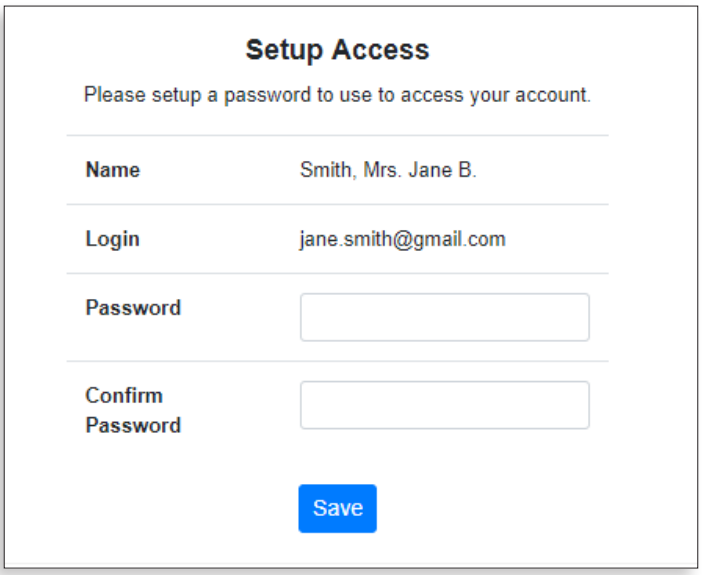
Welcome to Your New Giving Center

As a fundholder, you can access your fund's grants and contribution history, view your fund statements. If you have a Donor Advised Fund (DAF) you can make grants to the organizations you care about and learn about community needs. Our Giving Center makes it simple to manage your fund and is available 24/7 from anywhere, on any device.

Initial Login Process and Creating Your Account

You will receive an email with a custom invitation link to create your account in the Giving Center. Your username will be your email address that we have on file. Once you click on the invitation link in the email, you will be prompted to create a password of your choice. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.



Returning Users

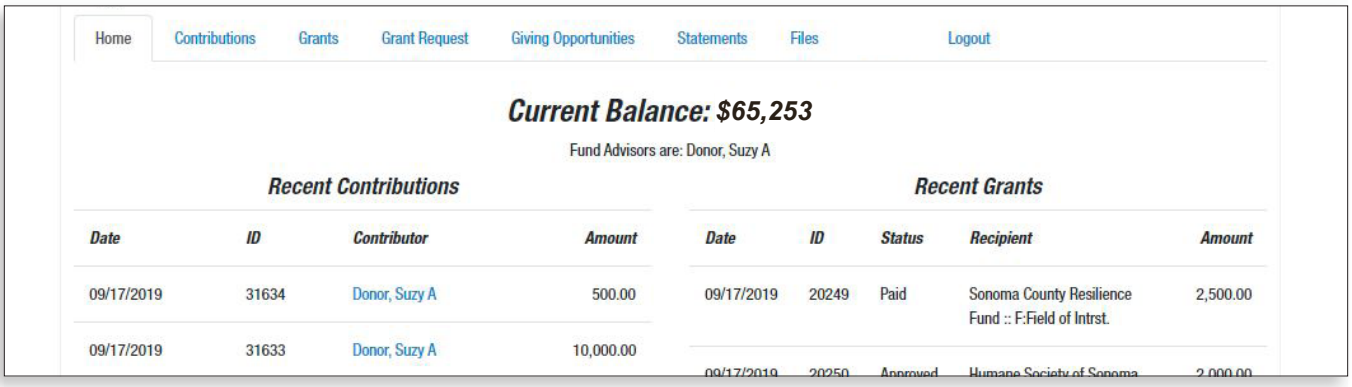
Once you have successfully completed the registration process, you can visit **www.sonomacf.org** and click on the Giving Center button in the upper right-hand corner of our home page to access your account at any time

If you have forgotten your username: In most cases you username is the same as your email address. If you need assistance with finding your username, please contact us at 707-579-4073 or **invest@sonomacf.org**.

If you have forgotten your password: For security reasons, our staff do not have the ability to access your password. If you need to reset your password, please use the reset password link on the login page.

Note: The Giving Center will lock you out after five unsuccessful login attempts. If you are locked out, please contact us.

Giving Center Features



Once you are logged in, your homepage will appear. Your homepage is a quick snapshot of your fund's most recent activity. It will show your fund's current balance, all fund advisors, recent contributions and recent grant history.

The tabs at the top of the page display different features available to you as a fundholder. *Note: the tabs available to you may be different depending on your fund type.*

Choose fund
If you manage multiple funds, you will see a **Choose Fund** menu. Choose the fund you wish to review from the drop-down menu. *Note:* if you are listed as an advisor for only one fund, you will not see this screen. Instead, you will be taken directly to the main screen.

Contributions
Provides information regarding each contribution received into your fund. Clicking on a contributor's name will bring up their history of contributions to your fund including date, and amount of the gift. *Note:* an "Export" option appears on the far-right side of the menu bar. This feature will export information about each donation into a Microsoft Excel spreadsheet.

Grants
This tab shows the history of grants awarded from your fund including date, organization name, grant purpose, and amount.

Grant Request
This tab allows you to make a grant recommendation from your fund.

Giving Opportunities
This tab shows a curated list of community needs from our philanthropic advising team, with opportunities to immediately recommend a grant from your fund should you choose.

Statements
This tab shows your fund's quarterly fund statements as they become available.

Files
This tab will show any viewable files regarding your fund. *Note:* at this time confidential documents are not available through the Giving Center.

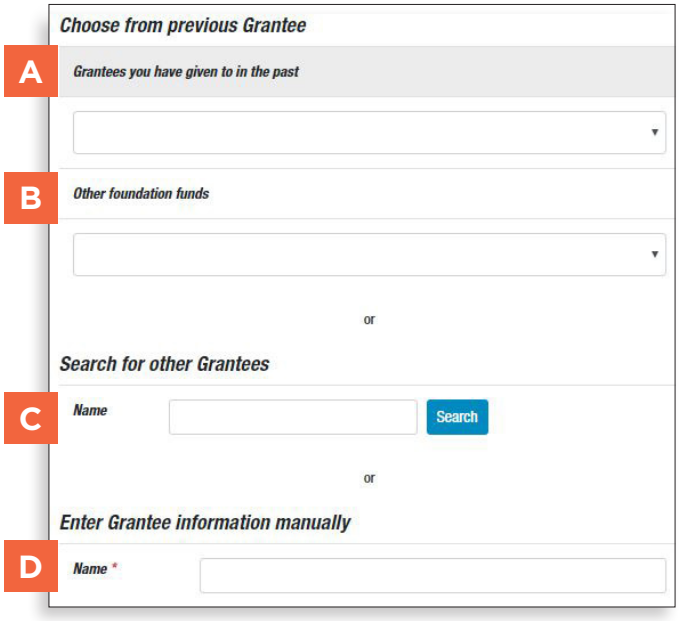
Logout
For security, if you access your Giving Center from a shared computer or device, we strongly encourage you to use the Logout option after completing each session.

Submitting a Grant Request

To recommend a grant from your fund, click the **Grant Request** tab.

Recommending a grant is a three-step process:

1. Choose a Grantee in one of four ways:



A **Choose a Previous Grantee**
Choose the organization you wish to support from a drop-down list of organizations you have previously given to.

B **Other Foundation Funds**
Choose a fund you wish to give to from this drop-down list of funds.

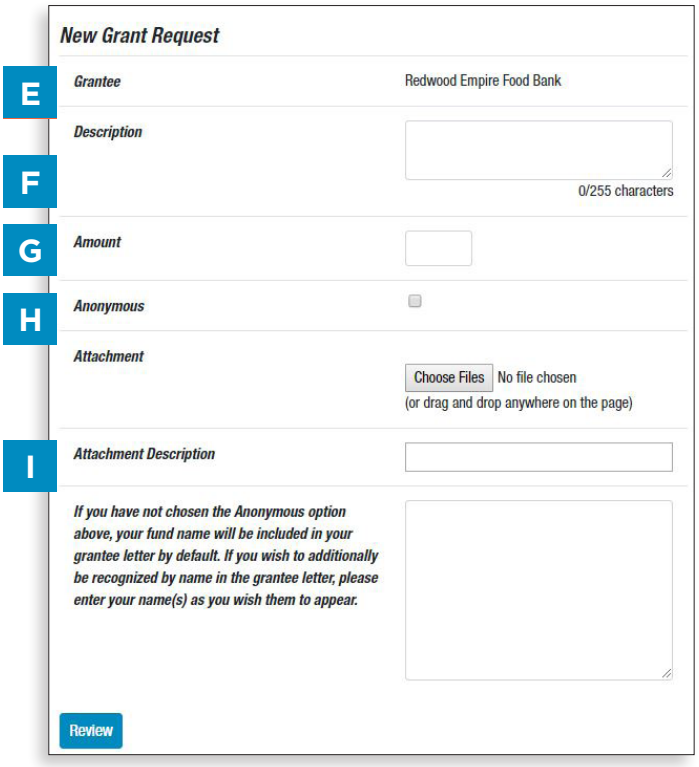
C **Search for Other Grantees**
Search for the organization you want to support in GuideStar/Candid. Once you find the organization you want to support, click **Create Request**.

D **Enter Grantee Information Manually**
If you can't find the organization you wish to support, please enter the organization manually: name, address and phone number.

Once you have selected your grantee, click **Submit** and continue to the next page.

2. Grant Details

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including grant description and amount.



E Description
Please provide the grant purpose. *Note:* if you don't designate a specific grant purpose, your grant will be earmarked for General Support.

F Amount:
A $250 minimum is required.

G Anonymous:
Please check this box if you would like your grant to be made anonymously. *Note:* checking this box ensures that your fund name will not be shared in the grantee letter.

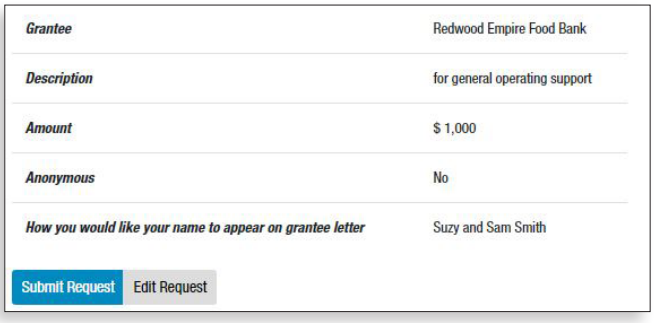
H Attachment
If there is a letter or other attachment you would like to submit along with your grant recommendation please attach it here. *Note:* this field is optional.

I Donor Recognition
If you have not chosen the **Anonymous** option above, your fund name will be included in your grantee letter by default. If you wish to **additionally be recognized by name** in the grantee letter, please enter your name(s) as you wish them to appear in this box.

Once you are finished entering this information, click **Review** and continue to the next page.

3. Review and Submit Request

Review your grant request details and click **Submit Request**. Once you submit the request, you will receive an automated confirmation email and our staff will begin processing your grant recommendation.



Viewing Grant History

To review your grant history, click the **Grants** tab. Your grants will be displayed by organization, and below, by date.

To view all of the grants you have made to a **specific organization**, simply click on the name of the organization you wish to view. To view **grants by date** scroll down this page to view all of your grants, sorted by date.

Under the **Status** column, you will see one of six statuses for each grant:

Request means that your grant request has been sent to our staff. If you would like to cancel a pending grant request before it is processed, click the yellow **Cancel** button.

Canceled means your grant request has been canceled.

Pending means that our staff is currently processing your grant request.

Approved means your grant request has been approved, but not yet paid.

Paid means that a check is in the queue for printing and mailing.

Completed means the grant request has successfully been fulfilled, and a check has been paid out to the organization.

Email Alerts

We will alert you via automated emails every time a donation is made in to your fund or a grant has been awarded from your fund. These alerts can be canceled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations. If you would like to cancel these alerts, please contact us at 707-579-4073 or **invest@sonomacf.org**.

Questions

If you have any questions about the Giving Center, please contact us at 707-579-4073 or **invest@sonomacf.org**.

Giving Center Frequently Asked Questions

How often are fund statements posted?

Fund statements are posted the month immediately following the end of each quarter. You will be notified via email when your statement is ready to be viewed in the Giving Center. If you are not receiving these notification emails, please contact us at 707-579-4073 or **invest@sonomacf.org**.

I've lost my password. What should I do?

For security reasons, our staff do not have the ability to access your password. If you need reset your password, please use the reset password link on the login page.

How long does it take for my recommendation to be processed?

Most grants that are submitted by Monday at 10am will be included in that week's grant cycle. Grants submitted after that time will be included in the next grant cycle.

Who can I make grant recommendations to?

Grant recommendations must be made to most 501(c)(3) organizations (including schools, churches and government entities). If you have questions about whether the organization you wish to make a grant to is eligible, please contact your philanthropic representative.

What is the minimum amount for a grant recommendation?

A $250 minimum is required for each grant recommendation.

Are there other ways to submit a grant recommendation?

Yes, you can submit grant requests via email to your philanthropic representative. Please include your fund name, the organization you wish to support, grant amount, grant purpose and any additional instruction in the email.

How do I know if a grant I recommended has been issued?

Your most recent grants paid will be listed on your Giving Center homepage. Or, you may click on the Grant Request tab and on the right side of this page, you will see your recent grant requests with their status.

Who do I contact if I'm having issues with the Giving Center?

If you have any questions or are experiencing issues with the Giving Center, please contact us at 707-579-4073 or **invest@sonomacf.org**.