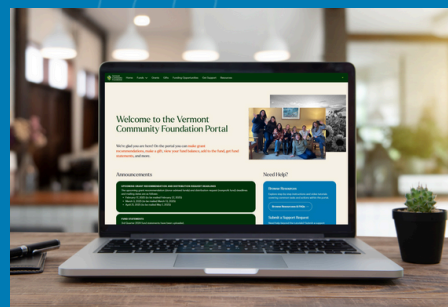# Portal Guide – Nonprofit Fund Edition

Welcome to the online portal for Vermont Community Foundation fundholders. From here you can access detailed fund information—including the current balance and fund statements—submit distribution requests, and view distribution and gift history.

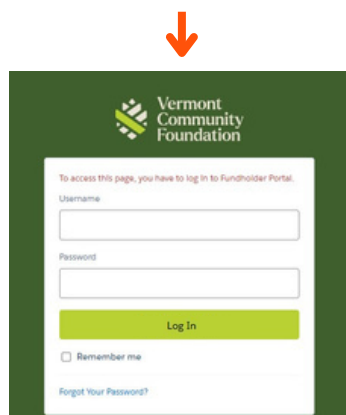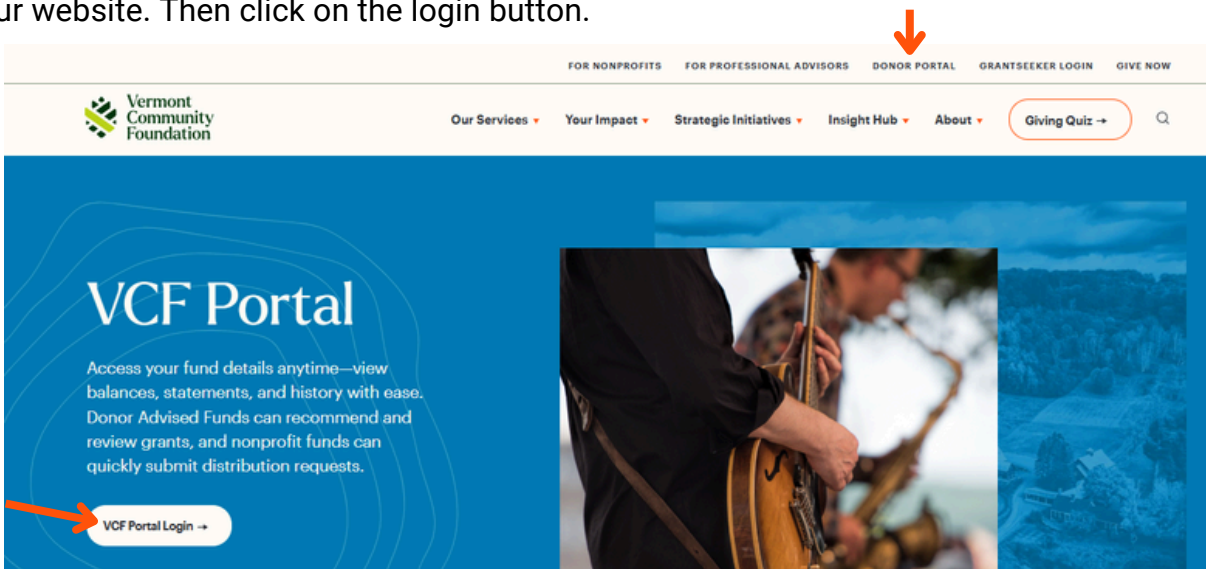More instructions and helpful tutorial videos can be found at vermontcf.org/donor-portal-resources.

If you need assistance or have questions not addressed in these materials, please contact philanthropy@vermontcf.org. And, if you have suggestions for how this handbook could be clearer or more helpful, let us know!

Explore the portal with this 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.

Table of Contents

Setting Up Your Portal Account & Password Requirements - Follow along with this video tutorial
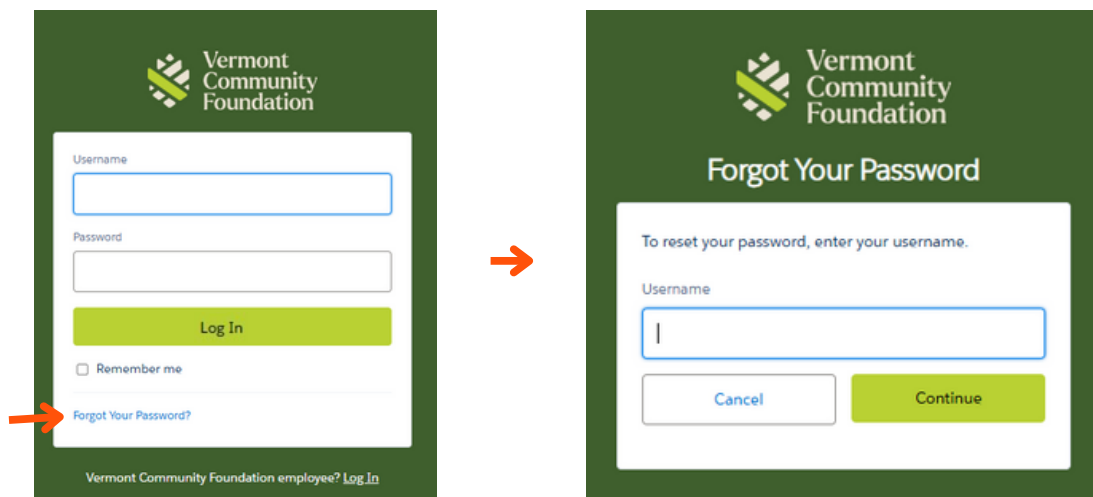
You will receive an email, to the email address we have on file, providing your login link and inviting you to set your password.

When you set up your password, the following security requirements apply:
- 8 or more characters
- A combination of letters and numbers
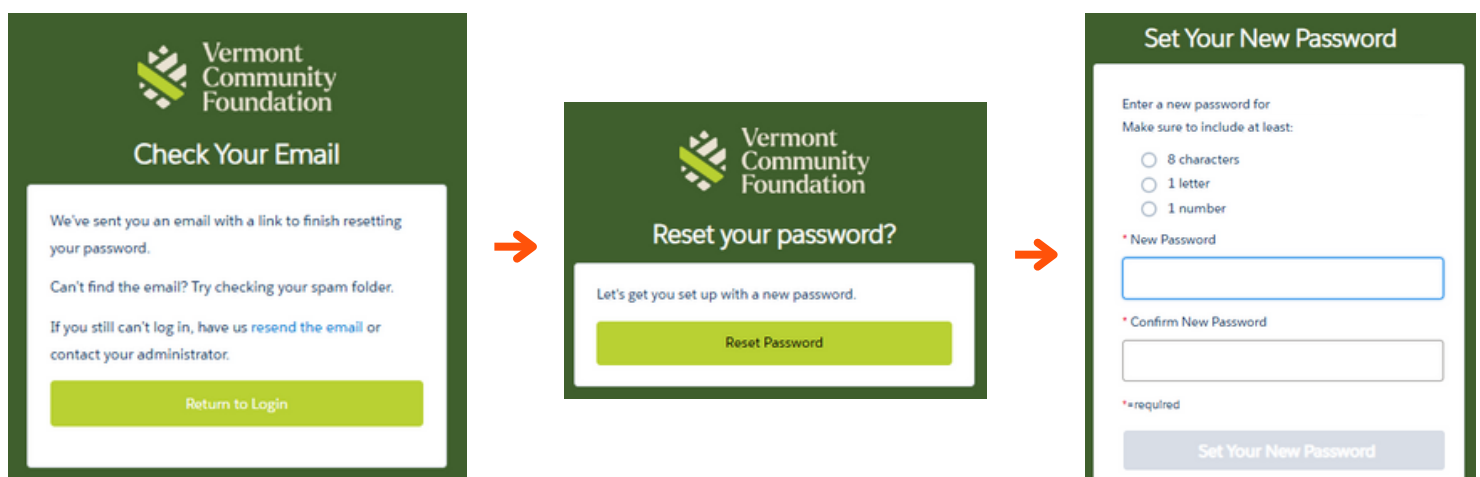- Must be changed every 180 days

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.

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.
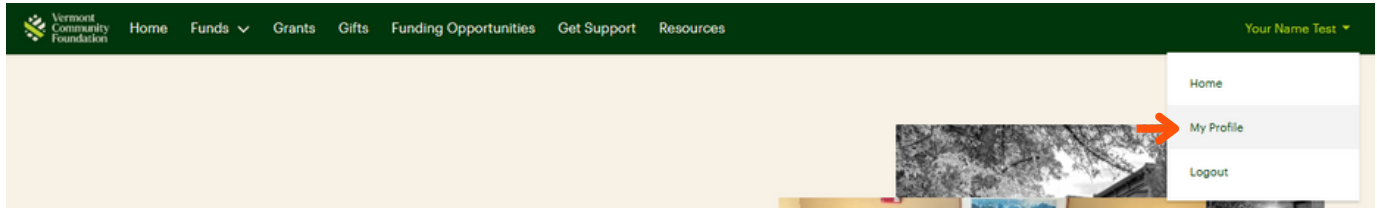

If you still cannot log in, please contact philanthropy@vermontcf.org

3

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**.
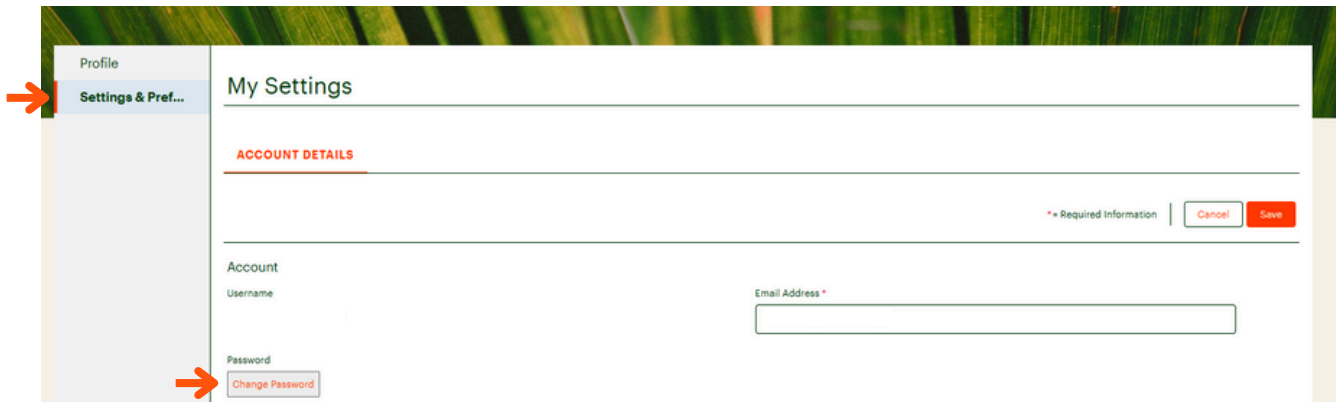
4. Enter your current password and the new password you would like to use.
5. Re-type the new password to verify.
6. Click **Save**.

Access for Other Users
If you would like to give portal access to other staff or board members, please contact us through the support request form. We'll set up their access for you, including view-only permissions if appropriate. Likewise, if someone is no longer with your organization, just let us know so we can remove their access and add the appropriate new person.

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, and recent stories and news from the VCF.

To explore the homepage and see some of its features, check out this preview video:
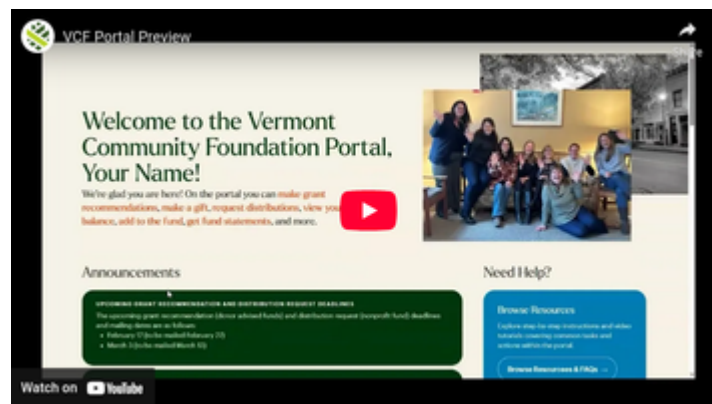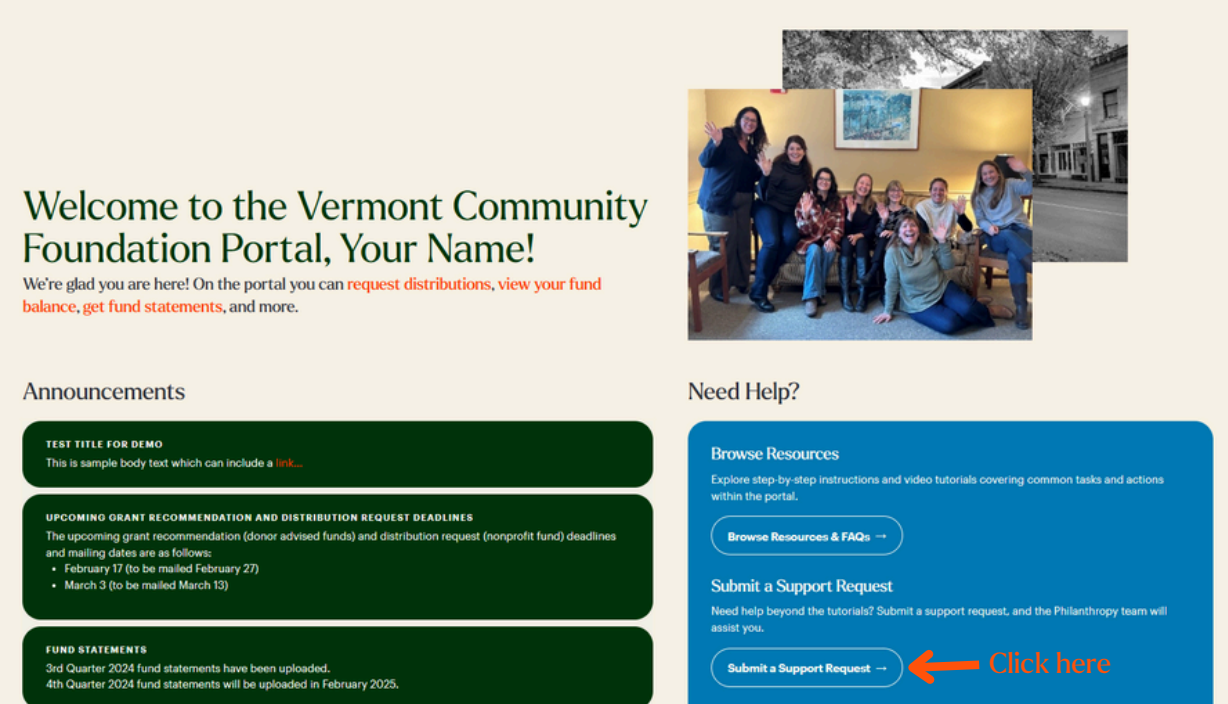
Support Request

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?** Alternatively, you can click **Get Support** in the top navigation menu.

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

3. Click **Create Support Request**.

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.

Distribution requests can be submitted through this portal only by the nonprofit organization's Executive Director and a Board Officer, or two Board Officers. Follow along with this video tutorial.

1. Starting on the Home page, click the **request distributions** link.

2. If you have multiple funds, select the one you'd like to request a distribution from. If you have only one fund, simply click on it.

Instructions continue on the next page.

3. Enter the details of your distribution request, including the amount and your title as it relates to the nonprofit organization. Check the box to indicate your intent to be legally bound by the terms of this document.

4. Provide contact information for the secondary approver and check the box to confirm they are the Executive Director or an authorized Board Officer. They will receive an email asking them to approve or decline your request.

5. Once you have reviewed all the details, click **Submit**.

The Status will be "Pending Second Approval." Once the secondary approver reviews and approves the request, you will both receive a confirmation email and the status will change to "Submitted"

If the ED and/or a board officer requesting the distribution is not registered for the donor portal to initiate a request, please use this **fillable PDF request form** found on the **portal resources page**.

Easily access your distribution history anytime.
1. Starting on the Home page, click **Funds** under the **Funds** dropdown in the header.
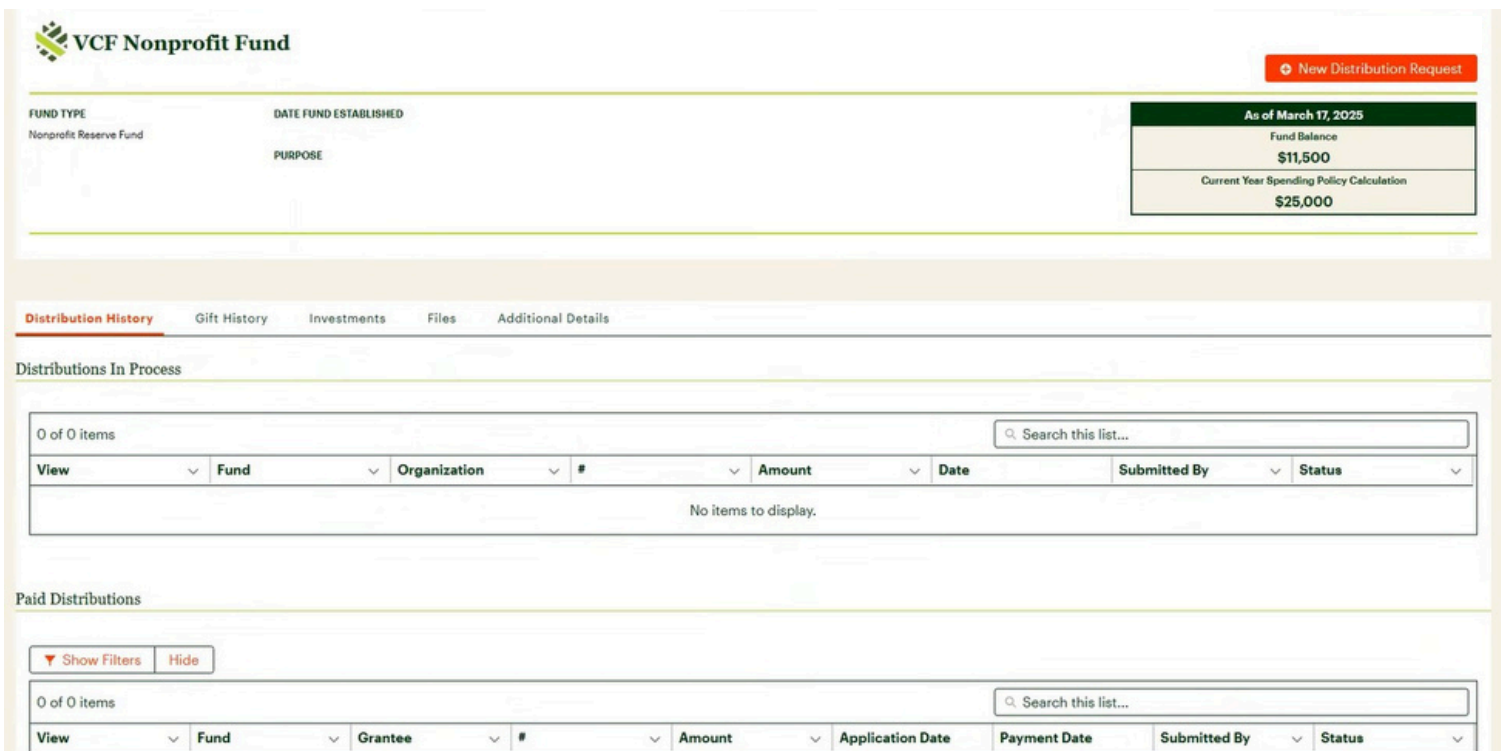
Click here

Welcome to the Vermont Community Foundation Portal, Your Name!
We're glad you are here! On the portal you can request distributions, view your fund balance, get fund statements, and more.
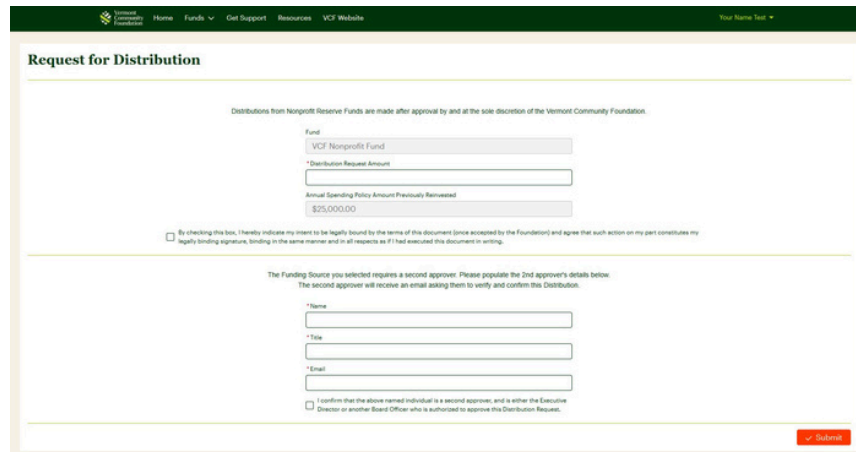
2. Select your fund.

Please select a Fund   Click here

VCF Nonprofit Fund

Fund Balance
$500,000
Spendable Balance
$25,000
Reinvested Distributions
$25,000
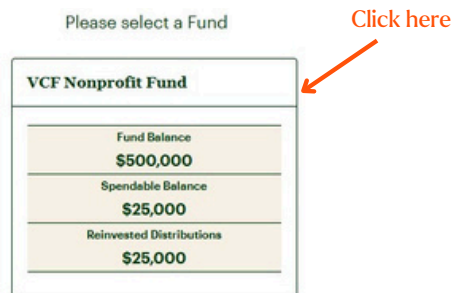
2. View your full Distribution History. You'll see any distributions in process at the top (for example, if a second approval is still pending) and any paid distributions below that.

VCF Nonprofit Fund

● New Distribution Request

FUND TYPE	DATE FUND ESTABLISHED		As of March 17, 2025
Nonprofit Reserve Fund			Fund Balance
	PURPOSE		$11,500
			Current Year Spending Policy Calculation
			$25,000

Distribution History   Gift History   Investments   Files   Additional Details

Distributions In Process

0 of 0 items   🔍 Search this list...

View		Fund		Organization		#		Amount		Date	Submitted By		Status	
					No items to display.									

Paid Distributions

▼ Show Filters   Hide

0 of 0 items   🔍 Search this list...

View		Fund		Grantee		#		Amount		Application Date	Payment Date	Submitted By		Status	

How to See Gift History and Other Fund Details

Vermont Community Foundation

Easily see the gifts that have made into your fund anytime.

1. Starting on the Home page, click **Funds** under the **Funds** dropdown in the header.

Click here

Welcome to the Vermont Community Foundation Portal, Your Name!
We're glad you are here! On the portal you can request distributions, view your fund balance, get fund statements, and more.

2. Select your fund.

Please select a Fund

Click here

VCF Nonprofit Fund

Fund Balance
$500,000

Spendable Balance
$25,000

Reinvested Distributions
$25,000

Instructions Continue on the next page.

3. At the top of the page, you can see your Fund Balance, Current Year Spending Policy Calculation and Annual Spending Policy Amount Previously Reinvested (if applicable).

5. The default view will show you your Distribution History. Click on the "Gift History" tab to view the records of gifts that have been made into the fund over time.

6. You can also click on the "Investments" tab to view monthly account balances, the "Files" tab to view Fund Statements and other documents, and the "Additional Details" tab to view your Investment Pool, Supporting Fees, and Spending Policy.

7. Scroll down to see Market Value History and Investment Details, updated quarterly.

VCF Nonprofit Fund

⊕ New Distribution Request

FUND TYPE	DATE FUND ESTABLISHED		As of March 17, 2025
Nonprofit Reserve Fund			Fund Balance
	PURPOSE		$11,500
			Current Year Spending Policy Calculation
			$25,000

Click here

Distribution History **Gift History** Investments Files Additional Details

▼ Show Filters   Hide

2 of 2 items   🔍 Search this list...

| View	Donor(s)	Fund	Type	Payment Method	Date	Amount
📁 View	Your Name and User Test and Other Family Members	VCF Nonprofit Fund	One-time gift	Cash	Feb 28, 2025	$1,500.00
📁 View	Your Name and User Test and Other Family Members	VCF Nonprofit Fund	One-time gift	Stock	Jan 1, 2025	$10,000.00

Distribution Summary

Total Distributions Paid	$0
Total Distributions	0
Suggested Distribution Budget	$42,482
Distributions This Year	$0
Distributions to be Paid	$0
Distributions in Process	$0

Gift Summary

Total Gifts	$1,801,389
Total # Gifts	36
Gifts This Year	$0
Gifts In Process	$0
Last Gift Date	January 17, 2024

Market Value History

Market Value History   Quarterly Balances

As of Today at 4:06 PM
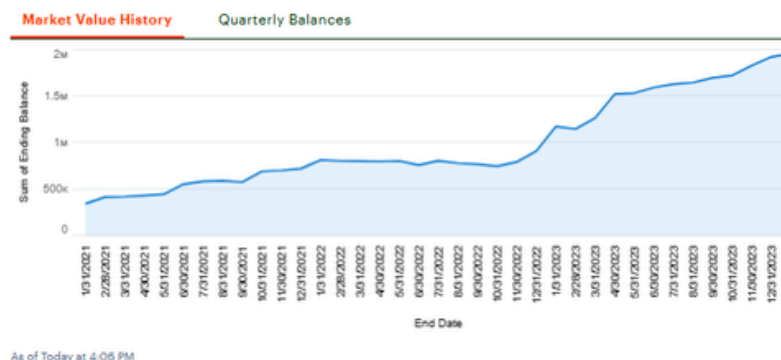
Easily access, download, print, or email your fund statements in just a few steps.

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**.
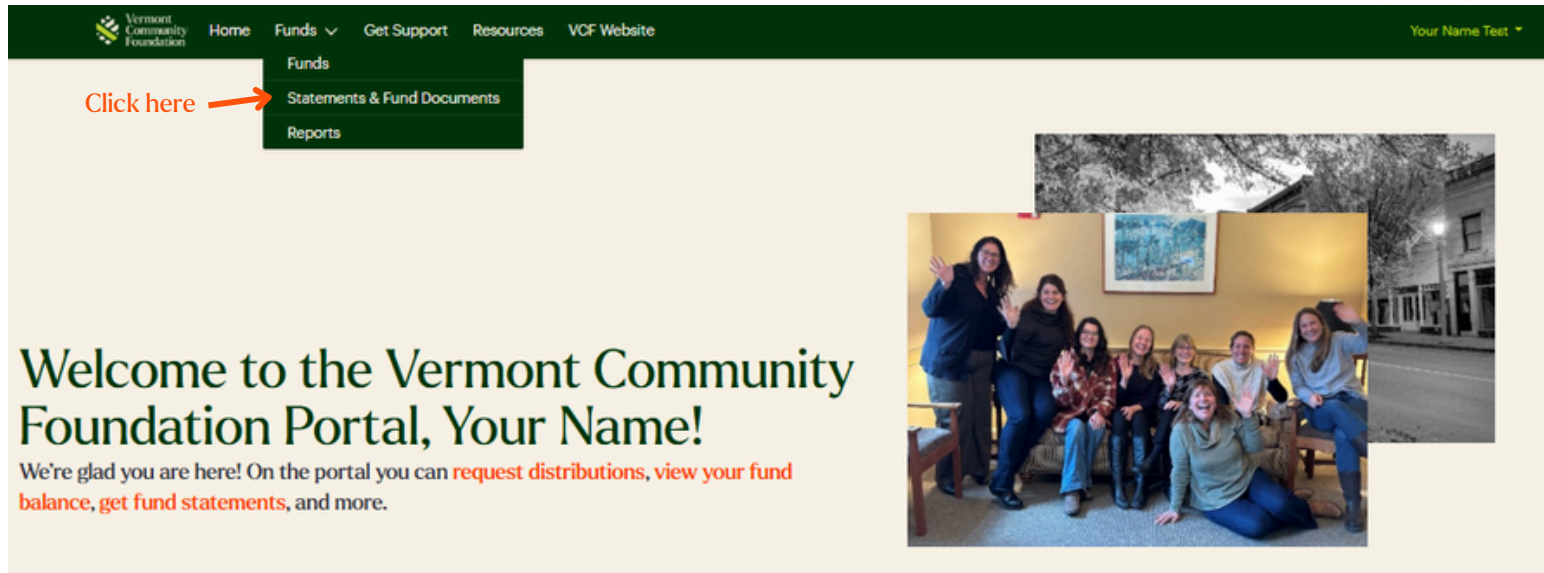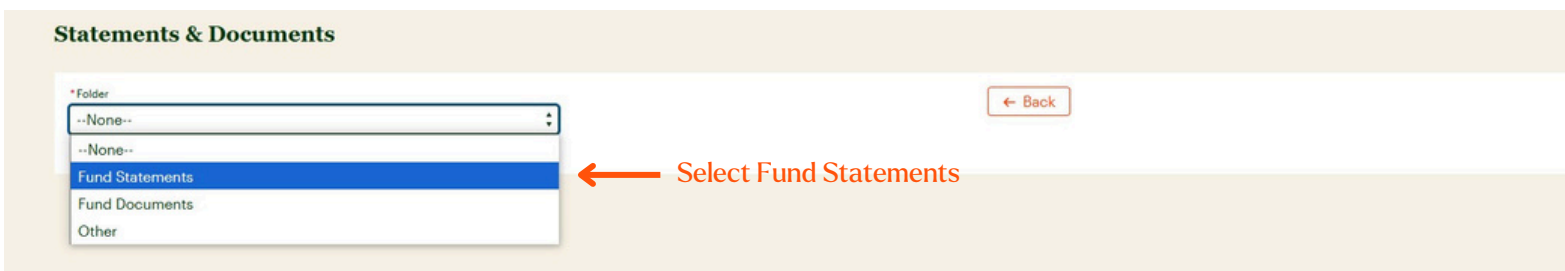

2. Select your fund.

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 **vermontcf.org/terms**