New Project
Quick Start Guide

Everything You Need to Know to Get Started Right Now

October 2021
**Thank you** for choosing to work with the Social Good Fund. We’re excited to support your efforts to shape a more compassionate and engaged world.

Social Good Fund was founded on the idea that positive social change is not only possible, it’s an absolutely necessary component of healthy communities.

We are a sponsor for people to implement their passion-driven charitable ideas and we are honored to serve you and your stakeholders.

**Now let’s get started!**
While this guide will get you up and running quickly, the Social Good Fund Project Handbook is THE comprehensive resource for learning how to work with us.

Remember, fiscal sponsorship is a partnership. We will always treat you with respect and responsiveness and we expect the same from you. The relationship works best when you look to our resources for your own answers first. If you can’t find what you’re looking for, please do reach out to us; we’re happy to help.

All general questions can be sent to socialgood@socialgoodfund.org. Our team of experts monitors the inbox and will always give you the best answer our collective brains can.

Thank you!
From the Social Good Fund Team
1. Sign Up and Sign In

The first thing: 
**Register to pay the monthly admin fee.**

Register here:  

After successfully registering, you will receive a prompt to: **Create an account on the Social Good Fund website.**

*Please use your project name as your username when you register.*

This account will provide access to the SGF **Member Portal** where you can find the **Project Handbook** and many other important documents and forms you will need!

**Member Page Login:** [https://www.socialgoodfund.org/members/login/](https://www.socialgoodfund.org/members/login/)

*If your admin fee has been waived or you’re having difficulty registering, please email socialgood@socialgoodfund.org for assistance.*
2. Open a Gmail Account

If you don’t have one, you will need a Gmail account.

Specifically, you will need a Gmail account to request any payments (invoices, bills, reimbursements, etc.) from your project funds.

If you don’t have one, you can create a Gmail account easily.
3. Read the **Project Handbook**

The **Project Handbook** has all the information you need to **understand how we work** and what you need to do to **be a great Sponsored Project**.

Please **bookmark it**.

**Find it here:**

[SocialGood Project Handbook](#)
We try very hard to provide you with the tools and support you need to be successful and to get out of your way otherwise. This means, we will only send out communication when it’s of critical importance. We use the Social Good Fund eNewsletter to keep you updated about tools, resources, policies and procedures that you need to be aware of.

Click to Sign Up for the Social Good Fund eNewsletter Now!
5. Sending/Directing Money to Social Good Fund

Given that SGF fiscally sponsors hundreds of charitable projects it is of vital importance that we are able to identify which project incoming funds are for.

Please do not direct anyone to send Social Good Fund money until after you’ve read the Project Handbook and understood the proper procedures for directing funds to us. We do not want to lose track of any incoming money (receivables).

When in doubt, please reach out to our Project Services Team for assistance.

socialgood@socialgoodfund.org
6. Add an online Donation Button to your website

Ready to fundraise online? We support a third party fundraising platform called Flipcause.

Take a look at the Project Handbook to understand your options and then reach out to discuss your needs:

socialgood@socialgoodfund.org
7. Receive a Hardcopy Check

The check should be **formatted like this**:

![Check example](image)

And **sent here**:

Social Good Fund  
PO Box 5473  
Richmond, CA 94805-4021

We recommend that you have checks sent to you first rather than having your donors send checks directly to us.

This way you can make sure that the check has been made out properly and that you have thanked your donor and provided them with a donation receipt in a timely manner.

See the Project Handbook for more information and to access the deposit notification form, which you should use for any checks being sent directly to us.
8. Recognize Your Donors

Donor recognition is your responsibility. We encourage you to thank your donors in a timely and thoughtful way.

Online donations processed by Flipcause will automatically receive an email receipt that acknowledges the amount of the donation. If you are using a different platform, or receiving hardcopy checks, it is up to you to make sure your donors receive a donation receipt.

You can find the donation receipt template on the Member’s Portal acknowledging the tax deductibility of their donation.

Once your project **account balance** has reached **$500**, you can **request** the login credentials for a **Blackbaud account**.

Blackbaud is an online **fund accounting platform** that we use. It provides online access to financial reports, account balances and all financial activity for your organization.

**Request** a Blackbaud user login and check your account balance! Contact: **accounts@socialgoodfund.org**.
10. Request a Payment

Have money in your account and you’re ready to access it?

Need a **reimbursement** from your project funds for an out-of-pocket expense related to your project? (model A only)

Need to **pay an invoice or bill** from your project funds? (model A only)

Are you a Model C sponsored project and need a **grant disbursement**?

All the forms you need can be found on the [Fund Disbursement page](#) of the Member’s Portal, which can be accessed after you register with us.

These forms require a Gmail account!
11. Make Sure You’re Covered
(Insurance for Model A projects only)

In most cases, your activities are covered by our general liability insurance (unless otherwise discussed with you).

However, if you are thinking about producing a big event (+50 people) or doing some other non-office related activity or programming (e.g. take people swimming or horseback riding, or selling alcohol at your fundraiser), you must let us know at least a month in advance so that we can make sure your activity is fully insured.

You will use the Event Notification Form on the Member’s Portal to inform us and to request a review of your insurance needs.

Have questions about insurance? socialgood@socialgoodfund.org
12. Submit a Grant Proposal, Receive a Grant

The documents you’re likely to need to complete a grant proposal/application can be found on the Member’s Portal.

If you can’t find it there, ask us for it: socialgood@socialgoodfund.org

We want to see any grant proposal requesting $10,000 or more, at least one week before it is sent. Submit them for approval with the Grant Proposal Submission Form on the Member’s Portal.

Copies of grant proposals requesting less than $10,000 also must be submitted to us using the same form as above. However, you do not need to seek our approval before it is sent.
13. Engage an Independent Contractor

Have incoming funds and ready to engage an Independent Contractor?

Paying people is a highly regulated process governed by the IRS. SGF will evaluate each individual circumstance against state and federal regulations/guidance about contractor classification to determine the proper payment method (e.g. employee, independent contractor, stipend, paid intern, etc.)

If, after reading the Project Handbook, you still have questions about engaging an Independent Contractor, reach out to: socialgood@socialgoodfund.org.
14. Hire an Employee

Have incoming funds and ready to hire an employee?

**Read the Project Handbook and then start the process on the Member’s Portal.** Once you complete the required information, a member of our HR team will reach out to discuss your needs.

If, after reading the Project Handbook, you still have questions, reach out to: hr@socialgoodfund.org.
15. Request an Expense Card

We don't offer petty cash. If you need quick access to your project funds for project expenses, you can use a PEX Card. A PEX Card is a pre-paid credit card that we can “load” with up to $1,000 of your project funds at your request.

When your account has the funds*, you may Request a PEX Card at: socialgood@socialgoodfund.org

*you MUST have funds in your account PRIOR to requesting a PEX Card.
16. Complete the Project Activity Report

At the end of the calendar year you will be required to complete and submit a Project Activity Report.

We will send you a link to the Project Activity Report in December of each year.

The report is an online form that allows us to learn more about your program activities and stay in compliance with the IRS guidelines for fiscal sponsorship.
17. Communicate with Us

General Questions:
socialgood@socialgoodfund.org
510-621-7223

Accounts Questions:
accounts@socialgoodfund.org

HR Questions:
HR@socialgoodfund.org