

# THE GIVING PARTNER

## How to Navigate Your Profile Process & Checklist

### Introduction

Thank you for making an impact in our wonderful community!

Whether your organization is **new** to *The Giving Partner*, or **already has a profile**, we are glad to have you be a part of our online platform.

This document contains important information which includes everything you'll need to know to ensure that creating and maintaining your profile is a success!

#### Checklists:

- If your organization **does not yet have a profile**, see page 4 for the **Checklist** of required fields.
- If your organization **already has a profile**, see page 10 for the **Checklist** of key updates required.

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### THE GIVING PARTNER & GIVING CHALLENGE How Are These Different?

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

- **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 for opportunities through the Community Foundation of Sarasota County, such as eligibility to apply for grants and for participation in the Giving Challenge!
- **Giving Challenge** is a **24-hour online giving event** available exclusively to nonprofits with an Approved/CURRENT profile in *The Giving Partner*.

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### QUESTIONS?

Please note that a few areas of the platform are still under a bit of construction. If you encounter any fields that don't seem to be working properly, need help with uploading documents, or clarification about what to enter, please click the **Blue Chat Bubble**  **(bottom right of website)** to connect with our Customer Success team!

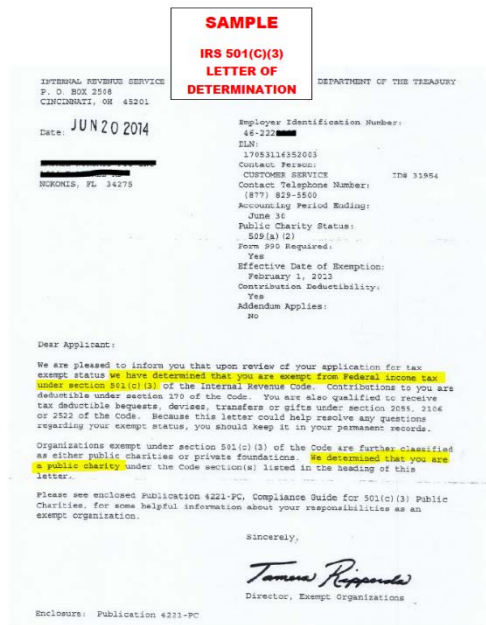
If you have any further questions, please contact [Nonprofits@CFSarasota.org](mailto:Nonprofits@CFSarasota.org).

# How to Create a Profile

## ELIGIBILITY & QUALIFICATION REQUIREMENTS For All Organizations

In order to have a profile, an organization must have both of the following:

1. IRS 501(c)(3) Letter of Determination (see image below for an example of what this looks like), **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



## GETTING STARTED – ORIENTATION For Organizations That Don't Yet Have a Profile

If your organization meets the above eligibility requirements, we invite you to join us!

The next step is an orientation which 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 have 30 days to complete your profile with guidance from our team. There is no cost to have a profile or for the orientation. Profiles are created **online**.

- If comfortable with technology, we encourage you to get started! Click the button below for a **virtual orientation**:

[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** (typically held quarterly and almost identical to the virtual orientation):

**Next Session - coming Summer 2020**

*(registration is not yet open, but usually opens about a month prior)*

## GETTING STARTED – APPLY TO CREATE A PROFILE For Organizations That **Don't Yet** Have a Profile

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

[Click Here to Apply to Create a Profile](#). You'll be taken to the registration application.

The first page looks like this:

Register Your Organization for  
**The Giving Partner**  
Powered by GiveGab

Organization Name

Street Address Line 1

Street Address Line 2

City

State  
Select a State

ZIP/Postal Code

☐ Not located in the United States?

Logo

Select Image

Remove

Recommended dimensions 300x300  
Max file size 5MB

Your First and Last Name

Your Email

Password

Click "Continue" to complete your registration for  
**The Giving Partner**

Continue

**Basic organization information**

**Creating your login information**

The next page 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

After you've submitted your application, please wait for our verification to ensure that you qualify, before you start working on your profile. You'll receive an email notification indicating when you can begin creating your profile.

# How to Create a Profile

## LOGIN TO PROFILE

Click this link to access your organization's profile: [Login to Profile](#)

## CHECKLIST FOR NEW PROFILES For Organizations That Don't Yet Have a Profile

All required fields must be completed to have an Approved/CURRENT profile.

Below is a Checklist to help you ensure that you've entered the necessary content and that the **correct documents** are uploaded. Once you have completed **all required fields**, click on **Submit Profile for Review** (top right of profile).

**\*\*\* Important:** 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

- ☐ ADD ADMINISTRATOR – Add any additional administrators who are **authorized** to make edits to your profile

PROFILE SETUP Tab

### Required

- ☐ Tagline
- ☐ Website
- ☐ Logo
- ☐ Causes
- ☐ Cover Photo
- ☐ Tell Your Story

### Optional

- ☐ Video (optional)

**Add Your Causes**

✓ Add Your Organization's Info

Tagline: Help a senior dog with your donation!

Website: <http://www.loganpdx.com>

Logo:

Causes:

- Cause #1: Community Advocacy
- Cause #2: Education
- Cause #3:

**Add Your Story**

✓ Add Your Story

Cover Photo:

Tell Your Story: Meet Buster

Video List: Upload Your Video or Video Link Here

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 – Overall Organization

### Required

- ☐ Year of Incorporation
- ☐ Tax Exempt Status
- ☐ Tax Status
- ☐ Federal Employer/Tax Identification Number ("EIN")
- ☐ Organization Doing Business As ("DBA") (if applicable)
- ☐ IRS 501(c)(3) Letter of Determination
- ☐ State Charitable Solicitations Permit (see image below for an example of what this looks like)

*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 our 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.). Must upload either the Permit or the Exemption document that you receive from the State.*



- ☐ 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.)*

- ☐ Primary Organization Type and Sub-Type

*Instructions: Refer to Appendix for acceptable choices to select from*

### Optional

- ☐ Other Organization Names
- ☐ Mailing Address (enter **only** if this differs from your Street/Physical address)
- ☐ Awards, Affiliations, Accreditations & Collaborations
- ☐ Fundraising Plan, Communication Plan, Strategic Plan

*Instructions: If organization has any of these **board-approved** documents, **enter period covered**.*

- ☐ Continuity of Operations Plan, Management Succession Plan, Nondiscrimination Policy

*Instructions: If organization has any of these **board-approved** documents, **enter year adopted**.*

- ☐ D&O Insurance Policy

*Instructions: If organization has this document, **enter period covered**.*

- ☐ Whistleblower Policy, Organization Policies & Procedures, Policy Against Compensation for Fundraising Consultants

*Instructions: **Enter Yes or No**.*

- ☐ Secondary Organization Type and Sub-Type

*Instructions: Refer to Appendix for acceptable choices to select from*

## 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, 990EZ, 990N, or 990PF.***

*If organization **files 990N**, upload this here **and additionally** upload organization's Profit & Loss Statement (Income & Expense Statement) AND Balance Sheet **under the "Financial Statements or Audit" section**.*

*If **IRS indicates** that organization has a **religious, educational, or other Exemption** (see IRS 501(c)(3) Letter of Determination to verify this), **then skip this section and** upload organization's Profit & Loss Statement (Income & Expense Statement) AND Balance Sheet **under the "Financial Statements or Audit" section**.*

*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

*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 (Income & Expense Statement) AND Balance Sheet.*

*If 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 (2019 is not required at this time, but please upload if you have this)

❑ Tax Information

- Total Revenue

*Instructions: From 990: Part I, Line 12. From 990-EZ: Part I, Line 9. Or, from your accounting records.*

- Foundation Corporate Contributions, Government Contributions (Federal Contributions, State Contributions, Local Contributions, Unspecified Government Contributions), Individual Contributions, Indirect Public Contributions

*Instructions: From 990: Part I, Line 8. From 990-EZ: Part I, Line 1. Or, from your accounting records.*

- Earned Revenue

*Instructions: From 990: Part I, Line 9. From 990-EZ: Part I, Line 2. Or, from your accounting records.*

- Net Investment Income

*Instructions: From 990: Part I, Line 10. From 990-EZ: Part I, Line 4. Or, from your accounting records.*

- Membership Dues, Special Event(s) Revenue, In-Kind Revenue, Other Revenue

*Instructions: From 990: Part I, Line 11. From 990-EZ: Part I, Line 3,5c,6d,7c and 8. Or, from your accounting records.*

- Total Expenses

*Instructions: From 990: Part I, Line 18. From 990-EZ: Part I, Line 17. Or, from your accounting records.*

- Administration Expense

*Instructions: From 990: Part IX, Line 25(C). Or, from your accounting records.*

- Program Expense

*Instructions: From 990: Part IX, Line 25(B). Or, from your accounting records.*

- Fundraising Expense

*Instructions: From 990: Part IX, Line 25(D). Or, from your accounting records.*

- Affiliate Payments, Current Assets

*Instructions: From 990, or, from your accounting records.*

- Total Assets

*Instructions: From 990: Part I, Line 20. From 990-EZ: Part II, Line 25. Or, from your accounting records.*

- Total Net Assets

*Instructions: From 990: Part I, Line 22. From 990-EZ: Part II, Line 27. Or, from your accounting records.*

- Current Liabilities, Long Term Liabilities

*Instructions: From 990: Part I, Line 21. From 990-EZ: Part II, Line 26. Or, from your accounting records.*

### ***Optional***

- ☐ Endowment
- ☐ Capital Campaign

## GOVERNANCE Tab

### ***Required***

- ☐ Board Chair – **Term Begins & Term Ends**
- ☐ Board Members – List **all** members along with voting status
- ☐ Number of Board Meetings Held in Prior Fiscal/Calendar Year
- ☐ Board Meeting Attendance %

*Click this link to easily calculate this %:* [Board Meeting Attendance Calculator](#)

- ☐ 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). At least one program is required to have a profile.*

- ☐ Program Name
- ☐ Program Description

*Instructions: Try to limit this to as few paragraphs as possible, while still conveying an adequate description*

- ☐ Program Start Year
- ☐ Program Costs (Annual)
- ☐ Program Category, Program Sub-Category

*Instructions: Refer to Appendix for acceptable choices to select from*

- ☐ Population Served 1, 2, and/or 3

*Instructions: Refer to Appendix for acceptable choices to select from*



- ☐ Program Areas Served
- ☐ Population Served Description
- ☐ Number Served Last Year
- ☐ Projected Number Served This Year
- ☐ What Outcome(s) do You Seek for Participants?
- ☐ How is the Extent of Outcome Achievement Confirmed?
- ☐ Define the Outcomes Achieved in the Last Completed Year of this Program

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**Be sure to review for grammar and typos (we do not edit for you)! It is also beneficial to have someone outside of your organization read the profile – do things make sense from their perspective?**

Once your work is **fully** complete and ready for our review, click **SUBMIT PROFILE FOR REVIEW**

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# How to Update a Profile

## LOGIN TO PROFILE

Click this link to access your organization's profile: [Login to Profile](#)

## CHECKLIST FOR EXISTING PROFILES For Organizations That **Already** Have a Profile

Key updates must be made to maintain an Approved/CURRENT profile.

Below is a Checklist which **you'll need to cross-check** with your profile to ensure that you've updated any necessary documents/data that have expired or changed.

**\*\*\* Important:** 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
- ☐ ADD ADMINISTRATOR – Add any additional administrators who are authorized to make edits to your profile

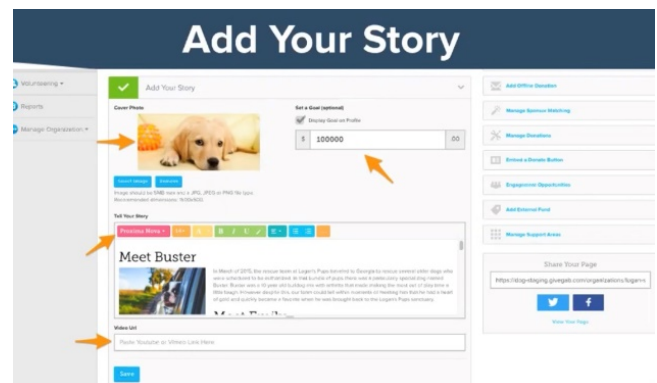
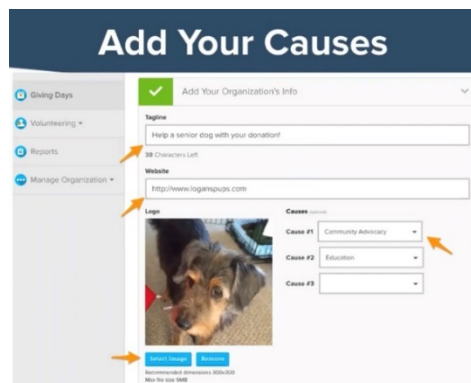
PROFILE SETUP Tab

### *Required*

- ☐ Website
- ☐ Causes
- ☐ Tell Your Story

### *For Review*

- ☐ Tagline
- ☐ Logo
- ☐ Cover Photo
- ☐ 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 – Overall Organization

### Key Updates Required

- ☐ IRS 501(c)(3) Letter of Determination

*Instructions: Click existing uploaded document and verify that the document is viewable. If the document is not viewable, re-upload this document. (If everything is correct with existing upload, do not upload again.)*

- ☐ State Charitable Solicitations Permit (see image below for an example of what this looks like)

*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 our 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.). Must upload either the Permit or the Exemption document that you receive from the State.*



- ☐ Conflict of Interest Policy

*Instructions: Click existing uploaded document and verify that the document is viewable. If the document is not viewable or if you have an updated version, re-upload entire Policy which also includes the signature block that board members would sign. (If everything is correct with 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, Communication Plan, Strategic Plan

*Instructions: If organization has any of these **board-approved** documents, enter period covered.*

- ☐ Continuity of Operations Plan, Management Succession Plan, Nondiscrimination Policy

*Instructions: If organization has any of these **board-approved** documents, **enter year adopted**.*

- ☐ D&O Insurance Policy

*Instructions: If organization has this document, **enter period covered**.*

- ☐ Whistleblower Policy, Organization Policies & Procedures, Policy Against Compensation for Fundraising Consultants

*Instructions: **Enter Yes or No**.*

- ☐ 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, 990EZ, 990N, or 990PF.***

*If organization **files 990N**, upload this here **and additionally** upload organization's Profit & Loss Statement (Income & Expense Statement) AND Balance Sheet **under the "Financial Statements or Audit" section**.*

*If **IRS indicates** that organization has a **religious, educational, or other Exemption** (see IRS 501(c)(3) Letter of Determination to verify this), **then skip this section and** upload organization's Profit & Loss Statement (Income & Expense Statement) AND Balance Sheet **under the "Financial Statements or Audit" section**.*

- ☐ 2019 990 Document (the 2019 is not required at this time, but please upload if you have this)
- ☐ 2018 Financial Statements 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 (Income & Expense Statement) AND Balance Sheet.*

*If organization has an Audit, upload **only** if you have this.*

- ☐ 2019 Financial Statements or Audit (2019 is not required at this time, but please upload if you have this)
- ☐ Tax Information

- Total Revenue

*Instructions: From 990: Part I, Line 12. From 990-EZ: Part I, Line 9. Or, from your accounting records.*

- Foundation Corporate Contributions, Government Contributions (Federal Contributions, State Contributions, Local Contributions, Unspecified Government Contributions), Individual Contributions, Indirect Public Contributions

*Instructions: From 990: Part I, Line 8. From 990-EZ: Part I, Line 1. Or, from your accounting records.*

- Earned Revenue

*Instructions: From 990: Part I, Line 9. From 990-EZ: Part I, Line 2. Or, from your accounting records.*

- Net Investment Income

*Instructions: From 990: Part I, Line 10. From 990-EZ: Part I, Line 4. Or, from your accounting records.*

- Membership Dues, Special Event(s) Revenue, In-Kind Revenue, Other Revenue

*Instructions: From 990: Part I, Line 11. From 990-EZ: Part I, Line 3,5c,6d,7c and 8. Or, from your accounting records.*

- Total Expenses

*Instructions: From 990: Part I, Line 18. From 990-EZ: Part I, Line 17. Or, from your accounting records.*

- Administration Expense

*Instructions: From 990: Part IX, Line 25(C). Or, from your accounting records.*

- Program Expense

*Instructions: From 990: Part IX, Line 25(B). Or, from your accounting records.*

- Fundraising Expense

*Instructions: From 990: Part IX, Line 25(D). Or, from your accounting records.*

- Affiliate Payments, Current Assets

*Instructions: From 990, or, from your accounting records.*

- Total Assets

*Instructions: From 990: Part I, Line 20. From 990-EZ: Part II, Line 25. Or, from your accounting records.*

- Total Net Assets

*Instructions: From 990: Part I, Line 22. From 990-EZ: Part II, Line 27. Or, from your accounting records.*

- Current Liabilities, Long Term Liabilities

*Instructions: From 990: Part I, Line 21. From 990-EZ: Part II, Line 26. Or, from your accounting records.*

***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 %

Click this link to easily calculate this %: [Board Meeting Attendance Calculator](#)

***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 program(s). At least one program is required to have a profile.*

- ☐ Program Name
- ☐ Program Description

*Instructions: Try to limit this to as few paragraphs as possible, while still conveying an adequate description*

- ☐ Program Start Year
- ☐ Program Costs (Annual)
- ☐ Program Category, Program Sub-Category

*Instructions: Refer to Appendix for acceptable choices to select from*

- ☐ Population Served 1, 2, and/or 3

*Instructions: Refer to Appendix for acceptable choices to select from*

- ☐ Population Served Description
- ☐ Number Served Last Year

- ☐ Projected Number Served This Year
- ☐ Outcomes (3 fields)

\*\*\*

**Be sure to review for grammar and typos (we do not edit for you)!**

Once your work is **fully** complete and ready for our review, click **SUBMIT PROFILE FOR REVIEW**

\*\*\*

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# Deadlines, Profile Status & Review Process

## DEADLINE FOR PROFILE SUBMISSION To Qualify for the 2020 Giving Challenge (April 28-29, 2020)

If creating a **new** profile, the deadline to **submit your completed profile** was **January 31, 2020**.

If updating an **existing** profile, the deadline to **submit your fully updated profile** is **before 5:00 p.m. on February 28, 2020**.

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## PROFILE STATUS

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

Pending	Your <b>new</b> profile is pending your completion and submission of all required fields
Submitted	Your profile is in line for review
Re-verification Pending	Your profile has <b>one or more</b> key fields expired or missing
Re-verification (In Review)	Your profile is being reviewed
Approved	Your profile is up-to-date and CURRENT!

After initial approval, 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. **We've provided this Checklist so that you can easily determine which fields need updating!**

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## FOUNDATION REVIEW PROCESS

Foundation Reviews occur **in the order that profiles are submitted**. After we have reviewed your profile, you will receive a notification email indicating the status of the profile.

- So long as you've not missed any required/key fields and have provided the correct documents/data, then your profile will be published with the status of "Approved/CURRENT."
- If you've missed any required/key fields or have not provided the correct documents/data, the notification email will indicate "Pending (Re-Verification)" so that you can quickly provide the documents/data.

We appreciate your patience, especially during peak periods with many 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/key fields, as multiple re-reviews result in delays for everyone.**

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



# Appendix

The lists below reflect answer choices as indicated for specific fields. Be sure to select the response that best describes your organization.

## GOVERNANCE Tab

### FIELD: Standing Committees

*(Enter all that apply and separate each with a comma e.g. "Audit, Board Governance, Development")*

- Academic Affairs
- Administration
- Advisory Board / Advisory Council
- Audit
- Audit, Compliance and Controls
- Board Development / Board Orientation
- Board Governance
- Building
- By-laws
- Campus Planning and Development
- Capital Campaign
- Collections
- Communications / Promotion / Publicity / Public Relations
- Community Outreach / Community Relations
- Development / Fund Development / Fund Raising / Grant Writing / Major Gifts
- Donor Services
- Education
- Endowment
- Executive
- Finance
- Fiscal Affairs
- Housing and Community Development
- Human Resources / Personnel
- Human Resources / Personnel and Finance and Marketing and Nominating and By-laws
- Institutional Advancement
- Investment
- Legislative
- Management
- Marketing
- Membership
- Nominating
- Operations
- Parents
- Personnel
- Production
- Program / Program Planning
- Project Oversight
- Scholarship
- Scientific Advisory
- Special Events (Golf Tournament, Walk / Run, Silent Auction, Dinner / Gala)
- Staff Development
- Strategic Planning / Strategic Direction
- Student Affairs
- Technology
- Trusteeship
- Volunteer
- Youth

**PROGRAMS Tab**  
**FIELD: Population Served**  
(Enter up to 3)

- Adults
- Aging, Elderly, Senior Citizens
- Infants to Preschool (under age 5)
- K-12 (5-19 years)
- Children Only (5-14 years)
- Children and Youth (0-19 years)
- Adolescents Only (13-19 years)
- Caregivers
- Children of LGBT parents
- Families
- Foster and adoptive children
- Foster and adoptive parents
- Grandparents
- Orphans
- Parents
- Single Parents
- Transitioning children
- Widows and widowers
- Indigenous Peoples
- Multiracial people
- People of African descent
- People of Asian, Pacific Islander descent
- People of Caribbean descent
- People of European descent
- People of Latin American descent
- People of Middle Eastern descent
- Heterosexuals
- LGBTQIA People
- Men
- Women
- Africa
- Asia
- Australia, New Zealand, Oceania
- Canada
- Europe & Newly Independent States
- International
- Latin America & the Caribbean
- Middle East
- US
- US & International
- People/Families of People with Cancer
- People/Families of People with Developmental Disabilities
- People/Families of People with Disabilities
- People/Families of People with Health Conditions
- People/Families of People with HIV/AIDS
- People/Families with Other Disabilities
- People/Families of People with Physical Disabilities
- People/Families of People with Psychological Disabilities
- Pregnant People
- Terminally ill people
- Substance abusers
- Academics
- At-Risk Populations
- Artists and performers
- Emergency responders
- Farmers
- Homeless
- Immigrant, Newcomers, Refugees
- Migrant Workers
- Minorities
- Military personnel
- Offenders/Ex-Offenders
- Poor, Economically Disadvantaged, Indigent
- Retired people
- Unemployed, Underemployed, Dislocated
- Veterans
- Victims and Oppressed people
- General/Unspecified

## PROGRAMS Tab

### FIELD: Program Category and Sub-Category

(Enter one category and one sub-category. Categories are bolded, and subcategories are the bullet points below them.)

#### **Animal-Related**

- Animal Control
- Animal Exhibitions & Shows
- Animal Ownership
- Animal Protection & Welfare
- Animal Training
- Animal-Related, General/Other
- Bird Preservation & Protection
- Farm & Domestic Animal Protection & Welfare
- Fishery Conservation & Management
- Marine Animals Preservation & Protection
- Pet Cemetery Services
- Pet-Related Financial & Commodities Assistance
- Prevention of Cruelty to Animals Enforcement
- Veterinary Services
- Wild Animals Preservation & Protection
- Wildlife Preservation & Protection
- Zoological Parks & Aquariums

#### **Arts, Culture & Humanities**

- Archaeology
- Architecture
- Artists' Services
- Artists-in-Residence
- Arts, Culture & Humanities, General/Other
- Broadcasting
- Celebratory Events
- Children's Theater Programs
- Choreography
- Commemorative Events
- Cultural & Ethnic Awareness
- Cultural Festivals
- Cultural Heritage
- Curatorial Work & Exhibitions
- Dance
- Dance Festivals
- Dance Instruction
- Dance Performances
- Electronic Media
- Film & Video
- Folklife & Traditional Arts
- Foreign Language & Linguistics
- Genealogy
- Historic Preservation & Conservation
- History & Historical Programs
- Humanities Programs
- Journalism

- Literature
- Media & Communications
- Memorials & Monuments
- Museum Acquisitions
- Museum Audience Services
- Museum Collections Conservation
- Museum Education
- Museums
- Music
- Music Appreciation
- Music Composition
- Music Festivals
- Music Instruction
- Musical Performances
- Opera
- Performing Arts
- Philosophy & Ethics
- Public Art Programs
- Publishing
- Puppet Shows
- Theater
- Theater Arts Instruction
- Theater Festivals
- Theatrical Performances
- Theology & Comparative Religion
- Traveling Exhibitions
- Visual Arts
- Visual Arts Exhibitions
- Visual Arts Festivals
- Visual Arts Instruction
- Dance Performances Presenting
- General Arts Education
- General Arts Funding
- General Arts Presenting
- Music Performances Presenting
- Opera Festivals
- Opera Performances
- Opera Performances Presenting
- Theatrical Performances Presenting

#### **Beneficiary Code**

- Adolescents Only (13-19 years)
- Adults
- Africa
- Aging, Elderly, Senior Citizens
- Alcohol, Drug, Substance Abusers
- Asia
- Asian, Pacific Islander Heritage

- At-Risk Populations
- Australia, New Zealand, Oceania
- Blacks, African Heritage
- Canada
- Children & Youth (0-19 years)
- Elderly and/or Disabled
- Europe & the Newly Independent States
- European Heritage
- Families
- Females
- General/Unspecified
- Hispanic, Latino Heritage
- Homeless
- Immigrants, Newcomers, Refugees
- Infants to Preschool (under age 5)
- International
- K-12 (5-19 years)
- Latin America & the Caribbean
- Lesbians, Gays, Bisexuals, Transgendered
- Males
- Middle East
- Middle Easterner Heritage
- Migrant Workers
- Minorities
- Native Americans
- Offenders, Ex-Offenders
- Other Economic Level
- Other Health/Disability
- Other Named Groups
- People/Families of People with Cancer
- People/Families of People with Health Conditions
- People/Families of People with HIV/AIDS
- People/Families with of People with Developmental Disabilities
- People/Families with of People with Disabilities
- People/Families with of People with Physical Disabilities
- People/Families with of People with Psychological Disabilities
- Poor, Economically Disadvantaged, Indigent
- Unemployed, Underemployed, Dislocated
- US
- US & International
- Victims

#### **Civil Rights, Social Action & Advocacy**

- Censorship, Freedom of Speech & Press
- Children's Rights
- Civil Liberties
- Civil Rights
- Civil Rights, Social Action & Advocacy, General/Other

- Disabled Persons' Rights
- Ethnic Groups' Rights & Racial Equality
- Immigrants' Rights
- Intergroup Relations
- Lesbian & Gay Rights
- Privacy Rights
- Reproductive Rights
- Right to Die
- Right to Life
- Seniors' Rights
- Women's Rights

#### **Community Development**

- Business Promotion
- Business Recruitment & Attraction
- Community Development, General/Other
- Community Economic Development
- Organizational Development & Training
- Regional Economic Development
- Rural Economic Development
- Small & Minority Business Development Programs
- Tourism Development
- Community Renewal
- Business District Revitalization
- Neighborhood Revitalization
- Waterfront Development

#### **Community**

- Business Districts Revitalization
- Community Renewal
- Neighborhood Revitalization
- Waterfront Development

#### **Crime & Legal**

- Administration of Justice
- Alternative Sentencing/Supervision
- Child Abuse Prevention
- Citizen Crime Reporting
- Community Crime Prevention
- Constitutional Law
- Crime & Legal, General/Other
- Crime Control & Prevention
- Criminal Justice & Corrections
- Drunk Driving Programs
- Environmental Law
- Ex-Offender Services/Supervision
- Family Violence Prevention
- Guardians ad Litem
- Gun Control
- Hate Crimes Prevention

- Housing Discrimination
- Inmate Support
- Intellectual Property Law
- Juvenile Justice
- Labor & Employment Law
- Landlord/Tenant Law
- Law Enforcement Agencies
- Legal Services
- Mediation Programs
- Missing Persons
- Rehabilitation Services for Offenders
- Sexual Assault Prevention
- Specialized Law Practice Areas
- Spouse Abuse Prevention
- Youth Violence Prevention

### **Diseases, Disorders & Medical Disciplines**

- Allergy & Immunological Diseases
- Alzheimer Disease
- Amyotrophic Lateral Sclerosis
- Arthritis
- Asthma
- Biomedical Engineering
- Birth Defects, Genetic Disorders & Developmental Disorders
- Cancer
- Cardiovascular Diseases
- Cerebral Palsy
- Chronic Fatigue Syndrome
- Communications Disorders
- Community Medicine
- Cystic Fibrosis
- Diabetes
- Digestive System Diseases
- Diseases & Disorders
- Diseases of the Blood & Blood-Forming Organs
- Diseases, Disorders & Medical Disciplines, General/Other
- Down Syndrome
- Ear, Nose & Throat Diseases
- Endocrine, Metabolic & Nutritional Diseases
- Epidemiology
- Epilepsy
- Eye Diseases, Blindness & Vision Impairments
- Genitourinary Diseases
- Geriatrics
- Head Injuries
- Heart Diseases
- Hemophilia
- Hepatitis
- HIV/AIDS
- Infectious Diseases
- Kidney Diseases

- Language & Speech Disorders
- Learning Disabilities
- Leukemia
- Liver Diseases
- Lung Diseases
- Lupus
- Lyme Disease
- Medical Disciplines & Occupations
- Medical Genetics
- Medical Specialties
- Military & Naval Medicine
- Multiple Sclerosis
- Muscular Dystrophy
- Musculoskeletal & Connective Tissue Diseases
- Nervous System Diseases
- Nursing
- Osteopathic Medicine
- Osteoporosis
- Parkinson Disease
- Respiratory System Diseases
- Sexually Transmitted Diseases
- Sickle Cell Disease
- Skin Diseases
- Spinal Cord Injuries
- Sports Medicine
- Surgical Specialties
- Telemedicine
- Tropical Medicine
- Tuberculosis
- Women's Cancer
- Wounds & Injuries

### **Education**

- Adult Education
- Afterschool Enrichment
- Alumni
- Computer Literacy
- Curriculum Development
- Distance Education
- Dropout Programs
- Early Childhood Education
- Education & Technology
- Education Policy Programs
- Educational Research
- Education, General/Other
- Educational Assessment & Evaluation
- Educational Delivery
- Educational Programs
- Educational Testing
- Elementary & Secondary Education
- Extracurricular Activities
- Extracurricular Music
- Extracurricular Sports

- Gifted Education
- Guidance & Counseling
- Library
- Literacy
- Partnerships in Education
- Postsecondary Education
- Remedial Programs
- Service Learning
- Special Education
- Student Financial Aid
- Student Services
- Summer School
- Teacher & Faculty
- Tutorial Programs
- Vocational Education
- School Health Services
- Extracurricular Math & Science
- Extracurricular Arts & Culture

### **Employment**

- Apprenticeships
- Employment, General/Other
- Internships
- Job Search & Placement
- Job Training & Employment
- Labor Programs
- Retraining
- Vocational Guidance
- Vocational Rehabilitation
- Youth Job Training & Employment

### **Environment**

- Air Pollution Control
- Architectural & Landscape Design
- Botanical & Aquatic Gardens
- Climatic Change
- Energy Resources
- Environment, General/Other
- Environmental & Sustainable Design
- Environmental & Urban Beautification
- Environmental Education
- Environmental Hazards Control
- Horticulture
- Land Conservation
- Land Use Planning
- Marine Conservation
- Natural Resources Conservation & Protection
- Pest Control
- Plant Conservation
- Pollution Abatement & Control
- Radiation Control
- Recycling

- Waste Management
- Water Conservation
- Water Pollution Control
- Watershed Conservation

### **Food, Agriculture & Nutrition**

- Agricultural Economics & Farm Management
- Agricultural Exhibitions
- Agricultural Production
- Agricultural Water Management
- Agriculture
- Food
- Food Distribution
- Food Outlets
- Food Science
- Food, Agriculture & Nutrition, General/Other
- Hunger Action
- Meal Distribution
- Nutrition
- Sustainable Agriculture

### **General Code**

- Advocacy
- Awards, Prizes & Competitions
- Capacity Building
- Communications & Public Education
- Direct Service
- Fundraising, Grants & Financial Support
- Licensure, Accreditation & Certification
- Management, Administrative & Technical Support
- Membership Programs
- Professional Development & Training
- Research & Public Policy Analysis
- Volunteer Programs

### **Health Care**

- Acupuncture
- Alternative Health Care
- Ambulatory & Primary Health Care
- Anatomical Gifts Provision
- Assistive Technology Equipment Provision
- Bioethics & Medical Ethics
- Blood Banking
- Cardiovascular Technology
- Chemotherapy/Radiation
- Chiropractic Care
- Dental Health Care
- Diagnostic Medical Sonography
- Early Intervention & Prevention
- Emergency Services, Hospital-Based

- Environmental Health
- Family Planning
- Family Services for Adolescent Parents
- Health Care Economics
- Health Care Equipment & Supplies Provision
- Health Care Issues
- Health Care Referrals
- Health Care Reform
- Health Care, General/Other
- Health Diagnostic, Intervention & Treatment Services
- Health Insurance Counseling
- Hemodialysis
- Home Health Care
- Homeopathic Medicine
- Hospice Care
- Independent Living Skills Instruction
- Inpatient/Hospital Care
- International Public Health/International Health
- Magnetic Resonance Imaging
- Maternal & Infant Care
- Medical Case Management
- Medical Expense Assistance
- Medical Radiologic Technology
- Naturopathic Medicine
- Nursing Home Care
- Occupational Health & Industrial Hygiene
- Occupational Therapy
- Organ & Tissue Procurement
- Patient & Family Enrichment
- Patient & Family Housing
- Patient & Family Support
- Patient Care/Health Care Delivery
- Patient Education
- Pharmaceuticals
- Physical Therapy
- Preventive Health
- Public Health
- Quality of Health Care
- Rehabilitation of Hearing Impaired
- Rehabilitation of Language & Speech Disorders
- Rehabilitation Services
- Reproductive Health
- School Health Services
- Sexuality Education
- Wish Foundation Programs
- Rural Health Services

## **Housing**

- Affordable Housing
- Barrier-Free Housing
- Crisis Shelter
- Emergency Shelter

- Home Barrier Removal
- Home Improvement
- Home Repair Programs
- Homeless Shelter
- Housing Counseling
- Housing Development, Construction & Management
- Housing Expense Assistance
- Housing Owners
- Housing Support
- Housing, General/Other
- Transitional Housing
- Weatherization

## **Human Services**

- Adoption
- Burial & Cemetery Services
- Case Management
- Child Care
- Children & Youth Services
- Children's Protective Services
- Companionship
- Emergency Assistance
- Family Preservation
- Family-Based Services
- Financial Counseling
- Foster Care
- Holiday Assistance
- Household Goods Provision
- Human Services, General/Other
- In-Home Assistance
- Information & Referral
- Mentoring
- Parenting Education
- Personal Enrichment
- Personal Goods & Services
- Personal Social Services
- Programs for Single Parents
- Residential Care
- Residential Care for Dependent Children
- Residential Care for Individuals with Disabilities
- Respite Care
- Senior Residential Facilities Programs
- Senior Services
- Services for Ethnic & Immigrant Groups
- Services for Individuals with Disabilities
- Services for Specific Populations
- Services for the Homeless
- Temporary Financial Aid
- Thrift Shop Operation
- Transportation Assistance
- Travelers' Assistance
- Family Services for Adolescent Parents

## **International, Foreign Affairs & National Security**

- Arms Control
- Democratic Values Promotion
- International Agricultural Assistance
- International Children's Relief
- International Development
- International Economic Assistance
- International Education Assistance
- International Exchange
- International Health Care Assistance
- International Human Rights
- International Peace & Security
- International Relations
- International Relief
- International Scientific & Technical Assistance
- International Trade
- International, Foreign Affairs & National Security, General/Other
- Migration/Refugee Rights
- National Security
- Refugee Relief

## **Medical Research**

- Allergy & Immunological Diseases Research
- Alzheimer Disease Research
- Amyotrophic Lateral Sclerosis Research
- Arthritis Research
- Asthma Research
- Biomedical Engineering Research
- Birth Defects, Genetic Disorders & Developmental Disorders Research
- Cancer Research
- Cardiovascular Diseases Research
- Cerebral Palsy Research
- Chronic Fatigue Syndrome Research
- Communications Disorders Research
- Community Medicine Research
- Cystic Fibrosis Research
- Diabetes Research
- Digestive System Diseases Research
- Diseases & Disorders Research
- Diseases of the Blood & Blood-Forming Organs Research
- Down Syndrome Research
- Ear, Nose & Throat Diseases Research
- Endocrine, Metabolic & Nutritional Research
- Epidemiology Research
- Epilepsy Research
- Eye Diseases, Blindness & Vision Impairments Research
- Genitourinary Diseases Research
- Geriatrics Research

- Head Injury Research
- Heart Diseases Research
- Hemophilia Research
- Hepatitis Research
- HIV/AIDS Research
- Infectious Diseases Research
- Kidney Diseases Research
- Language & Speech Disorders Research
- Learning Disabilities Research
- Leukemia Research
- Liver Diseases Research
- Lung Diseases Research
- Lupus Research
- Lyme Disease Research
- Medical Disciplines & Occupations Research
- Medical Genetics Research
- Medical Research, General/Other
- Medical Specialties Research
- Military & Naval Medicine Research
- Multiple Sclerosis Research
- Muscular Dystrophy Research
- Musculoskeletal & Connective Tissue Diseases Research
- Nervous System Diseases Research
- Nursing Research
- Osteopathic Medicine Research
- Osteoporosis Research
- Parkinson Disease Research
- Pharmacology
- Pharmacology Research
- Respiratory System Diseases Research
- Sexually Transmitted Diseases Research
- Sickle Cell Disease Research
- Skin Diseases Research
- Spinal Cord Injury Research
- Sports Medicine Research
- Surgical Specialties Research
- Telemedicine Research
- Tropical Medicine Research
- Tuberculosis Research
- Women's Cancer Research
- Wounds & Injuries Research

## **Mental Health, Substance Abuse Program**

- Adjustment Disorders
- Animal-Assisted Therapy
- Anxiety Disorders
- Assessment for Substance Abuse
- Child Abuse Counseling
- Childhood Mental Health Disorders
- Cognitive Disorders
- Creative Arts Therapy
- Crisis Intervention Programs



- Detoxification
- Dissociative Disorders
- Eating Disorders
- Factitious Disorders
- Family Violence Counseling
- Grief Counseling
- Impulse-Control Disorders
- Inpatient Mental Health Treatment
- Inpatient Substance Abuse Treatment
- Marriage Counseling
- Mental Disorders
- Mental Health Treatment
- Mental Health, Substance Abuse Programs, General/other
- Mood Disorders
- Outpatient Mental Health Treatment
- Outpatient Substance Abuse Treatment
- Pastoral Counseling
- Peer Counseling
- Personality Disorders
- Psychiatric Case Management
- Relapse Prevention/Transitional Substance Abuse
- Residential Mental Health Treatment
- Residential Substance Abuse Treatment
- Schizophrenia & Other Psychotic Disorders
- Sexual & Gender Identity Disorders
- Sexual Assault Crisis Intervention
- Sleep Disorders
- Smoking Cessation
- Somatoform Disorders
- Specialized Counseling
- Specialized Therapy
- Spouse Abuse Counseling
- Substance Abuse
- Substance Abuse Counseling
- Substance Abuse Crisis Intervention
- Substance Abuse Prevention
- Substance Abuse Support Group
- Suicide Prevention
- Psychophysiological Disorders

#### **Mutual, Membership Benefit**

- Disability Insurance
- Health Insurance
- Insurance Benefits
- Life Insurance
- Mutual, Membership Benefit, General/Other
- Pension & Retirement Benefits
- Professional Liability Insurance
- Unemployment Insurance
- Worker's Compensation Insurance

#### **Philanthropy, Voluntarism & Grantmaking**

- Community Service
- Comprehensive Grantmaking
- Fundraising
- Grants Development
- Philanthropy, Voluntarism & Grantmaking, General/Other
- Senior Volunteer Programs
- Voluntarism Promotion
- Volunteer Training & Placement

#### **Public Safety, Disaster Services**

- Aviation Safety
- Disaster Preparedness
- Disaster Relief/Recovery
- Disaster Services
- Emergency Communications
- Emergency Medical & Ambulance Services
- Emergency Personnel
- Fire Prevention
- Fire Protection
- First Aid Training
- Occupational Health and Safety Awareness
- Poison Information
- Public Safety, Disaster Services, General/Other
- Safety Education
- Traffic Safety
- Water Safety

#### **Public, Society Benefit**

- Banking & Financial Services
- Citizen Participation Programs
- Communication Systems
- Consumer Protection
- Government & Public Administration
- Infrastructure
- Leadership Development Programs
- Maritime
- Military & Veteran Affairs
- Public Assistance
- Public Finance, Taxation & Monetary Policy
- Public, Society Benefit, General/Other
- Transportation Systems
- Utility Systems
- Voter Services

#### **Recreation & Sports**

- Athletics & Sports
- Baseball/Softball
- Basketball

- Boating
- Camping
- Cycling
- Equestrian
- Football
- Gambling
- Golf
- Golf Courses
- Gymnastics
- Hobbies
- Hockey
- Hunting & Fishing
- Intercollegiate Sports Competitions
- Leisure & Recreational Activities
- Martial Arts
- Olympics & Related International Competitions
- Parks, Recreation & Leisure Facilities
- Physical Fitness
- Public Parks & Recreational Trails
- Racquet Sports
- Recreation & Sports, General/Other
- Recreation Centers
- Skating
- Skiing
- Soccer
- Special Olympics Programs
- Sports Competitions
- Swimming
- Swimming Facilities
- Track & Field

## **Religion**

- Buddhism
- Christianity
- Hinduism
- Interfaith Programs
- Islam
- Judaism
- Religion, General/Other

## **Science & Technology**

- Astronomy & Astrophysics
- Atmospheric Sciences & Meteorology
- Biochemistry, Biophysics & Molecular Biology
- Biological & Life Sciences
- Botany
- Chemistry
- Computer & Information Science
- Ecology, Evolution, Systematics & Population Biology
- Engineering
- Engineering & Technology

- Geological & Earth Sciences
- Manufacturing & Industry
- Mathematics
- Physical & Earth Sciences
- Physics
- Science & Technology, General/Other
- Zoology

## **Social Science**

- African-American/Black Studies
- American Indian/Native American Studies
- Anthropology
- Area Studies
- Area, Ethnic, Cultural & Gender Studies
- Asian-American Studies
- Behavioral Science Programs
- Diversity Studies
- Economics
- Gay/Lesbian Studies
- Geography
- Gerontology Studies
- Hispanic-American, Puerto Rican & Mexican-American/Chicano Studies
- History
- Interdisciplinary Studies
- Political Science
- Poverty Studies
- Psychology
- Science, Technology & Society Studies
- Social Science; General/Other
- Sociology
- Urban Studies
- Women's Studies
- Demography

## **Social Science Research**

- Demography

## **Youth Development**

- Youth Agriculture
- Youth Business
- Youth Citizenship
- Youth Development, General/Other
- Youth Leadership

**LEGAL, PLANNING & POLICIES Tab**  
**FIELD: Organization Type & Sub-Type**

*The National Taxonomy of Exempt Entities (NTEE) Classification System developed by the National Center for Charitable Statistics as part of its keyword searching criteria. (For example, an organization that is coded C27 will come up when someone searches on the keyword "recycling.")*

*(Enter one Primary Org Type and one Primary Org Sub-Type. Primary Org Types are bolded, and Sub-Types are the bullet points below them.)*

**Arts, Culture, and Humanities**

- A01 Alliance/Advocacy Organizations
- A02 Management & Technical Assistance
- A03 Professional Societies & Associations
- A05 Research Institutes and/or Public Policy Analysis
- A11 Single Organization Support
- A12 Fundraising and/or Fund Distribution
- A19 Nonmonetary Support N.E.C.\*
- A20 Arts, Cultural Organizations—Multipurpose
  - A23 Cultural/Ethnic Awareness
  - A25 Arts Education/Schools
  - A26 Arts Council/Agency
- A30 Media, Communications Organizations
  - A31 Film, Video
  - A32 Television
  - A33 Printing, Publishing
  - A34 Radio
- A40 Visual Arts Organizations
- A50 Museums & Museum Activities
  - A51 Art Museums
  - A52 Children's Museums
  - A54 History Museums
  - A56 Natural History, Natural Science Museums
  - A57 Science & Technology Museum
- A60 Performing Arts
  - A61 Performing Arts Centers
  - A62 Dance
  - A63 Ballet
  - A65 Theater
  - A68 Music
  - A69 Symphony Orchestras
  - A6A Opera
  - A6B Singing Choral
  - A6C Music Groups, Bands, Ensembles
  - A6E Performing Arts Schools
- A70 Humanities Organizations
- A80 Historical Societies and Related Activities
  - A84 Commemorative Events
- A90 Arts Service Activities/ Organizations
- A99 Other Art, Culture, Humanities Organizations/Services N.E.C.\*

**Educational Institutions**

- B01 Alliance/Advocacy Organizations
- B02 Management & Technical Assistance
- B03 Professional Societies & Associations
- B05 Research Institutes and/or Public Policy Analysis
- B11 Single Organization Support
- B12 Fundraising and/or Fund Distribution
- B19 Nonmonetary Support N.E.C.\*
- B20 Elementary, Secondary Ed
  - B21 Kindergarten, Nursery Schools, Preschool, Early Admissions
  - B24 Primary/Elementary School
  - B25 Secondary/High School
  - B28 Special Ed Institutions/ Schools for Visually or Hearing Impaired, Learning Disabled
- B30 Vocational Technical
- B40 Higher Ed Institutions
  - B41 Community/Jr. College
  - B42 Undergraduate College (4-year)
  - B43 University or Technological
- B50 Graduate, Professional (Separate Entities)
- B60 Adult, Continuing Ed
- B70 Libraries, Library Science
- B80 Student Services and Organizations
  - B82 Scholarships, Student Financial Aid, Awards
  - B83 Student Sororities, Fraternities
  - B84 Alumni Associations
- B90 Educational Services and Schools—Other
  - B92 Remedial Reading, Reading Encouragement
  - B94 Parent Teacher Group
- B99 Education N.E.C.\*

**Environmental Quality Protection, Beautification**

- C01 Alliance/Advocacy Organizations
- C02 Management & Technical Assistance
- C03 Professional Societies & Associations
- C05 Research Institutes and/or Public Policy Analysis
- C11 Single Organization Support
- C12 Fundraising and/or Fund Distribution
- C19 Nonmonetary Support N.E.C.\*
- C20 Pollution Abatement and Control Services
  - C27 Recycling
- C30 Natural Resource Conservation and Protection
  - C32 Water Resource, Wetlands Conservation & Management

- C34 Land Resources Conservation
- C35 Energy Resources Conservation & Development
- C36 Forest Conservation
- C40 Botanical, Horticultural, and Landscape Services
  - C41 Botanical Gardens, Arboreta and Botanical Organizations
  - C42 Garden Club, Horticultural Programs
- C50 Environmental Beautification
- C60 Environmental Education and Outdoor Survival Programs
- C99 Environmental Quality Protection and Beautification N.E.C.\*

#### **Animal related**

- D01 Alliance/Advocacy Organizations
- D02 Management & Technical Assistance
- D03 Professional Societies & Associations
- D05 Research Institutes and/or Public Policy Analysis
- D11 Single Organization Support
- D12 Fundraising and/or Fund Distribution
- D19 Nonmonetary Support N.E.C.\*
- D20 Animal Protection and Welfare (includes Humane Societies and SPCAs)
- D30 Wildlife Preservation/Protection
  - D31 Protection of Endangered Species
  - D32 Bird Sanctuary/Preserve
  - D33 Fisheries
  - D34 Wildlife Sanctuary/Refuge
- D40 Veterinary Services
- D50 Zoo, Zoological Society
- D60 Other Services, Specialty Animals
  - D61 Animal Training/Behavior
- D99 Animal Related Activities N.E.C.\*

#### **Health—General & Rehabilitative**

- E01 Alliance/Advocacy Organizations
- E02 Management & Technical Assistance
- E03 Professional Societies & Associations
- E05 Research Institutes and/or Public Policy Analysis
- E11 Single Organization Support
- E12 Fundraising and/or Fund Distribution
- E19 Nonmonetary Support N.E.C.\*
- E20 Hospitals and Primary Medical Care Facilities
  - E21 Community Health Systems
  - E22 Hospital (General)
  - E24 Hospital (Specialty)
- E30 Health Treatment Facilities (Primarily Outpatient)
  - E31 Group Health Practice (HMOs)
  - E32 Ambulatory Health Center, Community Clinic
- E40 Reproductive Health Care Facilities and Allied Services
  - E42 Family Planning Centers

- E50 Rehabilitative Medical Services
- E60 Health Support Services
  - E61 Blood Supply Related
  - E62 Ambulance/Emergency Transport
  - E65 Organ and Tissue Bank
- E70 Public Health Programs
- E80 Health (General and Financing)
  - E86 Patient Services—Entertainment, Recreation
- E90 Nursing Services General (includes Candy Strippers)
  - E91 Nursing, Convalescent (Geriatric and Nursing)
  - E92 Home Health Care (includes Visiting Nurse Associations)
- E99 Health—General & Rehabilitative N.E.C.\*

#### **Mental Health, Crisis Intervention**

- F01 Alliance/Advocacy Organizations
- F02 Management & Technical Assistance
- F03 Professional Societies & Associations
- F05 Research Institutes and/or Public Policy Analysis
- F11 Single Organization Support
- F12 Fundraising and/or Fund Distribution
- F19 Nonmonetary Support N.E.C.\*
- F20 Alcohol, Drug, and Substance Abuse, Dependency, Prevention & Treatment
  - F21 Alcohol, Drug Abuse (Prevention Only)
  - F22 Alcohol, Drug Abuse (Treatment Only)
- F30 Mental Health Treatment
  - F31 Psychiatric, Mental Health Hospital
  - F32 Community Mental Health Center
  - F33 Group Home, Residential Treatment Facility—Mental Health Related
- F40 Hot Line, Crisis Intervention
  - F42 Rape Victim Services
- F50 Addictive Disorders
  - F52 Smoking
  - F53 Eating Disorder
  - F54 Gambling
- F60 Counseling Support Groups
- F70 Mental Health Disorders
- F80 Mental Health Associations—Multipurpose
- F99 Other Mental Health, Crisis Intervention N.E.C.\*

#### **Disease, Disorders, Medical Disciplines**

- G01 Alliance/Advocacy Organizations
- G02 Management & Technical Assistance
- G03 Professional Societies & Associations
- G05 Research Institutes and/or Public Policy Analysis
- G11 Single Organization Support
- G12 Fundraising and/or Fund Distribution
- G19 Nonmonetary Support N.E.C.\*
- G20 Birth Defects, Genetic Diseases
  - G25 Down's Syndrome

- G30 Cancer
- G40 Diseases of Specific Organs
  - G41 Eye Diseases, Blindness, & Vision Impairment
  - G42 Ear/Throat
  - G43 Heart and Circulatory System
  - G44 Kidney
  - G45 Lung
  - G48 Brain Disorders
- G50 Nerve, Muscle, and Bone Diseases
  - G51 Arthritis
  - G54 Epilepsy
- G60 Allergy Related Diseases
  - G61 Asthma
- G70 Digestive Diseases, Disorders
- G80 Specifically Named Diseases
  - G81 AIDS
  - G83 Alzheimer's
  - G84 Autism
- G90 Medical Disciplines
  - G92 Biomedicine, Bioengineering
  - G94 Geriatrics
  - G96 Neurology, Neuroscience
  - G98 Pediatrics
  - G9B Surgery
- G99 Diseases, Disorders, Medical Disciplines N.E.C.\*

## Medical Research

- H01 Alliance/Advocacy Organizations
- H02 Management & Technical Assistance
- H03 Professional Societies & Associations
- H05 Research Institutes and/or Public Policy Analysis
- H11 Single Organization Support
- H12 Fundraising and/or Fund Distribution
- H19 Nonmonetary Support N.E.C.\*
- H20 Birth Defects, Genetic Diseases Research
  - H25 Down's Syndrome
- H30 Cancer Research
- H40 Specific Organ Research
  - H41 Eye
  - H42 Ear and Throat
  - H43 Heart and Circulatory
  - H44 Kidney
  - H45 Lung
  - H48 Brain Disorders
- H50 Nerve, Muscle, and Bone Research
  - H51 Arthritis
  - H54 Epilepsy Research
- H60 Allergy Related Diseases Research
  - H61 Asthma
- H70 Digestive Diseases/Disorders Research
- H80 Specifically Named Diseases Research
  - H81 AIDS
  - H83 Alzheimer's

- H84 Autism
- H90 Medical Specialty Research
  - H92 Biomedicine, Bioengineering
  - H94 Geriatrics
  - H96 Neurology, Neuroscience
  - H98 Pediatrics Research
  - H9B Surgery
- H99 Other Medical Research N.E.C.\*

## Crime, Legal Related

- I01 Alliance/Advocacy Organizations
- I02 Management & Technical Assistance
- I03 Professional Societies & Associations
- I05 Research Institutes and/or Public Policy Analysis
- I11 Single Organization Support
- I12 Fundraising and/or Fund Distribution
- I19 Nonmonetary Support N.E.C.\*
- I20 Crime Prevention N.E.C.
  - I21 Delinquency Prevention
  - I23 Drunk Driving Related
- I30 Correctional Facilities N.E.C.
  - I31 Transitional Care, Half-Way House for Offenders/Ex-Offenders
- I40 Rehabilitation Services for Offenders
  - I43 Services to Prisoners/Families
  - I44 Prison Alternatives
- I50 Administration of Justice, Courts (Court Administration, Court Reform, Alternatives to Litigation and Sentencing)
  - I51 Dispute Resolution/Mediation Services
- I60 Law Enforcement Agencies (Police Departments)
- I70 Protection Against and Prevention of Neglect, Abuse, Exploitation
  - I71 Spouse Abuse, Prevention of
  - I72 Child Abuse, Prevention of
  - I73 Sexual Abuse, Prevention of
- I80 Legal Services
  - I83 Public Interest Law/Litigation
- I99 Crime, Legal Related N.E.C.\*

## Employment, Job Related

- J01 Alliance/Advocacy Organizations
- J02 Management & Technical Assistance
- J03 Professional Societies & Associations
- J05 Research Institutes and/or Public Policy Analysis
- J11 Single Organization Support
- J12 Fundraising and/or Fund Distribution
- J19 Nonmonetary Support N.E.C.\*
- J20 Employment Procurement Assistance and Job Training
  - J21 Vocational Counseling/Guidance/Testing
  - J22 Employment Training

- J30 Vocational Rehabilitation (includes Job Training and Employment for Disabled and Elderly)
  - J32 Goodwill Industries
  - J33 Sheltered Remunerative Employment, Work Activity Center N.E.C.\*
- J40 Labor Unions/Organizations
- J99 Employment, Job Related N.E.C.

### **Agriculture, Food, Nutrition**

- K01 Alliance/Advocacy Organizations
- K02 Management & Technical Assistance
- K03 Professional Societies & Associations
- K05 Research Institutes and/or Public Policy Analysis
- K11 Single Organization Support
- K12 Fundraising and/or Fund Distribution
- K19 Nonmonetary Support N.E.C.\*
- K20 Agricultural Programs
  - K25 Farmland Preservation
  - K26 Livestock Breeding, Development, Management
  - K28 Farm Bureau
- K30 Food Service, Free Food Distribution Programs
  - K31 Food Banks, Food Pantries
  - K34 Congregate Meals
  - K35 Organization-Sponsored Eatery or Agency
  - K36 Meals on Wheels
- K40 Nutrition Programs
- K50 Home Economics
- K99 Other Food, Agriculture, Nutrition N.E.C.\*

### **Housing, Shelter**

- L01 Alliance/Advocacy Organizations
- L02 Management & Technical Assistance
- L03 Professional Societies & Associations
- L05 Research Institutes and/or Public Policy Analysis
- L11 Single Organization Support
- L12 Fundraising and/or Fund Distribution
- L19 Nonmonetary Support N.E.C.\*
- L20 Housing Development, Construction, Management
  - L21 Public Housing
  - L22 Senior Citizens' Housing, Retirement Communities
  - L25 Housing Rehabilitation
- L30 Housing Search Assistance
- L40 Low-Cost Temporary Housing (includes Youth Hostels)
  - L41 Temporary Shelter for the Homeless
- L50 Housing Owners, Renters Organizations
- L80 Other Housing Support Services
  - L81 Home Improvement/Repairs
  - L82 Housing Expense Reduction Support, Rent Assistance
- L99 Other Housing, Shelter N.E.C.\*

### **Public Safety, Disaster Preparedness and Relief**

- M01 Alliance/Advocacy Organizations
- M02 Management & Technical Assistance
- M03 Professional Societies & Associations
- M05 Research Institutes and/or Public Policy Analysis
- M11 Single Organization Support
- M12 Fundraising and/or Fund Distribution
- M19 Nonmonetary Support N.E.C.\*
- M20 Disaster Preparedness and Relief Service
  - M23 Search and Rescue Services
  - M24 Fire Prevention/Protection/Control
- M40 Safety Education
  - M41 First Aid Training
  - M42 Automotive Safety
- M99 Other Public Safety, Disaster Preparedness and Relief N.E.C.\*

### **Recreation, Sports, Leisure, Athletics**

- N01 Alliance/Advocacy Organizations
- N02 Management & Technical Assistance
- N03 Professional Societies & Associations
- N05 Research Institutes and/or Public Policy Analysis
- N11 Single Organization Support
- N12 Fundraising and/or Fund Distribution
- N19 Nonmonetary Support N.E.C.\*
- N20 Recreational and Sporting Camps (Day, Overnight, etc.)
- N30 Physical Fitness/Community Recreational Facilities
  - N31 Community Recreational Centers
  - N32 Parks and Playgrounds
- N40 Sports Training Facilities
- N50 Recreational, Pleasure, or Social Club
  - N52 County/Street/Civic/Multi-Arts Fairs and Festivals
- N60 Amateur Sports Clubs, Leagues
  - N61 Fishing and Hunting Clubs
  - N62 Basketball
  - N63 Baseball, Softball (includes Little Leagues)
  - N64 Soccer Clubs/Leagues
  - N65 Football Clubs/Leagues
  - N66 Tennis and Racquet Sports Clubs/Leagues
  - N67 Swimming, Water Recreation
  - N68 Winter Sports (Snow and Ice)
  - N69 Equestrian, Riding
  - N6A Golf (Country Clubs, use N50)
- N70 Amateur Sports Competitions
  - N71 Olympics Committees and Related International Competitions
  - N72 Special Olympics
- N80 Professional Athletic Leagues
- N99 Other Recreation, Sports, or Leisure

## Youth Development

- O01 Alliance/Advocacy Organizations
- O02 Management & Technical Assistance
- O03 Professional Societies & Associations
- O05 Research Institutes and/or Public Policy Analysis
- O11 Single Organization Support
- O12 Fundraising and/or Fund Distribution
- O19 Nonmonetary Support N.E.C.\*
- O20 Youth Centers and Clubs (includes Boys/Girls Clubs)—Multipurpose
  - O21 Boys Clubs
  - O22 Girls Clubs
  - O23 Boys and Girls Clubs (Combined)
- O30 Adult, Child Matching Programs
  - O31 Big Brother, Big Sisters
- O40 Scouting
  - O41 Boy Scouts
  - O42 Girl Scouts
  - O43 Camp Fire
- O50 Youth Development Programs
  - O51 Community Service Clubs, Youth Development
  - O52 Agricultural, Youth Development
  - O53 Business, Youth Development
  - O54 Citizenship Programs, Youth Development
  - O55 Religious Leadership, Youth Development
- O99 Other Youth Development N.E.C.\*

## Human Services

- P01 Alliance/Advocacy Organizations
- P02 Management & Technical Assistance
- P03 Professional Societies & Associations
- P05 Research Institutes and/or Public Policy Analysis
- P11 Single Organization Support
- P12 Fundraising and/or Fund Distribution
- P19 Nonmonetary Support N.E.C.\*
- P20 Human Service Organizations
  - P21 American Red Cross
  - P22 Urban League
  - P24 Salvation Army
  - P26 Volunteers of America
  - P27 YMCA, YWCA, YWHA, YMHA
  - P28 Neighborhood Center, Settlement House
  - P29 Thrift Shops
- P30 Children's and Youth Services
  - P31 Adoption
  - P32 Foster Care
  - P33 Child Day Care
- P40 Family Services
  - P42 Single Parent Agencies/Services
  - P43 Family Violence Shelters and Services

- P44 Homemaker, Home Health Aide
- P45 Family Services (Adolescent Parents)
- P46 Family Counseling, Marriage Counseling
- P50 Personal Social Services
  - P51 Financial Counseling, Money Management
  - P52 Transportation (Free or Subsidized)
  - P58 Gift Distribution
- P60 Emergency Assistance (Food, Clothing, Cash)
  - P61 Travelers' Aid
  - P62 Victims' Services
- P70 Residential, Custodial Care (Group Home)
  - P72 Half-Way House (Short-Term Residential Care)
  - P73 Group Home (Long-Term, Primarily Assisted Living)
  - P74 Hospice
  - P75 Senior Continuing Care Communities
- P80 Services to Promote the Independence of Specific Populations
  - P81 Senior Centers/Services
  - P82 Developmentally Disabled Services/Centers
  - P84 Ethnic/Immigrant Services
  - P85 Homeless Services/Centers
  - P86 Blind/Visually Impaired Centers, Services
  - P87 Deaf/Hearing Impaired Centers, Services
- P99 Human Services—Multipurpose & Other N.E.C.\*

## International, Foreign Affairs, and National Security

- Q01 Alliance/Advocacy Organizations
- Q02 Management & Technical Assistance
- Q03 Professional Societies & Associations
- Q05 Research Institutes and/or Public Policy Analysis
- Q11 Single Organization Support
- Q12 Fundraising and/or Fund Distribution
- Q19 Nonmonetary Support N.E.C.\*
- Q20 Promotion of International Understanding
  - Q21 International Cultural Exchange
  - Q22 International Student Exchange and Aid
  - Q23 International Exchanges
- Q30 International Development, Relief Services
  - Q31 International Agricultural Development
  - Q32 International Economic Development
  - Q33 International Relief
- Q40 International Peace and Security
  - Q41 Arms Control, Peace Organizations
  - Q42 United Nations Association
  - Q43 Domestic National Security (includes Military and Defense Issues)
- Q70 International Human Rights
  - Q71 International Migration, Refugee Issues
- Q99 International, Foreign Affairs and National Security N.E.C.\*

## Civil Rights, Social Action, Advocacy

- R01 Alliance/Advocacy Organizations
- R02 Management & Technical Assistance
- R03 Professional Societies & Associations
- R05 Research Institutes and/or Public Policy Analysis
- R11 Single Organization Support
- R12 Fundraising and/or Fund Distribution
- R19 Nonmonetary Support N.E.C.\*
- R20 Civil Rights, Advocacy for Specific Groups
  - R22 Minority Rights
  - R23 Disabled Persons' Rights
  - R24 Women's Rights
  - R25 Seniors' Rights
  - R26 Lesbian/Gay Rights
- R30 Intergroup/Race Relations
- R40 Voter Education/ Registration
- R60 Civil Liberties Advocacy
  - R61 Reproductive Rights
  - R62 Right to Life
  - R63 Censorship, Freedom of Speech, and Press Issues
  - R67 Right to Die, Euthanasia Issues
- R99 Civil Rights, Social Action, & Advocacy N.E.C.\*

### **Community Improvement, Capacity Building**

- S01 Alliance/Advocacy Organizations
- S02 Management & Technical Assistance
- S03 Professional Societies & Associations
- S05 Research Institutes and/or Public Policy Analysis
- S11 Single Organization Support
- S12 Fundraising and/or Fund Distribution
- S19 Nonmonetary Support N.E.C.\*
- S20 Community/Neighborhood Development, Improvement
  - S21 Community Coalitions
  - S22 Neighborhood/Block Association
- S30 Economic Development
  - S31 Urban, Community
  - S32 Rural
- S40 Business and Industry
  - S41 Promotion of Business (Chambers of Commerce)
  - S43 Management Services for Small Business/Entrepreneurs
  - S46 Boards of Trade
  - S47 Real Estate Organizations
- S50 Nonprofit Management
- S80 Community Service Clubs (Kiwanis, Lions, Jaycees, etc.)
  - S81 Women's Service Clubs
  - S82 Men's Service Clubs
- S99 Community Improvement, Capacity Building N.E.C.\*

### **Philanthropy, Voluntarism, and Grantmaking**

- T01 Alliance/Advocacy Organizations
- T02 Management & Technical Assistance
- T03 Professional Societies & Associations
- T05 Research Institutes and/or Public Policy Analysis
- T11 Single Organization Support
- T12 Fundraising and/or Fund Distribution
- T19 Nonmonetary Support N.E.C.\*
- T20 Private Grantmaking Foundations
  - T21 Corporate Foundations
  - T22 Private Independent Foundations
  - T23 Private Operating Foundations
- T30 Public Foundations
  - T31 Community Foundations
- T40 Voluntarism Promotion
- T50 Philanthropy/Charity/Voluntarism Promotion (General)
- T70 Fundraising Organizations that Cross Categories (includes Community Funds/Trusts and Federated Giving Programs), e.g., United Way
- T90 Named Trusts/Foundations N.E.C.\*
- T99 Other Philanthropy, Voluntarism, and Grantmaking Foundations N.E.C.\*

### **Science and Technology Research Institutes**

- U01 Alliance/Advocacy Organizations
- U02 Management & Technical Assistance
- U03 Professional Societies & Associations
- U05 Research Institutes and/or Public Policy Analysis
- U11 Single Organization Support
- U12 Fundraising and/or Fund Distribution
- U19 Nonmonetary Support N.E.C.\*
- U20 Science, General (includes Interdisciplinary Scientific Activities)
  - U21 Marine Science and Oceanography
- U30 Physical Sciences/Earth Sciences Research and Promotion
  - U31 Astronomy (includes Observatories)
  - U33 Chemistry, Chemical Engineering (includes Polymer Science)
  - U34 Mathematics
  - U36 Geology
- U40 Engineering and Technology Research, Services
  - U41 Computer Science
  - U42 Engineering
- U50 Biological, Life Science Research (includes Marine Biology, Physiology, Biochemistry, Genetics, Biotechnology, etc.)
- U99 Science & Technology Research Institutes, Services N.E.C.\*

### **Social Science Research Institutes**

- V01 Alliance/Advocacy Organizations



- V02 Management & Technical Assistance
- V03 Professional Societies & Associations
- V05 Research Institutes and/or Public Policy Analysis
- V11 Single Organization Support
- V12 Fundraising and/or Fund Distribution
- V19 Nonmonetary Support N.E.C.\*
- V20 Social Science Research Institutes, Services
  - V21 Anthropology, Sociology
  - V22 Economics (as a Social Science)
  - V23 Behavioral Science
  - V24 Political Science
  - V25 Population Studies, Demographics (includes Geography)
  - V26 Law, International Law, and Jurisprudence
- V30 Interdisciplinary Research
  - V31 Black Studies
  - V32 Women's Studies
  - V33 Ethnic Studies
  - V34 Urban Studies
  - V35 International Studies
  - V36 Gerontology
  - V37 Labor Studies
- V99 Social Science Research Institutes, Services N.E.C.\*

#### **Public, Society Benefit**

- W01 Alliance/Advocacy Organizations
- W02 Management & Technical Assistance
- W03 Professional Societies & Associations
- W05 Research Institutes and/or Public Policy Analysis
- W11 Single Organization Support
- W12 Fundraising and/or Fund Distribution
- W19 Nonmonetary Support N.E.C.\*
- W20 Government and Public Administration
  - W22 Public Finance, Taxation, Monetary Policy
  - W24 Citizen Participation
- W30 Military/Veterans' Organizations
- W40 Public Transportation Systems and Services
- W50 Telephone, Telegraph, and Telecommunications Services
- W60 Financial Institutions/Services (Non-Government Related)
  - W61 Credit Unions
- W70 Leadership Development
- W80 Public Utilities
- W90 Consumer Protection and Safety
- W99 Public, Society Benefit—Multipurpose & Other N.E.C.\*

#### **Religion, Spiritual Development**

- X01 Alliance/Advocacy Organizations
- X02 Management & Technical Assistance
- X03 Professional Societies & Associations

- X05 Research Institutes and/or Public Policy Analysis
- X11 Single Organization Support
- X12 Fundraising and/or Fund Distribution
- X19 Nonmonetary Support N.E.C.\*
- X20 Christian
  - X21 Protestant
  - X22 Roman Catholic
- X30 Jewish
- X40 Islamic
- X50 Buddhist
- X70 Hindu
- X80 Religious Media, Communications Organizations
  - X81 Religious Film & Video
  - X82 Religious Television
  - X83 Religious Printing, Publishing
  - X84 Religious Radio
- X90 Interfaith Issues
- X99 Religious Related, Spiritual Development N.E.C.\*

#### **Mutual/Membership Benefit Organizations, Other**

- Y01 Alliance/Advocacy Organizations
- Y02 Management & Technical Assistance
- Y03 Professional Societies & Associations
- Y05 Research Institutes and/or Public Policy Analysis
- Y11 Single Organization Support
- Y12 Fundraising and/or Fund Distribution
- Y19 Nonmonetary Support N.E.C.\*
- Y20 Insurance Providers/ Services (other than Health)
  - Y22 Benevolent Life Insurance Association, Mutual Irrigations and Telephone Companies and like Organizations
  - Y23 Mutual Insurance Company or Association
  - Y24 Supplemental Unemployment Compensation
  - Y25 State Sponsored Worker's Compensation Reinsurance Organizations
- Y30 Pension and Retirement Funds
  - Y33 Teachers' Retirement Fund Association
  - Y34 Employee Funded Pension Trust
  - Y35 Multi-Employer Pension Plan
- Y40 Fraternal Beneficiary Societies
  - Y42 Domestic Fraternal Societies
  - Y43 Voluntary Employees Beneficiary Associations (Non-Government)
  - Y44 Voluntary Employees Beneficiary Associations (Government)
- Y50 Cemeteries and Burial Services
- Y99 Mutual/Membership Benefit Organizations, Other N.E.C.\*