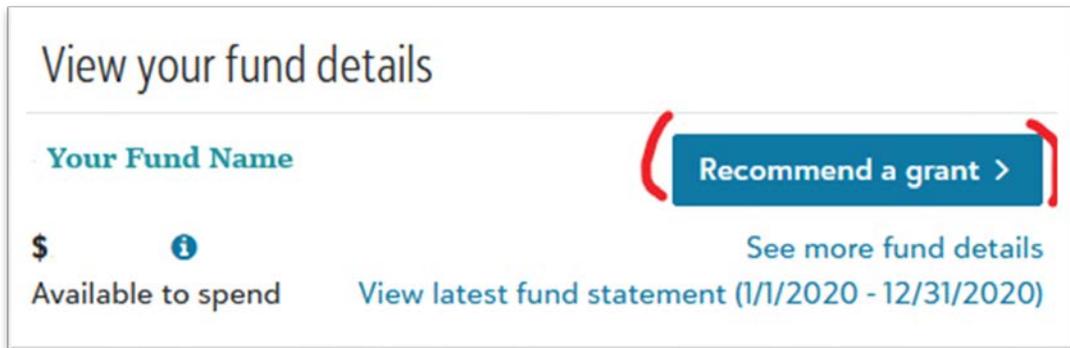


HOW TO RECOMMEND A GRANT IN DONORCENTRAL (for Donor Advised Funds only)

DonorCentral makes it easy for you to recommend a grant from your fund. You can replicate previous grants, schedule recurring grants or search a wide range of nonprofits to recommend a new grant.

To start a grant recommendation from the home page, there are three options:

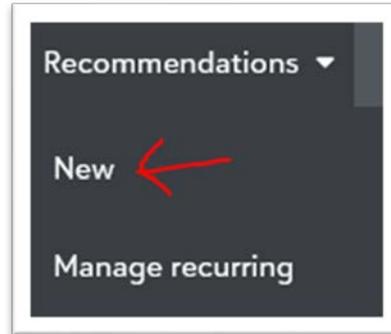
1. In the 'View your fund details' tile, click on the '**Recommend a grant**' button:



2. In the 'See your grants' tile, click on an organization name. This will take you to another page where you will find a '**Recommend Again**' button. Note: this option will prefill the grant purpose and amount in the recommendation form:



3. Along the top, there is a 'Recommendations' drop-down menu. Click on that and select 'New':



After selecting one of the three options above, the Grant Recommendation Form will pop up.

Under "Organizations in CFMC database" begin typing in the '**Organization Name**' or '**Prior Grant Recipient**' fields, and a list will appear with matching names. If the organization does not appear, this means it isn't in the CFMC database. For these, select '**Enter New Organization**' and fill in the required fields.

Grant recommendation ✕

Organization Recommendation Agreement

Organization in CFMC database

Organization Name *

Enter organization name here ✕ ▼

Please note, only organizations in the Community Foundation for Monterey County database will appear here. If the organization you wish to support doesn't appear, please click on the "Enter New Organization" box below and fill in the form.

OR

Prior Grant Recipient *

Enter prior grantee name here ✕ ▼

You can use this field to search ONLY for organizations to which you have previously granted.

Enter New Organization

Next Cancel Save for later

Click **'Next'**

Your fund name should appear in the funding source field. If it doesn't, use the **'Funding Source'** drop-down to select which fund the grant should come from. Then fill in the rest of the fields as needed. If you wish to make your grant recurring, select **'Is Recurring'** and fill in the fields as needed.

Grant recommendation ✕

Organization **Recommendation** Agreement

Fund

Funding source *
Select a fund... ✕ ▼

Advisor anonymous

And/Or

Fund anonymous

Grant

Amount *
\$

The minimum grant amount is \$250

Grant Program or Purpose

Leave this field as is for general operating support, or enter in a specific program or purpose.

Additional Information or Special Instructions

Enter here any other information about this grant, such as if the grant is in Honor or Memory of a person.

Recurrence

Is recurring

Previous **Next** Cancel Save for later

Click **'Next'** and Agree to the 'Fine Print' by clicking the box.

Grant recommendation ✕

Organization Recommendation **Agreement**

By checking the "I agree" box, I certify that approval and payment of the grant recommended will not result in the fulfillment of any legally enforceable pledge made by any donor advisor, nor the receipt of any goods or services by any donor advisor. I understand that CFMC does not make grants from donor-advised funds to, or for the specific benefit of, any individual; for any non-charitable purpose; or to any agency which is not recognized as tax-exempt under the provisions of the Pension Protection Act of 2006.

I agree *

Previous **Review** Cancel Save for later

Click **'Review'**

This next page will show you an overview of the grant recommendation. Make sure everything is correct. If you would like to change anything, you can click **'Previous'** to go back and edit your recommendation.

Review ✕

Organization Name	Organization Name will appear here
New Organization?	No
Funding source	Your Fund Name
Advisor Anonymous?	No
Fund Anonymous?	No
Amount	\$500.00
Grant Program or Purpose	general operating support
Additional Instructions	None found

✔Terms & conditions

Previous **Submit** Cancel Save for later

When you are done, you have two options:

1. **Submit**-this will trigger the recommendation email that is sent to you and CFMC staff, who will begin to process the grant.
2. **Save for Later**-Selecting this option will save the grant on your home page under '**Unsubmitted Recommendations**'. This is a good option if you are making multiple grant recommendations at one time, and only want to submit one recommendation email.

To do this, go to the home page and find the Unsubmitted Recommendations tile. Click '**Select All**' or pick individual recommendations, and then click '**Submit**' to trigger the recommendation email that is sent to you and CFMC staff, who will begin to process the grant(s).

Unsubmitted recommendations

Select all/none

<input checked="" type="checkbox"/>	Grantee Name \$500.00 Your fund name	Last saved 04/05/2021, 11:33 AM	Submit	🗑️
<input checked="" type="checkbox"/>	Grantee Name \$500.00 Your fund name	Last saved 04/05/2021, 11:32 AM	Submit	🗑️

2 Recommendations \$1,000.00 Recommended