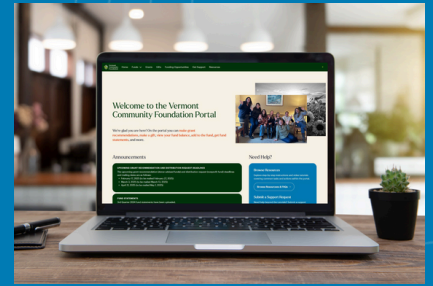




Portal Guide – Donor Advised Fund Edition



Welcome to the online portal for Vermont Community Foundation fundholders. 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.

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

If you have any questions that are not addressed in this handbook, please feel free to reach out with suggestions or recommendations for how this process can be made more clear.

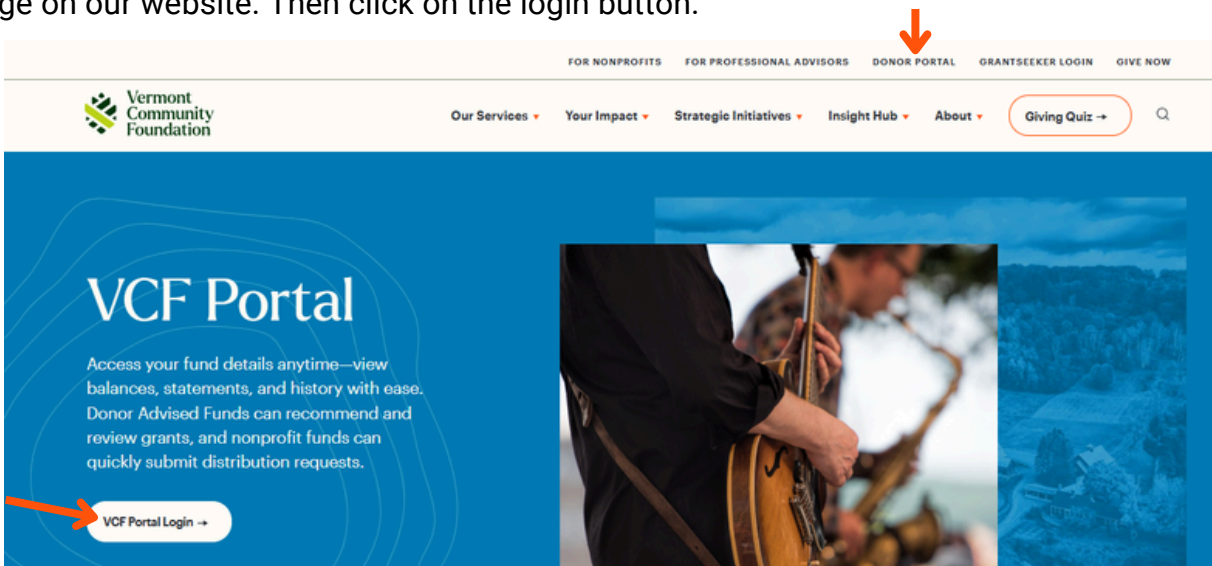
Instructions and helpful tutorial videos can be found at vermontcf.org/donor-portal-resources

[Explore the portal with this portal orientation video tour.](#)

How to Log In

There are a few ways to access the portal at any time:

- Go to vermontcommunityfoundation.my.site.com/login
- Visit vermontcf.org/donor-portal, or click on Donor Portal in the top right-hand section of any page on our website. Then click on the login button.



<u>Setting Up Your Portal Account</u>	3
<u>Forgotten Password</u>	3
<u>Change Your Password</u>	4
<u>Homepage Tour</u>	5
<u>Submit a Support Request</u>	6
<u>Make a Grant Recommendation</u>	7
<u>View Grant History</u>	12
<u>Grant History Key Terms</u>	13
<u>Check the Status of a Grant</u>	14
<u>Recall a Grant</u>	16
<u>View Fund Details & Information</u>	17
<u>Fund Information Key Terms</u>	18
<u>View & Print Fund Statements</u>	20
<u>View Gift History</u>	21
<u>Review Funding Opportunities</u>	22
<u>How to Make a Gift Online</u>	23

Setting Up Your Portal Account & Password Requirements - [Follow along with this video tutorial](#)

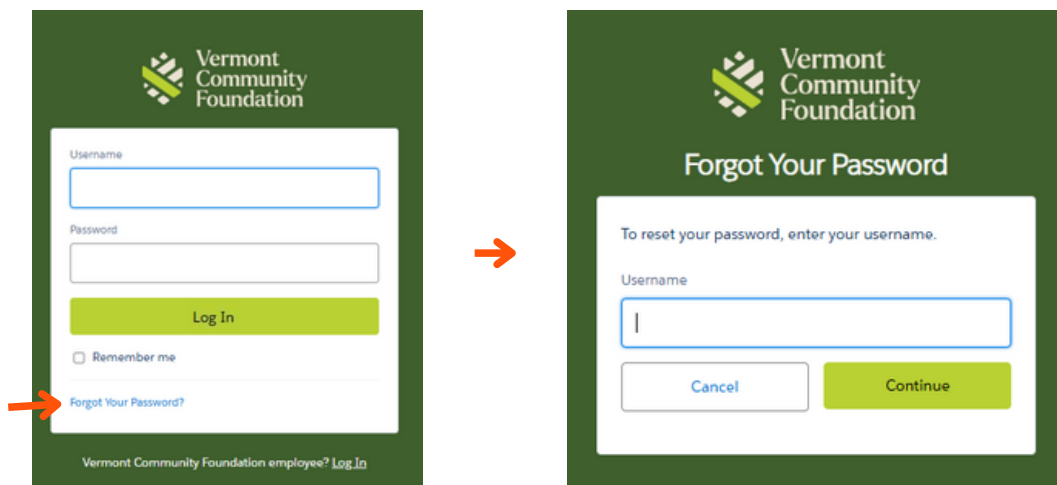
When opening a fund, you will share an email for correspondence, this will also be your username for accessing the portal. You will receive an email, to the email address we have on file, providing your login link and inviting you to set your password.

When you set up your password, the following security requirements apply:

- 8 or more characters
- A combination of letters and numbers
- Must be changed every 180 days

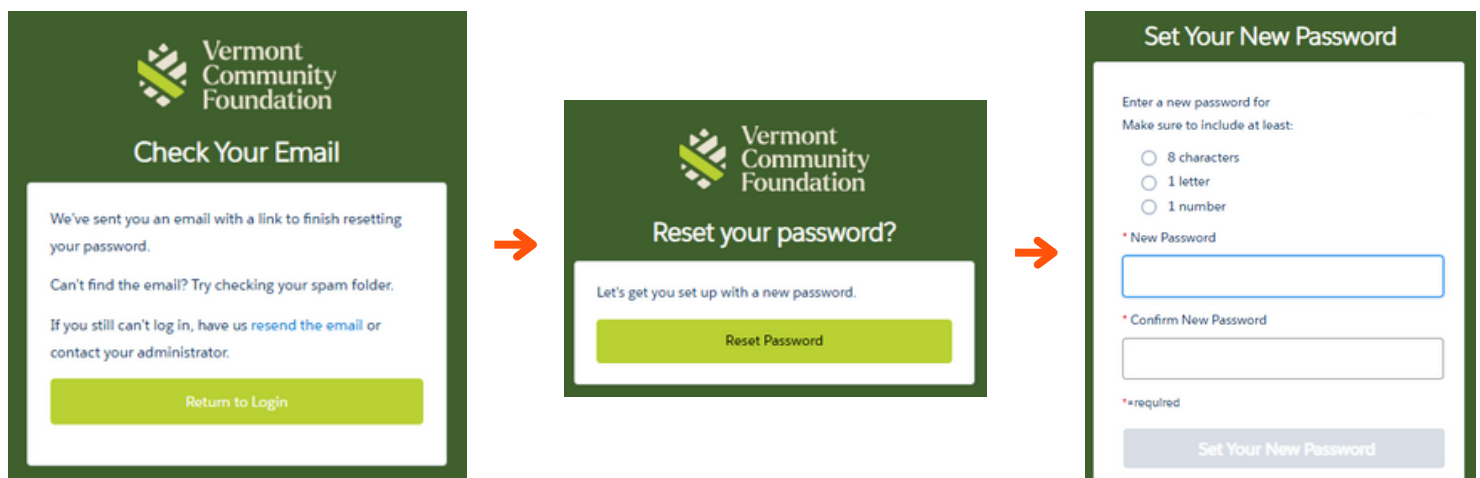
Forgotten Password - [Follow along with this video tutorial](#)

If you have forgotten your password, click on “Forgot Your Password?” on the portal login page and enter the email address you have on file with the VCF in the “Username” field.



The first screenshot shows the Vermont Community Foundation login page. It has fields for Username and Password, a Log In button, a Remember me checkbox, and a link for 'Forgot Your Password?'. An orange arrow points to the 'Forgot Your Password?' link. The second screenshot shows the 'Forgot Your Password' page, which asks the user to enter their username to reset their password. It has a single Username field and 'Cancel' and 'Continue' buttons. An orange arrow points from the first screenshot to the second.

Check your inbox for an email from info@vermontcf.org. If you don't see it within a few minutes, check your spam or promotions folders. Open the email and click the password reset link. When the portal window opens, Click **Reset Password** to continue. Enter a new password. Click **Set Your New Password**, and you will be brought to your home page. Be sure to save your new password in a safe place for the next time you log in.



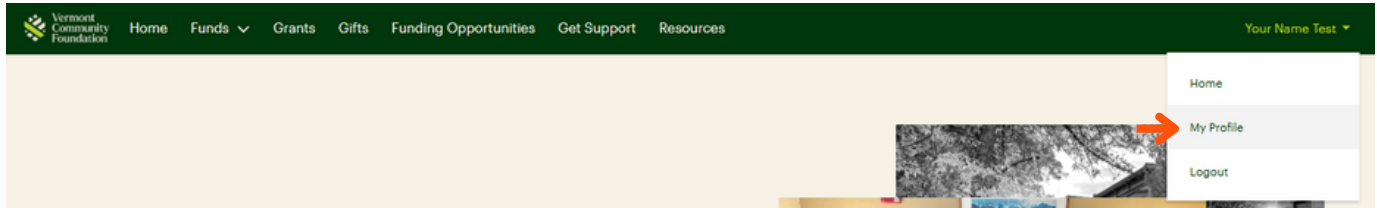
The first screenshot shows the 'Check Your Email' page, which informs the user that an email with a reset link has been sent and provides instructions on what to do if the email is not found. It includes a 'Return to Login' button. The second screenshot shows the 'Reset your password?' page, which prompts the user to set up a new password and features a 'Reset Password' button. The third screenshot shows the 'Set Your New Password' page, which requires the user to enter a new password that meets specific criteria (8 characters, 1 letter, 1 number) and confirm it. It includes a 'Set Your New Password' button. Orange arrows indicate the flow from one step to the next.

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

Change Your Password & User Access

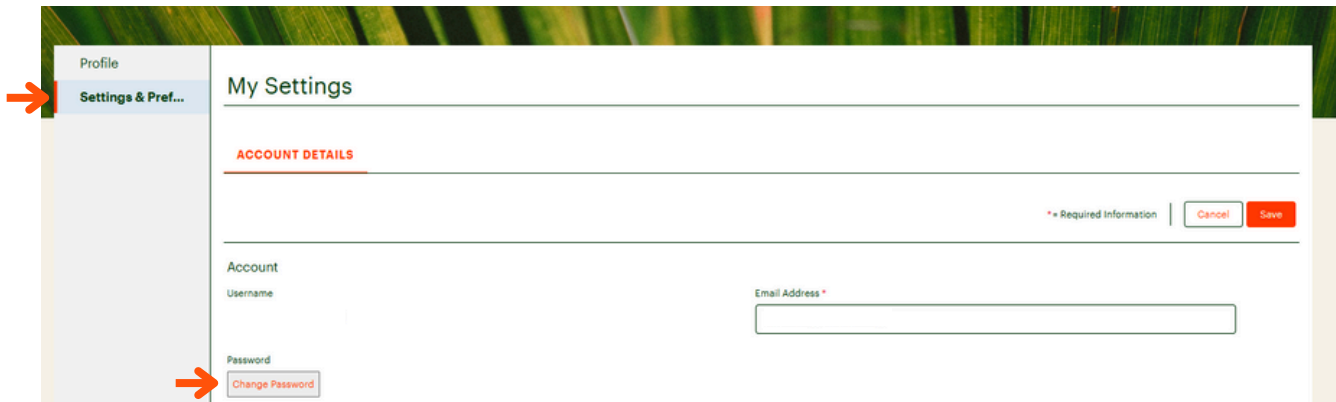
If you're already logged in and simply want to update your password, you can do that too!

1. Click My Profile from the dropdown menu in the top-right corner of the page.



2. Select **Settings and Preferences**.

3. Click **Change Password**.



4. Enter your current password and the new password you would like to use.

5. Re-type the new password to verify.

6. Click **Save**.

Change My Password

You must adhere to the following password rules:

- * Your password must be at least 8 characters long.
- * Your password must include letters and numbers

*	Current Password	<input type="password"/>
*	New Password	<input type="password"/>
*	Verify New Password	<input type="password"/>

CancelSave

Access for Other Users

If you'd like a family member or professional advisor (such as a tax advisor, attorney, or financial planner) to have access to your fund in the portal, please contact us. They can be set up with full or view-only access. You can also reach out anytime to have us remove someone's access.

Homepage

Here's a quick preview of what your homepage looks like! You will find shortcuts to key actions, important announcements, access to tutorials and the support request form, contact information for the Philanthropy team, fund details, featured funding opportunities, and stories that highlight the impact of your giving.



To explore the homepage and see some of its features, check out this [preview video](#):

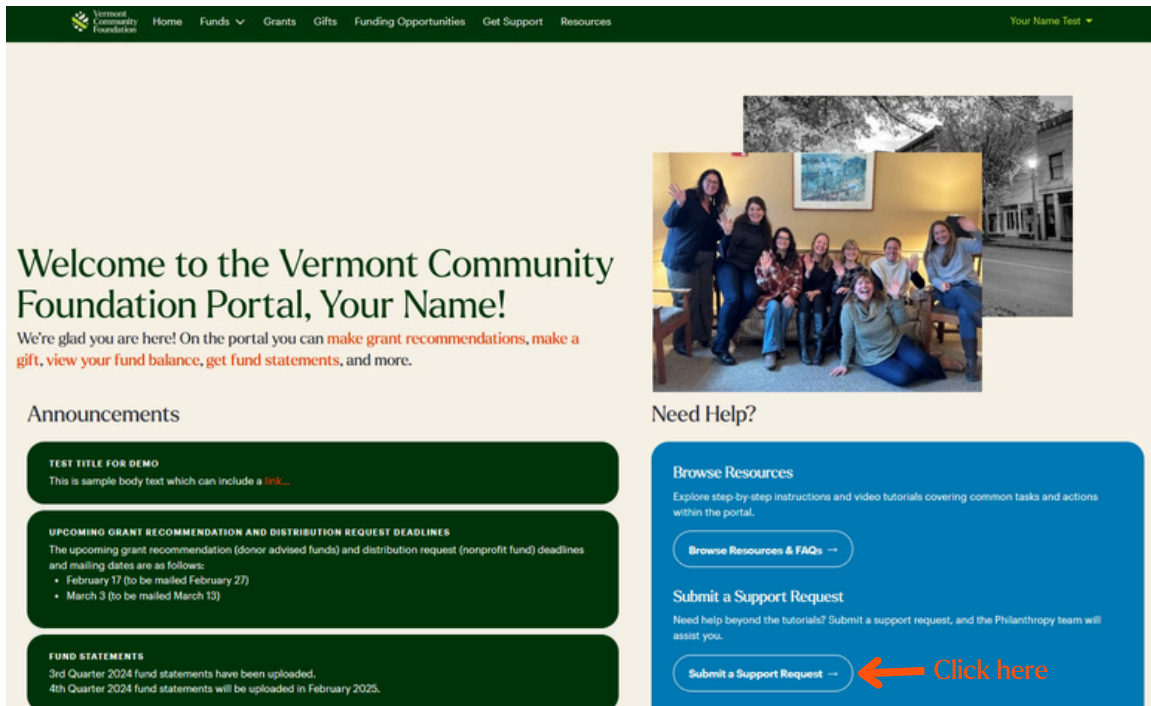


How to Submit a Support Request

Support Request

You can submit a support request and contact our team of philanthropic advisors directly from the home page.

1. Start by clicking **Submit a Support Request** in the blue box under **Need Help?**



2. Enter the type of support you need under the Support Type dropdown and a description of your request.

3. Click **Create Support Request**.

Get Support

Enter Request Details Below

*Support Type
--None--

*Description

[Create Support Request](#)

[Show Filters](#) [Hide](#)

0 of 0 items

Search this list...

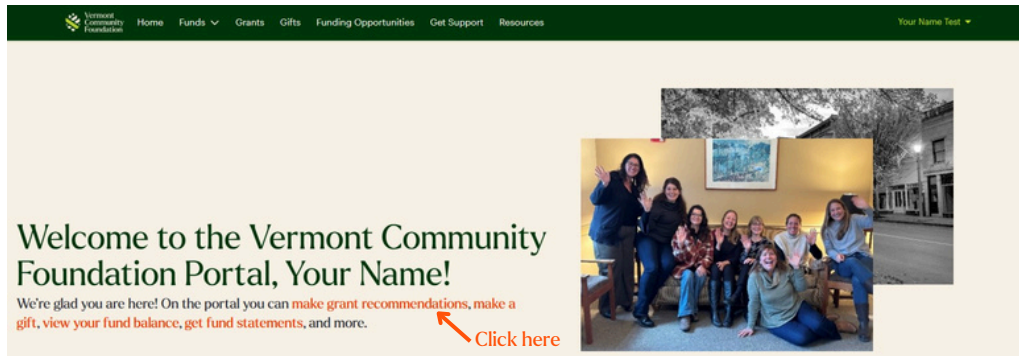
Case Number	Submitted Date	Subject	Case Type	Description	Status
No items to display.					

You'll find all your support requests, replies, and their status saved at the bottom of the page so you can refer back to them anytime.

How to Make a Grant Recommendation

This is an exciting new feature on our portal! - [Follow along with this video tutorial](#)

1. Starting on the homepage, click the **make grant recommendations** link or find the "New Grant Recommendation" button on the fund or grants pages.








You can choose from four methods to select a grantee organization. Your options include:

- **Search VCF Database:** Search within our database of organizations previously funded by the Vermont Community Foundation
- **Search Previous Grantees:** Search from a smaller list of organizations that your fund has directly supported in the past
- **Search GuideStar:** Search a list of around 3 million registered nonprofits
- **Directly Enter Grantee:** Use this method only if you cannot find your grantee through other means. Please double-check all details carefully to ensure accuracy!

Generally, we recommend using the VCF database search, as it provides prefilled details for easier data entry. Follow the instructions below to proceed with this method.

2. Click the **Search VCF Database** button


Please indicate how you would like to select a Grantee Organization.

  Search VCF Database Search VCF's database to find organizations that have previously received grants.	 Search Previous Grantees Search organizations you have previously supported with grants.
 Search Guidestar Look up your grantee in GuideStar's national database, which features profiles of around 3 million nonprofit organizations.	 Directly Enter Grantee Can't find your grantee in our database or GuideStar? If needed, you can manually enter their information.

How to Make a Grant Recommendation

3. To search our VCF Database:

- Type the nonprofit you want to grant to in the search bar on the right side of the screen.
- Select it by checking the box on the left.
- Click **Recommend a Grant** in the green header button to move forward.



Search VCF Database

About: Use this tool to search for charitable organizations and initiate grant recommendations based on VCF's database of previous grantees.
Instructions: Use the search box to find an organization or browse the list below. Check the box to the left of an organization, then click **View Organization** for details or **Recommend a Grant** to proceed.
Show/Hide Filters: Click **Show** to search by keyword, subject area, population served, or geography. Click **Reset** to clear all filters.

ShowHide

View OrganizationRecommend a Grant

1 of 1 item • 1 item selected

Vermont Foodbank

☒

Organization

Vermont Foodbank, Inc.
EIN: 22-3021942

☒

EIN

EIN: 22-3021942

☒

Address

33 Parker Road, Wilson Industrial Park
Barre, VT 05641

4. Verify that the nonprofit you selected is correct, and then click **Create Grant Recommendation** in the green button.

Let's initiate Your Grant Recommendation!

You are about to initiate a Grant Recommendation for the following organization:



Vermont Foodbank, Inc.
EIN: 22-3021942

Physical Address
33 Parker Road
Wilson Industrial Park
Barre, VT 5641

Other Address
33 Parker Road
Wilson Industrial Park
Barre, VT 5641

Website
www.vtfoodbank.org

Next, you will specify additional information about the grant recommendation.

[← Back](#) [Create Grant Recommendation](#)

Click here

5. Great news! The grantee information for Parts 1 and 2 is already filled in. Simply start with Part 3 and complete each section—make sure to select the fund you'd like to grant from, choose the purpose from the dropdown menu, and enter the grant amount in the designated field.

If you choose "Specific Project or Program" or "Other" as the purpose, you'll need to provide more details. Finally, indicate how you'd like the grant to be recognized.

Your Grant Recommendation

PART 1
Grantee Organization
Enter details about the grantee organization below. Required fields are indicated by *.

Organization Name* Vermont Foodbank, Inc.	Street Address* 33 Parker RoadWilson Industrial Park
EIN 22-3021942	City* Barre
	State* VT
	Zip Code* 5641

PART 2
Grantee Primary Contact
Enter details about the grantee primary contact below. Required fields are indicated by *.

First Name* John	Last Name* Sayles
Title* Chief Executive Officer	Email* jsayles@vtfoodbank.org
	Phone* 802-477-4101

PART 3
Grant Recommendation
Enter details about your grant recommendation below. Required fields are indicated by *.

Fund* VCF DAF Fund	Date* Mar 3, 2025
Grant Purpose* Unrestricted	Amount* \$500.00
<input type="checkbox"/> Make this a multi-payment	

Indicate how this Grant should be recognized:

Fund Recognition Preference* <input checked="" type="radio"/> Fund Named <input type="radio"/> Fund Anonymous	Advisor Recognition Preference* <input checked="" type="radio"/> Advisor Named with Address <input type="radio"/> Advisor Anonymous
--	--

Special Instructions (Optional)

Cancel Request Save as Draft **Save and Next**

6. Click **Save and Next**

7. Acknowledge you have read the agreed conditions by clicking the check box next to “I acknowledge and agree to the above statement.” Then click **Submit**.

Your Grant Recommendation

PART 4

Acknowledgement

Thank you for submitting a grant recommendation. Please read and agree to the following statements by checking the box below. Go back to make any changes.

AGREED CONDITIONS: By signing below, I attest that this grant will NOT:

- pay for goods, services, or any other material benefit for me and/or any member of my family. Material benefits include but are not limited to membership fees, dues, tuition, and auction items;
- pay for attendance/tickets to a charitable event, such as a gala, luncheon, or sporting event;
- be restricted or earmarked to benefit a specific individual;
- represent payment of any pledge or other financial obligation for me or any member of my family;
- support a political campaign and/or fund a lobbying communication that reflects the view of support or opposition to specific legislation;
- support a private non-operating foundation;
- support an organization for which I am, and/or a member of my family is, a paid employee. I attest that I/we only serve in a voluntary capacity.

I understand final 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 acknowledge and agree to the above statement.

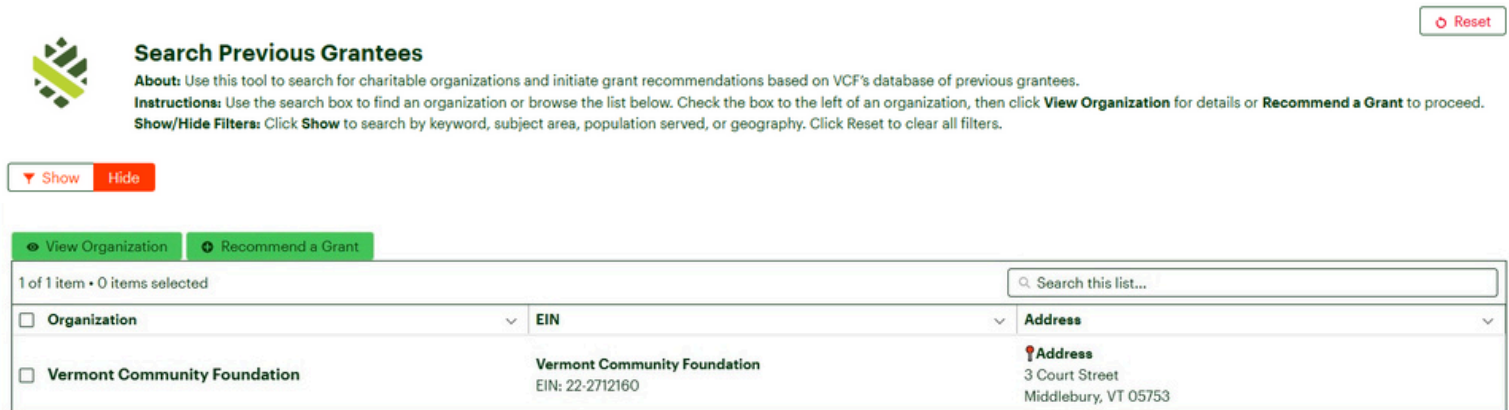
[← Back](#)[Submit](#)


Thank you for making a difference!

Other Methods to Select a Grantee Organization (How to Make a Grant Recommendation Continued)

We recommend selecting a grantee using the process outlined on the last few pages, which leverages our VCF database for streamlined data entry. However, you may also consider the three alternative options listed below.

- **Search Previous Grantees:** Search from a list of grantees you have funded in the past




 **Search Previous Grantees**

About: Use this tool to search for charitable organizations and initiate grant recommendations based on VCF's database of previous grantees.

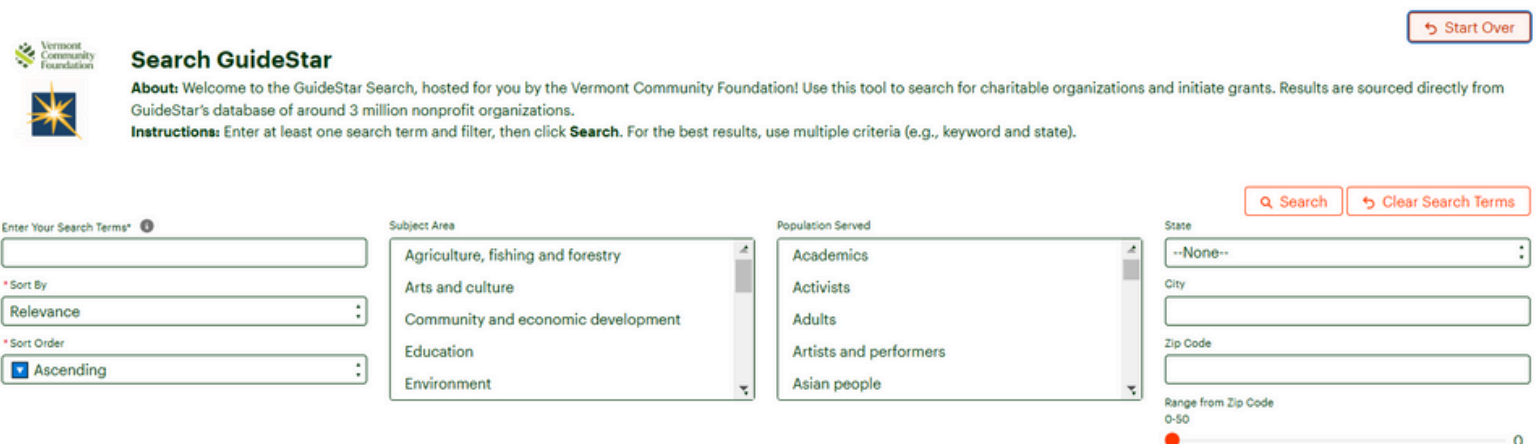
Instructions: Use the search box to find an organization or browse the list below. Check the box to the left of an organization, then click **View Organization** for details or **Recommend a Grant** to proceed.


Show/Hide Filters: Click **Show** to search by keyword, subject area, population served, or geography. Click **Reset** to clear all filters.

1 of 1 item • 0 items selected

<input type="checkbox"/> Organization	<input type="button" value="EIN"/>	<input type="button" value="Address"/>
<input type="checkbox"/> Vermont Community Foundation	Vermont Community Foundation EIN: 22-2712160	 Address 3 Court Street Middlebury, VT 05753


- **Search GuideStar:** Search a list of around 3 million registered nonprofits. Note: Not all organizations in GuideStar are eligible for grants through your DAF. If this is the case, someone from our team will reach out to you.
 - When using the search there are various options for filtering information by subject area, population served, and location. You do not need to make a selection in each option to complete your search.
 - If you know the name of the organization you are looking for, feel free to search with only the Search Term section used.
 - If you are exploring new organizations, feel free to use only the terms that apply to your interest areas.
 - Five results will be available at a time, to see more results you can click "load more results."



 **Search GuideStar**

About: Welcome to the GuideStar Search, hosted for you by the Vermont Community Foundation! Use this tool to search for charitable organizations and initiate grants. Results are sourced directly from GuideStar's database of around 3 million nonprofit organizations.

Instructions: Enter at least one search term and filter, then click **Search**. For the best results, use multiple criteria (e.g., keyword and state).

Enter Your Search Terms* 

*Sort By
Relevance

*Sort Order

Subject Area

- Agriculture, fishing and forestry
- Arts and culture
- Community and economic development
- Education
- Environment

Population Served

- Academics
- Activists
- Adults
- Artists and performers
- Asian people

State
--None--

City

Zip Code

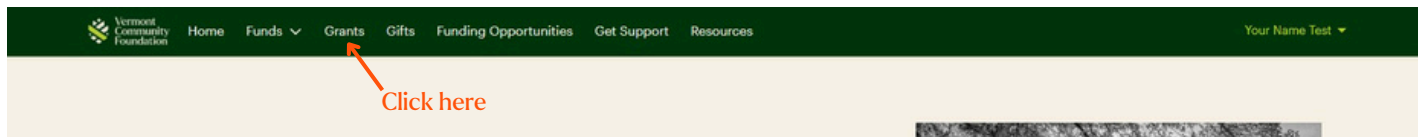
Range from Zip Code
0-50

- **Directly Enter Grantee:** Use this method only if you cannot find your grantee through other means. Double-check all details carefully to ensure accuracy.

How to View Grant History

Easily access a comprehensive report of your grants anytime through our portal.

1. Starting on the Home page, click **Grants** in the header.



2. View your full grant history here. Note: this list will include grants made from any fund that you can access.

Grant History

New Grant Recommendation

Grants Awarded by Impact Area

Since 2023This YearLast Year

Sum of Amount

Primary Impact Area

Health & Well Being

Other

1k

2.5k

1k

530

As of Today at 2:17 PM

Grants Awarded by Year

Sum of Amount

2.5k

CY2025

Date Awarded

As of Today at 2:17 PM

Grants by Year - All Time

Grant Recommendations - Unsubmitted & In Process

2 of 2 items

Search this list...

View	Fund	Organization	#	Amount	Date	Submitted By	Status
View/Edit	VCF DAF Fund	Vermont Community Fo...	Grant-123140	\$1,000.00	Mar 27, 2025	Your Name Test	Unsubmitted
View/Edit	VCF DAF Fund	Vermont Foodbank, Inc.	Grant-121923	\$1,000.00	Mar 17, 2025	Your Name Test	Unsubmitted

Grant Awards & Disbursements

AwardsScheduled DisbursementsPaid Disbursements

Show FiltersHide

3 of 3 items

Search this list...

View	Fund	Organization	#	Amount	Date	Submitted By	Status
View	VCF DAF Fund	Vermont Community Fo...	Grant-121864	\$1,000.00	Mar 3, 2025		Approved
View	VCF DAF Fund	Vermont Community Fo...	Grant-121865	\$530.00	Mar 3, 2025		Partially Paid
View	VCF Nonprofit Fund	Vermont Community Fo...	Grant-121866	\$10,000.00	Mar 3, 2025		Approved

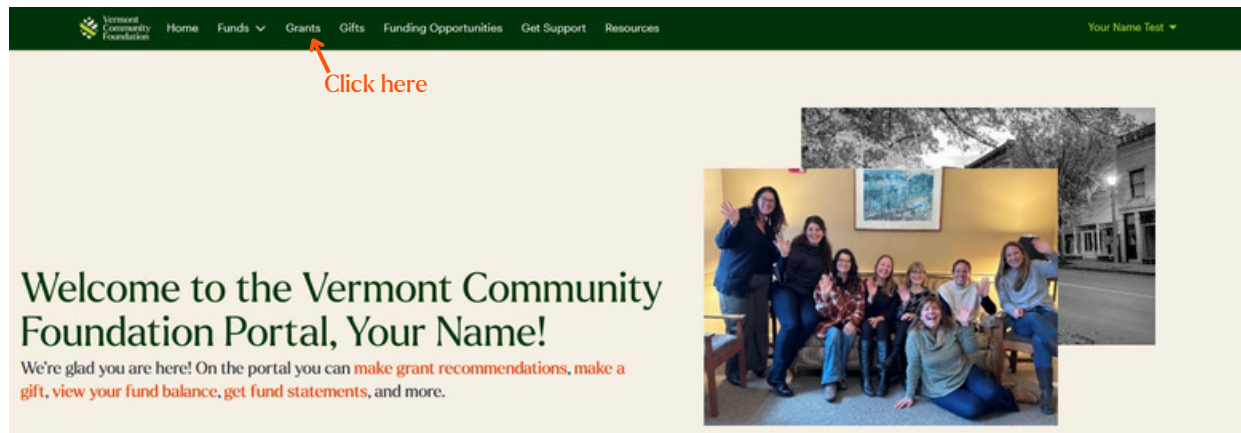
Thank you for your continued generosity and impact.

12

Unsubmitted Grants	Draft grant recommendations that have been started but have not yet been submitted to the VCF for review.
Grants in Process	Grant recommendations that have been submitted and are currently being reviewed or processed by the VCF. Note that if a grant recommendation is in the status of "Submitted" it is possible to recall the grant recommendation by clicking on it. You cannot recall grant recommendations that are in the status of "In Review," "On Hold," "Approved," or "Paid" within the Portal.
Grant Awards	Once the grant has been disbursed, the status will be updated to "Paid". If the grant has multiple disbursements, the status will be updated to "Partially Paid".

How to Check the Status of a Grant or Submit an Unsubmitted Grant

Check the status of your grant recommendations, recall a grant recommendation, or submit an unsubmitted grant recommendation—all in just a few clicks! Start on the Home page and click **Grants** in the header.



Check your grant status on this page:

- Unsubmitted or in-review grants appear in the middle section.
- Approved grants appear in the last section at the bottom of the screen.

1. To submit an unsubmitted grant, click **View/Edit** on the left side of the screen for your unsubmitted grant.

Grant History New Grant Recommendation

Grants Awarded by Impact Area

All Time This Year Last Year

Sum of Amount: 1.5k

Primary Impact Area: [dot]

As of Today at 5:24 PM

Grants Awarded by Year

Sum of Amount: 1.5k

CY2025

Date Awarded

As of Today at 5:23 PM

Grant Recommendations - Unsubmitted & In Process

1 of 1 Item

Search this list...

View	Fund	Organization	#	Amount	Date	Submitted By	Status
View/Edit	VCF DAF Fund	Vermont Foodbank, Inc.	Grant-121923	\$1,000.00	Mar 10, 2025	Your Name Test	Unsubmitted
View/Cancel	VCF DAF Fund 1	Vermont Foodbank, Inc.	Grant-121923	\$1,000.00	Mar 17, 2025	Your Name Test	Submitted

Grant Awards & Disbursements

Awards Scheduled Disbursements Paid Disbursements

Show Filters Hide

3 of 3 Items


Search this list...

View	Fund	Organization	#	Amount	Date	Submitted By	Status
View	VCF DAF Fund	Vermont Community Fo...	Grant-121864	\$1,000.00	Mar 3, 2025		Approved
View	VCF DAF Fund	Vermont Community Fo...	Grant-121865	\$530.00	Mar 3, 2025		Approved
View	VCF Nonprofit Fund	Vermont Community Fo...	Grant-121866	\$10,000.00	Mar 3, 2025		Approved

How to Check the Status of a Grant or Submit an Unsubmitted Grant Continued

2. After clicking **View/Edit**, you will be brought to the details of the grant recommendation. Here you can:

- Verify all information
- Make any necessary edits
- Choose to cancel the request or submit the grant

HomeFunds ▾GrantsGiftsFunding OpportunitiesGet SupportResources

Grant Number: Grant-121923
Status: Unsubmitted
Submitted Date: March 10, 2025

Your Grant Recommendation

PART 1

Grantee Organization

Enter details about the grantee organization below. Required fields are indicated by *.

Organization Name*	Street Address*
<input type="text" value="Vermont Foodbank, Inc."/>	<input type="text" value="33 Parker Road Wilson Industrial Park"/>
EIN	City*
<input type="text" value="22-3021942"/>	<input type="text" value="Barre"/>
	State*
	<input type="text" value="VT"/>
	Zip Code*
	<input type="text" value="5641"/>

PART 2

Grantee Primary Contact

Enter details about the grantee primary contact below. Required fields are indicated by *.

First Name*	Last Name*
<input type="text" value="John"/>	<input type="text" value="Sayles"/>
Title*	Email*
<input type="text" value="Chief Executive Officer"/>	<input type="text" value="jsayles@vtfoodbank.org"/>
	Phone*
	<input type="text" value="802-477-4101"/>

PART 3

Grant Recommendation

Enter details about your grant recommendation below. Required fields are indicated by *.

Fund*	Date*
<input type="text" value="VCF DAF Fund"/>	<input type="text" value="Mar 10, 2025"/>
Grant Purpose*	Amount*
<input type="text" value="Capital Campaign"/>	<input type="text" value="\$1,000.00"/>

☐ Make this a multi-payment

Indicate how this Grant should be recognized:

Fund Recognition Preference*	Advisor Recognition Preference*
<input checked="" type="radio"/> Fund Named	<input type="radio"/> Advisor Named with Address
<input type="radio"/> Fund Anonymous	<input checked="" type="radio"/> Advisor Anonymous

Special Instructions (Optional)

Cancel the grant by clicking here

Cancel Request

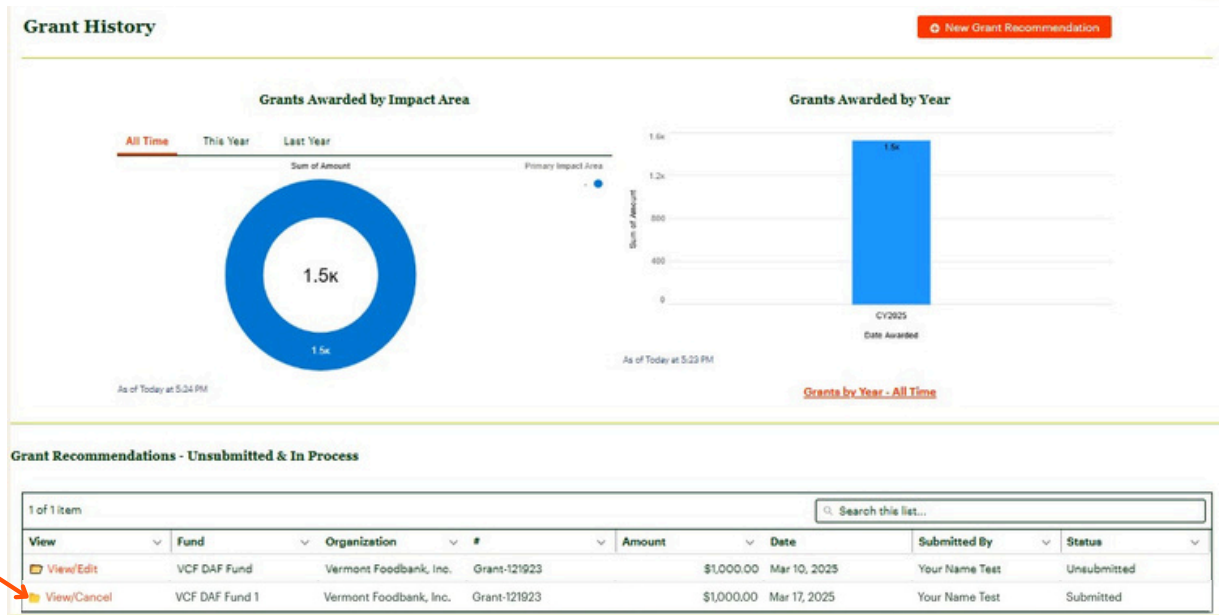
Save as Draft

Save and Next

Submit the grant by clicking here

15

Please Note: Once the status of a grant recommendation changes to "In Review" it cannot be recalled.
1. To recall a submitted grant, click **View/Cancel** on the left side of the screen of your submitted grant recommendation.



2. Click the **Recall Grant Recommendation** button at the top of the page.

Recall Grant Recommendation

Grant Number: Grant-121923
Status: Submitted
Submitted Date: March 17, 2025

Your Grant Recommendation

3. It will ask you to confirm that you would like to recall the grant recommendation. Click the **Recall Grant Recommendation** button again to confirm.

Please confirm you would like to recall this Grant Recommendation

Recall Grant Recommendation [Go Back](#)

Grant Number: Grant-121923
Status: Submitted
Submitted Date: March 17, 2025

4. The status of your grant will change to Unsubmitted on the top right side of your page.

Recall Grant Recommendation

Grant Number: Grant-121923
Status: Unsubmitted
Submitted Date: March 17, 2025

Congratulations! Your grant was recalled. You can click **Back** to go back to your grant summary page. 16

How to View Fund Details & Information

Our portal offers access to comprehensive information about your fund(s).

1. Starting on the Home page, scroll down and click on **View Fund Details**.

Welcome to the Vermont Community Foundation Portal, Your Name!
We're glad you are here! On the portal you can [make grant recommendations](#), [make a gift](#), [view your fund balance](#), [get fund statements](#), and more.

Announcements

- UPCOMING GRANT RECOMMENDATION AND DISTRIBUTION REQUEST DEADLINES**
The upcoming grant recommendation (donor advised funds) and distribution request (nonprofit fund) deadlines and mailing dates are as follows:
 - February 17 (to be mailed February 27)
 - March 2 (to be mailed March 13)
- FUND STATEMENTS**
3rd Quarter 2024 fund statements have been uploaded.
4th Quarter 2024 fund statements will be uploaded in February 2025.
- VERMONT COMMUNITY FOUNDATION TRANSITIONS FROM FLOOD RESPONSE FUND TO PERMANENT RESPONSE FOR FUTURE DISASTER RESPONSE AND RECOVERY**
We recently announced the establishment of the David B. Crotts Fund for Vermont Disaster Relief—a permanent fund ensuring Vermont communities and individuals have a reliable, immediate resource to prepare, respond, and recover when natural disasters strike. [Learn more](#)
- FUNDING FOR SOUTH LAKE CHAMPLAIN**
Grants are now available to support projects focused on education and research concerning Southern Lake Champlain's cultural and ecological history and heritage through the South Lake Champlain Fund at the Vermont Community Foundation.

Need Help?

Browse Resources
Explore step-by-step instructions and video tutorials covering common tasks and actions within the portal.
[Browse Resources & FAQs](#)

Submit a Support Request
Need help beyond the tutorials? Submit a support request, and the Philanthropy team will assist you.
[Submit a Support Request](#)

View Fund Details

VCF DAF Fund

Field	Value
Fund Balance	\$17,800
Total Grants Paid	\$17,800
Total Gifts	\$17,800

Grant Summary

Field	Value
Total Grants Paid	\$17,800
Total Grants	2
Suggested Grant Making Budget	\$17,800
Grants in Progress	\$17,800
Grants in Process	\$17,800

Grants by Year

Bar chart showing Grants by Year. The Y-axis represents the number of grants (0 to 150). The X-axis represents the year (2024). The bar for 2024 shows 2 grants.

Grants by Impact Area

Donut chart showing Grants by Impact Area. The chart is divided into two segments: Education (1.5k) and Other (0.5k). The total number of grants is 2.

Gift Summary

Field	Value
Total Gifts	\$17,800
Total Gifts	2
Gifts in Progress	\$17,800
Gifts in Process	\$17,800
Gifts in Process	\$17,800

Gifts by Year

Bar chart showing Gifts by Year. The Y-axis represents the number of gifts (0 to 150). The X-axis represents the year (2024). The bar for 2024 shows 2 gifts.

Market Value History

Table showing Market Value History. The table is currently empty.

Note: Processing times and system sync schedules vary, so you may see a delay between when information is entered and when it is visible in the portal. If you have a question, please reach out to us!

Key Terms (Fund Information)

Below are key terms you'll find on your detailed fund information page to help you better understand your grant and gift activity.

Fund Balance	Fund balance is updated when a grant recommendation is approved.
Total Grants Awarded	The total dollar amount of grants that have been made and approved from your fund (all time). Some of these grants may be paid in the future.
Total Number of Grants Awarded (Dollars)	The total number of all grants awarded from your fund, including paid and to-be-paid grants.
Suggested Grant Making Budget	A recommended annual grantmaking budget, calculated yearly, based on your fund's balance over the past 3 years <u>and</u> the spending policy associated with your fund. It is also called your "Spending Policy Calculation" on your Fund Statement. For most invested DAFs, the suggested spending policy is 3.5%. This figure is set and updated on an annual basis and will not reflect gifts in or grants out during the year.
Grants Awarded This Year	The total dollar amount of grants awarded from your fund in the current calendar year. <i>Note: the chart will show awards from the past 5 years, and you can click the link below the chart to see Grants by Year - All Time.</i>
Scheduled Disbursements	The total dollar amount of grant payments that are scheduled to be paid, but have not yet been completed. This may appear when you make multi-payment grants.
Grant Recommendations - Unsubmitted & in Process	The total dollar amount associated with the grant recommendations that are in process, but have not yet been approved. They may be drafts that are unsubmitted, or grant recommendations that are in the VCF queue to review and approve.

Key Terms (Fund Information) Continued

Total Gifts	The total dollar amount of contributions made to your fund (all time).
Total # Gifts	The total number of individual contributions received by your fund (all time).
Gifts This Year	The total amount of contributions received by your fund in the current calendar year. <i>Note: the chart will show gift amounts from the past 5 years, and you can click the link below the chart to see Gifts by Year - All Time.</i>
Gifts in Process	The dollar amount of contributions to the fund that have been initiated but are not yet fully processed.
Last Gift Date	The date of the most recent contribution to your fund.
Market Value History	A record of the fund's market value over time, reflecting changes due to contributions, withdrawals, and investment performance.
Quarterly Balances	The fund's balance at the end of each quarter, providing a snapshot of financial activity and growth over time.

Find an explanation of more terms here: vermontcf.org/explanation-of-terms/

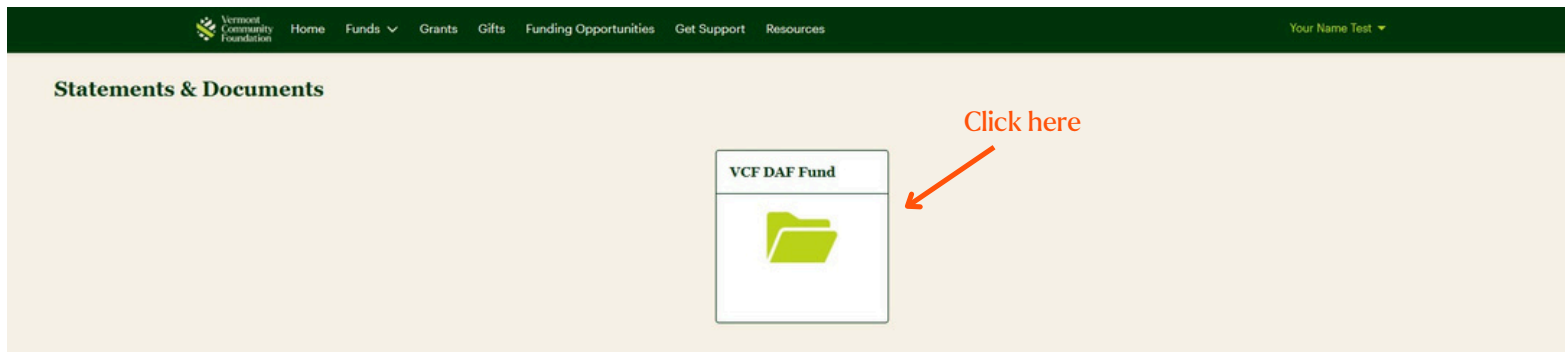
How to View & Print Fund Statements

Easily access, download, print, or email your fund statements in just a few steps.

1. Starting on the Home page, click the **get fund statements** link or go to the **Fund** dropdown in the header and select **Statements & Fund Documents**.

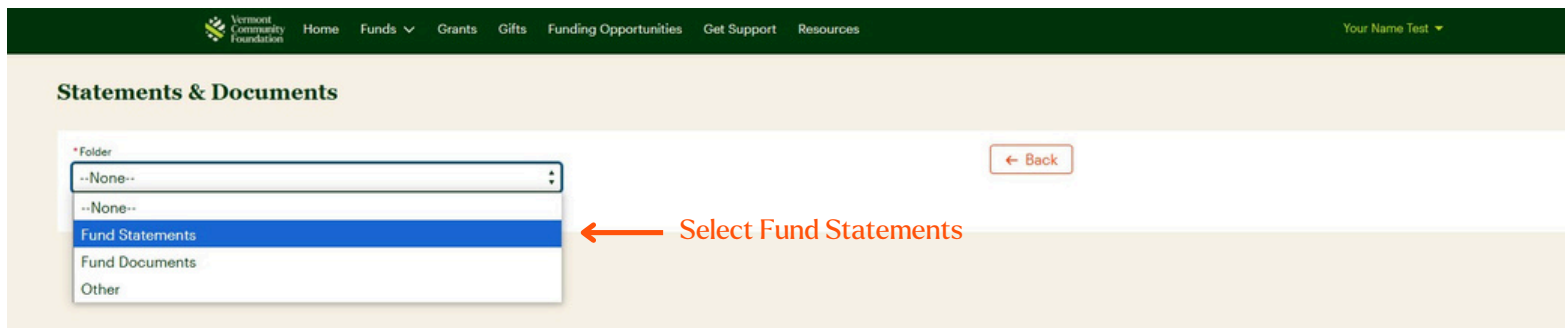


2. Select your fund.



3. Select **Fund Statements** from the dropdown menu.

4. Access your statements—when posted by the VCF, you can download, email, or print them from this page.

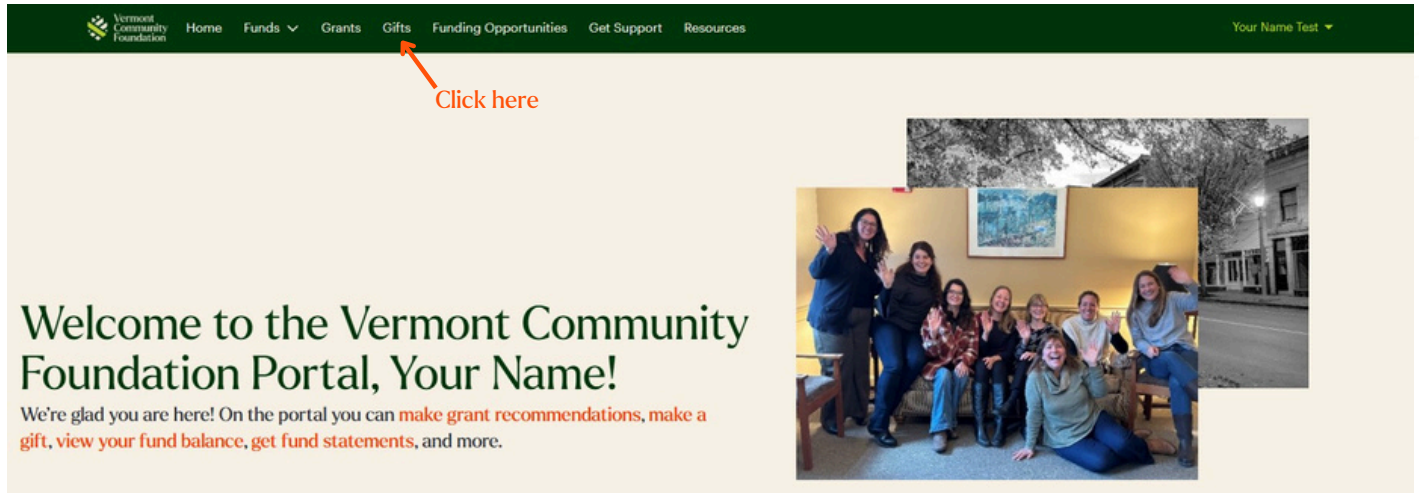


5. For a helpful explanation of terms on your fund statement, visit <https://vermontcf.org/terms>

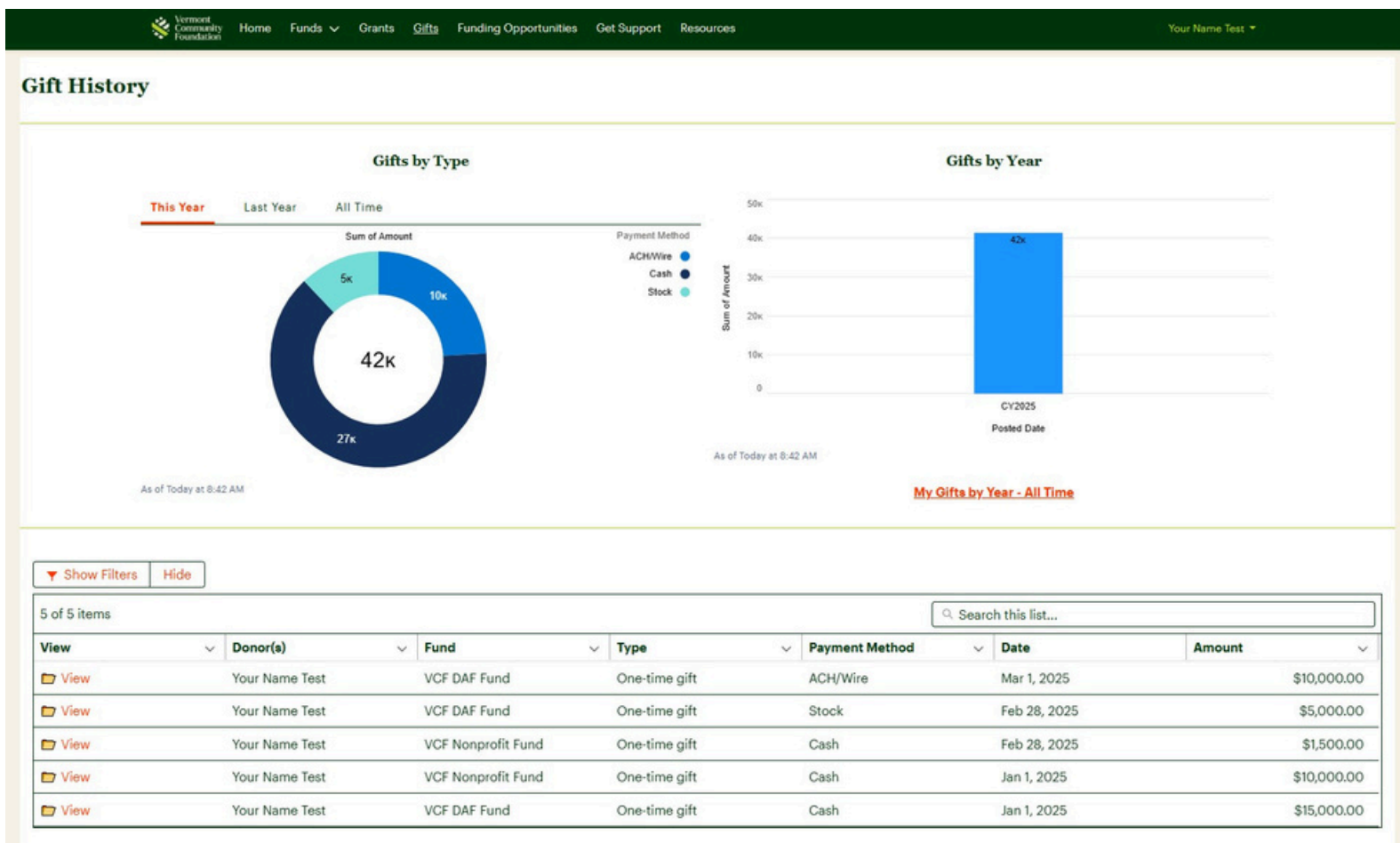
How to View Gift History

Access comprehensive information about your gifts anytime.

1. Starting on the Home page, click **Gifts** in the header.



2. View your full gift history here. Note: if you are looking for gifts to a fund from other donors, you can find this in the Fund Details page under the "Gift History" tab.



Thank you for your continued generosity and impact.

How to Review Funding Opportunities

Explore featured opportunities for collective giving and ways to make an impact by channeling your generosity where it is needed most.

1. Click on **Funding Opportunities** in the header to learn more.

The screenshot shows the top navigation bar of the Vermont Community Foundation portal. The bar is dark green with white text for the logo and menu items: Home, Funds, Grants, Gifts, Funding Opportunities, Get Support, and Resources. An orange arrow points to the 'Funding Opportunities' link with the text 'Click here'. On the right side of the bar is a user profile 'Your Name Test' with a dropdown arrow. Below the navigation bar is a large white area with a green heading 'Welcome to the Vermont Community Foundation Portal, Your Name!'. Below the heading is a paragraph: 'We're glad you are here! On the portal you can make grant recommendations, make a gift, view your fund balance, get fund statements, and more.' To the right of the text is a collage of three photos: a group of people waving, a person on a bicycle, and a street scene.

2. Explore each opportunity by clicking on the funds that interest you most.

The screenshot shows the 'Featured VCF Funding Opportunities' section of the portal. The navigation bar is the same as in the previous screenshot, but the 'Funding Opportunities' link is highlighted in green. Below the navigation bar is a heading 'Featured VCF Funding Opportunities'. There are four cards, each with a photo and text. The first card is for the 'Philanthropic Leadership Fund' (Nonprofit Development & Support) with a photo of a sunset over water. The second card is for the 'Samara Fund' (People & Issue-Based Grants) with a photo of a group of people on bicycles. The third card is for the 'Vermont Women's Fund' (People & Issue-Based Grants) with a photo of two women posing. The fourth card is for the 'Opportunity Fund for Southshire Youth' (Nonprofit Development & Support) with a photo of two children playing chess.

Philanthropic Leadership Fund	Samara Fund	Vermont Women's Fund	Opportunity Fund for Southshire Youth
NONPROFIT DEVELOPMENT & SUPPORT	PEOPLE & ISSUE-BASED GRANTS	PEOPLE & ISSUE-BASED GRANTS	NONPROFIT DEVELOPMENT & SUPPORT
Philanthropic Leadership Fund	Samara Fund	Vermont Women's Fund	Opportunity Fund for Southshire Youth
Our Philanthropic Leadership Fund makes possible much of the work that goes beyond grantmaking, supporting activities that strengthen the field of giving and nonprofits in Vermont.	The Samara Fund is a group of Queer and Trans Vermonters proving transformational grants and scholarships to people and groups in Vermont dedicated to the empowerment, health, and safety of lesbian, gay, bisexual, transgender, queer, and HIV positive (LGBTQ+) people.	The Vermont Women's Fund supports organizations that drive change for women and girls in Vermont. When women rise, communities thrive.	The Opportunity Fund for Southshire Youth makes annual grant awards to support organizations offering dynamic and innovative youth programs in Bennington, North Bennington, Poultney, Shaftsbury, and Woodford.

Note: Funding opportunities you see above may not be reflective of the most current opportunities active in your portal.

Thank you for exploring ways to make a difference in our communities!

How to Make a Gift Online (Credit Card or Bank Transfer)

Your generosity fuels the causes you care about most. Here's how to make a gift online:

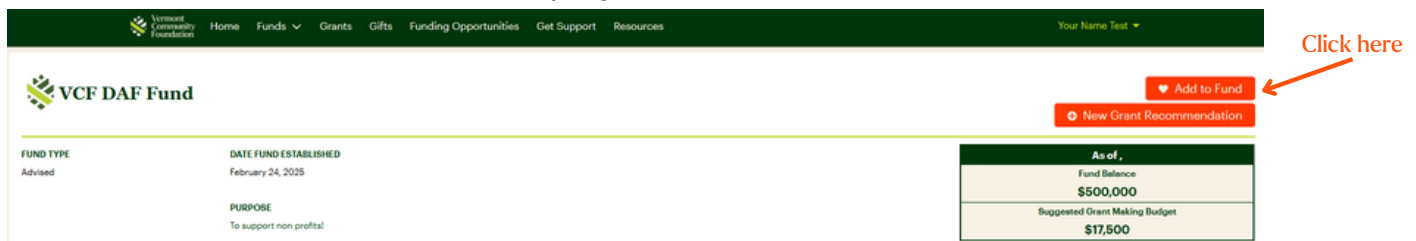
1. Start on the Home page and click the **make a gift** link.



2. Select the fund that you would like to make a gift to.

VCF DAF Fund	
Fund Balance	\$500,000
Total Grants Paid	\$0
Total Gifts	\$50,000

3. Click the **Add to Fund** button in the top right corner.



4. Choose whether your gift is one-time or monthly, enter your amount, and click **Continue**.

5. Enter your donor information, then click **Continue** again to choose credit card or bank transfer (ACH).

6. Follow the prompts to complete your payment securely.

VCF DAF Fund

You're making a difference

☒ One time ☐ Monthly

Choose a **one-time** amount

\$500 \$100

\$50 \$25

USD \$ Other

Choose an amount

VCF DAF Fund

Donor Information

One-time donation
\$500.00 USD

First Name * Last Name *

Your Name Test

Email *

☒ It's okay to contact me in the future.

Phone Number

Continue

VCF DAF Fund

Choose Payment

One-time donation
\$527.45

☒ Cover transaction fees

I'd like to cover the fees associated with my donation so more of my donation goes directly to The Vermont Community Foundation.

Transactions are secure and encrypted

Credit Card

Bank Transfer

Congratulations on making your gift! Thank you for making a difference!