

OC Nonprofit Central Launch

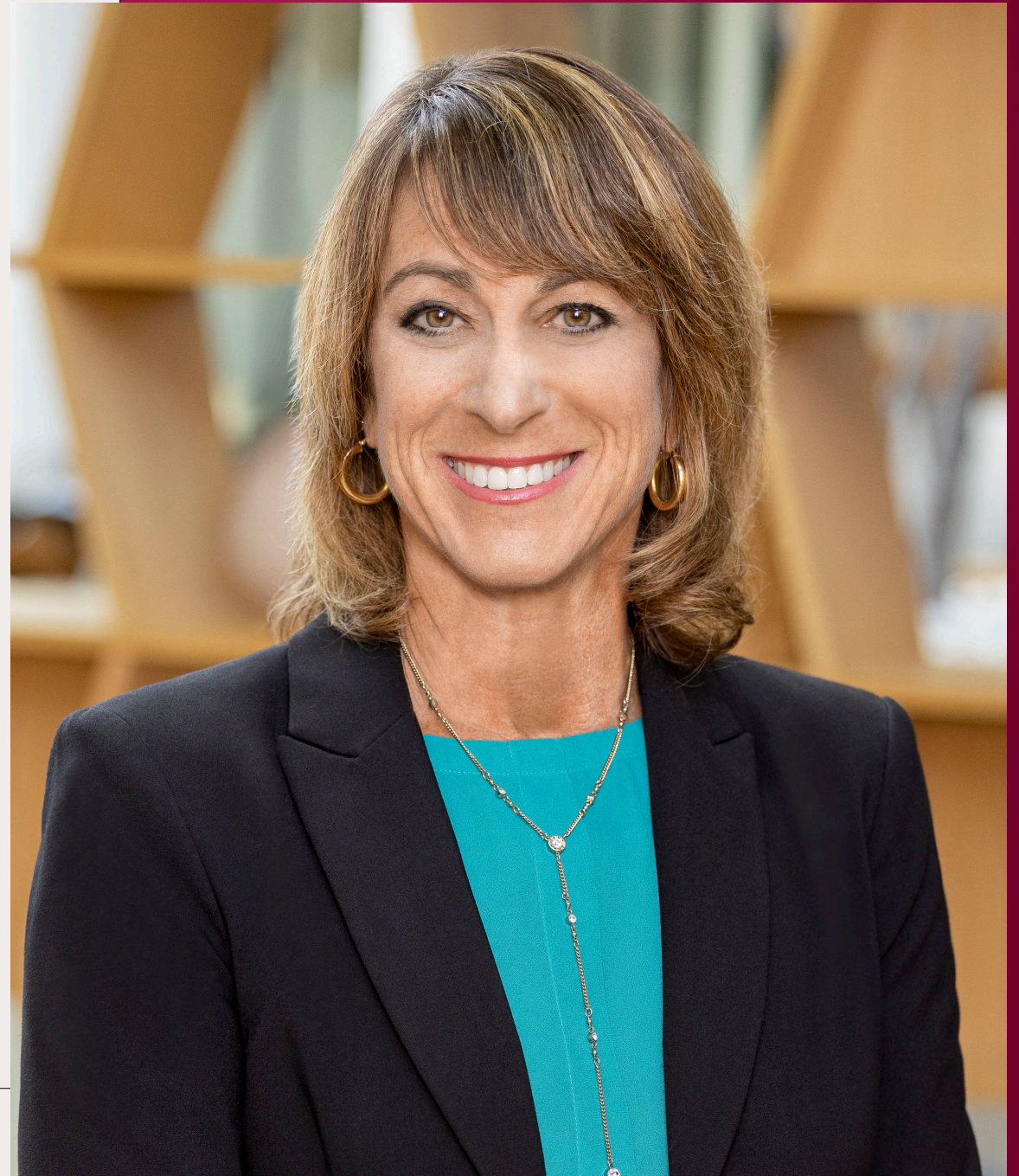
Jan 12-13, 2026



Welcome

Carol Ferguson

*Sr. Director, Donor & Community Engagement Orange County Community
Foundation*



Agenda/Overview



Introduction to GivSum



Benefits of Having a Profile on Nonprofit Central



What's New – Demonstration of public facing side



Managing your profile – Demonstration of back end



What's Next – Admin access, completing data fields; adding donation information



Q&A





Givsum Introduction

Shawn Wehan

CEO, Givsum



Orange County Community Foundation

Technology Partner – Founded 2013, Aliso Viejo, CA Comprehensive Platform

- Fundraising Campaigns
- Ticketed Events
- Auctions
- Custom Websites
- Memberships



OC Nonprofit Central Partners have access to the following GivSum products/services

- Capital Campaigns
- Peer-To-Peer Fundraising
- Ticketed Events
- Sponsorships
- Store Features
- Online Auctions
- Memberships
- Volunteer Management
- Text and Email Communications
- Custom Websites
- Reports and Analytics



Nonprofit Central is a fully searchable online database that provides detailed insights into the hundreds of nonprofit organizations serving Orange County.



Benefits of having a Nonprofit Central Profile

OC Nonprofit Central helps your organization to:

- Increase Awareness
- Tell Your Story
- Engage the Community
- Drive Donations
- Enable your organization to participate in OCCF grant programs and Grant & Giving Days



What's New

Public Site

- New streamlined look and feel
- Enhanced Powerful Search Capability
- Donations processed and paid within 1-3 business days

www.ocnonprofitcentral.org



Managing your profile

➤ Improved Logic

- Governance – board demographics
- Financials: Fiscal year dates, revenue and expense data
- Notification of missing required fields before submitting for approval or renewal

➤ Additional automation for OCCF Staff

- Financial data import
- AB 488 Compliance



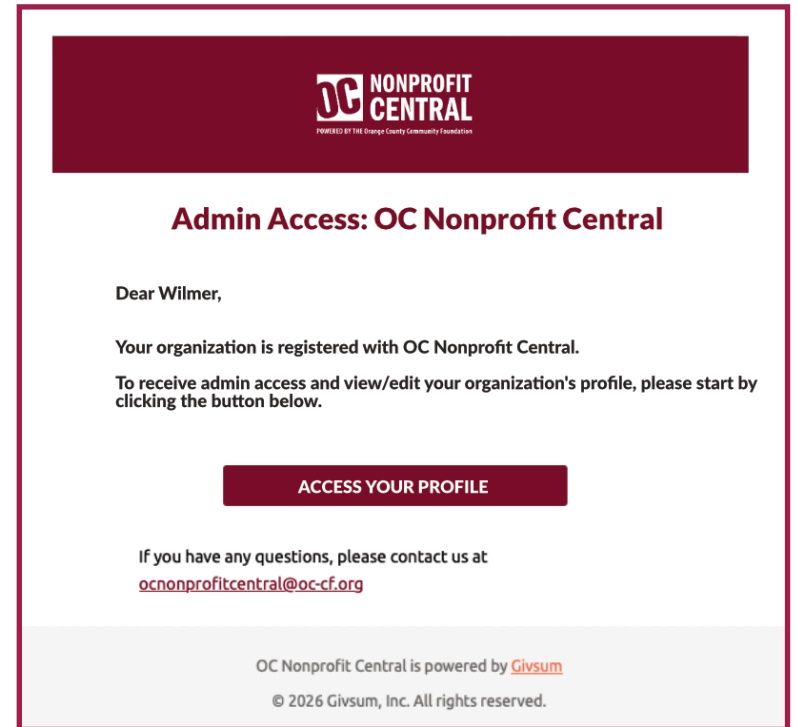
What's Next

➤ Admin Access

- Look for Admin Access email from:
noreply@givsum.com

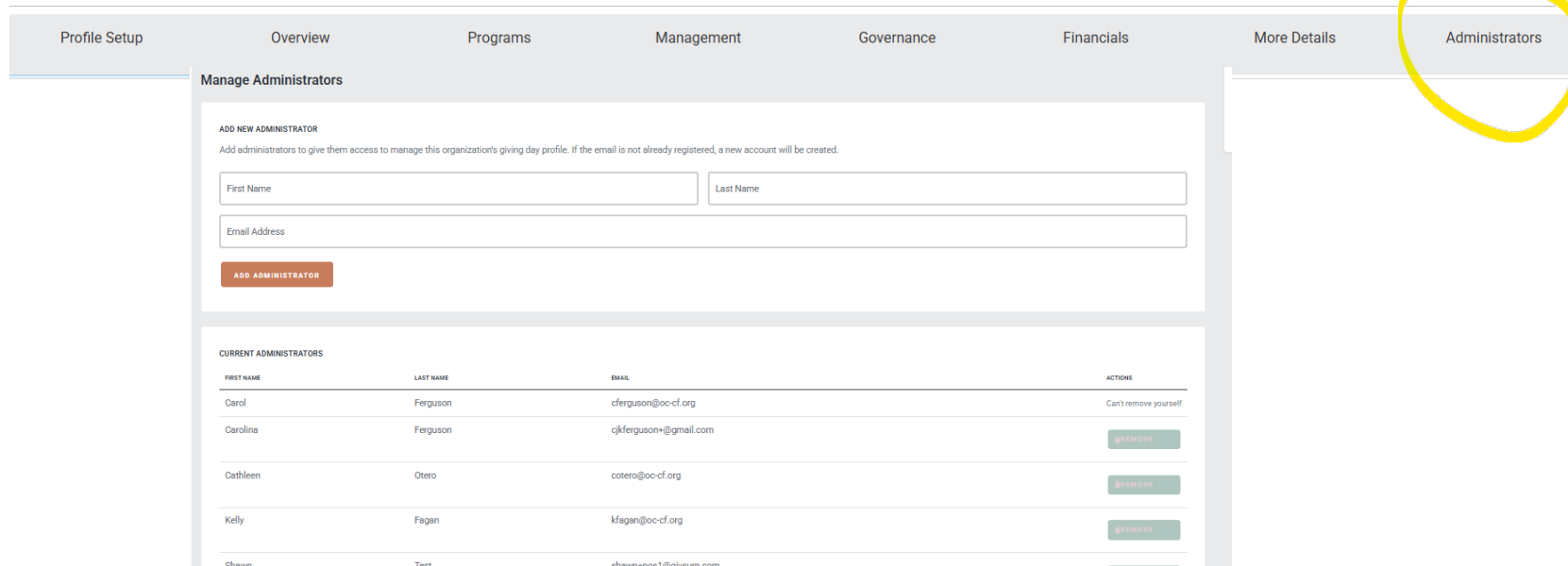
➤ Create New Password

➤ Land on Admin Profile Page



Administrators

- Up to 3 administrators have been migrated



Manage Administrators

ADD NEW ADMINISTRATOR
Add administrators to give them access to manage this organization's giving day profile. If the email is not already registered, a new account will be created.

First Name: Last Name:
Email Address:

ADD ADMINISTRATOR

CURRENT ADMINISTRATORS

FIRST NAME	LAST NAME	EMAIL	ACTIONS
Carol	Ferguson	cferguson@oc-cf.org	Can't remove yourself
Carolina	Ferguson	cjkferguson@gmail.com	get move
Cathleen	Otero	cotero@oc-cf.org	get move
Kelly	Fagan	kfagan@oc-cf.org	get move
Shawn	Test	shawn+cos1@olvisum.com	get move

- Administrators will receive Nonprofit Central Emails from OCCF and other nonprofit news.



What's Next

➤ Profile Setup

- Upload Logo (square 300 x 300pxl)
- Upload Cover Photo (rectangle 1440 x 480pxl)
- Complete Tell Your Story
- Enter Search Keywords
- Edit Thank You Message

The screenshot shows the 'Orange County Community Foundation Profile: OC Nonprofit Central' setup page. The page has a dark red header with the OC Nonprofit Central logo and navigation links for 'PROFILE' and 'REPORTS'. A 'RETURN TO VIEW ORGANIZATIONS' button is in the top right. The main content area is white with a yellow warning box at the top stating 'Donation Status: Incomplete' and 'Your organization has not completed payment setup. You will not be able to receive donations until this is complete.' Below this is a 'Complete Payment Setup' link. The page is divided into tabs: 'Profile Setup', 'Overview', 'Programs', 'Management', 'Governance', 'Financials', and 'More Details'. The 'Profile Setup' tab is active, showing a list of steps: 'Please provide documents as requested by OC Nonprofit Central.', 'Add Your Organization's Info', 'Add Your Story', and 'Add a Thank You Message'. Each step has a green checkmark and a red dropdown arrow. At the bottom left is a 'RESET PROFILE' button. On the right, there's a 'Participation Approval Status' section with a 'PENDING' status and a 'SUBMIT PROFILE FOR REVIEW' button. Below this, it shows 'Profile Expires: 08/31/2025' and 'Last Submitted: August 26, 2024'.



What's Next

➤ Review All Profile Tabs: As needed, edit and save changes.

- Overview
- Programs
- Management
- Governance
- Financials
- More Details

The screenshot shows the 'Orange County Community Foundation Profile' page within the 'OC Nonprofit Central' system. The page has a dark red header with the 'NONPROFIT CENTRAL' logo and the user's name 'Orange County Community Foundation'. Below the header, there are tabs for 'PROFILE' and 'REPORTS'. The main content area is titled 'Orange County Community Foundation Profile: OC Nonprofit Central' and includes a 'VIEW PROFILE' button. A sub-header reads 'Get Set Up - Complete the steps below to be sure that you are set up and ready to participate in OC Nonprofit Central.' Below this, there are several tabs: 'Profile Setup', 'Overview' (which is selected), 'Programs', 'Management', 'Governance', 'Financials', and 'More Details'. The 'Overview' tab contains two text input fields: 'Mission Statement *' with the text 'Transforming our Community's Heartfelt Intention into Greater Impact for Good.' and 'Background Statement *' with a longer paragraph about the foundation's mission. To the right of these fields is a red 'EDIT' button. Further right, there is a 'Participation Approval Status' section with a 'PENDING' status and a clock icon. It includes instructions to customize the profile and a link to a guide. At the bottom right, there is a 'SUBMIT PROFILE FOR REVIEW' button and a link to 'View Incomplete Requirements *'. The entire page is framed by a dark red border.




What's Next

➤ Complete Required Fields

- Red with Asterisk *
- Incomplete Requirements ▼

Participation Approval Status**PENDING**

Please customize your profile and make sure to complete all required fields. If you need assistance while customizing your profile, please follow the guide at <https://support.givsum.com/en/articles/3193342-how-to-customize-your-oc-nonprofit-central-profile> . You may also use the text bubble in the bottom right-hand corner or email us at ocnonprofitcentral@oc-cf.org . Once you've completed your profile, please press the "Submit profile for review" button to notify OCCF that your profile is ready for review.

 SUBMIT PROFILE FOR REVIEW

View Incomplete Requirements *

Governance

- Board Demographics - Gender total (14) does not match Board Members count (15)

Profile Expires:

08/31/2025

Last Submitted:

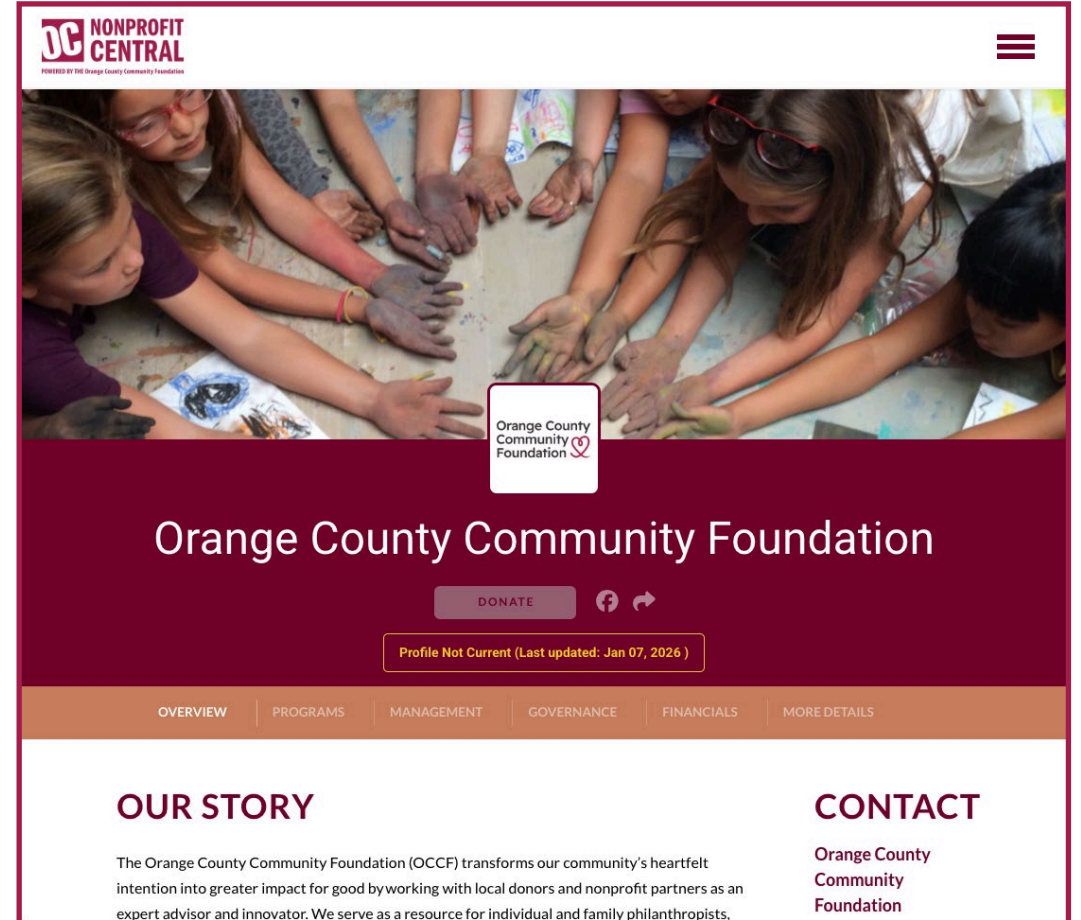
August 26, 2024



What's Next

➤ Preview Profile

- Review all tabs
- Edit as data as needed.



What's Next

- Submit for review for profiles in the following status:
 - Pending
 - Pending Re-Verification
- Approved profiles do not need to submit profile to publish updates

***Note:** you can only submit once the submit button turns **green**

Participation Approval Status **PENDING**

Please customize your profile and make sure to complete all required fields. If you need assistance while customizing your profile, please follow the guide at <https://support.givsum.com/en/articles/3193342-how-to-customize-your-oc-nonprofit-central-profile> . You may also use the text bubble in the bottom right-hand corner or email us at ocnonprofitcentral@oc-cf.org . Once you've completed your profile, please press the "Submit profile for review" button to notify OCCF that your profile is ready for review.

 **SUBMIT PROFILE FOR REVIEW**

Profile Expires:

Last Submitted:



Profile Submitted for Renewal

Dear Carol Ferguson,

Thank you for submitting your profile to Orange County Community Foundation for renewal. An OCCF staff member will review your profile and renew it or follow up with an email requesting additional documentation.

Review Timeline

We aim to review renewals within two weeks, though the process may take longer during periods of high volume.



What's Next




Donation Status: Incomplete

Your organization has not completed payment setup. You will not be able to receive donations until this is complete.

[Complete Payment Setup](#)


- Turn on Financial Account
- Stripe Verification
 - Business Information
 - Personal Information
 - DOB & SS# (last 4 digits?)
- Add Checking Account



Givsum partners with Stripe for secure financial services.

[← Return to Givsum](#)

Powered by **stripe** ⓘ

 Business details ▾

Tell us about your business

This information is collected to better serve your business and comply with regulators and financial partners, as indicated in the [Terms of Service](#).

Legal business name

Company

Your legal business name and Employer Identification Number must be entered exactly as they appear on IRS-issued documents, including capitalization and punctuation. Not sure? Check your Letter 147C or SS-4 Confirmation Letter.

Business name (Doing Business As) Optional

The operating name of your company, if it's different than the legal name.

Employer Identification Number (EIN)

If you use your Social Security number for business tax purposes, you can enter that instead.

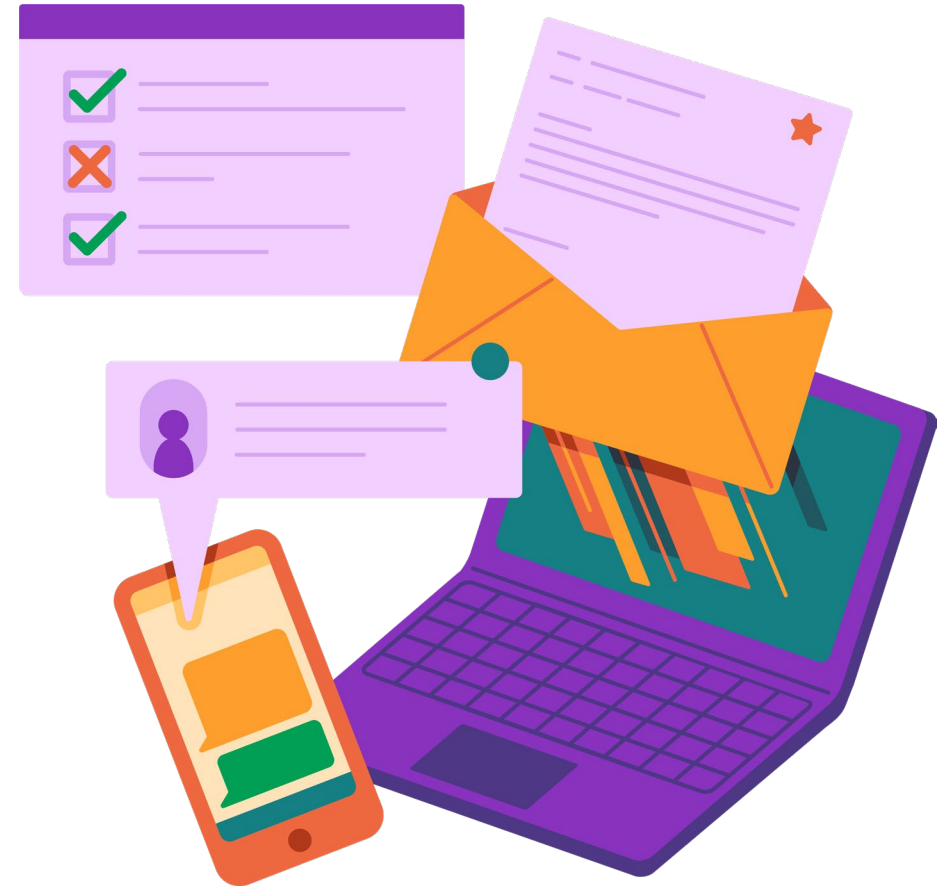
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Business address ⓘ



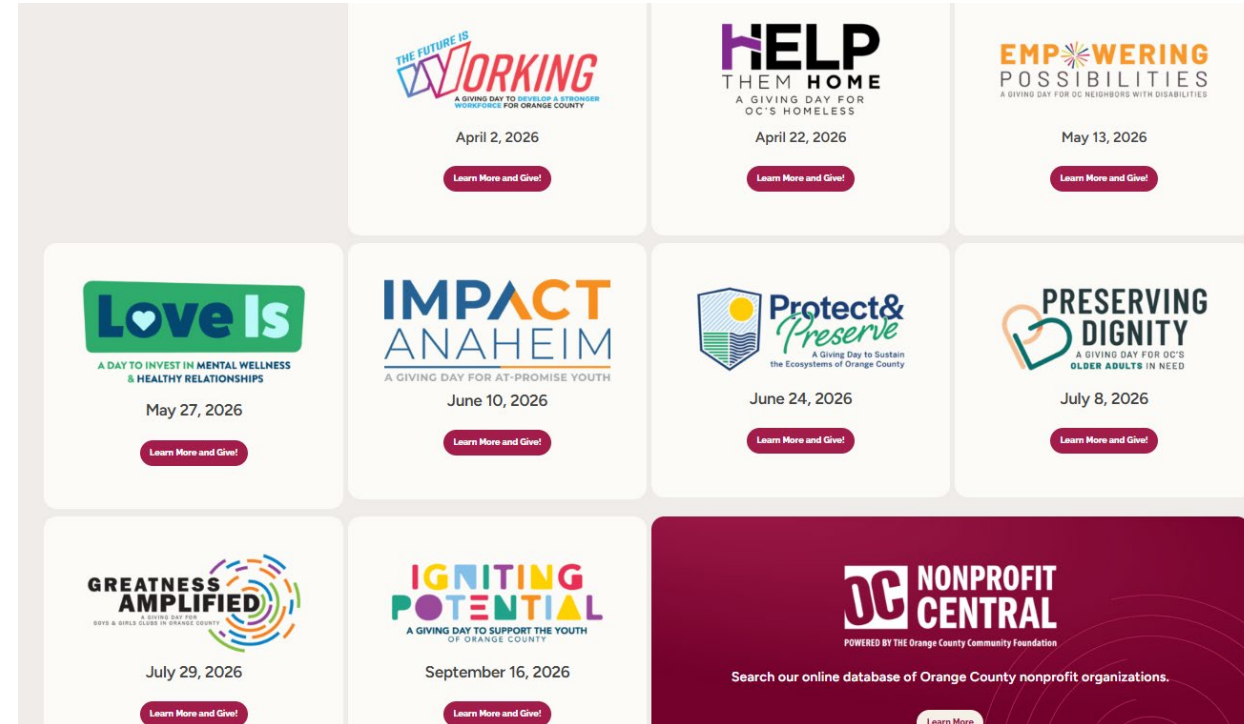
Need Assistance?

- Profile Completion and Status Questions
 - ocnonprofitcentral@oc-cf.org
- Technical Questions (7AM-4PM PST)
 - Chat (respond within 1-30 min)
 - support@givsum.com
 - Givsum FAQ Support Tools



Giving Days Update

- Development
 - January – March
- 10 Giving Days planned for 2026
 - First GD will be The Future is Working on April 2
 - AB 488 Compliance
- If you have questions:
 - Existing Giving Day – contact the steering committee
 - Interested in joining a giving day, contact Pia Flores at pflores@oc-cf.org



Q & A



Thank you!

Orange County
Community
Foundation 