



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



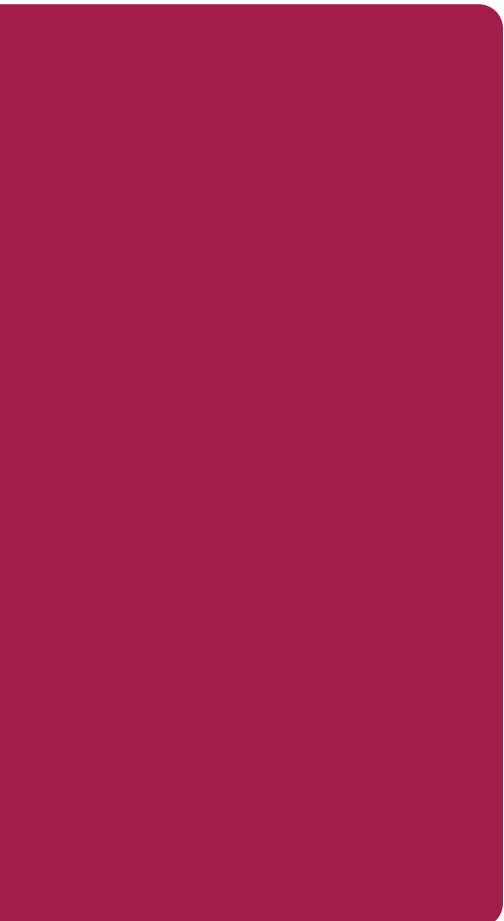
Managing your profile – Demonstration of back end



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



Q&A



Orange County Community Foundation

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



Orange County Community Foundation

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



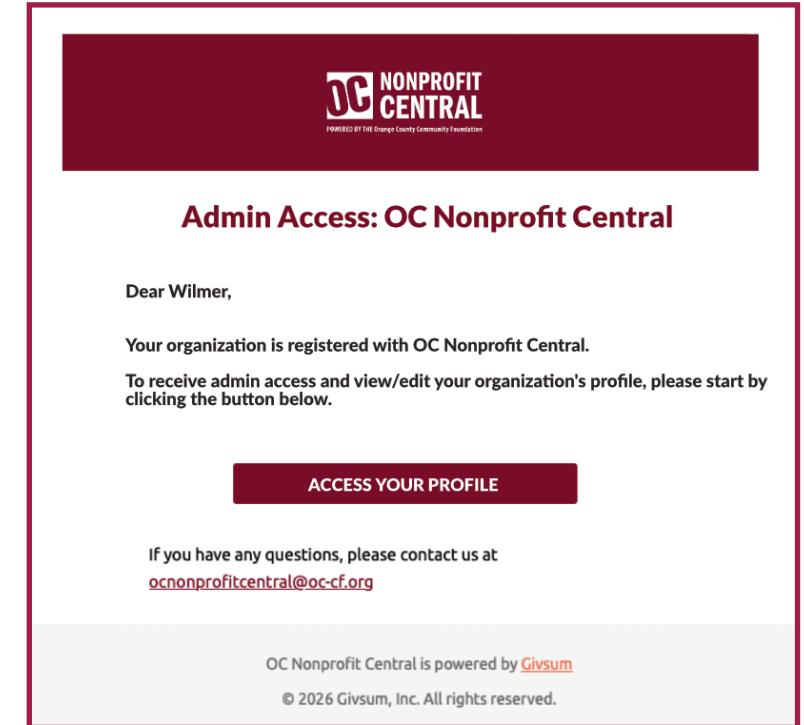
What's Next

➤ Admin Access

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

➤ Create New Password

➤ Land on Admin Profile Page



The image shows a template for an email from OC Nonprofit Central. The header features the OC Nonprofit Central logo and the text "POWERED BY THE Orange County Community Foundation". The main content area is titled "Admin Access: OC Nonprofit Central" and addressed to "Dear Wilmer". It informs the recipient that their organization is registered with OC Nonprofit Central and provides instructions to receive admin access. A large red button labeled "ACCESS YOUR PROFILE" is prominently displayed. At the bottom, there is a note about contacting support at ocnonprofitcentral@oc-cf.org and footer information stating "OC Nonprofit Central is powered by Givsum" and "© 2026 Givsum, Inc. All rights reserved."

OC NONPROFIT
CENTRAL
POWERED BY THE Orange County Community Foundation

Admin Access: OC Nonprofit Central

Dear Wilmer,

Your organization is registered with OC Nonprofit Central.

To receive admin access and view/edit your organization's profile, please start by clicking the button below.

ACCESS YOUR PROFILE

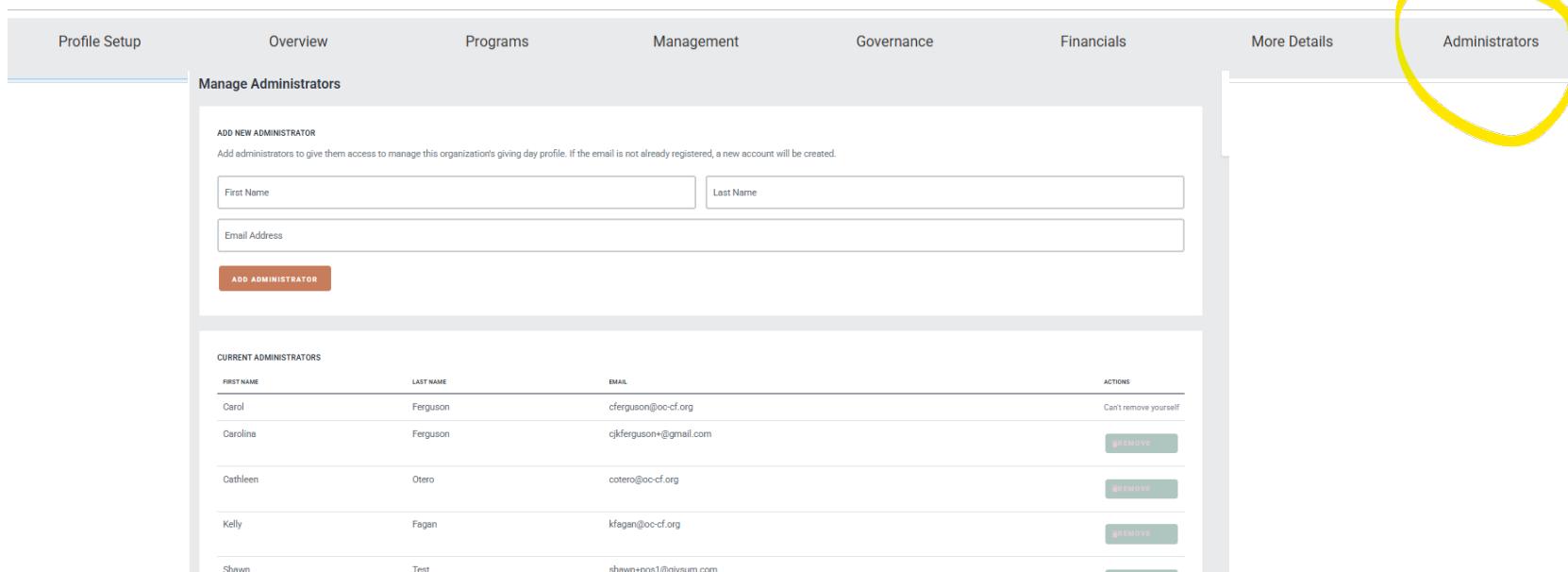
If you have any questions, please contact us at ocnonprofitcentral@oc-cf.org

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Administrators

- Up to 3 administrators have been migrated



The screenshot shows the 'Manage Administrators' page in Nonprofit Central. At the top, there is a navigation bar with tabs: Profile Setup, Overview, Programs, Management, Governance, Financials, More Details, and Administrators. The 'Administrators' tab is highlighted with a yellow circle. Below the navigation bar, there are two main sections: 'ADD NEW ADMINISTRATOR' and 'CURRENT ADMINISTRATORS'. The 'ADD NEW ADMINISTRATOR' section contains input fields for First Name, Last Name, and Email Address, along with a 'ADD ADMINISTRATOR' button. The 'CURRENT ADMINISTRATORS' section is a table with columns: FIRST NAME, LAST NAME, EMAIL, and ACTIONS. It lists five administrators: Carol Ferguson (cferguson@oc-cf.org), Carolina Ferguson (cjkferguson@gmail.com), Cathleen Otero (cotero@oc-cf.org), Kelly Fagan (kfagan@oc-cf.org), and Shawn Test (shawn+ocs1@alvsum.com). Each row in the table has a 'REMOVE' button in the ACTIONS column.

FIRST NAME	LAST NAME	EMAIL	ACTIONS
Carol	Ferguson	cferguson@oc-cf.org	Can't remove yourself
Carolina	Ferguson	cjkferguson@gmail.com	<button>REMOVE</button>
Cathleen	Otero	cotero@oc-cf.org	<button>REMOVE</button>
Kelly	Fagan	kfagan@oc-cf.org	<button>REMOVE</button>
Shawn	Test	shawn+ocs1@alvsum.com	

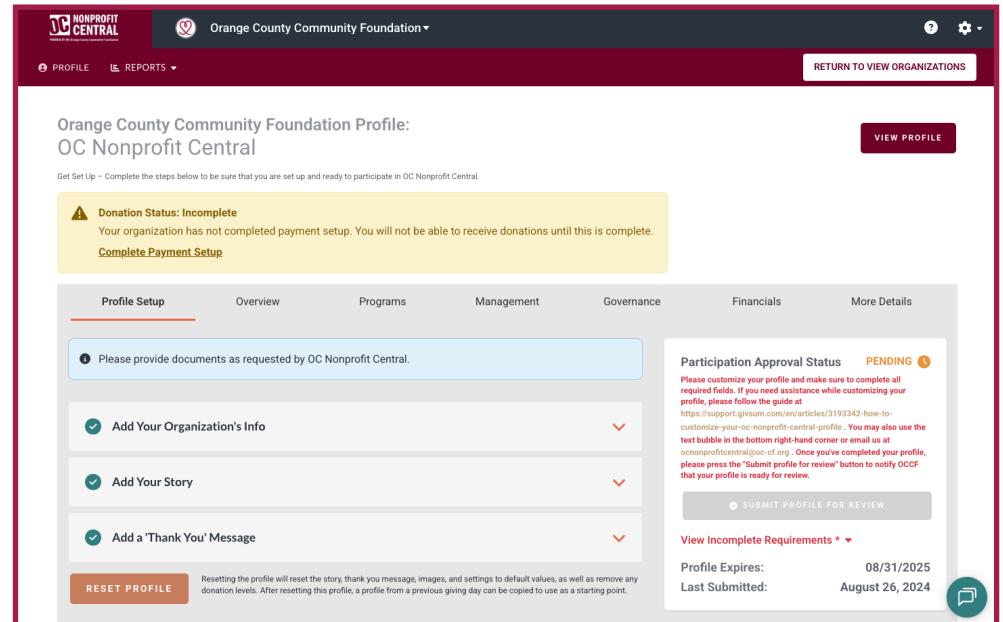
- Administrators will receive Nonprofit Central Emails from OCCF and other nonprofit news.



What's Next

➤ Profile Setup

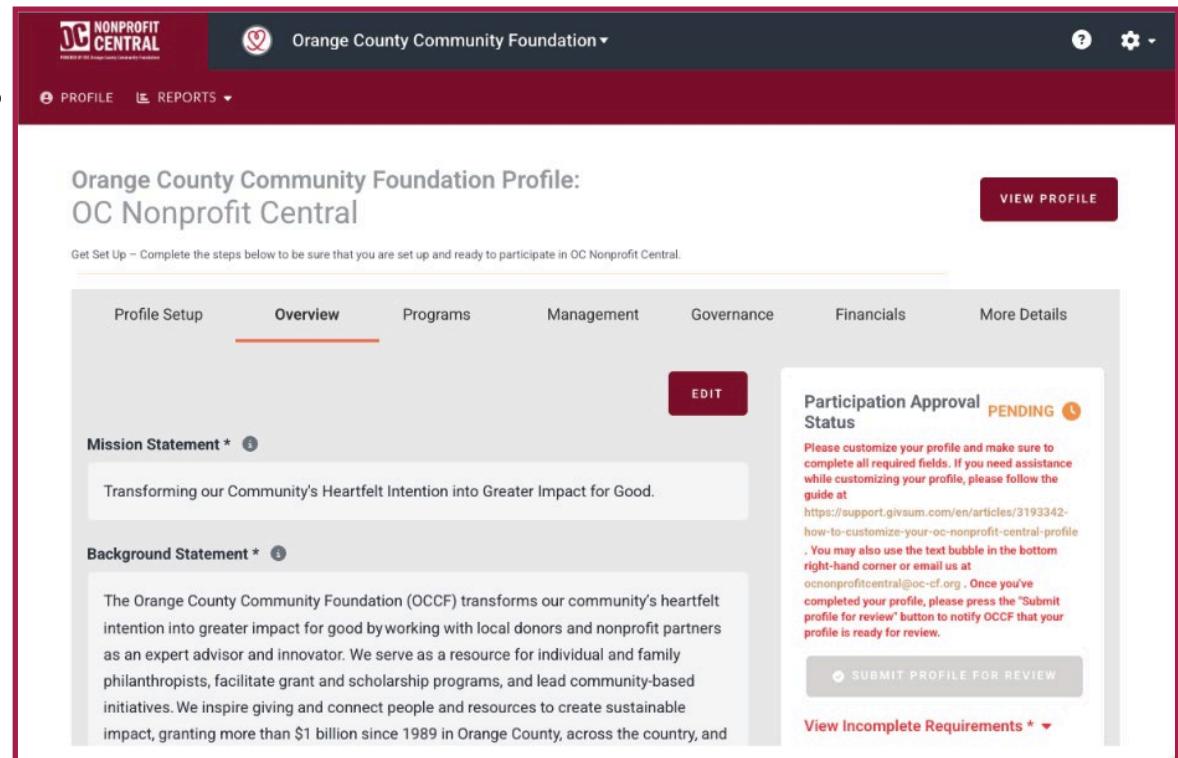
- Upload Logo (square 300 x 300pxl)
- Upload Cover Photo (rectangle 1440 x 480pxl)
- Complete Tell Your Story
- Enter Search Keywords
- Edit Thank You Message



What's Next

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

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



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.

DC NONPROFIT
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Orange County Community Foundation

Orange County Community Foundation

OVERVIEW | PROGRAMS | MANAGEMENT | GOVERNANCE | FINANCIALS | MORE DETAILS

OUR STORY

The Orange County Community Foundation (OCCF) transforms our community's heartfelt intention into greater impact for good by working with local donors and nonprofit partners as an expert advisor and innovator. We serve as a resource for individual and family philanthropists.

CONTACT

Orange County Community Foundation



Orange County Community Foundation

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.



Orange County Community Foundation

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

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

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.

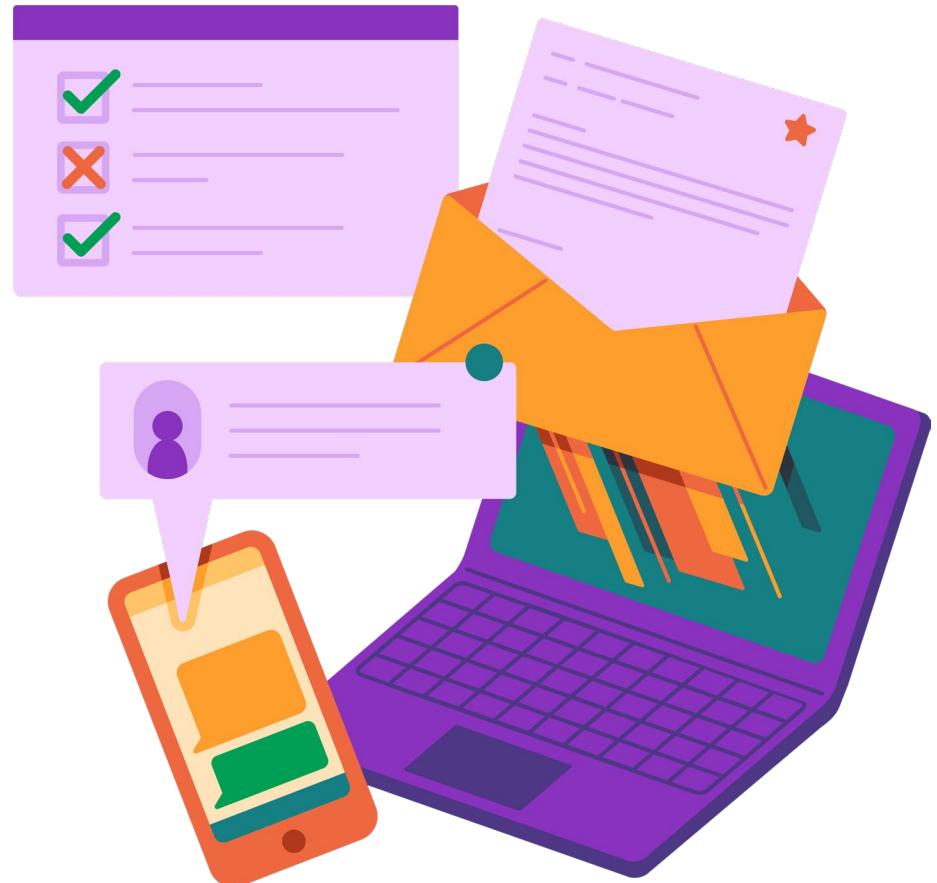
Business address ⓘ



Orange County Community Foundation

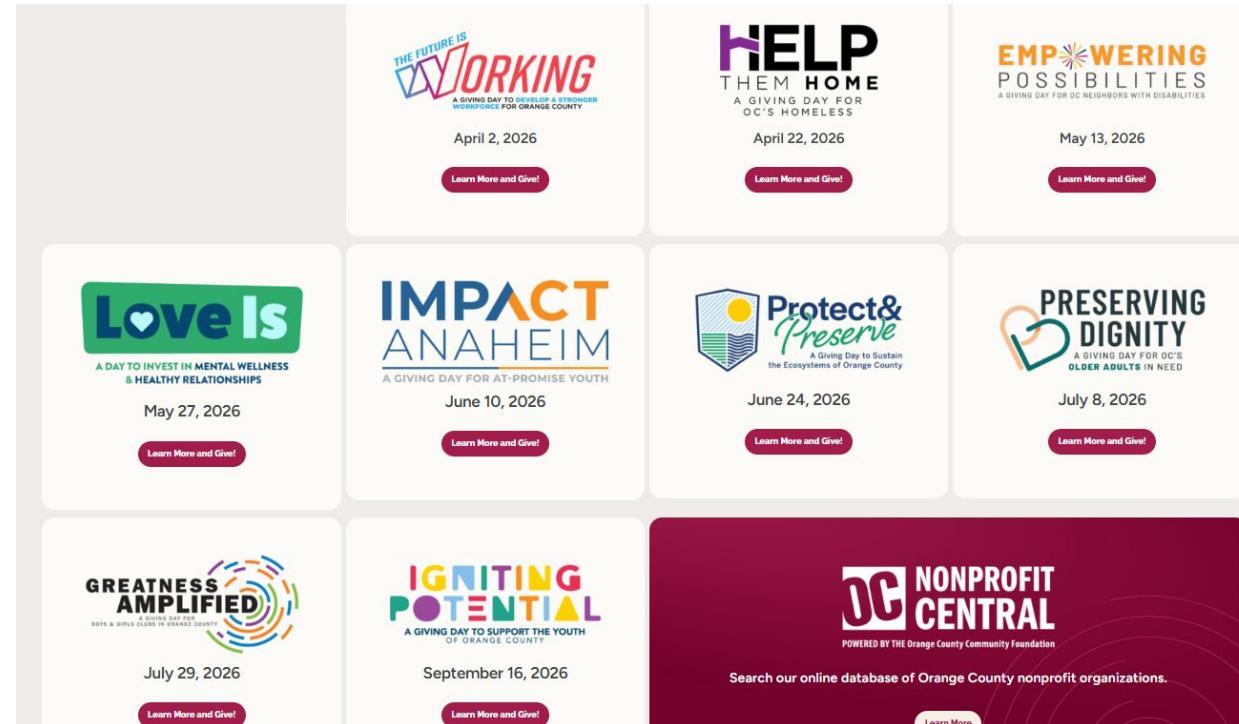
Need Assistance?

- 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



Orange County Community Foundation

Q & A



Thank you!

Orange County
Community
Foundation

