

WHERE TO START

Where do I go to make a grant recommendation utilizing the new platform?

Step 1: Always begin at the Texas Women's Foundation website's home page located at [txwf.org](https://www.txwf.org)
Step 2: Select the button at the top right-hand corner of the screen titled "Donor Advised Fund Login"
Step 3: Click on the "Grant Recommendation" button to begin the process.
Step 4: You must enter your username and password. You received instructions on creating a new account from our TXWF DAF Portal Launch email sent on January 18th, 2023.

Can any of the links that have been previously available to access the portal to make grant recommendations still be used?

All other links for making grants are no longer active.
If another link is used, it will redirect you to the new platform to begin the login process.

ACCOUNT LOGIN

On January 18th 2023, each primary donor advised fund holder received an email with instructions on how to create a new account in the system. You can review these steps at <https://www.txwf.org/grants/daf-grants-landing-page>.

A system generated confirmation email from mail@grantsapplication.com will be sent when an account is created. Check spam folders and all other inboxes for the confirmation email.

If a confirmation email is still not received after 10 minutes, contact William Capper from the Programs and Grants team at wcapper@txwf.org.

There is a second person serving as an advisor on my donor advised fund. Do they share my account login/password?

No. Every authorized user for each fund should have and use their unique login to maintain security standards. Please do not share usernames & passwords.

If you want to add another person to your fund, please send the name and contact information for additional authorized persons to grants@txwf.org.

The email sent to all primary DAF holders in January 2023 included information to share with other authorized advisors on how to access their fund(s).

Is there a limit on how many login accounts one DAF can have?

No, there is no limit. Only authorized individuals have access to the fund as established in the original agreement. Please contact William Capper at wcapper@txwf.org with any further questions.

Does a donor advised fund holder with multiple funds need to set up multiple accounts?

No. The primary holder of a donor advised fund can use their login to access any of the donor advised funds connected to their account.

MAKING A GRANT RECOMMENDATION

Does it matter how I input dollar amounts (500, 500.00 or \$500)?

No. The platform recognizes any of these inputs and will translate them correctly.

Can the portal store grantee addresses and other contact information for repeat grantees?

At this time, the portal does not store information from previous grant recommendations.

REVISITING GRANT RECOMMENDATIONS

Once logged in, how do I view my submitted applications?

Click the drop-down menu in the bottom right corner of your screen. Select “Submitted” recommendations to view all submitted applications.

Is historical information available for previous grant recommendations?

Currently, the platform will only show a history of recommendations made through the portal. Staff is sending out grant history statements with fund balances attached every quarter beginning in November 2023. If additional granting history is needed, please contact William Capper at wcapper@txwf.org.

How do I delete a grant recommendation?

If the grant recommendation was not submitted, select “In Progress Applications” from the drop-down menu on the bottom right side of the screen. Next, click the garbage bin icon next to the desired application to delete it.

If the application was submitted, please contact TXWF staff at grants@txwf.org to request deletion.

Can I edit my grant recommendation (ex. change the amount, add ‘In Memoriam’, etc.)?

If the grant recommendation was not submitted, select “In Progress Applications” from the drop-down menu on the bottom right side of the screen. Next, select the application you wish to edit and make the necessary changes. Make sure to submit the application when you are finished.

If the application was submitted, please contact TXWF staff at grants@txwf.org to request edits.

GRANT HISTORY

Where can I view my fund’s grant history?

Click the “View 2023 Fund Activity” button from the TXWF Donor Advised Fund Grants Resource Page. You will be prompted to enter your log-in information like you do when making a grant recommendation. Once you have entered it, you will be in your account. Select the tab on the right hand of your screen that says ‘In Progress’ Applications and select ‘Submitted’. You will now be able to see the fund’s granting history from January 2023 on.

What about the fund activity from before 2023?

TXWF staff is hard at work porting old fund activity into the new system in a way that is easily accessible to fund holders. Staff is sending out grant history statements with fund balances attached every quarter beginning in November 2023.

For additional documents, please reach out to TXWF staff at grants@txwf.org and staff will prepare a document with the fund's full activity upon request.

FUND BALANCE

How do I check my Fund Balance?

Click the "Ask for Fund Balance" button from the TXWF Donor Advised Fund Grants Resource Page or contact the TXWF finance team at finance@txwf.org.

CONTRIBUTING TO YOUR FUND

How do I add funds to my Donor Advised Fund?

Select the "Contribute to My Fund" button from the Donor Advised Fund Grants Resource Page. This will direct you to our giving page. Input your preferred Gift amount and then click the drop-down tab labeled 'I want to support'. Scroll down to 'My Donor Advised Fund' and select. Then complete your payment information as usual.

If you have more than one Donor Advised Fund, please use the comments section to specify which fund you would like your gift to support.