THE GIVING PARTNER

How to Create a NEW Profile – Process & Checklist

Thanks so much for your interest in developing a profile in *The Giving Partner*.

Below is important information which includes everything you'll need to know to make creating a profile a success!

First, a bit of clarification for two of our highly-regarded platforms with similar names:

GIVING CHALLENGE & THE GIVING PARTNER
How Are These Different?

- **Giving Challenge** is a **24-hour online giving event** available exclusively to nonprofits with an Approved/CURRENT profile in *The Giving Partner*.

- **The Giving Partner** is a **year-round online resource** reflecting nonprofits in our local area. Having a profile is a great way to increase awareness of your organization. It provides a holistic view of a nonprofit's impact, needs, leadership and financial health which demonstrate a commitment to transparency. Plus, maintaining an Approved/CURRENT profile qualifies your organization to apply for grants from the Community Foundation of Sarasota County and to participate in the Giving Challenge!

Next, here's how to get started:

GETTING STARTED – ELIGIBILITY REQUIREMENTS
Qualifications

Please know that in order **to create a profile, your organization must have both** of the following:

1. IRS 501(c)(3) Letter of Determination, **and**
2. At least one current program (ideally in existence for at least six months) with local impact in at least one of the following counties: Sarasota, Manatee, Charlotte or DeSoto

If you meet the above eligibility requirements, we invite you to join us!

GETTING STARTED - ORIENTATION

The orientation explores the platform with informative illustration for easy to follow navigation, so that creating your profile is a breeze! Learn best practices and expectations. You then have 30 days to complete your profile with guidance from our team. There is no cost for the orientation or to have a profile. All profiles are created **online**.

- If you are comfortable with technology, we encourage you to get started! Click the button below for a **virtual orientation** including helpful tips and information:

How to Create a New Profile!

- If you are not comfortable with technology, or prefer to learn more in person, you may **register** to attend our next **in-person group orientation** (these are typically held quarterly and are almost identical to the virtual orientation):

Next Session - coming Summer 2020
(*registration is not yet open, but usually opens about a month prior*)

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GETTING STARTED - CREATE A PROFILE
Apply to Create a Profile

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After you've viewed the orientation, here are your next steps:

Click Here to Apply to Create a Profile. You'll be taken to a registration form (see image of this below) when you'll enter basic information and create a login for yourself to access your organization's profile. Once your registration is verified, you'll receive an email notification indicating that you can begin creating your profile.

Then, the next page will be a brief registration survey, which looks like this:

Organization's Legal Name (Enter this exactly as reflected on IRS 501(c)(3) Letter of Determination): *

Employer Identification Number (EIN) (Enter this exactly as reflected on IRS 501(c)(3) Letter of Determination, include the dash): *

Contact First Name: *

Contact Last Name: *

Contact Email: *

Contact Phone Number: *

Organization must have at least one currently active program with local impact in at least one of these counties: Sarasota, Manatee, Charlotte or DeSoto. Describe "local" impact in one paragraph or less: *

My organization is currently classified as a 501(c)(3) public charity? *
Please select one choice

| Yes | ▼ |

Please note that a few sections of the platform are still under construction (certain financial fields). Stay tuned! **In the meantime, go ahead and complete the rest of your profile.**

LOGIN TO PROFILE

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

Required fields must be completed to have an Approved/Current profile. Below is a Checklist to help you determine which "**required** fields" **you'll need to verify** to be sure the documents/data are **current** and also to make sure the **correct document** is uploaded. Once you have completed **all of the required fields**, click the **Submit Profile for Review** button (top right of profile), and so long as you've not missed any required fields 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)

Review

❑ EDIT INFORMATION – Physical Address, Phone Number, County, Header Stats (optional)

Optional

❑ ADD ADMINISTRATOR – Add any additional administrators who are authorized to make edits to your profile

PROFILE SETUP Tab

Required

❑ Tagline
❑ Website
❑ Review Your Logo
❑ Review Your Causes
❑ Cover Photo
❑ Tell Your Story

Optional

❑ Video (optional)

OVERVIEW Tab

Required

❑ Mission
❑ Background
❑ Needs (Top 5: List up to 5 related to programs, overhead, volunteers, etc.)
❑ Accomplishments (For the past year)
❑ Goals (For the next 1-3 years)
❑ Areas Served

LEGAL, PLANNING & POLICIES Tab

Required

❑ Year of Incorporation
❑ Tax Exempt Status
❑ EIN

- ❏ Doing Business As ("DBA") if applicable
- ❏ IRS 501(c)(3) Letter of Determination
- ❏ 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. If you need help with uploading this document or converting your paper document into an electronic PDF, use the Blue Chat Bubble to connect with GiveGab's Customer Success team. Organization may be Exempt from filing fee (if less than $25,000 revenue) or Exempt from registration (Florida State Statute 496.406) if the State determines organization qualifies (i.e., religious, educational, etc.)

Example of what this looks like:
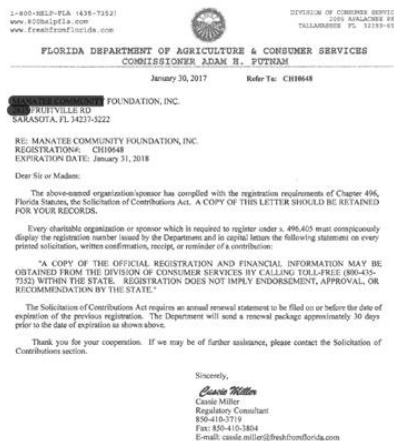
- ❏ Conflict of Interest Policy

Instructions: Florida law requires this for board members. Upload entire Policy which also includes the signature block that board members would sign.)

- ❏ Organization Type

Optional

- ❏ Mailing Address (enter **only** if this differs from your Street/Physical address)
- ❏ Awards, Affiliations, Accreditations & Collaborations
- ❏ Fundraising Plan
- ❏ Communication Plan
- ❏ Strategic Plan
- ❏ Continuity of Operations Plan
- ❏ Management Succession Plan
- ❏ Nondiscrimination Policy
- ❏ Whistleblower Policy
- ❏ D&O Insurance Policy
- ❏ Organization Policies & Procedures

FINANCIALS Tab

Required

- ❏ Current Fiscal/Calendar Year - **Start** Date
- ❏ Current Fiscal/Calendar Year - **End** Date
- ❏ Projected Annual Revenue
- ❏ Projected Annual Expenses
- ❏ 2018, 2017 and 2016 990 Documents

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. If organization has less than three years of 990s, enter the most recent year(s) that you do have.

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

❑ 2018, 2017 and 2016 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. If organization has less than three years of financials, enter the most recent year(s) that you do have.

❑ 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)

Optional

❑ Endowment
❑ Capital Campaign

GOVERNANCE Tab

Required

❑ Board Chair – **Term Begins & Term Ends**
❑ Board Members – List **all** members
❑ Number of Board Meetings Held in Prior Fiscal/Calendar Year
❑ Board Meeting Attendance %
❑ Board Statistics
❑ Are You Currently Seeking Board Members?
❑ Board Demographics

MANAGEMENT & VOLUNTEERS Tab

Required

❑ Management & Volunteer Statistics
❑ CEO/Executive Director – If this individual is not **paid** in *this* position (i.e., board member is **acting** as the ED but is not paid), enter **No Executive** in the **FIRST NAME** field and **Director** in the **LAST NAME** field

PROGRAMS Tab

Required

❑ Enter data for at least one local, active program (ideally in existence for at least six months)

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.

Pending   Your new profile is pending your completion and submission of all required fields
In Review   Your new profile is in line for review
Approved   Your profile is up-to-date and CURRENT!

After your profile has been approved, you are required to make updates to certain key fields when these expire. 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.

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 required fields, 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 January 31, 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.