

## 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 located at [www.txwf.org](http://www.txwf.org)

Step 2: Select the button at the right-hand corner of the screen titled "*Donor Advised Fund Portal*"

Step 3: Click on the "*Begin Grant Recommendation*" button to begin the process.

Step 4: You must enter your e-mail and password. You received instructions on creating a new account from our TXWF DAF Portal Launch email sent in July 2025.

### **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All other links for making grants are no longer active.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

Donor advised fund holders received an email with instructions on how to create a new account in the system. You can review these steps at <https://www.txwf.co/grants/daf-grants-landing-page>.

A system generated confirmation email from [noreply@blackbaud.com](mailto:noreply@blackbaud.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 the Mission & Grants team at [grants@txwf.org](mailto:grants@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](mailto:grants@txwf.org).

### **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 the Mission & Grants team at [grants@txwf.org](mailto:grants@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 make recommendations for 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.

### When can I make a grant recommendation?

Per our new guidelines, there are 3 windows to make recommendations. They are as follows:

- November 1 – November 20<sup>th</sup>
- March 1 – March 20<sup>th</sup>
- July 1 – July 22<sup>nd</sup>

### Can I have more than one advisor work on a recommendation?

Yes, you can add other advisors to an in-progress recommendation by clicking on “*Manage Applicants*” in the upper right-hand corner. Enter their email when prompted and they will receive an invite to log in. They can then contribute to the grant recommendation.

## REVISITING GRANT RECOMMENDATIONS

### Once logged in, how do I view my submitted recommendation?

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 Finance at [finance@txwf.org](mailto:finance@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 Mission & Grants staff at [grants@txwf.org](mailto: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 Grants staff at [grants@txwf.org](mailto:grants@txwf.org) to request edits.

## GRANT HISTORY

### Where can I view my fund's grant history?

As we port to the new system, there will not be a backup of previous recommendations available at log-in. To get a grant history, please reach out to our finance team at [finance@txwf.org](mailto:finance@txwf.org).

### What about the fund activity from before 2023?

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 [finance@txwf.org](mailto:finance@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](mailto: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