

THE GIVING PARTNER

CHECKLIST

(Revised September 8, 2021)

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

- LOGIN:** Click [here](#) to login to your organization's profile.
- 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.
- DETAILED INSTRUCTIONS:** In your profile, view instructions by clicking on the Info Bubbles **i** that appear.
- 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.)
- 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).

Field Name	Organizations Creating a New Profile	Organizations That Already Have a Profile
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MANAGE ORGANIZATION (left sidebar)

<ul style="list-style-type: none"> • Add Administrator (<i>add/remove users authorized to make edits</i>) 	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
<ul style="list-style-type: none"> • Edit Information - Organization Name (<i>must be the legal name as appears on your IRS Letter of Determination</i>) 	<input type="checkbox"/> Required	<input type="checkbox"/> Do Not Alter (<i>email nonprofits@cfsarasota.org if any changes</i>)

PROFILE SETUP Tab

ADD YOUR CAUSES: <ul style="list-style-type: none"> • Website • Logo • Causes 	<input type="checkbox"/> Required <input type="checkbox"/> Optional <input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (as needed)
ADD YOUR STORY: <ul style="list-style-type: none"> • Cover Photo • Tell Your Story • Video 	<input type="checkbox"/> Optional <input type="checkbox"/> Required <input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (as needed)

Field Name	Organizations Creating a New Profile	Organizations That Already Have a Profile
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OVERVIEW Tab

• Mission	<input type="checkbox"/> Required	<input type="checkbox"/> Update (optional)
• Mission Category	<input type="checkbox"/> Required	<input type="checkbox"/> Update (optional)
• Achievement Definition	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Background	<input type="checkbox"/> Required	<input type="checkbox"/> Update (optional)
• Primary Organization Type & Sub-Type	<input type="checkbox"/> Required	<input type="checkbox"/> Update (optional)
• Secondary Organization Type & Sub-Type	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (optional)
• Street Address and Mailing Address	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Geographical Areas Served - Overall Organization	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Geographical Areas Served - Overall (by zip code)	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
• Specific Areas Served	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
• Formal Collaborations	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
• Unite Us Profile	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (optional)

PROGRAMS & RESULTS Tab

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

• Program Name	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Program Description	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Success Looks Like	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Program Type	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Program Start Date (<i>program originally began</i>)	<input type="checkbox"/> Required	<input type="checkbox"/> Retain Original Date
• Program End Date (<i>if permanently ended; retains historical outcomes data</i>)	<input type="checkbox"/> Required (if ended)	<input type="checkbox"/> Update (if ended)
• Program Costs (Annual)	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• \$ Amount of Need	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Program Category	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Program Sub-Category	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Top 3 Populations Served	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Population Served Description	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Geographical Areas Served by Program	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
• Geographical Areas Served by Program (zip code)	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
• Projected Number to be Served	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Date Outcomes Achieved or Reported (<i>should be updated at least annually, or quarterly if desired</i>)	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Outcomes Achieved	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Number Served by this Program (<i>overall</i>)	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Number or % that Achieved Intended Outcomes	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Outcome was Measured/Confirmed by	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)

FINANCIALS Tab

CURRENT / PROJECTED:		
• Your Current Fiscal Period Begins	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Your Current Fiscal Period Ends	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Projected Annual Revenue	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE
• Projected Annual Expenses	<input type="checkbox"/> Required	<input type="checkbox"/> Required KEY UPDATE

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FINANCIALS Tab (continued)

<p>FINANCIALS - OTHER:</p> <ul style="list-style-type: none"> • Organization has Endowment? • Organization has Credit Line? • Organization has Reserve Fund? • Administrative Needs <p>CAPITAL CAMPAIGN:</p> <ul style="list-style-type: none"> • Currently in Capital Campaign? • Campaign Purpose • Amount Raised to Date <p>IRS FORM 990:</p> <ul style="list-style-type: none"> • IRS Letter of Determination Requires Form 990? • IRS Form 990 <p><i>Upload for 2018, 2019 (and 2020, 2021 if ready).</i></p> <p>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.</p> <p>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.</p> <p>FINANCIAL STATEMENTS OR AUDIT:</p> <ul style="list-style-type: none"> • Organization has Audited financial statements? • Financial Statements or Audit <p><i>Upload for 2018, 2019 (and 2020, 2021 if ready).</i></p> <p>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.</p> <p>If organization has Audited Financial Statements, upload these.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Required <ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Required (if Yes) <input type="checkbox"/> Required (if Yes) <ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Required (unless IRS determines organization is Exempt) <ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Required (IF organization files 990-N, or if a chapter of another organization, or if IRS determines organization is Exempt) 	<ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Required KEY UPDATE <ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Required (if Yes) <input type="checkbox"/> KEY UPDATE (if Yes) <ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Required KEY UPDATE (unless IRS determines organization is Exempt) <ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Required KEY UPDATE (IF organization files 990-N, or if a chapter of another organization, or if IRS determines organization is Exempt)
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Field Name	Organizations Creating a New Profile	Organizations That Already Have a Profile
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FINANCIALS Tab (continued)

<p>FINANCIAL DATA</p> <p><i>Based upon 3 most recent years of 990s/Financials that you have (click EDIT to add columns for each year).</i></p> <ul style="list-style-type: none"> • 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 <p>FINANCIAL DATA - EXPENSE ALLOCATION:</p> <ul style="list-style-type: none"> • Expenses - Administration • Expenses - Program • Expenses - Fundraising • Expenses - Affiliate Payments <p>FINANCIAL DATA - ASSETS & LIABILITIES:</p> <ul style="list-style-type: none"> • Total Assets • Current Liabilities • Long Term Liabilities • Net Assets 	<ul style="list-style-type: none"> <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Optional <input type="checkbox"/> Optional <input type="checkbox"/> Optional <input type="checkbox"/> Optional <ul style="list-style-type: none"> <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Optional <ul style="list-style-type: none"> <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Required 	<ul style="list-style-type: none"> <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE Update (as needed) Update (as needed) Update (as needed) Update (as needed) <ul style="list-style-type: none"> <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE Update (as needed) <ul style="list-style-type: none"> <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE Update (if applicable) <input type="checkbox"/> Required KEY UPDATE
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OPERATIONS Tab

<ul style="list-style-type: none"> • 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 <p><i>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.</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Optional <input type="checkbox"/> Optional <input type="checkbox"/> Required 	<ul style="list-style-type: none"> <input type="checkbox"/> Do Not Alter <input type="checkbox"/> Do Not Alter <input type="checkbox"/> Do Not Alter <input type="checkbox"/> Do Not Alter <input type="checkbox"/> Do Not Alter Update (as needed) Update (as needed) <input type="checkbox"/> Do Not Alter
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Field Name	Organizations Creating a New Profile	Organizations That Already Have a Profile
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OPERATIONS Tab (continued)

- State Charitable Solicitations Permit (*example below*)



Required

Required **KEY UPDATE**

- State Charitable Solicitations Permit - Exp Date
- Fundraising Plan
- Communications Plan
- Strategic Plan
- Continuity of Operations Plan
- Management Succession Plan
- Nondiscrimination Policy
- Whistleblower Policy
- Directors & Officers (D&O) Insurance Policy
- Organization Policies & Procedures
- Policy Against Compensation for Fundraising Consultants

- Required
- Optional
- Optional
- Optional
- Optional
- Optional
- Optional
- Answer **Required**
- Optional
- Answer **Required**
- Answer **Required**

- Required **KEY UPDATE**
- Update (as needed)
- Update (as needed)
- Update (as needed)
- Update (as needed)
- Update (as needed)
- Update (as needed)
- Update (as needed)
- Update (as needed)
- Update (as needed)
- Update (as needed)

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STAFF & VOLUNTEERS Tab

<p>STAFF OVERVIEW</p> <ul style="list-style-type: none"> • Number of Full-Time Staff • Retention Rate (for Full-Time Staff only) • Number of Part-Time Staff • Number of Contractors <p>CEO/EXECUTIVE DIRECTOR</p> <ul style="list-style-type: none"> • Name • Email • Term Began • Demographics <p>FORMER CEO/EXECUTIVE DIRECTOR</p> <ul style="list-style-type: none"> • Name • Term Began • Term Ended <p>VOLUNTEER OVERVIEW</p> <ul style="list-style-type: none"> • Number of Volunteers 	<ul style="list-style-type: none"> <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Answer Required <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Answer Required 	<ul style="list-style-type: none"> <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Required KEY UPDATE
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GOVERNANCE Tab

<p>BOARD MEMBERS</p> <ul style="list-style-type: none"> • Board Chair • Board Chair - Term Begins & Term Ends • Board Co-Chair • Board Co-Chair - Term Begins & Term Ends • Board Members - Other <p>BOARD OVERVIEW</p> <ul style="list-style-type: none"> • 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 <p><i>The total number for each demographics section must match the total number of overall board members (these must align).</i></p> <ul style="list-style-type: none"> • Standing Committees 	<ul style="list-style-type: none"> <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Required (if applicable) <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Answer Required <input type="checkbox"/> Optional 	<ul style="list-style-type: none"> <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (if applicable) <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Update (as needed) <input type="checkbox"/> Answer Required <input type="checkbox"/> Required KEY UPDATE <input type="checkbox"/> Update (as needed)
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