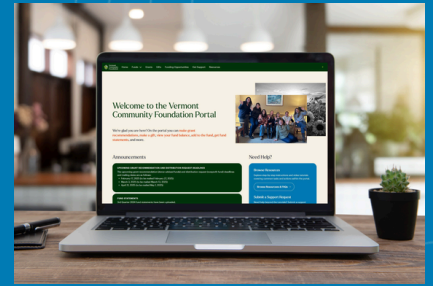




Portal Guide – Donor Advised Fund Edition



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.

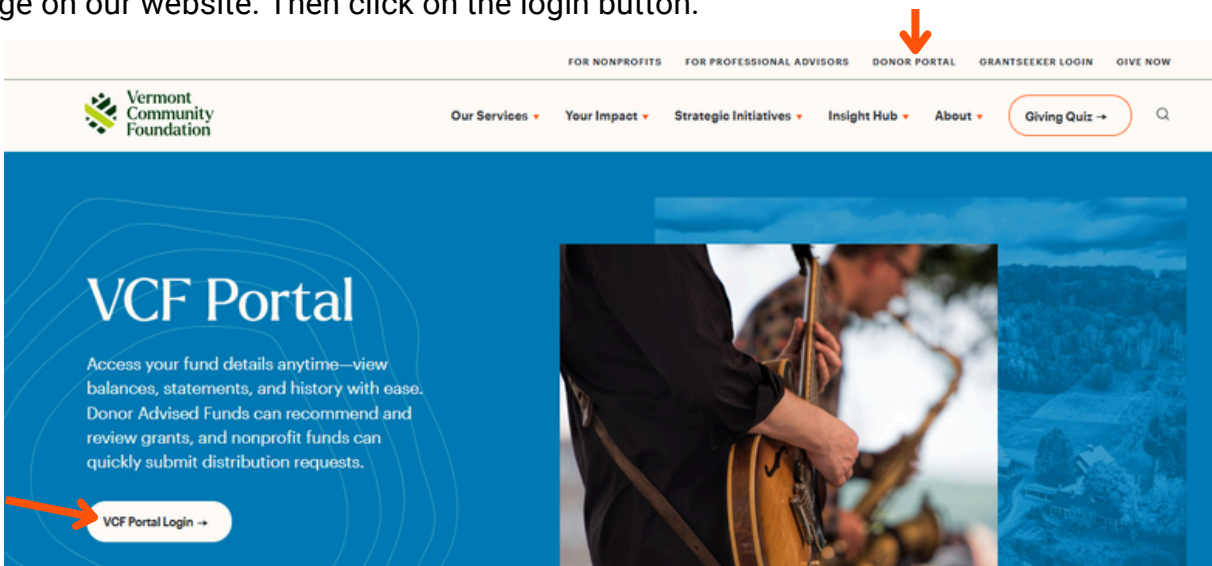
Instructions and helpful tutorial videos can be found at vermontcf.org/donor-portal-resources

[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.



Vermont Community Foundation

Username

Password

Log In

☐ Remember me

[Forgot Your Password?](#)

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<u>Change Your Password</u>	6
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Setting Up Your Portal Account & Password Requirements - [Follow along with this video tutorial](#)

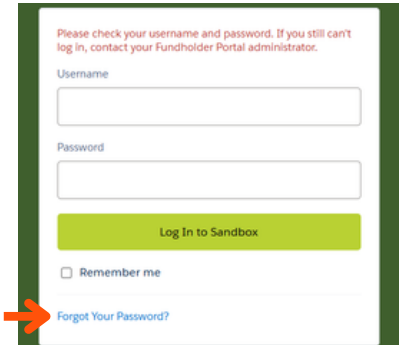
When you open a fund, you will share an email for correspondence. This will also be your username for accessing the portal. You'll receive an email at the address we have on file with a link to log in and set your password.

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

- 15 or more characters
- A combination of letters, numbers, and at least 1 special character

We recommend you use a unique password for the VCF Portal that you don't use for other services and that you change it periodically.

Please note: Links to set up your account or reset your password expire after 24 hours. If your link has expired, you will see the screen to the right. Click "Forgot Your Password?" and follow the instructions in the "Forgotten Password" section of this guide.



First time logging in? You'll be prompted to set up MFA on your next login. We recommend logging out and back in right away to complete the setup.

Setting Up Multi-Factor Authentication (MFA) - [Follow along with this video tutorial](#)

To help keep your Portal account secure, you'll be asked to choose one of the following verification methods when setting up MFA.

Text Message (SMS)

- Receive a verification code by text message each time you sign in.

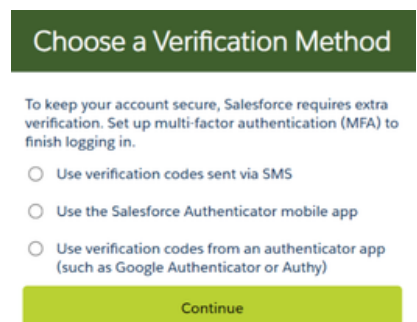
Salesforce Authenticator

- Salesforce Authenticator takes a few extra steps to set up initially, but future logins are faster because you can approve the sign-in request in the app, instead of entering a verification code.

Other Authenticator App (such as Google Authenticator) – This is the method we recommend.

- Authenticator apps provide even stronger account security than text message verification and are quick to set up. If you already use an authenticator app for other services, you can typically use that same app for the VCF Portal.

Find instructions for each option on the following page.



Step-by-Step MFA Setup

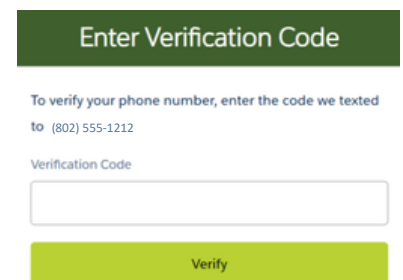
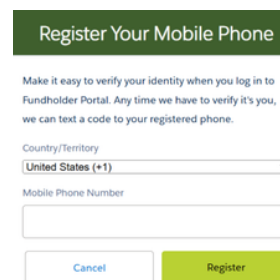
Our recommended option: An Authenticator App (such as Google Authenticator)

- If you don't already have an authenticator app, you can download Google Authenticator from the [Apple App Store](#) or [Google Play](#).
- Select **Use verification codes from an authenticator app** and click Continue.
- Open the authenticator app on your phone and scan the QR code displayed on your screen.
- Enter the verification code displayed in the app.
- Click Connect.



Option 2: Text Message (SMS)

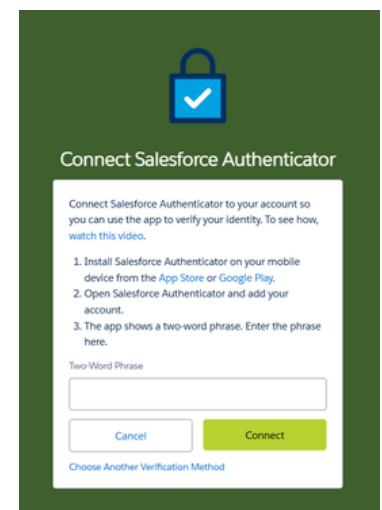
1. Select **Use verification codes sent via SMS** and click Continue.
2. Enter your mobile phone number.
3. Click Register.
4. Enter the verification code sent to your phone.
5. Click Verify.



Option 3: Salesforce Authenticator

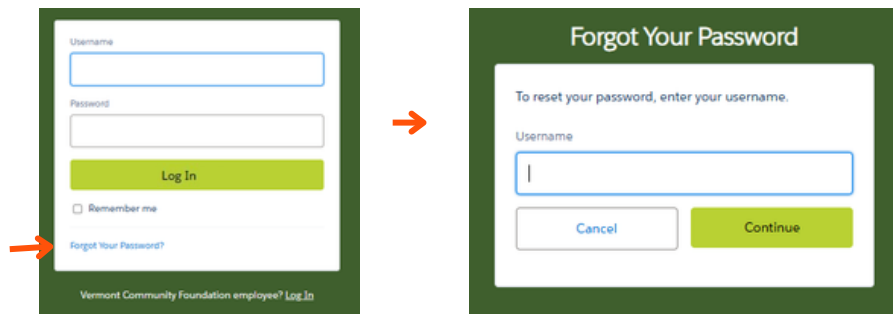
1. Download the Salesforce Authenticator app from the [Apple App Store](#) or [Google Play](#).
2. Select **Use Salesforce Authenticator mobile app** and click Continue.
3. Follow the prompts to connect the app to your account.
4. Approve the connection request in the app to complete setup.
5. For future logins, simply approve the sign-in notification in the app instead of entering a verification code.

For a complete walkthrough, watch this [Salesforce setup video](#).



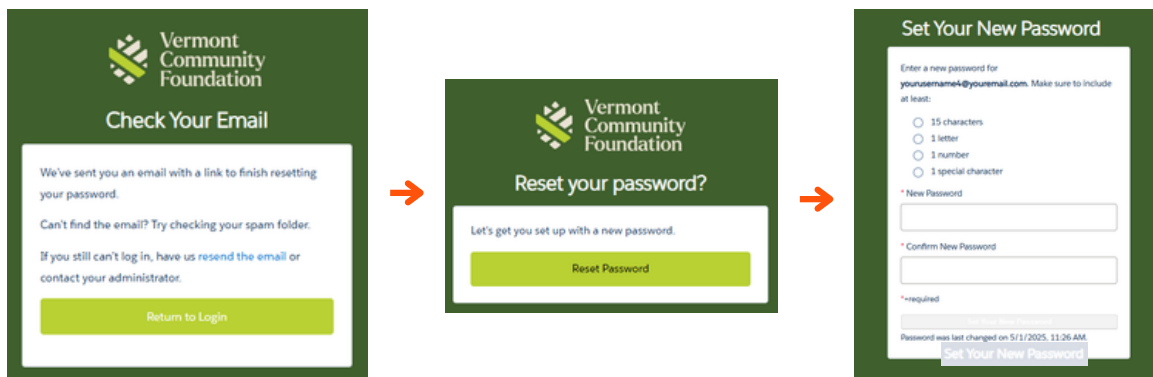
Forgotten Password - [Follow along with this video tutorial](#)

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 diagram illustrates the initial steps of the password reset process. It starts with the login page, where the 'Forgot Your Password?' link is highlighted by an orange arrow. This leads to the 'Forgot Your Password' screen, which prompts the user to enter their username and click the 'Continue' button, also highlighted by an orange arrow.

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.



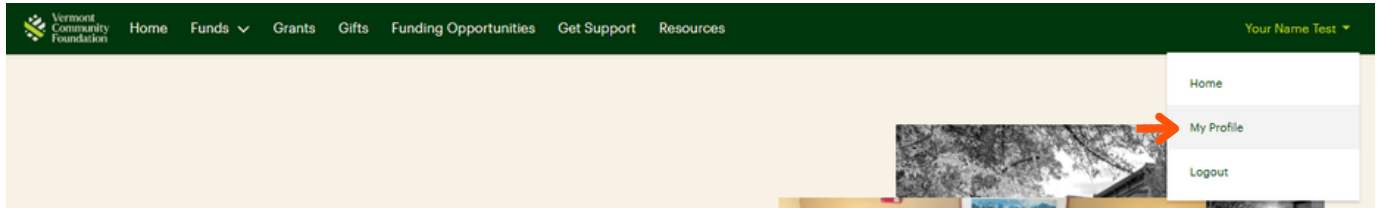
The diagram continues the password reset process. It shows the 'Check Your Email' screen, followed by the 'Reset your password?' screen where the 'Reset Password' button is highlighted by an orange arrow. This leads to the 'Set Your New Password' screen, which includes instructions on password requirements and fields for entering a new password and confirming it.

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

Change Your Password & User Access

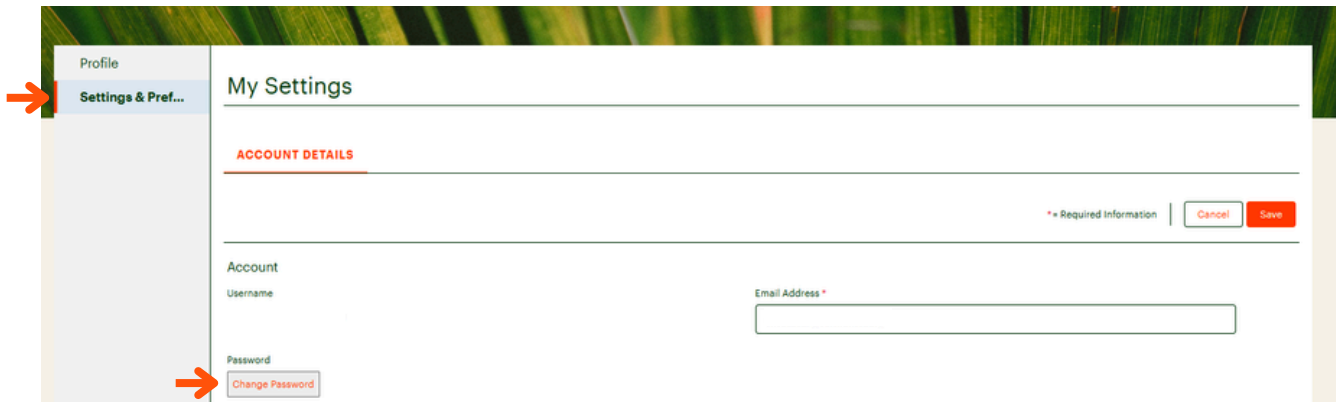
If you're already logged in and simply want to update your password, you can do that too!

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 15 characters long.
- * Your password must include letters, numbers and at least one of these special characters: !@#\$%^&*()_+=[]\|;:'.?/~><"

*	Current Password	
*	New Password	
*	Verify New Password	

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](#):

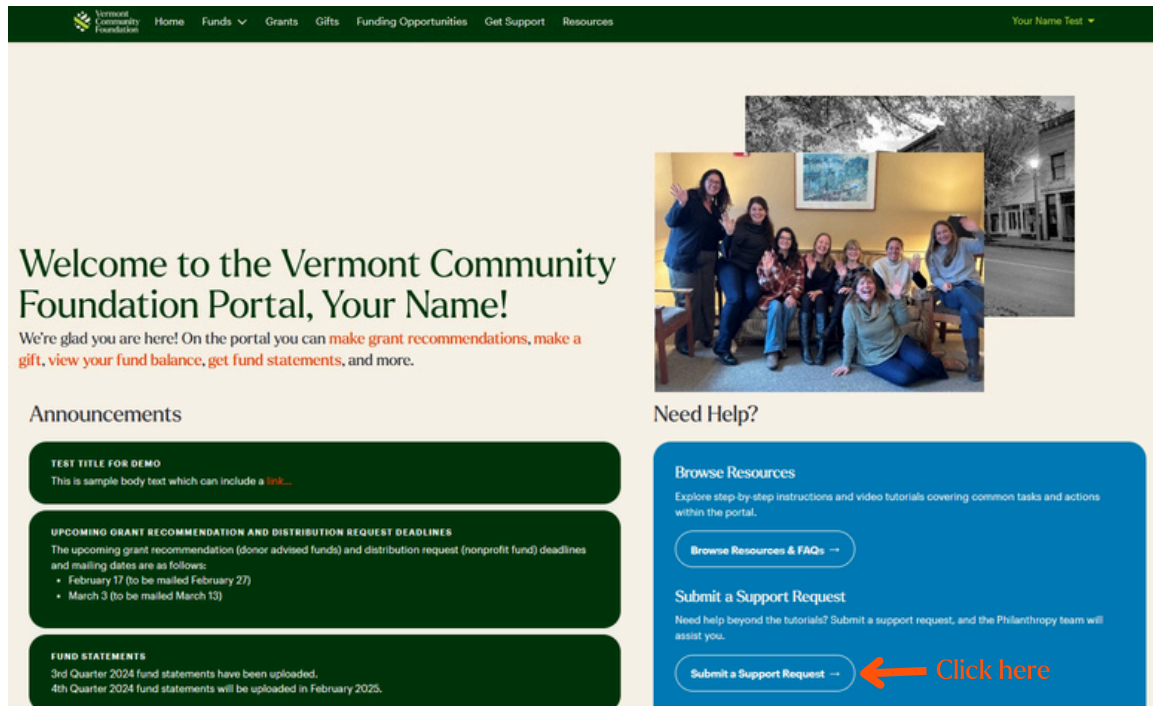


How to Submit a Support Request

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...

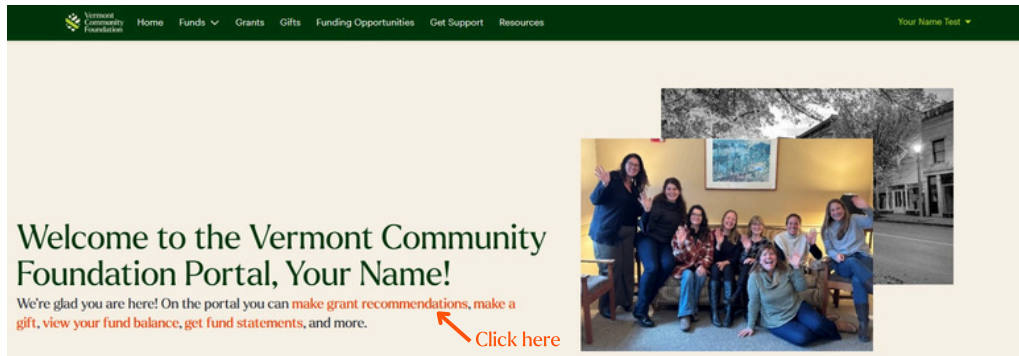
Case Number	Submitted Date	Subject	Case Type	Description	Status
No items to display.					

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.

 Click here  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.

Show Hide

View Organization

Recommend a Grant

1 of 1 item • 1 item selected

☒	Organization	EIN	Address
☒	 Vermont Foodbank, Inc. www.vtfoodbank.org	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

How to Make a Grant Recommendation Continued

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*	Street Address*
Vermont Foodbank, Inc.	33 Parker RoadWilson Industrial Park
EIN	City*
22-3021942	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*	Last Name*
John	Sayles
Title*	Email*
Chief Executive Officer	jsayles@vtfoodbank.org
	Phone*
	802-477-4101

Start with this section

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

Fund*	Date*
VCF DAF Fund	Mar 3, 2025
Grant Purpose*	Amount*
Unrestricted	\$500.00

☐ Make this a multi-payment

Indicate how this Grant should be recognized

Fund Recognition Preference*	Advisor Recognition Preference*
☒ Fund Named	☒ Advisor Named with Address
☐ Fund Anonymous	☐ Advisor Anonymous

Special Instructions (Optional)

Submit here

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.

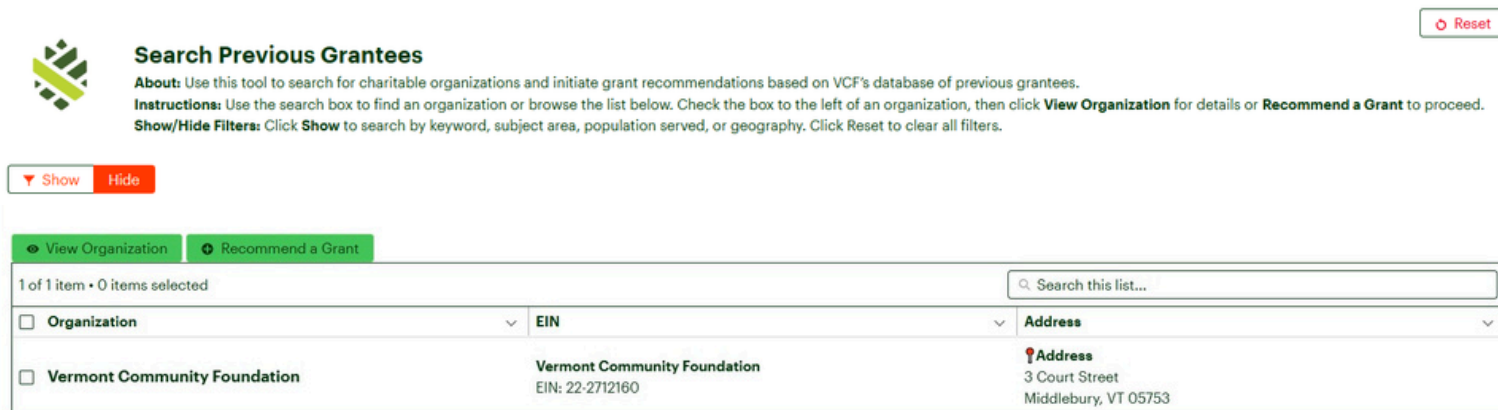
[← Back](#)[Submit](#)

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.

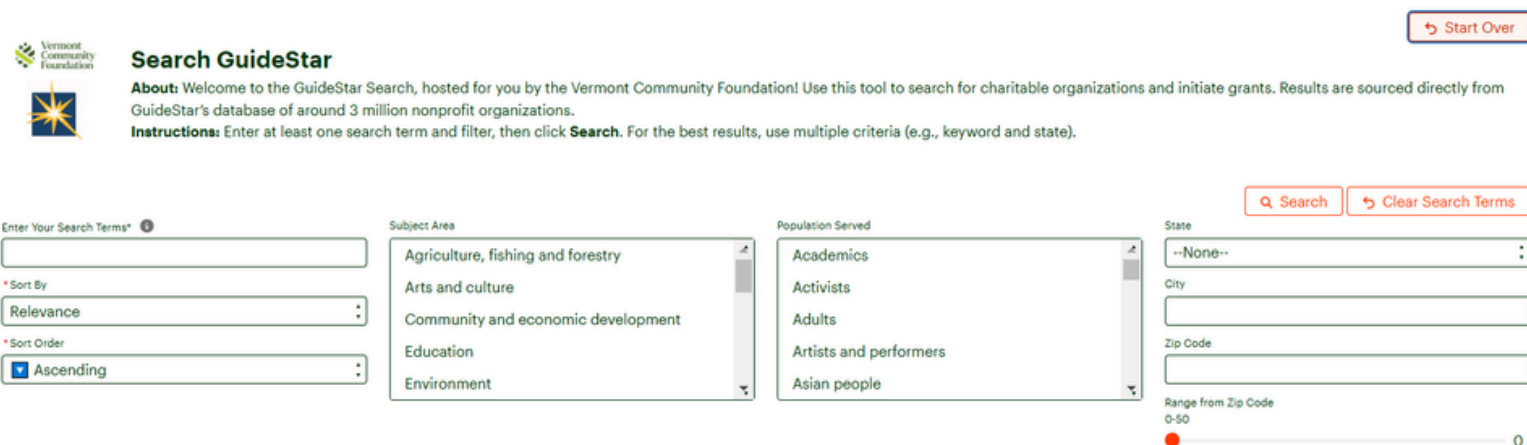
Instructions: Use the search box to find an organization or browse the list below. Check the box to the left of an organization, then click **View Organization** for details or **Recommend a Grant** to proceed.

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

☐ Organization	EIN	Address
☐ 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

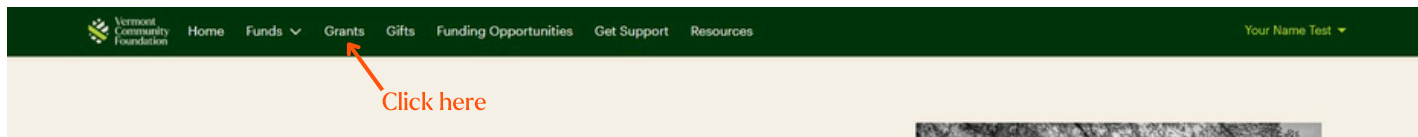
Range from Zip Code
0-50

- **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

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

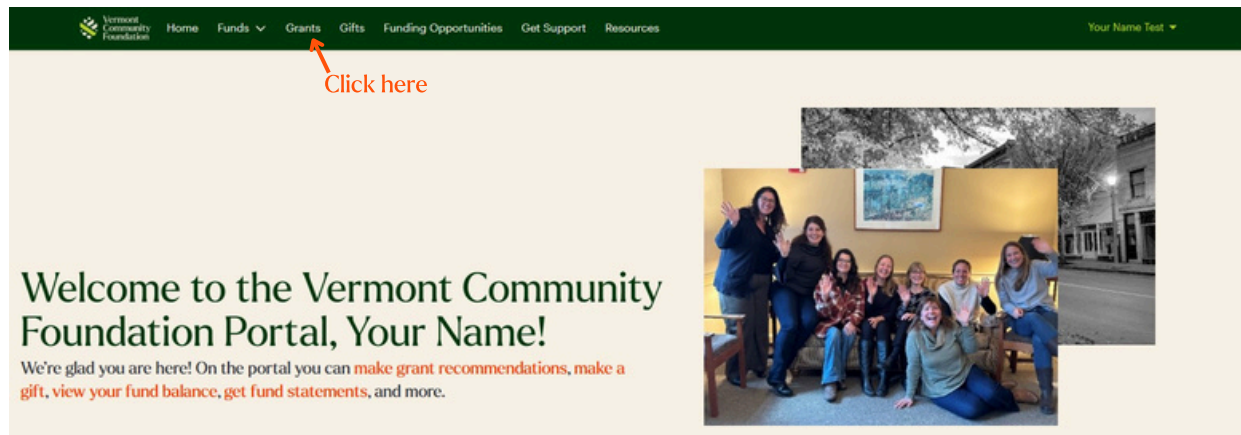
Thank you for your continued generosity and impact.

14

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.

The screenshot displays the 'Grant History' section of the portal. It includes two charts: 'Grants Awarded by Impact Area' (a donut chart showing 1.5k) and 'Grants Awarded by Year' (a bar chart showing 1.5k for CY2025). Below these charts is a table titled 'Grant Recommendations - Unsubmitted & In Process' with 1 item. The table has columns for View, Fund, Organization, #, Amount, Date, Submitted By, and Status. The first row shows an unsubmitted grant for VCF DAF Fund, Vermont Foodbank, Inc., Grant-121923, for \$1,000.00 on Mar 10, 2025. A red arrow points to the 'View/Edit' link for this grant. Below the table is a section titled 'Grant Awards & Disbursements' with tabs for Awards, Scheduled Disbursements, and Paid Disbursements. A red arrow points to the 'Paid Disbursements' tab. Below this is a table with 3 items showing approved grants for VCF DAF Fund and VCF Nonprofit Fund, all for \$1,000.00 on Mar 3, 2025.

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

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

 Home Funds ▾ Grants Gifts Funding Opportunities Get Support Resources

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*
Vermont Foodbank, Inc.	33 Parker Road Wilson Industrial Park
EIN	City*
22-3021942	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*	Last Name*
John	Sayles
Title*	Email*
Chief Executive Officer	jsayles@vtfoodbank.org
	Phone*
	802-477-4101

PART 3

Grant Recommendation

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

Fund*	Date*
VCF DAF Fund	Mar 10, 2025
Grant Purpose*	Amount*
Capital Campaign	\$1,000.00

☐ Make this a multi-payment

Indicate how this Grant should be recognized:

Fund Recognition Preference*	Advisor Recognition Preference*
☒ Fund Named	☐ Advisor Named with Address
☐ Fund Anonymous	☒ Advisor Anonymous

Special Instructions (Optional)

Cancel the grant by clicking here

Cancel Request

Save as Draft

Save and Next

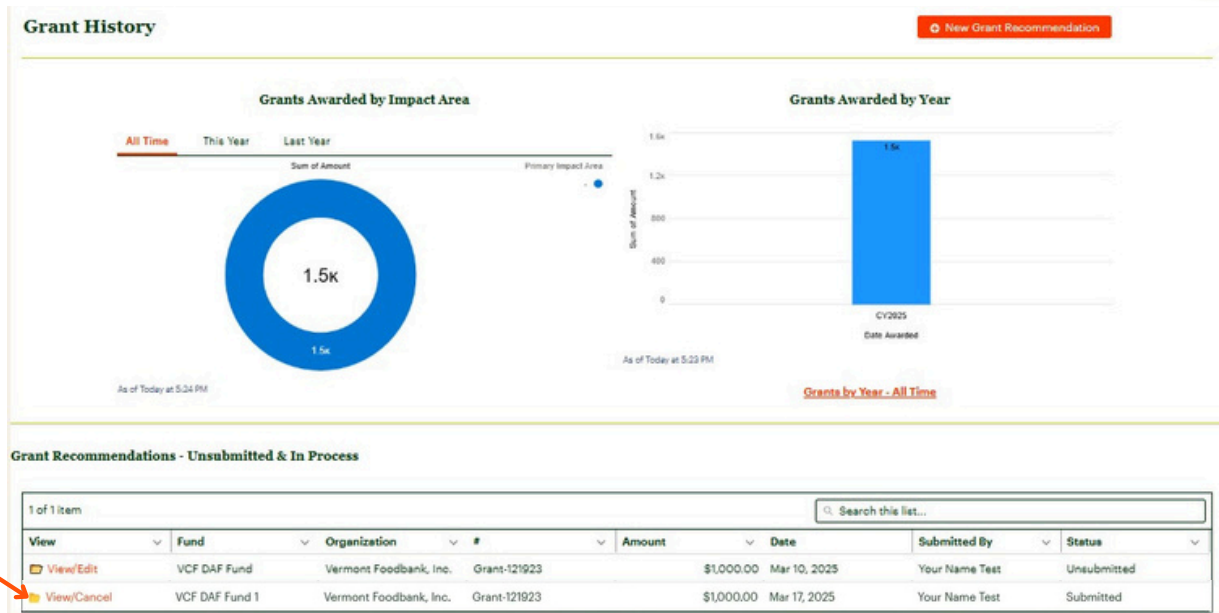
Submit the grant by clicking here

17

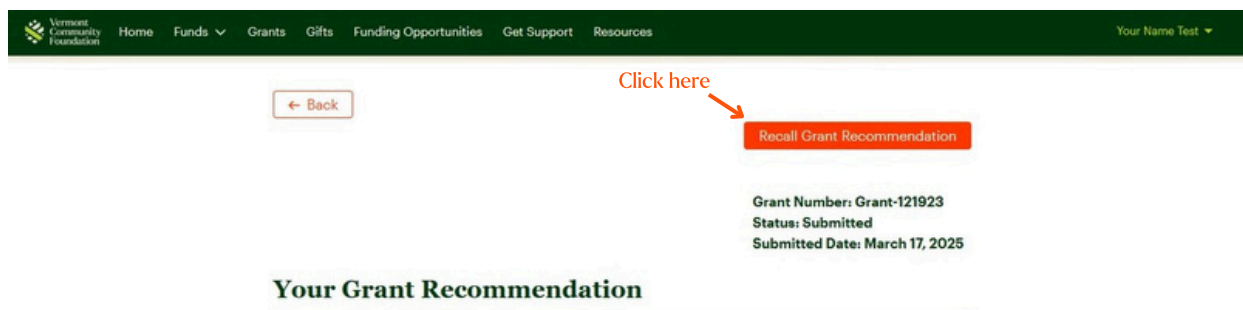
How to Recall a Grant

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.



The screenshot shows the 'Recall Grant Recommendation' page. At the top, there's a 'Back' button and a 'Recall Grant Recommendation' button. Below the buttons, there's a section titled 'Your Grant Recommendation' with the following information: Grant Number: Grant-121923, Status: Submitted, Submitted Date: March 17, 2025. A red arrow points to the 'Recall Grant Recommendation' button.

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.



The screenshot shows the confirmation page. At the top, there's a message: 'Please confirm you would like to recall this Grant Recommendation'. Below the message, there's a 'Recall Grant Recommendation' button and a 'Go Back' button. Below the buttons, there's a section titled 'Your Grant Recommendation' with the following information: Grant Number: Grant-121923, Status: Submitted, Submitted Date: March 17, 2025. A red arrow points to the 'Recall Grant Recommendation' button.

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



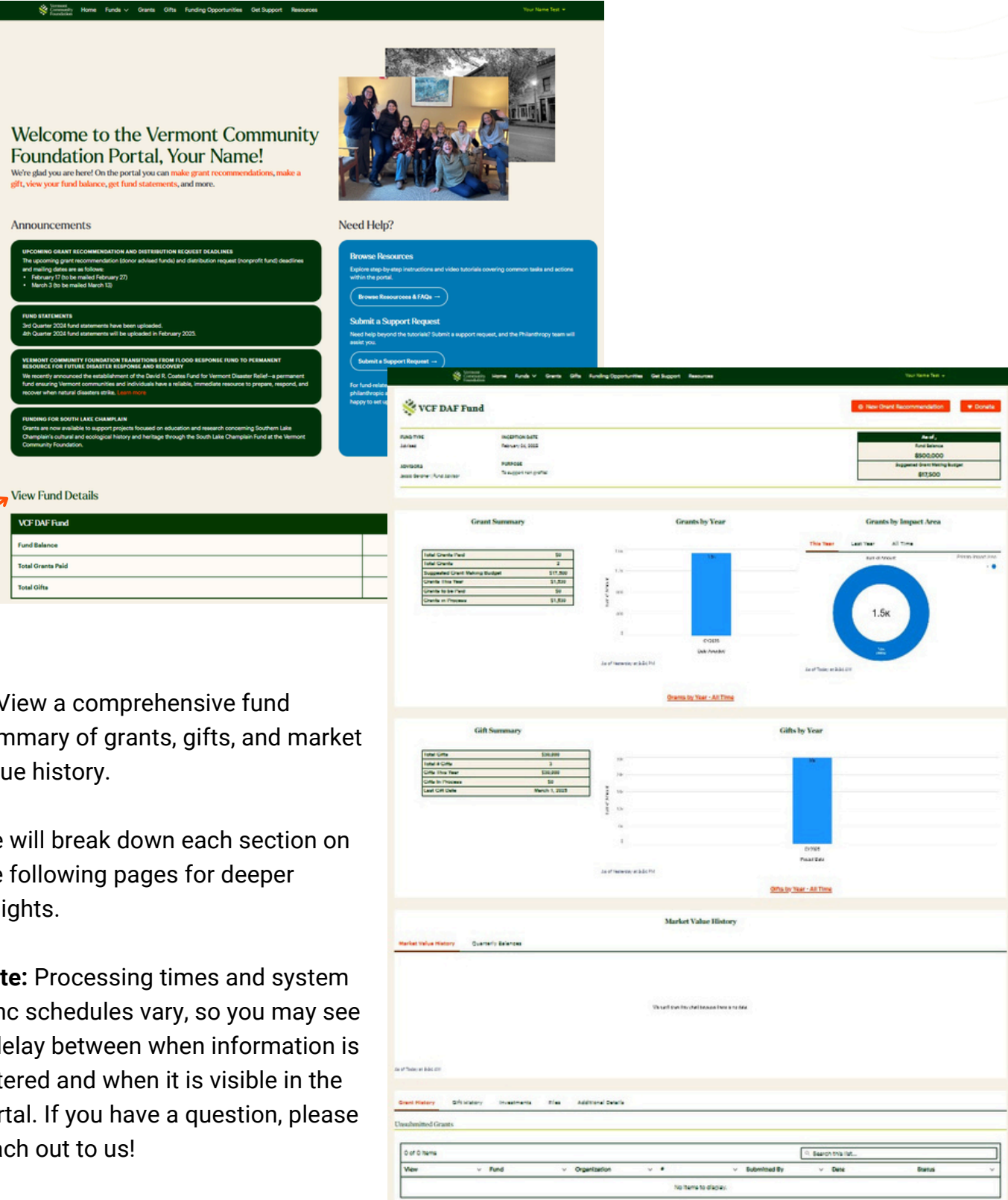
The screenshot shows the 'Grant History' page. At the top, there's a 'Back' button. Below the button, there's a section titled 'Your Grant Recommendation' with the following information: Grant Number: Grant-121923, Status: Unsubmitted, Submitted Date: March 17, 2025. A red arrow points to the 'Status: Unsubmitted' text.

Congratulations! Your grant was recalled. You can click **Back** to go back to your grant summary page. 18

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

Fund Summary	
Fund Balance	\$17,800
Total Grants Paid	\$17,800
Total Gifts	\$17,800

Grants by Year

Year	Grants
2024	1
2023	1
2022	1
2021	1
2020	1
2019	1
2018	1
2017	1
2016	1
2015	1
2014	1
2013	1
2012	1
2011	1
2010	1
2009	1
2008	1
2007	1
2006	1
2005	1
2004	1
2003	1
2002	1
2001	1
2000	1

Grants by Impact Area

Impact Area	Grants
Education	1
Research	1
Other	1

Gift Summary

Year	Gifts
2024	1
2023	1
2022	1
2021	1
2020	1
2019	1
2018	1
2017	1
2016	1
2015	1
2014	1
2013	1
2012	1
2011	1
2010	1
2009	1
2008	1
2007	1
2006	1
2005	1
2004	1
2003	1
2002	1
2001	1
2000	1

Market Value History

Year	Market Value
2024	\$17,800
2023	\$17,800
2022	\$17,800
2021	\$17,800
2020	\$17,800
2019	\$17,800
2018	\$17,800
2017	\$17,800
2016	\$17,800
2015	\$17,800
2014	\$17,800
2013	\$17,800
2012	\$17,800
2011	\$17,800
2010	\$17,800
2009	\$17,800
2008	\$17,800
2007	\$17,800
2006	\$17,800
2005	\$17,800
2004	\$17,800
2003	\$17,800
2002	\$17,800
2001	\$17,800
2000	\$17,800

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.

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/

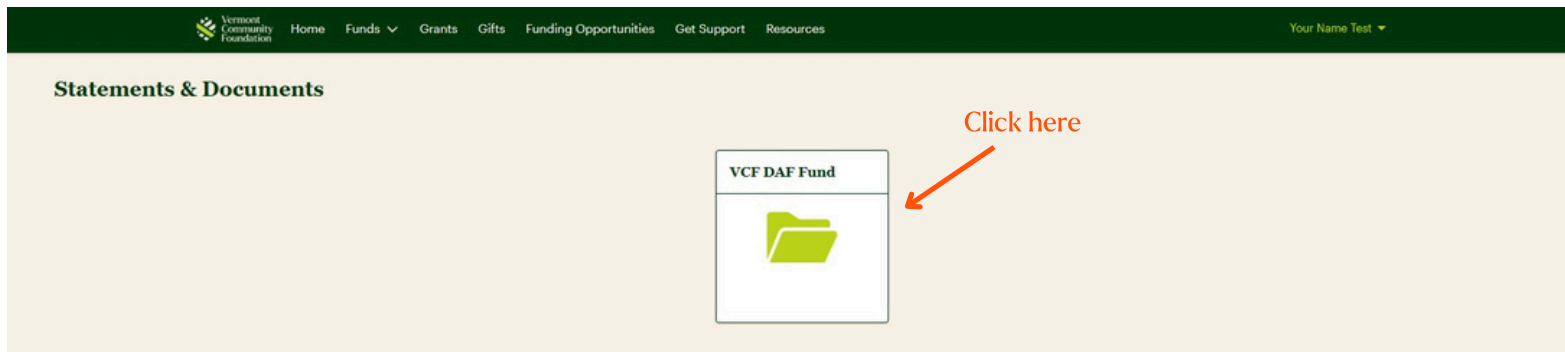
How to View & Print Fund Statements

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**.

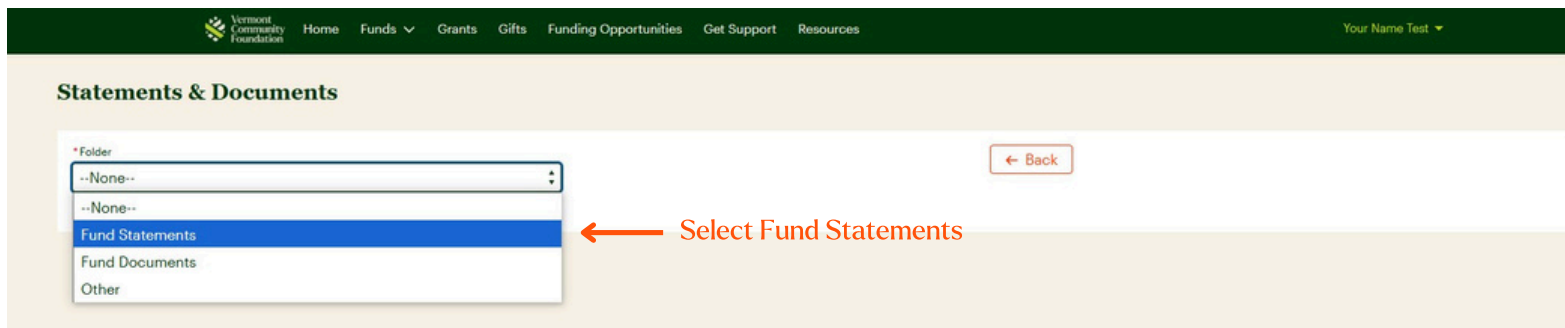


2. Select your fund.



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.

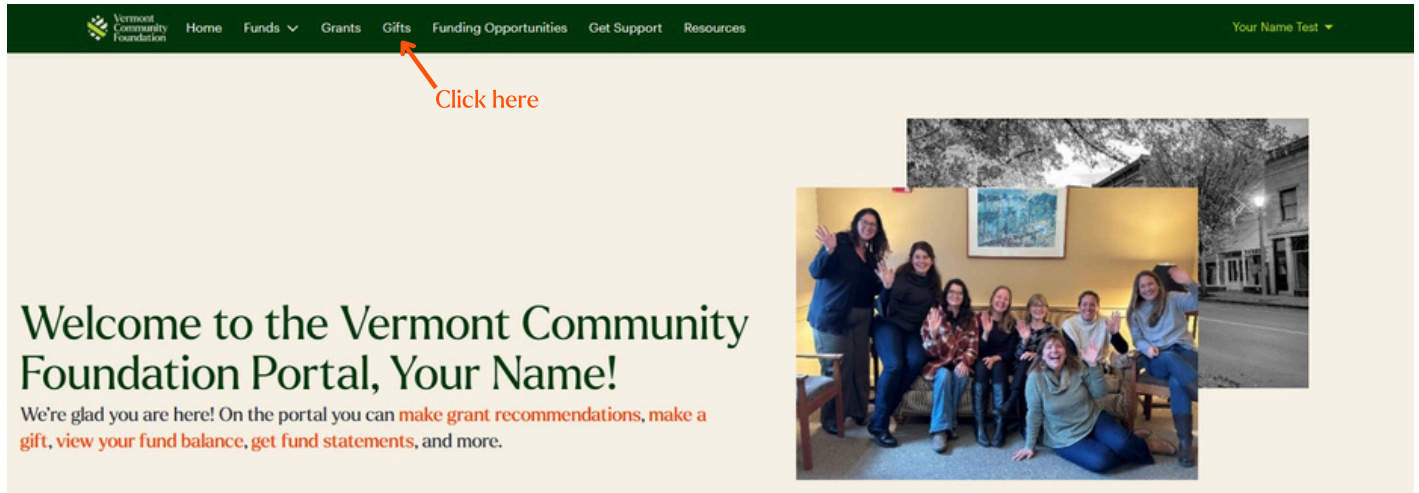


5. For a helpful explanation of terms on your fund statement, visit <https://vermontcf.org/terms>

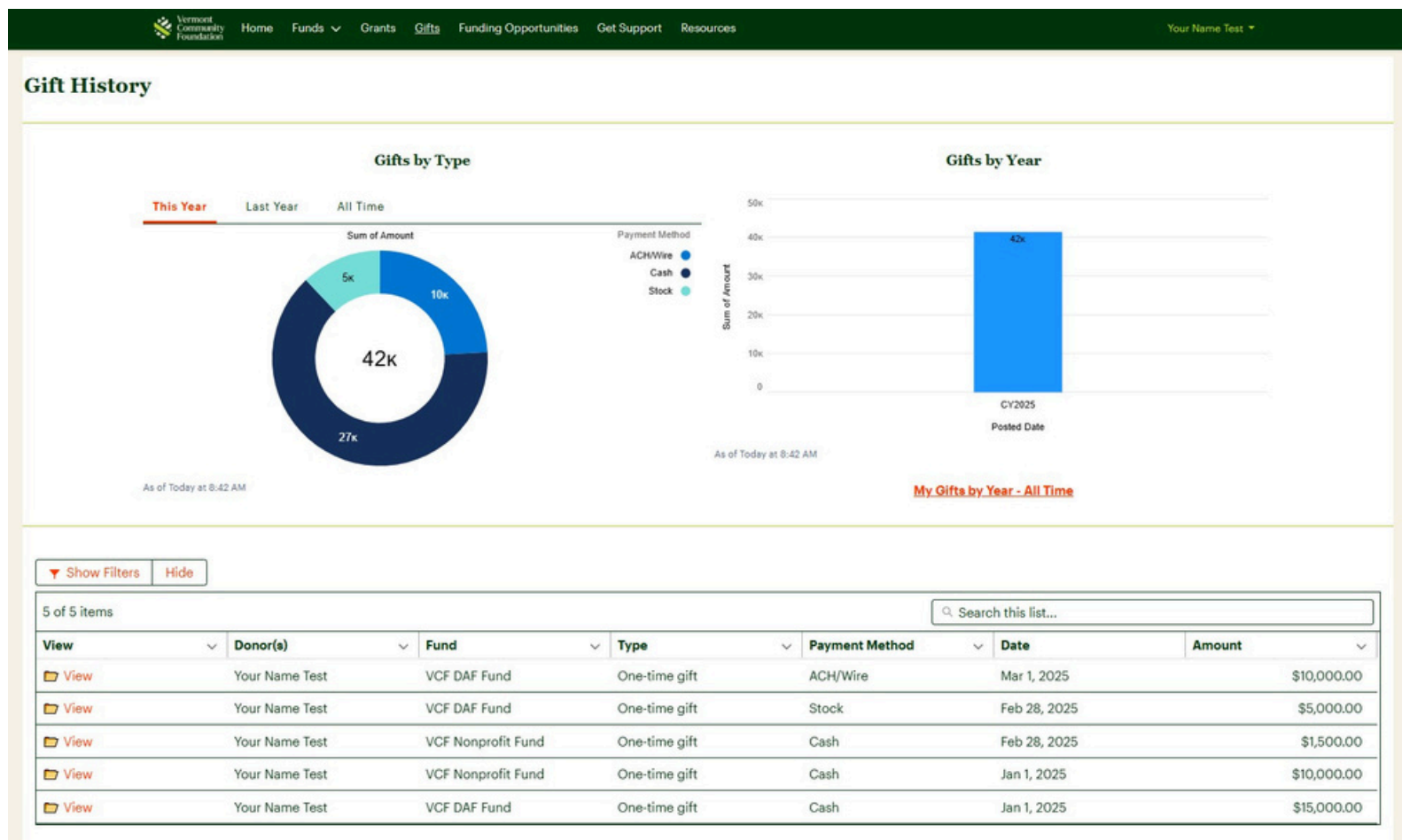
How to View Gift History

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.

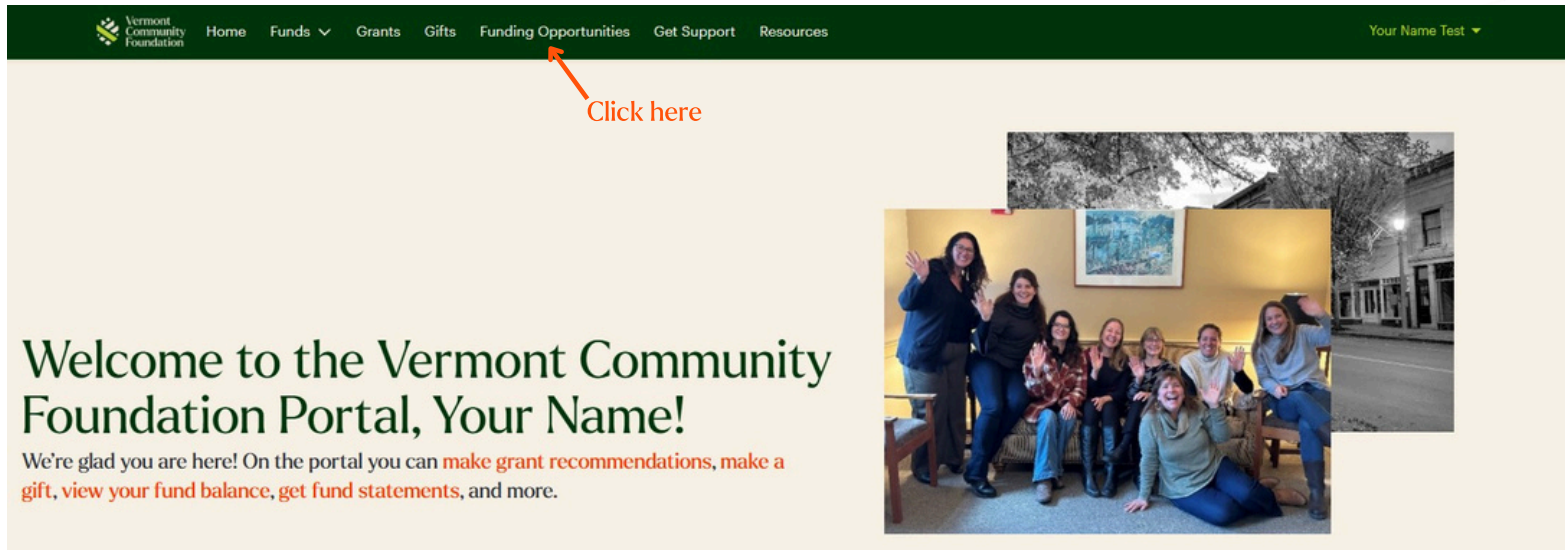


Thank you for your continued generosity and impact.

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 in a blue shirt, 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 'Funding Opportunities' is now the active page. Below the navigation bar is a heading 'Featured VCF Funding Opportunities'. There are four cards, each with a photo and text:

- Philanthropic Leadership Fund**: NONPROFIT DEVELOPMENT & SUPPORT. 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.
- Samara Fund**: PEOPLE & ISSUE-BASED GRANTS. 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.
- Vermont Women's Fund**: PEOPLE & ISSUE-BASED GRANTS. The Vermont Women's Fund supports organizations that drive change for women and girls in Vermont. When women rise, communities thrive.
- Opportunity Fund for Southshire Youth**: NONPROFIT DEVELOPMENT & SUPPORT. 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:

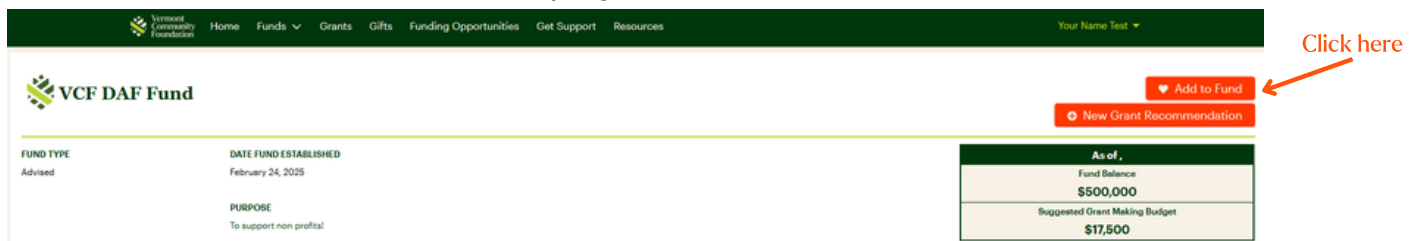
1. Start on the Home page and click the **make a gift** link.



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!