This Checklist will help you to provide the necessary content for your profile, in order to have an **Approved/Current** status!

1. **LOGIN**: Click [here](#) to login to your organization’s profile.

2. **FOLLOW THIS CHECKLIST**: Utilize either the blue (new profiles) or yellow (existing profiles) column below.
   - **Required** fields must be completed in order to have an Approved/Current status.
   - Fields denoted below as **KEY UPDATE** must be updated when documents/content have expired or are due (this occurs on different dates throughout each year). For all other fields, please refresh/update these as needed.

3. **DETAILED INSTRUCTIONS**: In your profile, view instructions by clicking on the Info Bubbles that appear.

4. **DOCUMENT UPLOADS**: During document uploads (after clicking SAVE), a “Success” banner will briefly flash and a “No Document Uploaded” message will appear - Please know that your document did save successfully (we can see the document). Certain fields require our review and approval before being finalized; this is to ensure that correct documents are uploaded. (Note: Currently, the platform doesn’t allow for this “No Document Uploaded” message to be changed.)

5. **SUBMIT FOR REVIEW**: After your work is fully completed, click **SUBMIT PROFILE FOR REVIEW / SUBMIT FOR RE-VERIFICATION** (top right of profile). Please **DO NOT** submit a partially completed/updated profile!

---

**NOTE**: If you encounter any technology issues, need clarification, or help uploading documents, connect with the Customer Success Team by clicking the Blue Chat Bubble (bottom right corner of your profile/website).

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### MANAGE ORGANIZATION (left sidebar)

- Add Administrator *(add/remove users authorized to make edits)*
  - Optional
  - Update (as needed)
  - Do Not Alter *(email nonprofits@cf Sarasota.org if any changes)*

- Edit Information - Organization Name *(must be the legal name as appears on your IRS Letter of Determination)*
  - Required

### PROFILE SETUP Tab

#### ADD YOUR CAUSES:

- Website
  - Required
  - Update (as needed)

- Logo
  - Optional
  - Update (as needed)

- Causes
  - Required
  - Update (as needed)

#### ADD YOUR STORY:

- Cover Photo
  - Optional
  - Update (as needed)

- Tell Your Story
  - Required
  - Update (as needed)

- Video
  - Optional
  - Update (as needed)
### OVERVIEW Tab

- Mission
- Mission Category
- Achievement Definition
- Background
- Primary Organization Type & Sub-Type
- Secondary Organization Type & Sub-Type
- Street Address and Mailing Address
- Geographical Areas Served - Overall Organization
- Geographical Areas Served - Overall (by zip code)
- Specific Areas Served
- Formal Collaborations
- Unite Us Profile

### PROGRAMS & RESULTS Tab

*Must have at least one local, active program (in existence for at least six months) to have a profile.*

- Program Name
- Program Description
- Success Looks Like
- Program Type
- Program Start Date *(program originally began)*
- Program End Date *(if permanently ended; retains historical outcomes data)*
- Program Costs (Annual)
- $ Amount of Need
- Program Category
- Program Sub-Category
- Top 3 Populations Served
- Population Served Description
- Geographical Areas Served by Program
- Geographical Areas Served by Program (zip code)
- Projected Number to be Served
- Date Outcomes Achieved or Reported *(should be updated at least annually, or quarterly if desired)*
- Outcomes Achieved
- Number Served by this Program *(overall)*
- Number or % that Achieved Intended Outcomes
- Outcome was Measured/Confirmed by

### FINANCIALS Tab

**CURRENT / PROJECTED:**

- Your Current Fiscal Period Begins
- Your Current Fiscal Period Ends
- Projected Annual Revenue
- Projected Annual Expenses
## FINANCIALS Tab (continued)

### FINANCIALS - OTHER:
- Organization has Endowment?  
- Organization has Credit Line?  
- Organization has Reserve Fund?  
- Administrative Needs

### CAPITAL CAMPAIGN:
- Currently in Capital Campaign?  
- Campaign Purpose  
- Amount Raised to Date

### IRS FORM 990:
- IRS Letter of Determination Requires Form 990?  
- IRS Form 990


*Must upload 990, 990-EZ, 990-N or 990-PF based on organization’s Fiscal Year ENDING date. REMOVE SCHEDULE B DONOR NAMES before upload. If organization has less than three years of 990s, upload most recent year(s) available.*

*If IRS indicates organization has religious, educational, or other Exemption (see your IRS Letter of Determination to verify), then skip this 990 section and go to FINANCIAL STATEMENTS OR AUDIT section.*

### FINANCIAL STATEMENTS OR AUDIT:
- Organization has Audited financial statements?  
- Financial Statements or Audit


*If organization files 990-N, or if a chapter of another organization, or if IRS indicates that organization has religious, educational, or other Exemption (see your IRS Letter of Determination to verify), you must upload both Profit & Loss Statement AND Balance Sheet. If organization has less than three years of financial statements, upload most recent year(s) available.*

*If organization has Audited Financial Statements, upload these.*
## FINANCIALS Tab (continued)

**FINANCIAL DATA**

*Based upon 3 most recent years of 990s/Financials that you have (click EDIT to add columns for each year).*

- Financial Year **ENDING**
- Total Revenue
- Total Expenses
- Contributions & Grants Received
- Program Service Revenue
- Investment Income
- Membership Dues
- Special Events Revenue
- Revenue In-Kind
- Other Revenue

**FINANCIAL DATA - EXPENSE ALLOCATION:**

- Expenses - Administration
- Expenses - Program
- Expenses - Fundraising
- Expenses - Affiliate Payments

**FINANCIAL DATA - ASSETS & LIABILITIES:**

- Total Assets
- Current Liabilities
- Long Term Liabilities
- Net Assets

## OPERATIONS Tab

- Year of Incorporation
- IRS Subsection - Tax Status
- IRS Subsection - Tax Exempt Status
- Federal Employer Identification Number (EIN)
- Organization DBA
- Other Organization Name(s)
- IRS 501(c)(3) or 501(c)(4) Letter of Determination

*Only the following determinations are eligible: 501(c)(3), or 501(c)(4) veterans’ organizations with 90% war vet membership, or 501(c)(4) volunteer fire departments.*
OPERATIONS Tab (continued)

- State Charitable Solicitations Permit (example below)
  - Required
  - Update (as needed)

- Fundraising Plan
  - Optional
  - Update (as needed)

- Communications Plan
  - Optional
  - Update (as needed)

- Strategic Plan
  - Optional
  - Update (as needed)

- Continuity of Operations Plan
  - Optional
  - Update (as needed)

- Management Succession Plan
  - Optional
  - Update (as needed)

- Nondiscrimination Policy
  - Optional
  - Update (as needed)

- Whistleblower Policy
  - Optional
  - Update (as needed)

- Directors & Officers (D&O) Insurance Policy
  - Optional
  - Update (as needed)

- Organization Policies & Procedures
  - Optional
  - Update (as needed)

- Policy Against Compensation for Fundraising Consultants
  - Answer Required
  - Update (as needed)
## STAFF & VOLUNTEERS Tab

### STAFF OVERVIEW
- Number of Full-Time Staff
- Retention Rate (for Full-Time Staff only)
- Number of Part-Time Staff
- Number of Contractors

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### CEO/EXECUTIVE DIRECTOR
- Name
- Email
- Term Began
- Demographics

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### FORMER CEO/EXECUTIVE DIRECTOR
- Name
- Term Began
- Term Ended

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### VOLUNTEER OVERVIEW
- Number of Volunteers

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## GOVERNANCE Tab

### BOARD MEMBERS
- Board Chair
- Board Chair - Term Begins & Term Ends
- Board Co-Chair
- Board Co-Chair - Term Begins & Term Ends
- Board Members - Other

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### BOARD OVERVIEW
- Top Accomplishment in Your Last Fiscal Year
- # of Board Meetings Held for Prior Fiscal Year
- Board Meeting Attendance %
- Board Term Length
- Board Term Limits
- Board Members Making Monetary Contributions
- Board Members Making In-Kind Contributions
- Are You Currently Seeking Board Members
- Board Demographics

The total number for each demographics section must match the total number of overall board members (these must align).

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