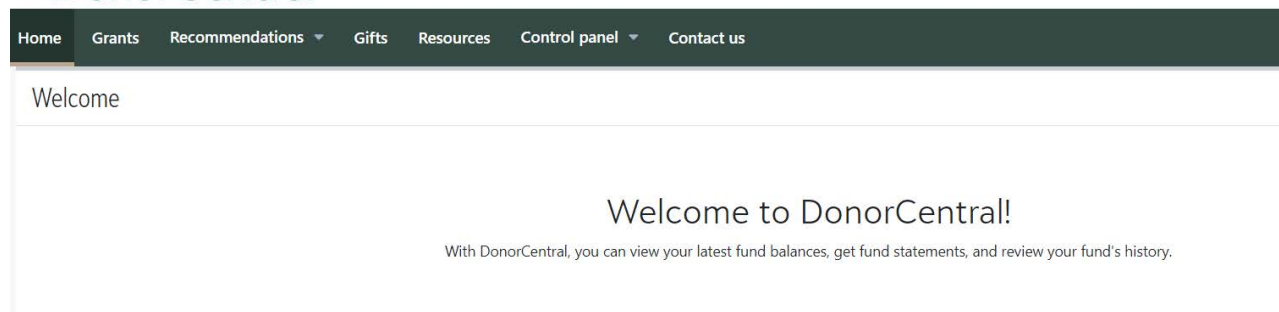


DonorCentral Quick Start Guide

DonorCentral is Vermont Community Foundation’s online fund management system. From here you can access detailed fund information, including your fund balance and fund statements, review the gifts and grants you have made, and recommend new grants.

In DonorCentral, you can view information related to your fund at a glance on your “Home” tab or browse other sections via the additional tabs at the top of your screen.

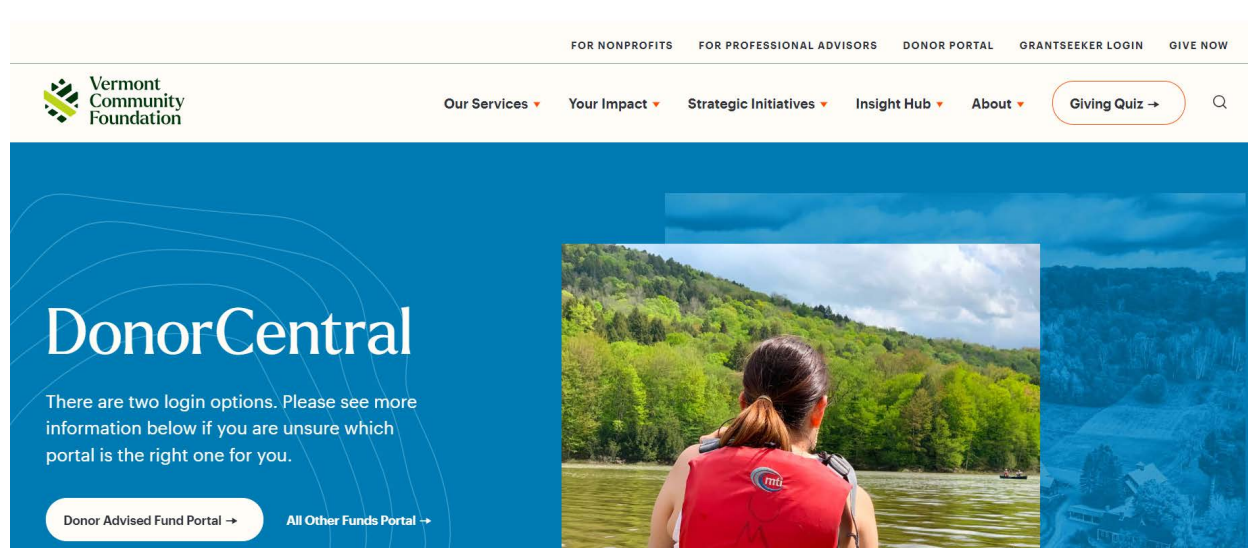


If you need assistance or have any questions, please contact philanthropy@vermontcf.org

ACCESS DONORCENTRAL

There are two ways to access DonorCentral at any time.

- go to vermontcf-daf.donorcentral.com
- go to vermontcf.org and click on Donor Portal in the top right-hand section of any page on our website. Then click on the login button for Donor Advised Fund accounts



SETTING UP YOUR ACCOUNT

You will receive an email from DonorCentral directly. In the email from DonorCentral, you will receive information to reset your account password and establish your login credentials

For security, your password will need to have:

- 8 or more characters
- At least 2 of the following: Capital letters, Numbers, or Special Characters (such as one of these: ! @ # \$ %)

FORGOTTEN PASSWORD

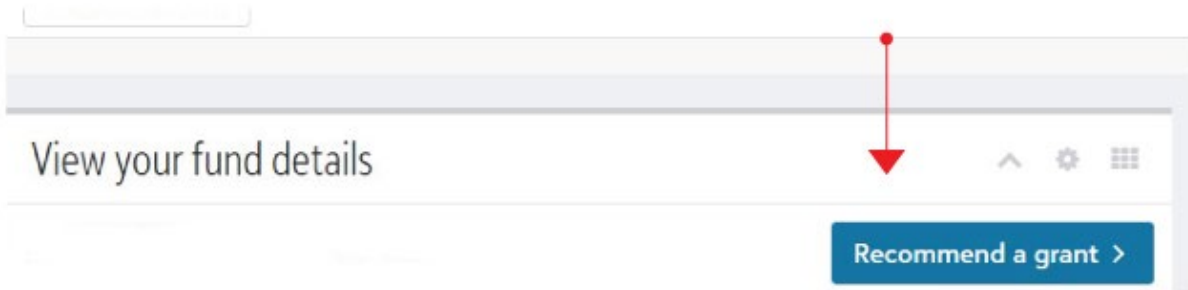
If you have forgotten your password, click on “Forgot password?” on the DonorCentral login page and **enter the email address associated with your fund**. Password reset instructions will be emailed to you. It is important that you use the email address that you gave to the Vermont Community Foundation to associate with your fund.

If you still cannot log on, please contact philanthropy@vermontcf.org

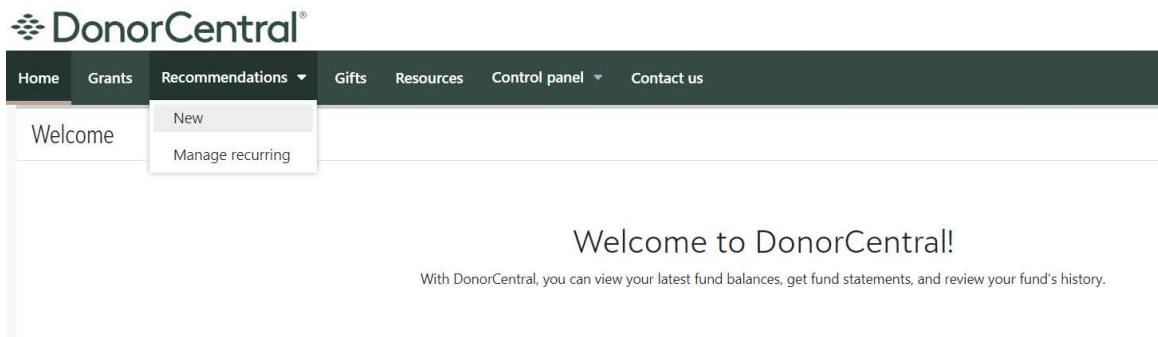
RECOMMEND A GRANT

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

1. On your home page from the **View Your Fund Details** section, click on **Recommend a Grant**.



2. You may also select **Recommendations** in the top menu of your screen, then click **New**



3. The **Grant Recommendation** screen appears

Grant recommendation ✕

Recommend a Grant Recommendation Agreement

Grant Recommendation

Support an organization that the fund has previously supported *

✕ ▼

OR

Search for an organization in our database *

✕ ▼

If no matching results found, continue below to add a new recommendation

Add a new organization

Next Cancel Save for later

4. Select an organization by selecting a prior recipient or searching for an organization

If the organization does not show in DonorCentral yet, check the **Add a New Organization** box to create grant recommendation for this “new” organization

5. Select **Next** and it will take you to the **Recommendation** tab

Grant recommendation

Recommend a Grant **Recommendation** Agreement

Fund

Funding source *

Select a fund... x ▾

Grant

Amount *

\$

Fund and Advisor Recognition in Grant Letters *

Grant purpose *

NEW: So that the Foundation can track grants in response to COVID-19 we are asking you to tell us whether or not your grant recommendation is for this purpose. In the Special Instruction field below please indicate "YES" if this grant is specifically in response to COVID-19, or "NO" if it is not.

Special Instructions *

Previous **Next** Cancel Save for later

- a. In the **Fund** section of the grant recommendation, select the fund for this recommendation in the **Funding Source** field
- b. In the **Grant** section of the grant recommendation, enter the recommended **Amount** and **Grant Purpose**


6. Select **Next** and it will take you to the **Agreement** tab

Grant recommendation ✕

Recommend a Grant Recommendation **Agreement**

Please read and agree to the conditions below.

AGREED CONDITIONS: I attest 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  *

Previous **Submit** Cancel Save for later

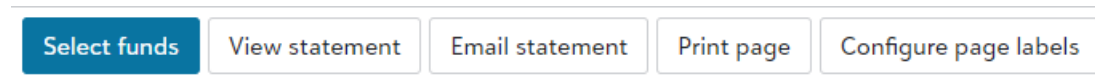
- a. Acknowledge the grant recommendation requirements by selecting the **I Agree** box
- b. If necessary, at any time in the process click **Save for Later** to store your grant recommendation without submitting. To return later and complete it, look for it in the **Unsubmitted Recommendations** tile on the Home page
- c. **If you are ready to recommend a single grant** click **Submit**
- d. **If you are recommending multiple grants** at the same time, click on **Save for later** to create a grant recommendation list. **Unsubmitted recommendations** will appear on the Home page

VIEW YOUR FUND INFORMATION

DonorCentral offers easy access to comprehensive information about your fund(s), allowing you to view, print, and email fund statements. To view fund information, select your fund on the Home page **View Your Fund Details** tile or click on **Funds** in the top menu of your screen.

This screen displays the fund name, description, and other details.

To view information on multiple funds, choose **Select Funds**.



VIEW GIFT AND GRANT HISTORY

For a gift or grant history, click on the amount total. Then, the gift or grant history will display. You can also export the history to Excel.

Date range
All

Fund details **Click on any \$ amounts below to view details**

\$75,000.00 Gifts to Fund ⓘ	N/A Submitted Recommendations ⓘ	N/A Grants to be Paid ⓘ	\$2,000.00 Grants paid ⓘ
--------------------------------	------------------------------------	----------------------------	-----------------------------

Grants paid: \$2,000.00
1 record

Customize your columns here →

Find in this list

ID	Date	Description
----	------	-------------



To see an explanation of each item, hover your mouse cursor over the small blue information bubbles.

EXPLORE GRANT OPPORTUNITIES

Vermont Community Foundation will highlight specific grant opportunities on the Home page **Explore Opportunities** tile to channel generosity where it is needed throughout our region.

Explore opportunities

VT COVID-19 Response Fund [Recommend a grant >](#)

VT COVID-19 Response Fund

This fund serves as a resource to the pandemic response and long-term recovery efforts in Vermont.

- Supports nonprofits that are particularly equipped to address community impacts of COVID-19
- Offers donors the opportunity to be part of a coordinated response to the many effects of the pandemic

For more information about creating a grant recommendation, see the **Recommend a Grant** section above.

QUESTIONS?

If you need assistance or have any questions, please contact philanthropy@vermontcf.org