THE GIVING PARTNER

CHECKLIST For NEW Profile Creation

If your organization **is creating a new profile** in The Giving Partner, follow this checklist to ensure you have completed these necessary fields before submitting your profile to our profile review team.

MANAGE ORGANIZATION (Left Sidebar)

- ☐ Add Administrators – Add users you'd like to authorize to make edits to your organization's profile
- ☐ Edit Information – Organization Name (must be the legal name as appears on your IRS Letter of Determination)

PROFILE SETUP TAB

ADD YOUR CAUSES:
- ☐ Website
- ☐ Causes

ADD YOUR STORY:
- ☐ Cover Photo
- ☐ Tell Your Story

OVERVIEW TAB

- ☐ Mission
- ☐ Mission Category
- ☐ Primary Organization Type & Sub-Type

- ☐ Street Address & Mailing Address
- ☐ Geographical Areas Served – Overall Organization

PROGRAMS & RESULTS TAB

- ☐ Program Name
- ☐ Program Description
- ☐ Program Type
- ☐ Date Program Initially/Originally Began
- ☐ Program Costs (Annual)
- ☐ $ Amount of Need
- ☐ Program Category & Subcategory
- ☐ Top 3 Populations Served

- ☐ Geographical Areas Served by Program
- ☐ Projected Number to be Served
- ☐ Actual Numbers Served
- ☐ Date the Actual Numbers Served was Achieved or Reported
- ☐ Number or % that Achieved Intended Results (as of above date)
- ☐ Results were Measured/Confirmed By

FINANCIALS TAB

CURRENT / PROJECTED:
- ☐ Your Current Fiscal Period Begins & Ends Dates
- ☐ Projected Annual Revenue & Expenses
- ☐ Does Total Projected Revenue include "in-kind" contributions?

FINANCIALS – OTHER:
- ☐ Organization has Endowment?
- ☐ Endowment Value
- ☐ Organization has Credit Line?
- ☐ Organization has Reserve Fund?

CAPITAL CAMPAIGN
- ☐ Organization is currently in a Capital Campaign?

IRS FORM 990:
- ☐ IRS Form 990 – Upload three most recent years based on Fiscal Year **ENDING** date.
  If IRS indicates organization has **an Exemption**, **then skip this section** and go to STATEMENTS OR AUDIT section.

FINANCIALS TAB (Continued)

FINANCIAL STATEMENTS OR AUDIT:
- ☐ Financial Statements or Audit – Upload three most recent years of financials. **Required if** organization files 990-N, or if a chapter of another organization, or if IRS determines organizations is Exempt from filing 990.

FINANCIAL DATA: Enter data for three most recent fiscal years available.
- ☐ Financial Year ENDING
- ☐ Total Revenue
- ☐ Total Expenses
- ☐ Contributions & Grants Received
- ☐ Program Service Revenue
- ☐ Investment Income

FINANCIAL DATA – EXPENSE ALLOCATION:
- ☐ Expenses – Administration
- ☐ Expenses – Program
- ☐ Expenses – Fundraising

FINANCIAL DATA – ASSETS & LIABILITIES
- ☐ Total Assets
- ☐ Current Liabilities
- ☐ Net Assets

OPERATIONS TAB

- ☐ Year of Incorporation
- ☐ IRS Subsection – Tax Status
- ☐ IRS Subsection – Tax Exempt Status
- ☐ Federal Employer Identification Number (EIN)
- ☐ IRS Letter of Determination

- ☐ State Charitable Solicitations Permit (Example Attached)
- ☐ State Charitable Solicitations Permit – Registration Number
- ☐ State Charitable Solicitations Permit – Expiration Date
- ☐ Whistleblower Policy

STAFF & VOLUNTEERS TAB

STAFF OVERVIEW
- ☐ # of Full-Time Staff
- ☐ Retention Rate % (Full-Time Staff)
- ☐ # of Part-Time Staff

- ☐ Number of Consultants
- ☐ Board Conducts a Formal Written Assessment of CEO/Executive Director

GOVERNANCE TAB

BOARD MEMBERS:
- ☐ Board Chair – Term Begins & Term Ends

BOARD OVERVIEW:
- ☐ Board Meeting Attendance %
- ☐ Board Demographics – The total number for each demographics section must match the total number of overall board members (these must align).

Tips on Creating Your Profile:
- Login to your account at **GiveGab** to make edits to your profile in The Giving Partner.
- Detailed instructions can be found within your profile by clicking on the Info Bubbles next to fields.
- After uploading a document and clicking SAVE, a **"Document Uploaded and is Being Reviewed"** message will appear. Certain fields require our review before being finalized.
- After you have fully completed your updates, click *Submit Profile for Review* (top right of profile).
- If you encounter any technology issues, need clarification, or help uploading documents, connect with the Customer Success Team by clicking the **Blue Chat Bubble** at the bottom right corner of your dashboard or reach out via email at **CustomerSuccess@GiveGab.com**.

Below is an example of a State Charitable Solicitations permit.

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