

# THE GIVING PARTNER

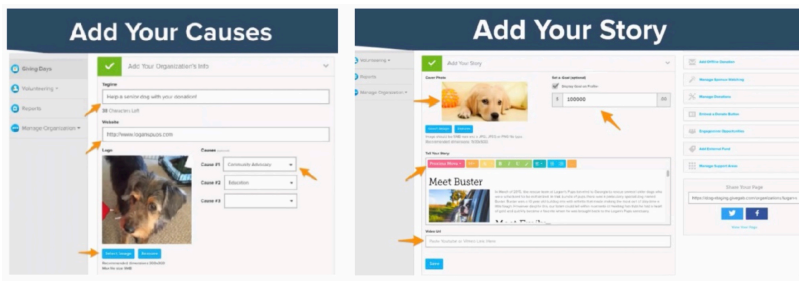
## CHECKLIST

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

- First, click [here](#) to login to your organization's profile.
- Next, utilize the appropriate column below to complete your work:
  - **Blue column** for organizations that **don't yet have a profile**
  - **Yellow column** for organizations that **already have a profile**
- After your work is **fully** completed, click **SUBMIT PROFILE FOR REVIEW** (top right of profile). Please **DO NOT** submit a **partially** completed profile!
- If you encounter any technology issues, need clarification, or help uploading documents, click the **Blue Chat Bubble** (bottom right of website) to connect with the Customer Success Team!

Organizations That <b>Don't Yet</b> Have a Profile	Organizations That <b>Already</b> Have a Profile
All <b>REQUIRED</b> fields must be completed in order to have an Approved/CURRENT status.	Fields below denoted as <b>KEY UPDATE</b> must be updated <b>when documents/content have expired or are due (this occurs throughout each year)</b> , in order to maintain an Approved/CURRENT status. For all other fields, please refresh/update these as needed.

### PROFILE SETUP Tab



<input type="checkbox"/> Tagline <input type="checkbox"/> Website <input type="checkbox"/> Logo <input type="checkbox"/> Causes <input type="checkbox"/> Cover Photo <input type="checkbox"/> Tell Your Story <input type="checkbox"/> Video (optional)	<input type="checkbox"/> Tagline <input type="checkbox"/> Website <input type="checkbox"/> Logo <input type="checkbox"/> Causes <input type="checkbox"/> Cover Photo <input type="checkbox"/> Tell Your Story <input type="checkbox"/> Video (optional)
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### OVERVIEW Tab

<input type="checkbox"/> Mission <input type="checkbox"/> Background <input type="checkbox"/> Needs <input type="checkbox"/> Accomplishments <input type="checkbox"/> Goals <input type="checkbox"/> Areas Served - Overall Organization	<input type="checkbox"/> Needs <input type="checkbox"/> <b>KEY UPDATE</b> Accomplishments <input type="checkbox"/> <b>KEY UPDATE</b> Goals
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**LEGAL, PLANNING & POLICIES Tab**

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

- Organization Doing Business As DBA) (if applicable)
- KEY UPDATE** State Charitable Solicitations Permit (*below is an example of what this looks like*)



- Conflict of Interest Policy
- Primary Organization Type and Sub-Type
- Addresses
- Awards, Affiliations, Accreditations & Collaborations (optional)
- Secondary Organization Type and Sub-Type (optional)
- Fundraising Plan (optional)
- Communications Plan (optional)
- Strategic Plan (optional)
- Continuity of Operations Plan (optional)
- Management Succession Plan (optional)
- Nondiscrimination Policy (optional)
- Directors & Officers (D&O) Insurance Policy (optional)
- Whistleblower Policy
- Organization Policies & Procedures (optional)
- Policy Against Compensation for Fundraising Consultants

- Addresses
- Awards, Affiliations, Accreditations & Collaborations (optional)
- Fundraising Plan (optional)
- Communications Plan (optional)
- Strategic Plan (optional)
- Continuity of Operations Plan (optional)
- Management Succession Plan (optional)
- Nondiscrimination Policy (optional)
- Directors & Officers (D&O) Insurance Policy (optional)
- Whistleblower Policy
- Organization Policies & Procedures (optional)
- Policy Against Compensation for Fundraising Consultants

**FINANCIALS Tab**

<ul style="list-style-type: none"> <li><input type="checkbox"/> Current Fiscal/Calendar Year <b>Start</b> Date</li> <li><input type="checkbox"/> Current Fiscal/Calendar Year <b>End</b> Date</li> <li><input type="checkbox"/> Projected Annual Revenue</li> <li><input type="checkbox"/> Projected Annual Expenses</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>KEY UPDATE</b> Current Fiscal/Calendar Year <b>Start</b> Date</li> <li><input type="checkbox"/> <b>KEY UPDATE</b> Current Fiscal/Calendar Year <b>End</b> Date</li> <li><input type="checkbox"/> <b>KEY UPDATE</b> Projected Annual Revenue</li> <li><input type="checkbox"/> <b>KEY UPDATE</b> Projected Annual Expenses</li> </ul>
<ul style="list-style-type: none"> <li><input type="checkbox"/> IRS Form 990 for 2019, 2018, and 2017 (and 2020 if you have this ready)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>KEY UPDATE</b> IRS Form 990 for 2019, 2018, and 2017 (and 2020 if you have this ready)</li> </ul>
<p><i>Instructions: <b>Must upload 990, 990-EZ , 990-N, or 990-PF (REMOVE SCHEDULE B DONOR NAMES) unless IRS determines organization is Exempt.</b></i></p> <p><i>If IRS indicates that organization has <b>religious, educational, or other Exemption</b> (see your IRS 501(c)(3) Letter of Determination to verify), <b>then skip this 990 section.</b></i></p> <p><i>If organization has less than three years of 990s, enter the most recent year(s) that you do have.</i></p>	<p><i>Instructions: <b>Must upload 990, 990-EZ , 990-N, or 990-PF (REMOVE SCHEDULE B DONOR NAMES) unless IRS determines organization is Exempt.</b></i></p> <p><i>If IRS indicates that organization has <b>religious, educational, or other Exemption</b> (see your IRS 501(c)(3) Letter of Determination to verify), <b>then skip this 990 section.</b></i></p> <p><i>If organization has less than three years of 990s, enter the most recent year(s) that you do have.</i></p>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Statements or Audit for 2019, 2018, and 2017 (and 2020 if you have this ready)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>KEY UPDATE</b> Financial Statements or Audit for 2019, 2018, and 2017 (and 2020 if you have this ready)</li> </ul>
<p><i>Instructions: <b>If organization files 990-N, or if IRS indicates that organization has religious, educational, or other Exemption</b> (see your IRS 501(c)(3) Letter of Determination to verify), <b>you must upload both Profit &amp; Loss Statement AND Balance Sheet.</b></i></p> <p><i>If organization has <b>Audited</b> Financial Statements, upload these.</i></p> <p><i>If organization has less than three years of financials, enter the most recent year(s) that you do have.</i></p>	<p><i>Instructions: <b>If organization files 990-N, or if IRS indicates that organization has religious, educational, or other Exemption</b> (see your IRS 501(c)(3) Letter of Determination to verify), <b>you must upload both Profit &amp; Loss Statement AND Balance Sheet.</b></i></p> <p><i>If organization has <b>Audited</b> Financial Statements, upload these.</i></p> <p><i>If organization has less than three years of financials, enter the most recent year(s) that you do have.</i></p>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Endowment</li> <li><input type="checkbox"/> Credit Line</li> <li><input type="checkbox"/> Reserve Fund</li> <li><input type="checkbox"/> Capital Campaign</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Endowment</li> <li><input type="checkbox"/> Credit Line</li> <li><input type="checkbox"/> Reserve Fund</li> <li><input type="checkbox"/> Capital Campaign</li> </ul>
<p><b>Financials (Historical)</b></p>	<p><b>Financials (Historical)</b></p>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Year (enter 2019, 2018 and 2017)</li> <li><input type="checkbox"/> Total Revenue</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>KEY UPDATE</b> Financial Year (enter 2019, and also 2018 if you've not yet done so)</li> <li><input type="checkbox"/> <b>KEY UPDATE</b> Total Revenue</li> </ul>
<p><i>Instructions: From 990: Part I, Line 12. From 990-EZ: Part I, Line 9. Or, from your accounting records.</i></p>	<p><i>Instructions: From 990: Part I, Line 12. From 990-EZ: Part I, Line 9. Or, from your accounting records.</i></p>

Organizations That <b>Don't Yet</b> Have a Profile	Organizations That <b>Already</b> Have a Profile
<input type="checkbox"/> Total Expenses  <i>Instructions: From 990: Part I, Line 18. From 990-EZ: Part I, Line 17. Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Total Expenses  <i>Instructions: From 990: Part I, Line 18. From 990-EZ: Part I, Line 17. Or, from your accounting records.</i>
<input type="checkbox"/> Contributions & Grants Received  <i>Instructions: From 990: Part I, Line 8. From 990-EZ: Part I, Line 1. Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Contributions & Grants Received  <i>Instructions: From 990: Part I, Line 8. From 990-EZ: Part I, Line 1. Or, from your accounting records.</i>
<input type="checkbox"/> Foundation & Corporate Contributions, Federal Contributions, State Contributions, Local Contributions, Unspecified Contributions, Individual Contributions, Indirect Public Support  <i>Instructions: From 990: Part I, Line 8. From 990-EZ: Part I, Line 1. Or, from your accounting records.</i>	<input type="checkbox"/> Foundation & Corporate Contributions, Federal Contributions, State Contributions, Local Contributions, Unspecified Contributions, Individual Contributions, Indirect Public Support  <i>Instructions: From 990: Part I, Line 8. From 990-EZ: Part I, Line 1. Or, from your accounting records.</i>
<input type="checkbox"/> Program Service Revenue  <i>Instructions: From 990: Part I, Line 9. From 990-EZ: Part I, Line 2. Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Program Service Revenue  <i>Instructions: From 990: Part I, Line 9. From 990-EZ: Part I, Line 2. Or, from your accounting records.</i>
<input type="checkbox"/> Investment Income  <i>Instructions: From 990: Part I, Line 10. From 990-EZ: Part I, Line 4. Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Investment Income  <i>Instructions: From 990: Part I, Line 10. From 990-EZ: Part I, Line 4. Or, from your accounting records.</i>
<input type="checkbox"/> Membership Dues, Special Events Revenue, Revenue In-Kind, Other Revenue  <i>Instructions: From 990: Part I, Line 11. From 990-EZ: Part I, Line 3,5c,6d,7c and 8. Or, from your accounting records.</i>	<input type="checkbox"/> Membership Dues, Special Events Revenue, Revenue In-Kind, Other Revenue  <i>Instructions: From 990: Part I, Line 11. From 990-EZ: Part I, Line 3,5c,6d,7c and 8. Or, from your accounting records.</i>
<input type="checkbox"/> Expenses - Administration  <i>Instructions: From 990: Part IX, Line 25(C). Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Expenses - Administration  <i>Instructions: From 990: Part IX, Line 25(C). Or, from your accounting records.</i>
<input type="checkbox"/> Expenses - Program  <i>Instructions: From 990: Part IX, Line 25(B). Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Expenses - Program  <i>Instructions: From 990: Part IX, Line 25(B). Or, from your accounting records.</i>
<input type="checkbox"/> Expenses - Fundraising  <i>Instructions: From 990: Part IX, Line 25(D). Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Expenses - Fundraising  <i>Instructions: From 990: Part IX, Line 25(D). Or, from your accounting records.</i>
<input type="checkbox"/> Expenses - Affiliate Payments  <i>Instructions: From 990, or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Expenses - Affiliate Payments  <i>Instructions: From 990, or, from your accounting records.</i>

Organizations That <b>Don't Yet</b> Have a Profile	Organizations That <b>Already</b> Have a Profile
<input type="checkbox"/> Total Assets  <i>Instructions: From 990: Part I, Line 20. From 990-EZ: Part II, Line 25. Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Total Assets  <i>Instructions: From 990: Part I, Line 20. From 990-EZ: Part II, Line 25. Or, from your accounting records.</i>
<input type="checkbox"/> Current Liabilities, Long Term Liabilities  <i>Instructions: From 990: Part I, Line 21. From 990-EZ: Part II, Line 26. Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Current Liabilities, Long Term Liabilities  <i>Instructions: From 990: Part I, Line 21. From 990-EZ: Part II, Line 26. Or, from your accounting records.</i>
<input type="checkbox"/> Net Assets  <i>Instructions: From 990: Part I, Line 22. From 990-EZ: Part II, Line 27. Or, from your accounting records.</i>	<input type="checkbox"/> <b>KEY UPDATE</b> Net Assets  <i>Instructions: From 990: Part I, Line 22. From 990-EZ: Part II, Line 27. Or, from your accounting records.</i>

### GOVERNANCE Tab

<input type="checkbox"/> Board Chair – <b>Term Begins &amp; Term Ends</b> <input type="checkbox"/> Board Members (all others)	<input type="checkbox"/> <b>KEY UPDATE</b> Board Chair – <b>Term Begins &amp; Term Ends</b> <input type="checkbox"/> <b>KEY UPDATE</b> Board Members (all others)
<i>Instructions: List <b>all</b> other board members.</i>  <i>For <b>Company Affiliation</b>, enter: Community Volunteer, Retired, or Name of <b>Other</b> Organization where board member is employed.</i>	<i>Instructions: Update board members.</i>  <i>For <b>Company Affiliation</b>, enter: Community Volunteer, Retired, or Name of <b>Other</b> Organization where board member is employed.</i>
<input type="checkbox"/> Number of Board Meetings Held in Prior Fiscal/Calendar Year <input type="checkbox"/> Board Meeting Attendance %	<input type="checkbox"/> <b>KEY UPDATE</b> Number of Board Meetings Held in Prior Fiscal/Calendar Year <input type="checkbox"/> <b>KEY UPDATE</b> Board Meeting Attendance %
<i>Click this link to easily calculate this %: <a href="#">Board Meeting Attendance Calculator</a></i>	<i>Click this link to easily calculate this %: <a href="#">Board Meeting Attendance Calculator</a></i>
<input type="checkbox"/> Board Term Length & Limits <input type="checkbox"/> Board Members Making Monetary Contributions <input type="checkbox"/> Board Members Making In-Kind Contributions <input type="checkbox"/> Are You Currently Seeking Board Members <input type="checkbox"/> Board Demographics <input type="checkbox"/> Standing Committees	<input type="checkbox"/> Board Term Length & Limits <input type="checkbox"/> Board Members Making Monetary Contributions <input type="checkbox"/> Board Members Making In-Kind Contributions <input type="checkbox"/> Are You Currently Seeking Board Members <input type="checkbox"/> <b>KEY UPDATE</b> Board Demographics <input type="checkbox"/> Standing Committees
<i>Instructions: Refer to Appendix (page i) of this document for acceptable choices to select from</i>	<i>Instructions: Refer to Appendix (page i) of this document for acceptable choices to select from</i>

### MANAGEMENT & VOLUNTEERS Tab

<input type="checkbox"/> Management & Volunteer Statistics <input type="checkbox"/> CEO/Executive Director	<input type="checkbox"/> <b>KEY UPDATE</b> Management & Volunteer Statistics <input type="checkbox"/> CEO/Executive Director
<i>Instructions: If this individual is not <b>paid</b> in <b>this position</b> (i.e., board member is <b>acting</b> as the ED but is not paid), enter <b>No Executive</b> in the FIRST NAME field and <b>Director</b> in the LAST NAME field</i>	<i>Instructions: If this individual is not <b>paid</b> in <b>this position</b> (i.e., board member is <b>acting</b> as the ED but is not paid), enter <b>No Executive</b> in the FIRST NAME field and <b>Director</b> in the LAST NAME field</i>

**PROGRAMS Tab**

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: Limit this to as few paragraphs as possible, while still conveying a clear description*

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

*Instructions: Refer to Appendix (page i) of this document for acceptable choices to select from*

- Population Served 1, 2, and/or 3

- Program Areas Served
- Population Served Description
- Number Served Last year
- Projected Number Served This Year
- What Outcomes 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

Update current programs, add new programs. Must have **at least one** local, active program (in existence for at least six months) in order to have a profile.

- Program Name
- Program Description

*Instructions: Limit this to as few paragraphs as possible, while still conveying a clear description*

- Program Start Year
- KEY UPDATE** Program Costs (Annual)
- Program Category, Program Sub-Category

*Instructions: Refer to Appendix (page i) of this document for acceptable choices to select from*

- Population Served 1, 2, and/or 3

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

**MANAGE ORGANIZATION (left sidebar)**

- ADD ADMINISTRATOR – Add any additional administrators **authorized** to make edits

- ADD ADMINISTRATOR – Add any additional administrators **authorized** to make edits



## APPENDIX

For the specific fields under the Governance, Programs, and Legal, Planning & Policies tabs, select your answers from the lists below that best describe your organization.

### GOVERNANCE Tab FIELD: Standing Committees

Select and enter **all** that apply and separate each with a comma

- Building
- By-laws
- Campus Planning and Development
- Capital Campaign
- 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, Auction, Dinner / Gala)

### PROGRAMS Tab FIELD: Population Served

Select and enter **up to three**

- 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
- United States
- International
- Africa
- Asia
- Australia, New Zealand, Oceania
- Canada
- Europe & Newly Independent States
- Latin America & the Caribbean
- Middle East
- 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
- Veterans
- Victims and Oppressed people
- General/Unspecified

## LEGAL, PLANNING & POLICIES Tab & PROGRAMS Tab

### FIELD: Organization Type & Sub-Type; Program Category & Sub-Category

The NTEE Classification System (developed by the National Center for Charitable Statistics).

Select and enter **one Primary and one Sub-Type**. Examples: D Animal Related (primary) and D33 Fisheries (sub-type); an organization coded as D33 will come up when someone searches for "fisheries."

A Arts, Culture, and Humanities	A90 Arts Service Activities/ Organizations	C Environmental Quality Protection, Beautification
A01 Alliance/Advocacy Organizations	A99 Other Art, Culture, Humanities Organizations/Services N.E.C. *	C01 Alliance/Advocacy Organizations
A02 Management & Technical Assistance		C02 Management & Technical Assistance
A03 Professional Societies & Associations	B Educational Institutions	C03 Professional Societies & Associations
A05 Research Institutes and/or Public Policy Analysis	B01 Alliance/Advocacy Organizations	C05 Research Institutes and/or Public Policy Analysis
A11 Single Organization Support	B02 Management & Technical Assistance	C11 Single Organization Support
A12 Fundraising and/or Fund Distribution	B03 Professional Societies & Associations	C12 Fundraising and/or Fund Distribution
A19 Nonmonetary Support N.E.C. *	B05 Research Institutes and/or Public Policy Analysis	C19 Nonmonetary Support N.E.C. *
A20 Arts, Cultural Organizations— Multipurpose	B11 Single Organization Support	C20 Pollution Abatement and Control Services
A23 Cultural/Ethnic Awareness	B12 Fundraising and/or Fund Distribution	C27 Recycling
A25 Arts Education/Schools	B19 Nonmonetary Support N.E.C. *	C30 Natural Resource Conservation and Protection
A26 Arts Council/Agency	B20 Elementary, Secondary Ed	C32 Water Resource, Wetlands Conservation & Management
A30 Media, Communications Organizations	B21 Kindergarten, Nursery Schools, Preschool, Early Admissions	C34 Land Resources Conservation
A31 Film, Video	B24 Primary/Elementary School	C35 Energy Resources Conservation & Development
A32 Television	B25 Secondary/High School	C36 Forest Conservation
A33 Printing, Publishing	B28 Special Ed Institutions/ Schools for Visually or Hearing Impaired, Learning Disabled	C40 Botanical, Horticultural, and Landscape Services
A34 Radio	B30 Vocational Technical	C41 Botanical Gardens, Arboreta and Botanical Organizations
A40 Visual Arts Organizations	B40 Higher Ed Institutions	C42 Garden Club, Horticultural Programs
A50 Museums & Museum Activities	B41 Community/Jr. College	C50 Environmental Beautification
A51 Art Museums	B42 Undergraduate College (4-year)	C60 Environmental Education and Outdoor Survival Programs
A52 Children's Museums	B43 University or Technological	C99 Environmental Quality Protection and Beautification N.E.C. *
A54 History Museums	B50 Graduate, Professional (Separate Entities)	
A56 Natural History, Natural Science Museums	B60 Adult, Continuing Ed	D Animal related
A57 Science & Technology Museum	B70 Libraries, Library Science	D01 Alliance/Advocacy Organizations
A60 Performing Arts	B80 Student Services and Organizations	D02 Management & Technical Assistance
A61 Performing Arts Centers	B82 Scholarships, Student Financial Aid, Awards	D03 Professional Societies & Associations
A62 Dance	B83 Student Sororities, Fraternities	D05 Research Institutes and/or Public Policy Analysis
A63 Ballet	B84 Alumni Associations	D11 Single Organization Support
A65 Theater	B90 Educational Services and Schools —Other	
A68 Music	B92 Remedial Reading, Reading Encouragement	
A69 Symphony Orchestras	B94 Parent Teacher Group	
A6A Opera	B99 Education N.E.C. *	
A6B Singing Choral		
A6C Music Groups, Bands, Ensembles		
A6E Performing Arts Schools		
A70 Humanities Organizations		
A80 Historical Societies and Related Activities		
A84 Commemorative Events		



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.\*

E 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.\*

F 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.\*

G 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.\*

H 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.\*

I 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.\*

J 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.

K 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.\*

L 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.\*

M 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. \*

N 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 Activities N.E.C. \*

O 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. \*

P 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. \*

Q 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.\*

R 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.\*

S 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 (Kiwans, Lions, Jaycees, etc.)  
 S81 Women's Service Clubs  
 S82 Men's Service Clubs  
 S99 Community Improvement, Capacity Building N.E.C.\*

T 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.\*

U 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.\*

V Social Science Research Institutes	W20 Government and Public Administration	Y Mutual/Membership Benefit Organizations, Other
V01 Alliance/Advocacy Organizations	W22 Public Finance, Taxation, Monetary Policy	Y01 Alliance/Advocacy Organizations
V02 Management & Technical Assistance	W24 Citizen Participation	Y02 Management & Technical Assistance
V03 Professional Societies & Associations	W30 Military/Veterans' Organizations	Y03 Professional Societies & Associations
V05 Research Institutes and/or Public Policy Analysis	W40 Public Transportation Systems and Services	Y05 Research Institutes and/or Public Policy Analysis
V11 Single Organization Support	W50 Telephone, Telegraph, and Telecommunications Services	Y11 Single Organization Support
V12 Fundraising and/or Fund Distribution	W60 Financial Institutions/Services (Non-Government Related)	Y12 Fundraising and/or Fund Distribution
V19 Nonmonetary Support N.E.C.*	W61 Credit Unions	Y19 Nonmonetary Support N.E.C.*
V20 Social Science Research Institutes, Services	W70 Leadership Development	Y20 Insurance Providers/ Services (other than Health)
V21 Anthropology, Sociology	W80 Public Utilities	Y22 Benevolent Life Insurance Association, Mutual Irrigations and Telephone Companies and like Organizations
V22 Economics (as a Social Science)	W90 Consumer Protection and Safety	Y23 Mutual Insurance Company or Association
V23 Behavioral Science	W99 Public, Society Benefit—Multipurpose & Other N.E.C.*	Y24 Supplemental Unemployment Compensation
V24 Political Science	X Religion, Spiritual Development	Y25 State Sponsored Worker's Compensation Reinsurance Organizations
V25 Population Studies, Demographics (includes Geography)	X01 Alliance/Advocacy Organizations	Y30 Pension and Retirement Funds
V26 Law, International Law, and Jurisprudence	X02 Management & Technical Assistance	Y33 Teachers' Retirement Fund Association
V30 Interdisciplinary Research	X03 Professional Societies & Associations	Y34 Employee Funded Pension Trust
V31 Black Studies	X05 Research Institutes and/or Public Policy Analysis	Y35 Multi-Employer Pension Plan
V32 Women's Studies	X11 Single Organization Support	Y40 Fraternal Beneficiary Societies
V33 Ethnic Studies	X12 Fundraising and/or Fund Distribution	Y42 Domestic Fraternal Societies
V34 Urban Studies	X19 Nonmonetary Support N.E.C.*	Y43 Voluntary Employees Beneficiary Associations (Non-Government)
V35 International Studies	X20 Christian	Y44 Voluntary Employees Beneficiary Associations (Government)
V36 Gerontology	X21 Protestant	Y50 Cemeteries and Burial Services
V37 Labor Studies	X22 Roman Catholic	Y99 Mutual/Membership Benefit Organizations, Other N.E.C.*
V99 Social Science Research Institutes, Services N.E.C.*	X30 Jewish	Z Unknown
W Public, Society Benefit	X40 Islamic	Z99 Unknown
W01 Alliance/Advocacy Organizations	X50 Buddhist	
W02 Management & Technical Assistance	X70 Hindu	
W03 Professional Societies & Associations	X80 Religious Media, Communications Organizations	
W05 Research Institutes and/or Public Policy Analysis	X81 Religious Film & Video	
W11 Single Organization Support	X82 Religious Television	
W12 Fundraising and/or Fund Distribution	X83 Religious Printing, Publishing	
W19 Nonmonetary Support N.E.C.*	X84 Religious Radio	
	X90 Interfaith Issues	
	X99 Religious Related, Spiritual Development N.E.C.*	

\*N.E.C. = Not Elsewhere Classified