



Application Overview and Instructions

Welcome to Sunlight Giving's Application Overview and Instruction Guide. This guide includes the following documents to help you during the application process:

- **Application Overview:** provides an overview of all of the requested information in our application. Please note which fields are required and that all documents uploaded to the application must be in a PDF.
- **Application & Online Portal Procedures:** outlines the steps involved to log-in to our online application portal to create/update your organization information and submit an application.
- **Application & Online Portal FAQ:** includes commonly asked questions about how to use our application system and the application process.

Should you have any questions or feedback during the application process, please contact our grants management team at grants@sunlightgiving.org or at (650) 235-4883 x226.



Application Overview

Before you start the application, please review the list of fields and documents you will need to provide as part of Sunlight Giving’s online application process. When you are ready to start your application, please see **Application & Online Portal Procedures** to learn how to register your organization and complete the application.

APPLICATION FIELDS		
Required information that you will be asked to provide:	Fields	Details
	Director/CEO contact	Leader of your organization. If you are completing the application but are not the Director/CEO, you must add the Director/CEO contact under Organization Profile. <i>See FAQ: How do I add a new contact to my organization profile?</i>
	Primary contact	Person to be contacted for anything related to the application.
	Number of unduplicated individuals served yearly	Number of unique people that receive services from the organization annually. Input N/A if not applicable.
	Number of unduplicated children (ages 18 and under) served yearly	Number of unique children 18 years and younger that receive services from the organization annually. Input N/A if not applicable.
	Number of unduplicated children ages 0-5 served yearly	Number of unique children between the ages of 0 and 5 that receive services from the organization annually. Input N/A if not applicable.
	Number of unduplicated households served yearly	Number of unique family units that receive services from the organization annually. Input N/A if not applicable.
	Current year operating budget	The projected income and expenses for the organization’s current fiscal year.
	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. For example, equipment or free consultant services are considered in-kind but membership dues are not. Estimates are okay. Input 0 (zero) if not applicable.
	Foundation revenue	Total amount of funding the organization received or anticipates from private or corporate foundations in current fiscal year. Input 0 (zero) if not applicable.
	Top three foundation gifts within past 12 months [Please use this format: Funder Name - \$Amount . Example: Collins Foundation - \$10,000]	List of top three gifts received by private or corporate foundations. Do not include gifts from Sunlight Giving. Input N/A if not applicable.
	Program officer contact	Select from drop-down.
	Grant geographic service area	Select all counties where individuals receive services from the organization annually.



APPLICATION FIELDS		
Required PDF documents to upload:	Fields	Details
	Current year operating budget	PDF only.
	Project budget (if applicable)	PDF only.
	Most recent complete-year financials (audited, if available)	PDF only.
	Year-to-date balance sheet and income statement (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 year or your fiscal year). Indicate if the gifts are received, committed, or pending.
	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. To ensure that your organization profile and fiscal sponsor details are setup correctly, please refer to <i>FAQ: My organization has a fiscal sponsor. How do I register and complete my organization profile?</i>
	Miscellaneous additional information that you think would be helpful	PDF only. This is COMPLETELY optional. You are welcome to upload any miscellaneous additional information that you think would be helpful (strategic plan, annual report, board list, etc.)

ORGANIZATIONAL PROFILE		
Required information that you will be asked to provide:	Fields	Details
	Logo	Files must be less than 100 MB. Allowed file types: PNG, GIF, JPG, JPEG.
	501c3 determination letter	If you are a public charity, please upload your 501c3 determination letter. If you are a government entity, church, religious organization, or school, please upload your IRS determination letter for a tax-exempt status.

Application Review Process

Once you submit your application, the primary contact listed on your application will receive an email confirmation. Your program officer will review the materials and be in touch with any questions. You can expect to hear back about a decision on your request within two months of submitting your materials.

Application & Online Portal Procedures

Step 1: Review the **Application Overview** before starting your application which details the information and documents you'll need as part of the online application process.

Step 2: Log into the application [portal](#) to begin the application process or register your organization.

If you are not sure if your organization has an existing profile in the application portal, or if you need to be added as a contact for an organization already registered, please contact our grants management team at grants@sunlightgiving.org or at (650) 235-4883 x226.

To register your organization

1. Click on "Register Here"
2. Search your EIN number or manually enter the information
3. Designate primary contact
4. Submit your organization registration
5. Check your registered email for your username and temporary password to log into our application portal. **Please do NOT use the portal link provided in the automated email.**
6. Log into our application portal: <https://pfs.smartsimple.us/welcome/Sunlight/>

NOTE: If you have a fiscal sponsor, please refer to *FAQ: My organization has a fiscal sponsor. How do I register and complete my organization profile?*

Step 3: Review your **Personal Profile** and the **Organization Profile** to be sure we have your correct contact information and organization details.

- Note: Director/CEO contact information is required in the application. If you are completing the application but are not the Director/CEO, you must add the Director/CEO contact under Organization Profile. See *FAQ: How do I add a new contact to my organization profile?*

Step 4: Start your application by clicking the "New Application" icon under the Sunlight Giving header

SUNLIGHT GIVING

Sunlight Giving believes a child's economic status should not define their future. We are dedicated to supporting nonprofits that ensure young children and their families living in poverty in greater Silicon Valley have access to the resources they need. Sunlight Giving is a sister organization of Acton Family Giving and shares the same application portal.





- Note: **Please do NOT click on “New Application” under the Acton Family Giving header.** Acton Family Giving is a sister organization of Sunlight Giving with different funding initiatives.

Step 5: Fill out required fields and upload required documents

- Note: Our system does not auto-save so please be sure to click “Save Draft” at the bottom of the page periodically as you work.
- Note: You may save your draft application and complete it at another time. Log into the [portal](#) with your credentials and click on “Applications in Progress” to view and complete your draft application
- 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.

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 contact our grants management team at grants@sunlightgiving.org or at (650) 235-4883 x226.



Application & Online Portal FAQ

About the Application

What information will I be asked to provide in the application?

The Application Overview includes a list of all of the fields required in the application.

My organization does not track clients in the same way as requested in the application. How should I answer those questions?

The questions in the application are a way for our team to get a sense of how many people your organization serves. We recognize that tracking clients using this format may not be possible – if that is the case for your organization, we encourage you to use estimates where possible. If your organization does not provide direct services, please put N/A.

Where do I input how much my organization would like to request in funding?

Sunlight Giving does not ask organizations to request a specific amount of funding. We determine grant amounts internally by evaluating all organizations individually and taking into consideration mission alignment, reach, approach to work, budget, and population served.

Using the Online Portal

Where do I upload a proposal or other document relating to a specific request?

Please upload any documents in the “Documents” section in the application.

What if I am having trouble with uploading documents or the application process?

If you have any problems, please feel free to contact our grants management team at grants@sunlightgiving.org or at (650) 235-4883 x226.



Can I upload other information not requested in the application?

Absolutely. You are welcome to upload any additional documents under the section labeled “Miscellaneous additional information that you think would be helpful”. Please know that this is optional. You are only required to upload documents listed as required in the Application Overview.

How do I add a new contact to my organization profile?

1. Log into the [portal](#) with your credentials
2. When on Home page, click “Organization Profile”
3. In the top left-hand corner, click “New” and select “Contact” from the drop-down menu
4. Using the new contact form, enter the contact’s information
5. Click “Save”

If you are an existing grantee and do not remember your credentials, please contact our grants management team at grants@sunlightgiving.org or at (650) 235-4883 x226.

My organization has a fiscal sponsor. How do I register and complete my organization profile?

If you have a fiscal sponsor, there are several things on the registration page that you need to fill out:

1. Under **New Organization Registration page**, fill out organization name and address section accordingly:
 - a. Follow screenshot below to fill out details from **IRS Search** to **Legal Name**

The screenshot shows a registration form with the following fields and instructions:

- IRS Search**: A dropdown menu with the text "I cannot find our Organization in the IRS Database". A yellow highlight above it says "Project should choose 'I cannot find our Org' from the dropdown menu".
- * EIN #**: A text input field with a yellow highlight containing the text "EIN of the *fiscal sponsor*".
- * Organization Name**: A text input field with a yellow highlight containing the text "Should be the project's name. Follow format: **Project name** (a project of **fiscal sponsor**)".
- * Legal Name**: A text input field with a yellow highlight containing the text "Should be the *fiscal sponsor's name*".
- Organization Common Name (if different from legal name)**: An empty text input field.

- b. Provide your **organization’s address** and **contact information**. Fiscal sponsorship information will be required at a different point of the application.
- c. Submit your registration. Check the email account that you used during the registration for your username and temporary password to log into our portal.
- d. After that, log into the portal: pfs.smartsimple.us/welcome/sunlight with your credentials



2. Under **Organization Profile**, fill out “Fiscal Sponsor” section
 - a. Scroll to the bottom of the page (see screenshot below) and provide fiscal sponsor’s address and Director/CEO details

Fiscal Sponsor (if applicable)

Fiscal Sponsor Name:	<input type="text"/>	EIN:	<input type="text"/>
Mailing Address:	<input type="text"/>	Mailing Address 2:	<input type="text"/>
City:	<input type="text"/>	State/Province:	<input type="text"/>
Zip Code:	<input type="text"/>	Country:	<input type="text"/>
Office Phone:	<input type="text"/>	Website:	<input type="text"/>
Fiscal Sponsor Contact Prefix:	<input type="text"/>	Fiscal Sponsor Contact:	<input type="text"/>
Fiscal Sponsor Contact Title:	<input type="text"/>		

3. In the **Application**:
 - a. Locate section “Letter of Agreement between your organization and fiscal sponsor, if applicable” and upload your letter of agreement

What are the next steps once I submit my application through the application portal?

Once we receive your application, your program officer will review the materials and be in touch with any questions. You can expect to hear back about a decision on your request within two months of submitting your materials.