DONORCENTRAL USER GUIDE
for donor advised funds

Accessing DonorCentral

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

This takes you to the DonorCentral Fund Management page.

DonorCentral - Online Fund Management

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

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

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

Click here to log in if you have an account.

Click here to see a demo of DonorCentral.

Click here to register for DonorCentral.

For questions about registering, please contact Jane Kimble at jkimble@vermontcf.org or 802-388-3355 ext. 286.
DonorCentral Homepage

See your list of unsubmitted grant recommendations

Welcome, John and Jane Doe!

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

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

Messages from the Foundation

View your fund activity

10 most recent grantees

This section will be visible when funding opportunities are available

Fund Summary

<table>
<thead>
<tr>
<th>Fund Name</th>
<th>Fund ID</th>
<th>Balance</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>John and Jane Doe Fund</td>
<td>0000</td>
<td>$52,628.07</td>
<td>View</td>
</tr>
</tbody>
</table>

Recent Grantees

<table>
<thead>
<tr>
<th>Grantee</th>
<th>Date Paid</th>
<th>Amount</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barre Opera House, Inc.</td>
<td>2/1/2016</td>
<td>$7,500.00</td>
<td>Make a Grant</td>
</tr>
<tr>
<td>AIDS Community Resource Network (ACORN)</td>
<td>7/11/2015</td>
<td>$3,950.00</td>
<td>Make a Grant</td>
</tr>
<tr>
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<td>12/27/2014</td>
<td>$1,000.00</td>
<td>Make a Grant</td>
</tr>
<tr>
<td>Vermont Community Loan Fund</td>
<td>12/27/2014</td>
<td>$8,000.00</td>
<td>Make a Grant</td>
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Giving Together

Innovations and Collaborations Small and Inspiring
3 Ways to Make a Grant Recommendation

#1

Click Recommend a Grant at the top of any page to access the Recommend a Grant page.
3 Ways to Make a Grant Recommendation (continued)

#2

This is the Recent Grantee section of the Homepage

Click Make a Grant to access the Grant Recommendation Form for the desired grantee

Recent Grantees

<table>
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<td>12/27/2014</td>
<td>$8,000.00</td>
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Grant Recommendation Form

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

Fields with an asterisk (*) are required.

Advisor(s) * John and Jane Doe
Funding Source * John and Jane Doe Fund
Organization Name * Addison County Community Action Group (HOPE)

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

Amount * 1000
Grant Purpose *
Fund and Advisor Recognition in Grant Letters *

Please read and agree to the conditions below.

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

© I agree  © I do not agree
3 Ways to Make a Grant Recommendation (continued)

#3

- Click Recommendations at the top of any page to access Your Recommendation List.

## Your Recommendation List

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Amount</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addison County Community Action Group</td>
<td>$1,000.00</td>
<td>Edit</td>
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<td>Edit</td>
</tr>
<tr>
<td>AIDS Community Resource Network (ACORN)</td>
<td>$1,000.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Vermont Community Loan Fund (VCLF)</td>
<td>$1,800.00</td>
<td>Edit</td>
</tr>
<tr>
<td>AIDS Community Resource Network (ACORN)</td>
<td>$3,950.00</td>
<td>Edit</td>
</tr>
<tr>
<td>birds in vermont</td>
<td>$250.00</td>
<td>Edit</td>
</tr>
<tr>
<td>VCF Basic Human Needs Fund</td>
<td>$500.00</td>
<td>Edit</td>
</tr>
<tr>
<td>Vermont Youth Orchestra Association, Inc.</td>
<td>$500.00</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Click Continue Recommending Grants or Grant History to access the Grant History page.

## Grant History

### John and Jane Doe Fund

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

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

<table>
<thead>
<tr>
<th>Giving Together</th>
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<td>![Image of Giving Together section]</td>
</tr>
</tbody>
</table>

- **Castleton State College - Castleton Entrepreneurial Collaborative**
  - Region Served: Rutland County
  - Amount Requested: $20,000
  - Partner Organizations: Rutland Young Professionals, EVOLVE Rutland (the Women's Professional Development Center)
  - Summary: Partners will join with a team of high-impact women leaders, mentors, and entrepreneurs and build three distinct yet connected customized training programs that result in enhanced employee skills. Their goal is to develop support, learning opportunities, and connections for women and lay the foundation that will make Rutland County, and all of Vermont, a place with a strong economy, a dynamic community, and a place where leaders, entrepreneurs, and their families will live, prosper, and thrive.
  - Make a Grant

- **Legal Services Law Line of Vermont - Homeless Assistance**
  - Region Served: Chittenden County
  - Amount Requested: $15,210
  - Partner Organizations: Committee on Temporary Shelter (COTS)
  - Summary: This project will support a cooperative effort by to provide information, consultation, and effective holistic services to homeless clients by sending an experienced advocate to the Daystation for 4-5 hours a week to consult with COTS staff, hold clinics, and help individual clients.
  - Make a Grant

- **Main Street Alliance of Vermont - Organizing for State Temporary Disability and Caregiver Insurance**
  - Region Served: Statewide
  - Amount Requested: $20,000
  - Partner Organizations: Vermont Commission on Women
  - Summary: The partners hope to facilitate the development and implementation of a Temporary Disability and Caregiver Insurance (TDCI) Program in Vermont to provide coverage for any worker needing time off due to personal or family disability. The federal FMLA and Vermont's Parental and Family Leave Act have given many people job protection for unpaid leave but most cannot afford unpaid leave. A TDCI program would improve the health and financial stability of women and families and cultivate a healthy, vibrant workforce.
  - Make a Grant