

# DONORCENTRAL USER GUIDE

## for donor advised funds

### Accessing DonorCentral

Click the DonorCentral Button at the top of any page on the VCF website to access DonorCentral



This takes you to the DonorCentral Fund Management page



## DonorCentral - Online Fund Management

- > Why Work With Us?
- > Who Works With Us
  - > Accidental Philanthropists
  - > Advising Generations
  - > A Legacy Preserved
  - > A Love of Learning
  - > An Old Soul
  - > A St. Johnsbury Gem

DonorCentral provides 24/7 online access to your charitable fund at the Vermont Community Foundation. It enables you to securely access information any time that's convenient for you.

Click on the plus (+) sign below to access DonorCentral information for your fund type.

Click the plus (+) sign to expand and see information

- Donor Advised Funds 
- All Other Funds (nonprofit, scholarship, designated, and discretionary) 

Here is the expanded view you will see:

## DonorCentral - Online Fund Management

- > Why Work With Us?
- > Who Works With Us
  - > Accidental Philanthropists
  - > Advising Generations
  - > A Legacy Preserved
  - > A Love of Learning
  - > An Old Soul
  - > A St. Johnsbury Gem
  - > Building Community
  - > Deepening Connections
  - > In Tune With Their Giving
  - > Libraries: the Lifeblood of the Community
  - > Open Curiosity
  - > Stowe Rescue Squad
  - > Remembering Senator Gannett
  - > The Kingdom Supporting the Kingdom
  - > Inspiration, Conserved
  - > A Different Path
  - > The Sport for a Lifetime

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- Donor Advised Funds 

[LOG IN TO DONORCENTRAL](#)

Click here to log in if you have an account

Donor advised funds have a user name that ends in "0228"

[Click here](#) for a short DonorCentral User Guide for Donor Advised Funds.

DonorCentral allows you to view and download fund statements, monitor the market value of the fund, access gift information, make online grant recommendations, and support Giving Together funding opportunities.

Click here to see a demo of DonorCentral


If you haven't used DonorCentral, we invite you to [see a demo account](#) or [register for an account](#) now.

Click here to register for DonorCentral

For questions about registering, please contact Jane Kimble at [jkimble@vermontcf.org](mailto:jkimble@vermontcf.org) or 802-388-3355 ext. 286.

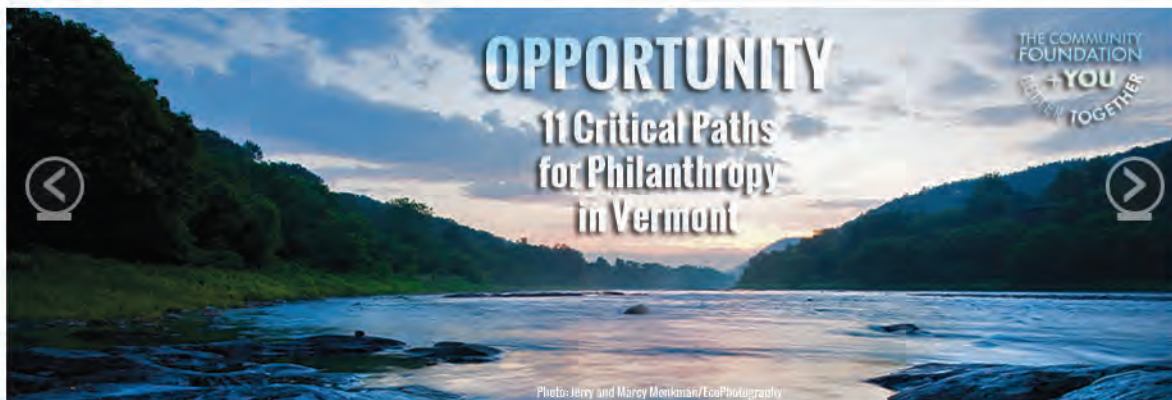
# DonorCentral Homepage

See your list of unsubmitted grant recommendations

 THE Vermont Community Foundation

[Recommendations \(8\)](#) Logged in as John and Jane Doe • [Logout](#)

[Home](#) [Recommend a Grant](#) [Fund Summary](#) [Resources](#) [Edit Password](#)



Messages from the Foundation

### Welcome, John and Jane Doe!

New **Giving Together** opportunities have been posted! You can make grants in the Giving Together section at the bottom of this page.

**Save the Date!** Our Annual Meeting is on Thursday, September 22nd at the Shelburne Museum from 3:30 - 7:00 p.m.

### Resources

- [Frequently Asked Questions \(FAQ\)](#)
- [Investments & Publications](#)
- [Giving Together Overview](#)
- [Contact Us](#)

### Fund Summary

Fund Name	Fund ID	Balance	Actions
John and Jane Doe Fund	0000	\$52,628.07	<a href="#">View</a>

View your fund activity

10 most recent grantees

### Recent Grantees

Grantee	Date Paid	Amount	Actions
Barre Opera House, Inc.	2/1/2016	\$7,500.00	<a href="#">Make a Grant</a>
AIDS Community Resource Network (ACORN)	7/11/2015	\$3,950.00	<a href="#">Make a Grant</a>
Addison County Community Action Group	12/27/2014	\$1,000.00	<a href="#">Make a Grant</a>
Vermont Community Loan Fund	12/27/2014	\$8,000.00	<a href="#">Make a Grant</a>

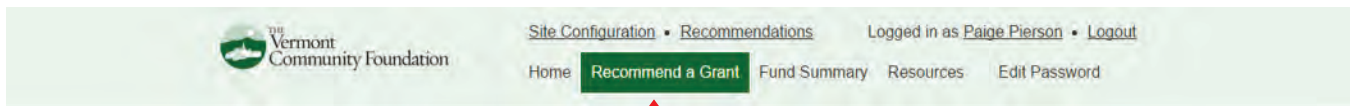
This section will be visible when funding opportunities are available

### Giving Together

[Innovations and Collaborations](#) [Small and Inspiring](#)

# 3 Ways to Make a Grant Recommendation

#1



Click Recommend a Grant at the top of any page to access the Recommend a Grant page

The screenshot shows the "Recommend a Grant" search form. At the top, it says "Recommend a Grant". Below that is a paragraph: "Look up nonprofits that are currently in the Foundation's database using any of the options below to review potential matches. Please note that the Interest Code Operator below is currently not in use." The form includes several input fields: "Name" with a dropdown menu set to "contains" and an empty text box; "City" with an empty text box; "State/Province" with a dropdown menu set to "- Select -"; "Zip/Postal" with an empty text box; "Tax ID (optional)" with an empty text box and a globe icon; "Interest Code Operator" with a dropdown menu set to "OR" and a globe icon. At the bottom, there is a checkbox labeled "Only search in prior recommendations" which is unchecked. Below the checkbox are three buttons: "Search" (green), "Clear", and "New Grant".

## 3 Ways to Make a Grant Recommendation (continued)

#2

This is the Recent Grantee section of the Homepage

Grantee	Date Paid	Amount	Actions
Barre Opera House, Inc.	2/1/2016	\$7,500.00	<a href="#">Make a Grant</a>
AIDS Community Resource Network (ACORN)	7/11/2015	\$3,950.00	<a href="#">Make a Grant</a>
Addison County Community Action Group	12/27/2014	\$1,000.00	<a href="#">Make a Grant</a>
Vermont Community Loan Fund	12/27/2014	\$8,000.00	<a href="#">Make a Grant</a>

Click [Make a Grant](#) to access the Grant Recommendation Form for the desired grantee

### Grant Recommendation Form

PLEASE NOTE: The required fields in this form have been auto-populated based on the information in our search database. Please review and edit the fields to reflect your current recommendation.

Fields with an asterisk (\*) are required.

Advisor(s) \*

Funding Source \*

Organization Name \*

PLEASE NOTE: Advised grant minimum is \$250, unless otherwise noted.

Amount \*

Grant Purpose \*

Fund and Advisor Recognition in Grant Letters \*

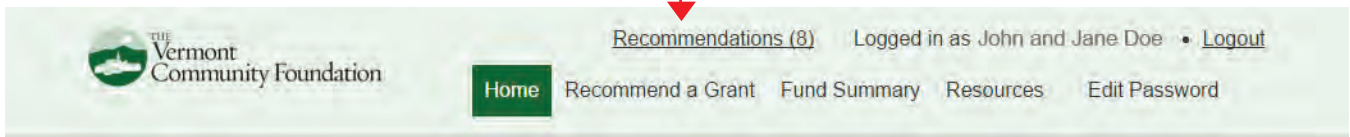
Please read and agree to the conditions below.

AGREED CONDITIONS: I attest that these recommendations do not represent the payment of any legally enforceable pledge or other financial obligation on behalf of the advisor(s), and that no tangible benefit, goods or services were received by any donor or advisor connected with the Fund, their family members, or entities controlled by aforesaid persons. I understand grant approval rests with the Vermont Community Foundation, whose charge it is to see that all distributions are within the legal parameters of advised fund grantmaking.

I agree  I do not agree

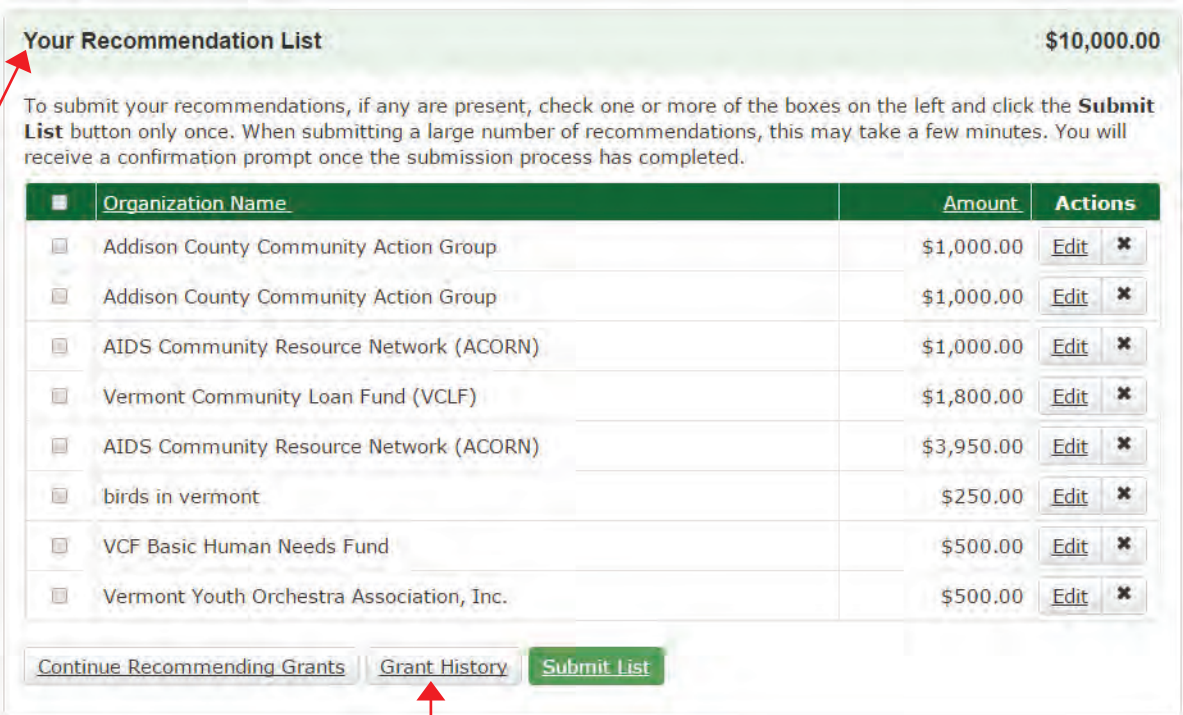
# 3 Ways to Make a Grant Recommendation (continued)

#3



The Vermont Community Foundation navigation bar includes the logo on the left, a 'Home' button, and a list of links: 'Recommend a Grant', 'Fund Summary', 'Resources', and 'Edit Password'. On the right, it shows 'Recommendations (8)', 'Logged in as John and Jane Doe', and a 'Logout' link.

Click [Recommendations](#) at the top of any page to access Your Recommendation List



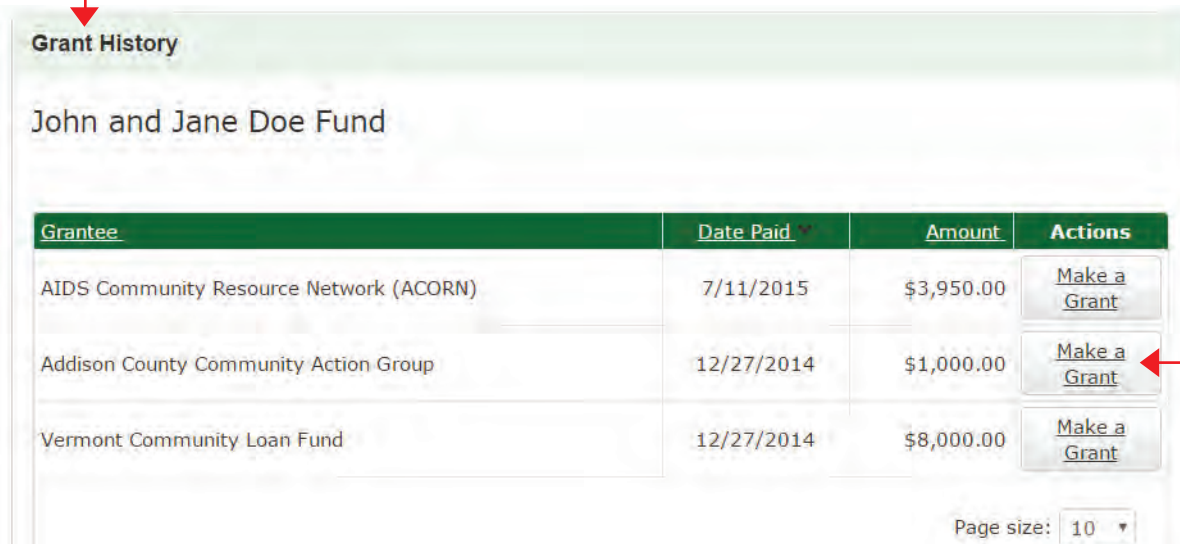
**Your Recommendation List** \$10,000.00

To submit your recommendations, if any are present, check one or more of the boxes on the left and click the **Submit List** button only once. When submitting a large number of recommendations, this may take a few minutes. You will receive a confirmation prompt once the submission process has completed.

<input type="checkbox"/>	Organization Name	Amount	Actions
<input type="checkbox"/>	Addison County Community Action Group	\$1,000.00	<a href="#">Edit</a> ✕
<input type="checkbox"/>	Addison County Community Action Group	\$1,000.00	<a href="#">Edit</a> ✕
<input type="checkbox"/>	AIDS Community Resource Network (ACORN)	\$1,000.00	<a href="#">Edit</a> ✕
<input type="checkbox"/>	Vermont Community Loan Fund (VCLF)	\$1,800.00	<a href="#">Edit</a> ✕
<input type="checkbox"/>	AIDS Community Resource Network (ACORN)	\$3,950.00	<a href="#">Edit</a> ✕
<input type="checkbox"/>	birds in vermont	\$250.00	<a href="#">Edit</a> ✕
<input type="checkbox"/>	VCF Basic Human Needs Fund	\$500.00	<a href="#">Edit</a> ✕
<input type="checkbox"/>	Vermont Youth Orchestra Association, Inc.	\$500.00	<a href="#">Edit</a> ✕

[Continue Recommending Grants](#) [Grant History](#) [Submit List](#)

Click [Grant History](#) to access the Grant History page



**Grant History**

John and Jane Doe Fund

Grantee	Date Paid	Amount	Actions
AIDS Community Resource Network (ACORN)	7/11/2015	\$3,950.00	<a href="#">Make a Grant</a>
Addison County Community Action Group	12/27/2014	\$1,000.00	<a href="#">Make a Grant</a>
Vermont Community Loan Fund	12/27/2014	\$8,000.00	<a href="#">Make a Grant</a>

Page size: 10

Click [Make a Grant](#) to access the Grant Recommendation Form for the desired grantee

# Giving Together

This section will be at the bottom of the homepage when Giving Together funding opportunities are available. A summary is listed for each proposal, and you can support a project by simply clicking [Make a Grant](#). If we have proposals from multiple grant rounds, they will be in the tab format as shown below.

The full proposals with images will be available on the Community Foundation's website, and you can link directly to them from the welcome section on the DonorCentral homepage.

## Giving Together

[Innovations and Collaborations](#) [Small and Inspiring](#)

**Castleton State College - Castleton Entrepreneurial Collaborative**

Region Served: Rutland County [Make a Grant](#)  
Amount Requested: \$20,000

Partner Organizations: Rutland Young Professionals, EVOLVE Rutland (the Women's Professional Development Center)

Summary: Partners will join with a team of high-impact women leaders, mentors, and entrepreneurs and build three distinct yet connected customized training programs that result in enhanced employee skills. Their goal is to develop support, learning opportunities, and connections for women and lay the foundation that will make Rutland County, and all of Vermont, a place with a strong economy, a dynamic community, and a place where leaders, entrepreneurs, and their families will live, prosper, and thrive.

Expires: 6/8/2016

**Legal Services Law Line of Vermont - Homeless Assistance**

Region Served: Chittenden County [Make a Grant](#)  
Amount Requested: \$15,210

Partner Organizations: Committee on Temporary Shelter (COTS)

Summary: This project will support a cooperative effort by to provide information, consultation, and effective holistic services to homeless clients by sending an experienced advocate to the Daystation for 4-5 hours a week to consult with COTS staff, hold clinics, and help individual clients.

Expires: 6/8/2016

**Main Street Alliance of Vermont - Organizing for State Temporary Disability and Caregiver Insurance**

Region Served: Statewide [Make a Grant](#)  
Amount Requested: \$20,000

Partner Organizations: Vermont Commission on Women

Summary: The partners hope to facilitate the development and implementation of a Temporary Disability and Caregiver Insurance (TDCI) Program in Vermont to provide coverage for any worker needing time off due to personal or family disability. The federal FMLA and Vermont's Parental and Family Leave Act have given many people job protection for unpaid leave but most cannot afford unpaid leave. A TDCI program would improve the health and financial stability of women and families and cultivate a healthy, vibrant workforce.

Expires: 6/8/2016