

## Acton Family Giving

Before you start the application, review the [Application Fields Guide](#) for the information and documents you'll need to upload as part our application process. Use the [Application Procedures](#) to learn how to register and submit.

### Application Fields Guide

	Field	Details
<b>Information that you'll be asked to provide:</b>	Director/CEO	If you are completing the application and are not the Director/CEO, please select the correct contact.
	Primary contact	Person to be contacted for anything related to the application
	Mission Statement	Your organization's mission statement
	How your organization's work aligns with our Empathy Building initiative programs, approaches, and priorities	Narrative, 350 word maximum. Please feel free to use bullet points / incomplete sentences - we're much more interested in content than presentation.
	Describe the community you serve. Include population demographics, numbers served, and geographic reach.	Narrative, 350 word maximum. Please feel free to use bullet points / incomplete sentences - we're much more interested in content than presentation.
	Current Year Operating Budget	The projected income and expenses for the organization's fiscal year.
	Projected In-Kind Revenue	Total dollar value of donations (goods, services, or time) received or anticipated in current fiscal year. This does not include cash donations or dues. Estimates are okay. Input 0 if not applicable.
	Projected Foundation Revenue	Total amount of funding the organization received or anticipates from private and corporate foundations in current fiscal year. Input 0 if not applicable.
	Top three foundation gifts within the last 12 months [Please use this format: <b>Funder Name - \$Amount</b> . Example: Collins Foundation - \$10,000]	List of top three gifts received by private or corporate foundations. Please exclude gifts from Acton Family Giving.

	Field	Details
<b>Required PDF documents to upload:</b>	Current year operating budget	PDF only
	Most recent complete-year financials (audited, if available)	PDF only
	Year-to-date balance sheet and income statement (from within the last three months)	PDF only
	List of committed and pending corporate/foundation funders and the amounts of their gifts	PDF only. A list of your corporate and foundation gifts for the year (this can be the calendar or fiscal year). Indicate if the grants are received, committed or pending.

	Field	Details
<b>Optional PDF documents to upload:</b>	Letter of Agreement between your organization and fiscal sponsor, if applicable	PDF only. If you have a fiscal sponsor, please upload the letter of agreement.
	Miscellaneous additional information that you think would be helpful	PDF only. This is COMPLETELY optional. You are welcome to upload any additional information that you think would be helpful (i.e. strategic plan, annual report, board list, program documentation aligned with our empathy building initiative).

*Note: You may notice that there is not a field for "Requested Grant Amount." We determine grant amounts internally by evaluating all organizations individually and taking into consideration mission alignment, reach, approach to work, budget, and population served.*

# Acton Family Giving

## Application Procedures

Acton Family Giving is a sister organization of Sunlight Giving. As a result, Acton Family Giving shares the application portal with Sunlight Giving, supported by Pacific Foundation Services (PFS). You may receive auto-generated emails from Sunlight Giving and/or PFS during the application process. Don't worry, you're in the right place and talking to the right people.

**Step 1:** Review the [Application Fields Guide](#) above, which details the information and documents required.

**Step 2:** Log into the applicant portal or register your organization.

[New Organization Registration](#)

[Existing Organizations Log In](#)

If you are unsure if your organization has an existing profile in the applicant portal, or if you need to be added as a contact for an organization already registered, please contact our grants management team at [grants@actonfamilygiving.org](mailto:grants@actonfamilygiving.org) or call 650-235-4883 x280.

### To register your organization

1. Search your EIN Number or manually enter the information
2. Designate primary contact
3. Submit your organization registration
4. Check your registered email for your username and temporary password to log into our applicant portal. **Do NOT use the portal link provided in the automated email.**
5. Log into our applicant portal:

<https://pfs.smartsimple.us/welcome/Sunlight/>

**Note:** Acton Family Giving's and sister entities' logos will be on the top left-hand corner of the page

### Fiscal Sponsors

If you have a fiscal sponsor, please register using the guide below:

- **IRS Search** – select "I cannot find our Org"
- **EIN** – EIN number of fiscal sponsor
- **Organization Name** – please use this naming method: *[Project name]* (a project of *[fiscal sponsor's name]*). For example: Collins Foundation (a project of Uplift Institute)
- **Legal Name** – Fiscal sponsor's name
- **Organization Common Name** – Project's name

**Organization address and contact information** should be the project's information. Fiscal sponsorship information will be required at a different point of the application

**Step 3:** Review **Personal Profile** and the **Organization Profile** for correct contact information and organization details.

1. Add or update Director/CEO contact
2. Upload IRS tax-exempt letter
3. Upload logo
4. Fiscal sponsor information, if applicable

## GENERAL INFORMATION



Organization Profile

Please ensure your organization and Director/CEO contact information is up to date.



Personal Profile

Please ensure your contact information is up to date.

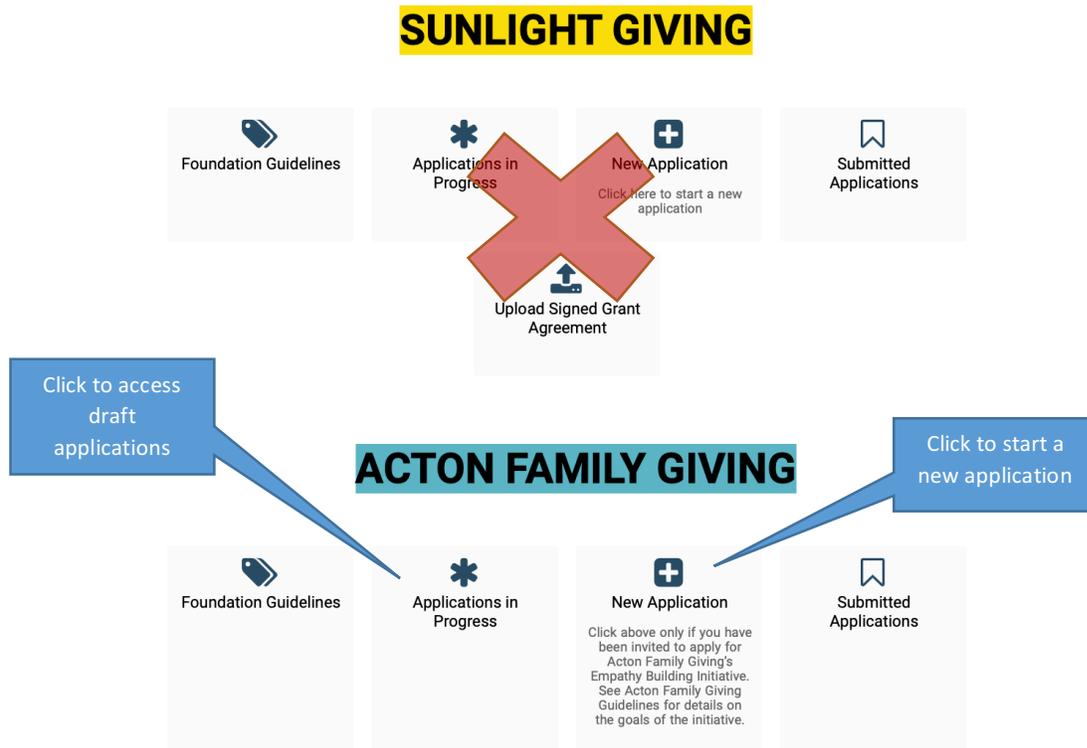


Contact Us

**Step 4:** Start your

Acton Family Giving header.

Sunlight Giving is a sister organization of Acton Family Giving with different funding initiatives. If you click on “New application” under the Sunlight Giving header, it will not be considered during the Acton Family Giving application review.



**Step 5:** Fill out required fields and upload required documents

- Periodically click “**Save Draft**” at the bottom of the page as you work.
- To access draft applications, log in to the portal and click on “**Applications in Progress**” to view and complete your application
- To delete duplicate applications, open the duplicate and click “**Delete Application**”

**Step 6:** Click “**Submit**”

- You may view and print a submitted application, but will not be able to edit it.
- **Note:** Whenever exiting the portal, please be sure to log out on the top-right corner of the page before closing the page or browser.

Should you have any questions or feedback during the application process, please email our grants management team at [grants@actonfamilygiving.org](mailto:grants@actonfamilygiving.org) or at (650) 235-4883 x280.

**Note:** Acton Family Giving is a Donor-Advised Fund that is held at Fidelity Charitable. Therefore, any grants we desire to make are strictly recommendations to Fidelity Charitable and a grant recommendation notification cannot be viewed as a pledge.