How to Update Your EXISTING Profile - Process & Checklist

Thank you for making an impact in our wonderful community and for being a part of *The Giving Partner*. Below is important information which includes everything you'll need to know to make updating your profile a success!

PROFILE STATUS

The status of your profile (described below) is indicated in the top right of your Admin Dashboard. Anytime the status changes, you will receive an auto-generated email informing you of this – **pay attention to your Inbox**, as these notifications will indicate if something is needed, or if your profile is Approved/CURRENT.

Reverification Pending	Your profile has **one or more** key fields expired or missing
Reverification (In Review)	Your profile is being reviewed
Approved	Your profile is up-to-date and CURRENT!

Because key documents and data expire at different intervals throughout the year, you'll need to routinely login and review the key fields in your profile against the Checklist to ensure that nothing is expired/needs updating. **We've provided a simple Checklist below so that you can easily determine which fields need updating!**

LOGIN TO PROFILE

Click this link to access your organization's profile: Login to Profile

CHECKLIST FOR EXISTING PROFILES

Key fields must be updated to have an Approved/Current profile. Below is a Checklist to help you determine which fields **you'll need to verify** to be sure the documents/data have **not expired** and also to make sure the **correct document** is uploaded. Once you have updated **all key fields**, click the **Submit Profile for Review** button (top right of profile), and so long as you've not missed any **key fields** that have expired and have provided the correct document/data, then once your changes have been reviewed by CFSC, your profile will be published with the status of Approved/Current.

Important Note: All file uploads **must be in PDF format only**

MANAGE ORGANIZATION Menu (left sidebar)

For Review

- ❑ EDIT INFORMATION – Physical Address, Phone Number, County, Header Stats (optional)
- ❑ ADD ADMINISTRATOR – Add any additional administrators who are authorized to make edits to your profile

PROFILE SETUP Tab

For Review

- ❑ Tagline
- ❑ Website
- ❑ Review Your Logo
- ❑ Review Your Causes
- ❑ Cover Photo
- ❑ Tell Your Story
- ❑ Video (optional)

OVERVIEW Tab

Key Updates Required

- ❑ Accomplishments (For the past year)
- ❑ Goals (For the next 1-3 years)

For Review

- ❑ Needs (List up to 5 related to programs, overhead, volunteers, etc.)
- ❑ Areas Served

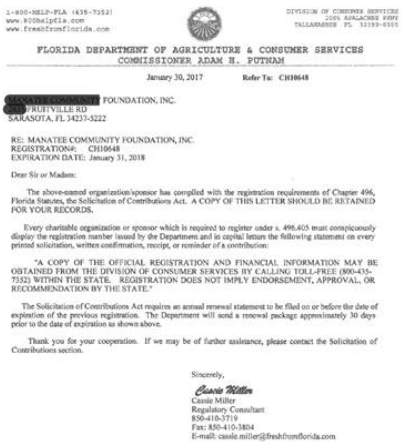
LEGAL, PLANNING & POLICIES Tab

Key Updates Required

- ❑ State Charitable Solicitations Permit

Instructions: If you do not have this document, contact the State of Florida Dept of Agriculture at 800-435-7352 or click http://www.freshfromflorida.com/Business-Services/Solicitation-of-Contributions. For help with uploading or converting the paper document into an electronic PDF, use the Blue Chat Bubble to connect with GiveGab..

Example of what this looks like:



FLORIDA DEPARTMENT OF AGRICULTURE & CONSUMER SERVICES
COMMISSIONER ADAM H. PUTNAM

January 30, 2017 Refer To: CH10648

[redacted] FOUNDATION, INC.
[redacted] RUFFVILLE RD
SARASOTA, FL 34237-5222

RE: MANATEE COMMUNITY FOUNDATION, INC.
REGISTRATION#: CH10648
EXPIRATION DATE: January 31, 2018

Dear Sir or Madam:

The above-named organization/sponsor has complied with the registration requirements of Chapter 496, Florida Statutes, the Solicitation of Contributions Act. A COPY OF THIS LETTER SHOULD BE RETAINED FOR YOUR RECORDS.

Every charitable organization or sponsor which is required to register under s. 496.405 must conspicuously display the registration number issued by the Department and in capital letters the following statement on every printed solicitation, written confirmation, receipt, or reminder of a contribution:

"A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE."

The Solicitation of Contributions Act requires an annual renewal statement to be filed on or before the date of expiration of the previous registration. The Department will send a renewal package approximately 30 days prior to the date of expiration as shown above.

Thank you for your cooperation. If we may be of further assistance, please contact the Solicitation of Contributions section.

Sincerely,

Cassie Miller
Regulatory Consultant
850-410-3719
Fax: 850-410-3804
E-mail: cassie.miller@freshfromflorida.com

- ❑ Conflict of Interest Policy

Instructions: If document isn't viewable or has changed, re-upload entire Policy which also includes the signature block that your board members would sign. (If everything is correct with the existing upload, do not upload again.)

For Review

- ❑ Mailing Address (enter ONLY if this differs from your Street/Physical address)
- ❑ Awards, Affiliations, Accreditations & Collaborations
- ❑ Fundraising Plan (optional) – IF you have this, be sure the period covered is not expired
- ❑ Communication Plan (optional) – IF you have this, be sure the period covered is not expired
- ❑ Strategic Plan (optional) – IF you have this, be sure the period covered is not expired
- ❑ Continuity of Operations Plan (optional)
- ❑ Management Succession Plan (optional)
- ❑ Nondiscrimination Policy (optional)
- ❑ Whistleblower Policy (optional)
- ❑ D&O Insurance Policy (optional) – IF you have this, be sure the period covered is not expired
- ❑ Organization Policies & Procedures (optional)
- ❑ Review Other Fields

FINANCIALS Tab

Key Updates Required

- ❑ Current Fiscal/Calendar Year - Start Date
- ❑ Current Fiscal/Calendar Year - End Date
- ❑ Projected Annual Revenue
- ❑ Projected Annual Expenses
- ❑ 2018 990 Document

  Instructions: Must upload IRS Form 990. If organization files 990N, go to the "Financial Statements or Audit" section where you must also upload organization's Profit & Loss Statement AND Balance Sheet, OR Income & Expense Statement. If IRS indicates that your organization has a religious, educational, or other Exemption (see your IRS 501(c)(3) Letter of Determination to verify this) then skip this section and go to the "Financial Statements or Audit" section where you must upload organization's Profit & Loss Statement AND Balance Sheet, OR Income & Expense Statement.

- ❑ 2019 990 Document (the 2019 is not required at this time, but please upload if you have this)

- ❑ 2018 Financial Statements or Audit Document (Profit & Loss Statement AND Balance Sheet, OR Income & Expense Statement, OR Audit)

  Instructions: If IRS indicates that your organization has a religious, educational, or other Exemption (See your IRS 501(c)(3) Letter of Determination to verify this), or organization files 990N, you must upload organization's Profit & Loss Statement AND Balance Sheet, OR Income & Expense Statement. If your organization has an Audit, upload only if you have this.

- ❑ 2019 Financial Statements or Audit Document (Profit & Loss Statement AND Balance Sheet, OR Income & Expense Statement, OR Audit) (the 2019 is not required at this time, but please upload if you have this)

For Review

- ❑ Endowment
- ❑ Capital Campaign

GOVERNANCE Tab

Key Updates Required

- ❑ Board Chair – **Term Begins & Term Ends**
- ❑ Number of Board Meetings Held in Prior Fiscal/Calendar Year
- ❑ Board Meeting Attendance %

For Review

- ❑ Are Board Members up-to-date?
- ❑ Board Statistics
- ❑ Are You Currently Seeking Board Members?
- ❑ Board Demographics

MANAGEMENT & VOLUNTEERS Tab

For Review

- ❑ Management & Volunteer Statistics
- ❑ CEO/Executive Director

PROGRAMS Tab

For Review

- ❑ Update programs (at least one program is required to have a profile)
- ❑ Program Start Year
- ❑ Population Served Description
- ❑ Number Served Last Year
- ❑ Projected Number Served This Year
- ❑ Outcomes

FOUNDATON REVIEW PROCESS

Foundation Reviews will occur **in the order that profiles are submitted**. We appreciate your patience, especially during peak periods with a large number of profiles in line for review. We know that you are excited for the upcoming 2020 Giving Challenge and want your profiles to be ready. **Please do not click "Submit Profile for Review" until you've completed ALL required fields for your profile, as multiple re-reviews result in delays for everyone.**

If you are concerned or aren't sure if you have completed all key updates, the easiest way to determine this is to easily cross-check what is in your profile with the Checklist.

Questions? Click the **Blue Chat Bubble** **(bottom right of website)** to connect with GiveGab's Customer Success team.

Important: The deadline to **submit your completed profile in The Giving Partner is before 5:00 p.m. on February 28, 2020**, in order to qualify for the 2020 Giving Challenge (April 28-29, 2020).

If you have any further questions, please contact Nonprofits@CFSarasota.org.