

# THE GIVING PARTNER

## Everything You Need to Know

How to Apply for, Create and Update  
Your Organization's Profile

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Presented by



Powered by



# INTRODUCTION

# Today's Presenters



Susan Geurin

**Nonprofit Data Manager,  
Knowledge and Equity**

# Agenda

- What is The Giving Partner? (slides #5-12)
- Steps to Having a Profile in The Giving Partner (slides #13-32)
  - **Qualify & Apply** – *Organizations that **don't yet** have a profile* (slides #14-15)
  - **Get Prepared** – *All organizations* (slides #16-18)
  - **Create** Your Organization's Profile – *Organization's that **don't yet** have a profile* (slides #21-33)
  - **Update (Maintain)** Your Organization's Profile – *Organization's that **already have** a profile* (slides #22-33)
- Foundation Review & Profile Statuses (slides #33-36)
- Collect & Manage Donations (slides 37-40)
- Promote Your Organization through The Giving Partner (slides #41-42)
- Search & Reports Interface (slides #43-44)
- Eligibility Requirements for Opportunities (slides #45-46)
- Assistance & Resources (slides #47-48)

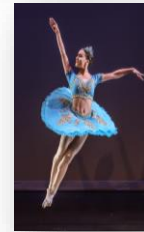
# WHAT IS THE GIVING PARTNER?

# What is The Giving Partner?

**The Giving Partner** is an online platform reflecting local nonprofit organizations that have made a commitment to transparency:

- 501(c)(3) and specific 501(c)(4) nonprofit organizations
- Serving in Sarasota, Manatee, Charlotte and/or DeSoto counties

This resource helps foundations, donors, businesses, media partners and other investors understand the local charitable marketplace.



**The Giving Partner** is not:

- A grant application
- A guarantee of funding
- A certification, rating or grade
- A substitute for **human** relationships
- Giving **Challenge**
  - Although similar in name, the Giving Challenge is **separate** and is a **24-hour online fundraising event**

**THE  
GIVING  
PARTNER**

# Evolution of The Giving Partner

- Since 2012, [The Giving Partner](#) has connected philanthropy and our community!
- We continue to work with our technology partner, GiveGab, to enhance functionality and performance to achieve the best overall experience.

## Milestones

2012

Community Foundation of Sarasota County launched *The Giving Partner*.

\$2.4 million was raised during the first *Giving Challenge* for nonprofit organizations with a profile in *The Giving Partner*.

2013-  
2018

A combined total of over \$40 million was raised over the course of five *Giving Challenges* for nonprofit organizations with a profile in *The Giving Partner*.

2019

*The Giving Partner* transitioned to a new platform, hosted by GiveGab, an online giving platform designed exclusively for nonprofits.

2020

Amidst the COVID-19 pandemic, the [2020 Giving Challenge](#) broke all previous records in a time of incredible uncertainty and unprecedented need. \$19.1 million was raised by 59,000 donors to strengthen 686 local nonprofit organizations with a profile in *The Giving Partner*.


12 nonprofit organizations with profiles in *The Giving Partner* participated in [Give 8/28](#), a national fundraising day for Black-led and Black-serving nonprofits, raising \$18,771 for their local efforts.

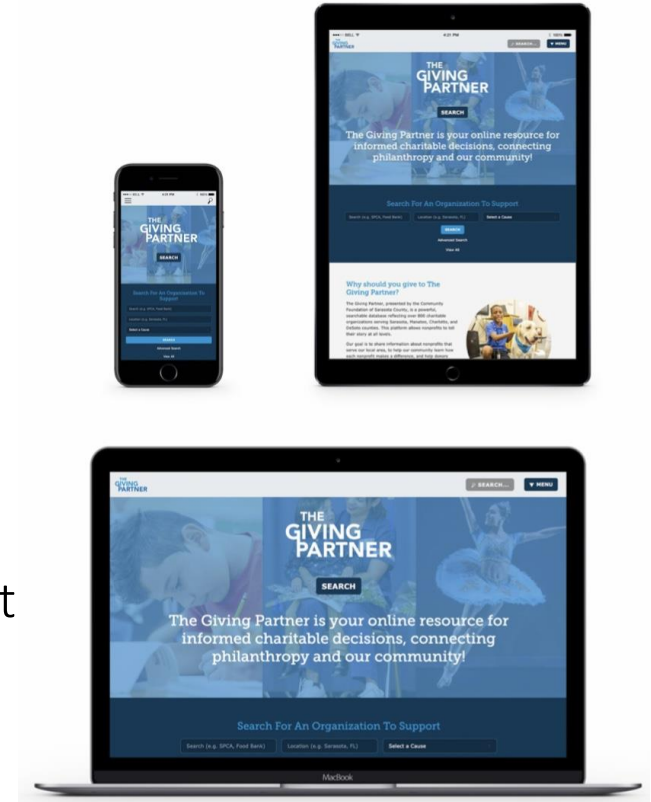




# Powering The Giving Partner – GiveGab

Our amazing technology partner, **GiveGab**, provides a safe, secure and reliable platform:

- Fail-safe redundancy
  - Load testing
  - Cloud services
  - Backup plans
- Partnered with **Stripe** (PCI Level 1 payment processor)
- Participating organizations verified as IRS and State recognized nonprofit
- Profiles are **mobile responsive** on every page
- Visible on any internet enabled device
- Dedicated **Customer Success Team** via Blue Chat Bubble! 



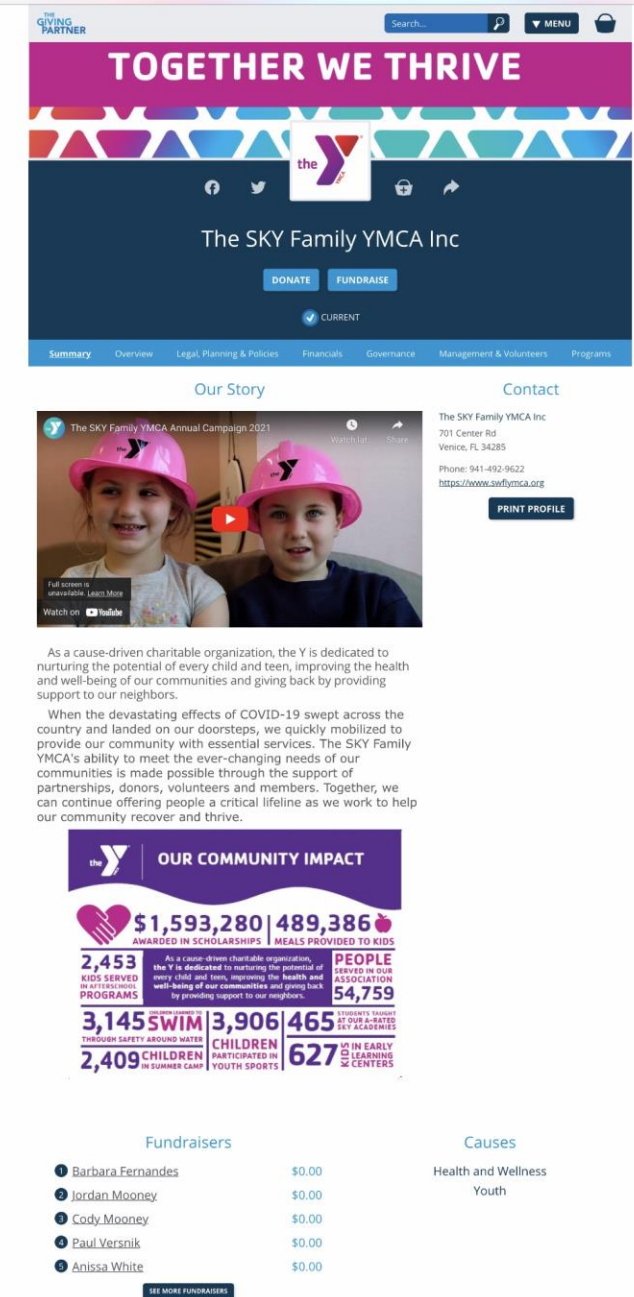
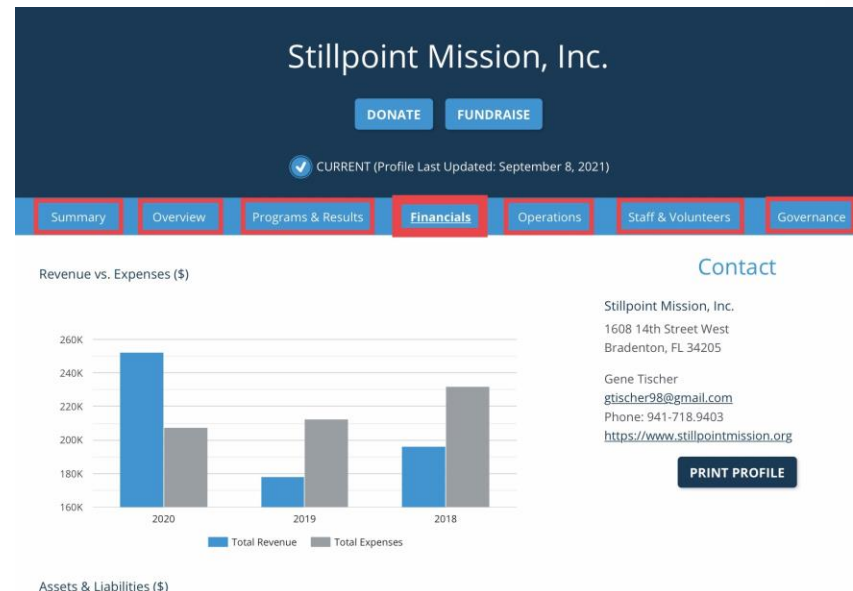
**THE  
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PARTNER**



# The Giving Partner - Public Interface

The public interface (which looks different from the admin interface where the data is entered) is a robust visualization of your organization's profile. Here are some of the great features:

- **Enhanced formatting** – photos, videos and graphics all come to life along with the profile data!
- **Features:**
  - Ability to Print Profile (Print Profile button)
  - Ability to Make Donation (Donate button)
  - Ability to become a Fundraiser (Fundraise button)



# How The Giving Partner Informs All of Us

## Data Collection & Review:

- Data is Entered/Updated by Nonprofit Organization Admins into their Organization's Profile
- Profile Data is Reviewed by the Community Foundation of Sarasota County



## Each Profile Reflects:

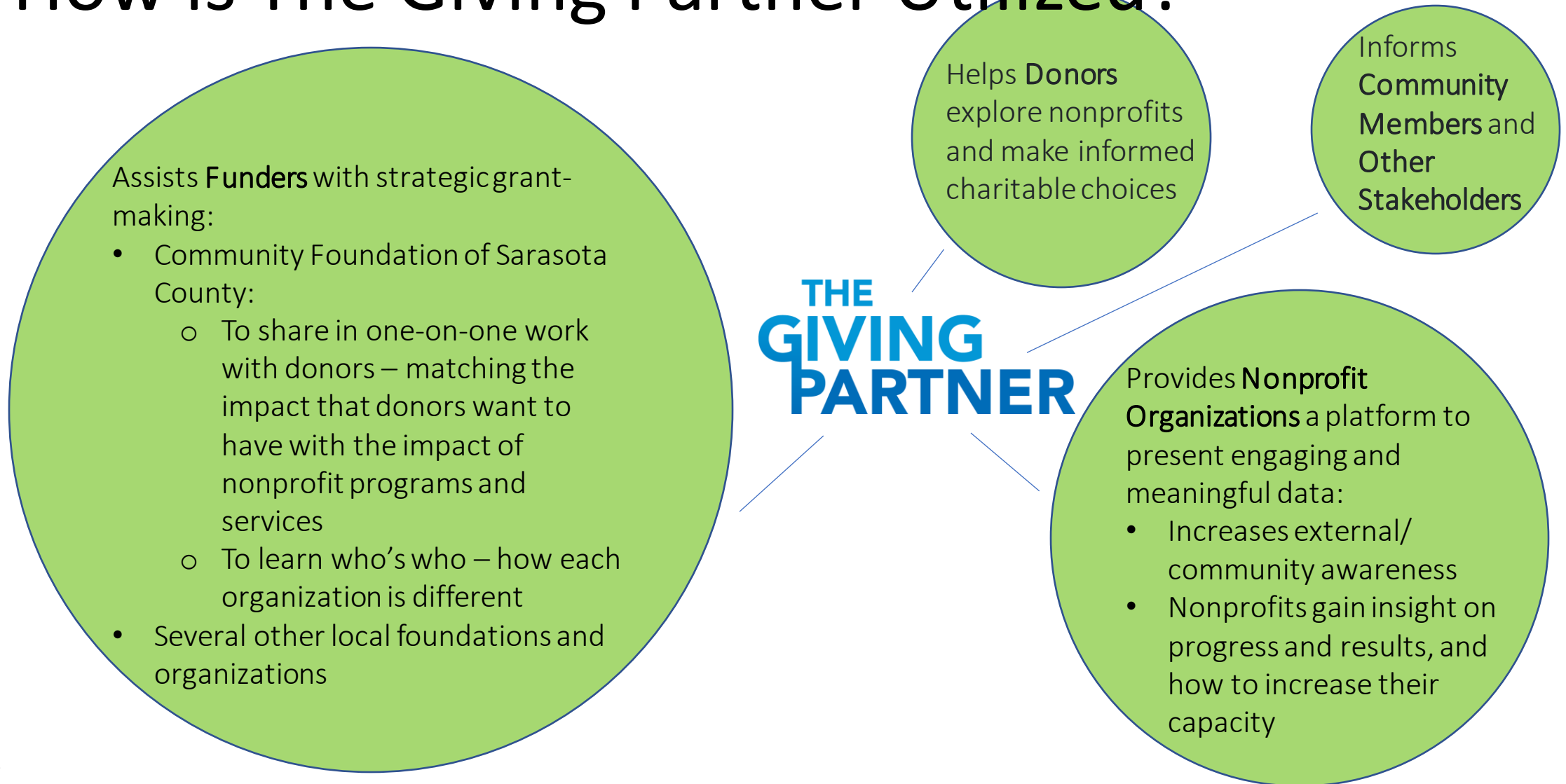
- Programmatic Results and Outcomes
- Financial Indicators
- Demographic Indicators
- Geographical Indicators
- Sector Indicators
- Community Indicators
- Organizational Capacity



## Community Indicators and Knowledge:

- We can learn about local nonprofit organizations and our community from curation and analysis of profile data

# How is The Giving Partner Utilized?



# Sector Report

- Here are some great examples of how [The Giving Partner](#) profile data is utilized to create reports for the Arts, Culture & Humanities sector

Arts and Culture is the  
**FOURTH LARGEST**  
industry in Florida  
(following retail, construction, and transportation)

**261,565 JOBS**

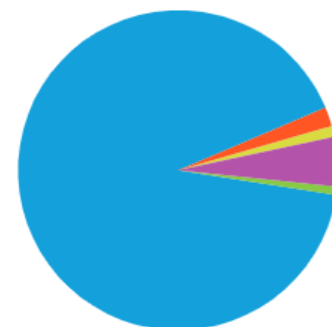
#### TOP FIVE REVENUE GENERATORS:

- 1 independent artists, writers, and performers
- 2 advertising
- 3 interior design services
- 4 architectural services
- 5 performing arts companies

#### Board Demographics of the Sector

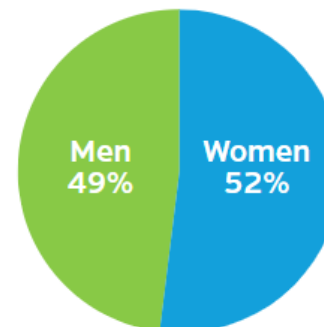
Nonprofit profiles on The Giving Partner include a breakdown of board members demographics for each organization. Over 1,400 board members' demographic information was included in the 127 pulled profiles.

BOARD MEMBERS  
BY ETHNICITY



African American: 5%   Hispanic/Latino: 2%  
Asian: 1%   Native American and Native Alaskan: 1%  
Caucasian: 91%

BOARD MEMBERS  
BY GENDER

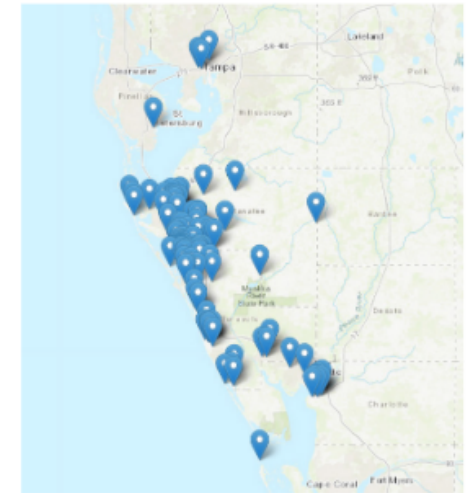


## The Giving Partner

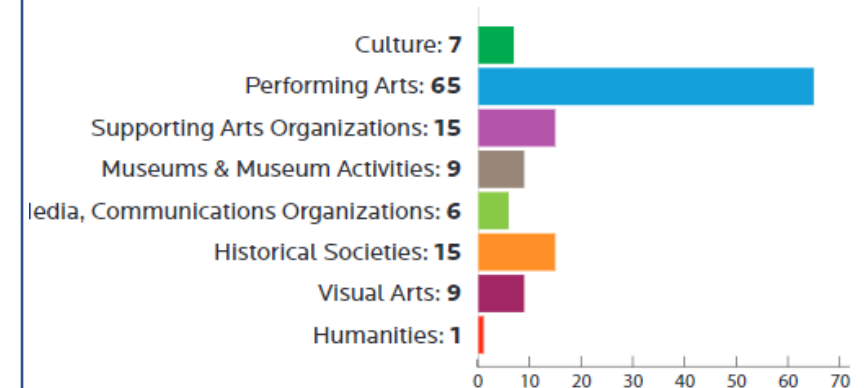
The Giving Partner allows local nonprofits to tell their stories at all levels and community members to explore how each nonprofit is making a difference. The Giving Partner is a powerful database containing profiles of over 700 501(c)(3) charitable organizations. In February 2021, the Community Foundation of Sarasota County prepared the Arts, Culture, & Humanities Sector Report derived from 127 nonprofit profiles in The Giving Partner.

#### KEY FINDINGS

Of the 127 organizations, 29% have endowments. The average projected annual revenue for organizations in this sector is \$993,036 and the average projected annual expenditure is \$983,940.



#### Arts, Culture, & Humanities sub-types:



# STEPS TO HAVING A PROFILE IN THE GIVING PARTNER

The following slides contain a step-by-step *overview* for nonprofit organizations to ensure that creating and maintaining a profile is a success! Always refer to the *Nonprofit Toolkit* (<https://www.thegivingpartner.org/info/nonprofit-toolkit>) for the most comprehensive instructions and information.



# STEP 1. Qualify

For Organizations That **Don't Yet** Have a Profile (if your organization **already** has a profile, **skip to Step #3**).

## HOW TO QUALIFY FOR A PROFILE

A nonprofit organization **must have all** of the following in order to meet eligibility requirements to have a profile:

- **IRS 501(c) Letter of Determination** as follows: 501(c)(3), 501(c)(4) veterans' organizations with 90% war vet membership, or 501(c)(4) volunteer fire departments (see example).
- At least **one active program** in existence for **at least six months** with local impact in **at least one** of the following counties: Sarasota, Manatee, Charlotte or DeSoto.
- A **street** address in **at least one** of the following counties: Sarasota, Manatee, Charlotte or DeSoto.

**SAMPLE**  
**IRS 501(C)(3)**  
**LETTER OF**  
**DETERMINATION**

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUN 20 2014

Employer Identification Number:  
46-222 [REDACTED]  
DLN:  
17053116352003  
Contact Person:  
CUSTOMER SERVICE ID# 31954  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
509(a) (2)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
February 1, 2013  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Sincerely,  
*Tamara Rippanda*  
Director, Exempt Organizations

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**PARTNER**

# STEP 2. Apply

For Organizations That **Don't Yet** Have a Profile (if your organization **already** has a profile, **skip to Step #3**).

## HOW TO APPLY FOR A PROFILE

If organization **meets the Qualifications** and does not already have a profile:

- Go to the [Nonprofit Toolkit](#) to utilize our *custom link* to Apply for a profile (you'll provide contact information, set up your login and password, along with some very basic information about your organization).
- After you've submitted your Application, your profile will be in a **Pre-Pending** status while we verify the information.
- So long as your organization meets the Qualifications, you'll receive an email notification indicating that you can proceed with developing your organization's profile

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

Organization Name

Street Address Line 1


Street Address Line 2

City

State

ZIP/Postal Code

☐ Not located in the United States?

Logo 

[Select Image](#)  
[Remove](#)

Image should be 5MB max and a JPG, JPEG or PNG file type. Recommended dimensions: 300x300.

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

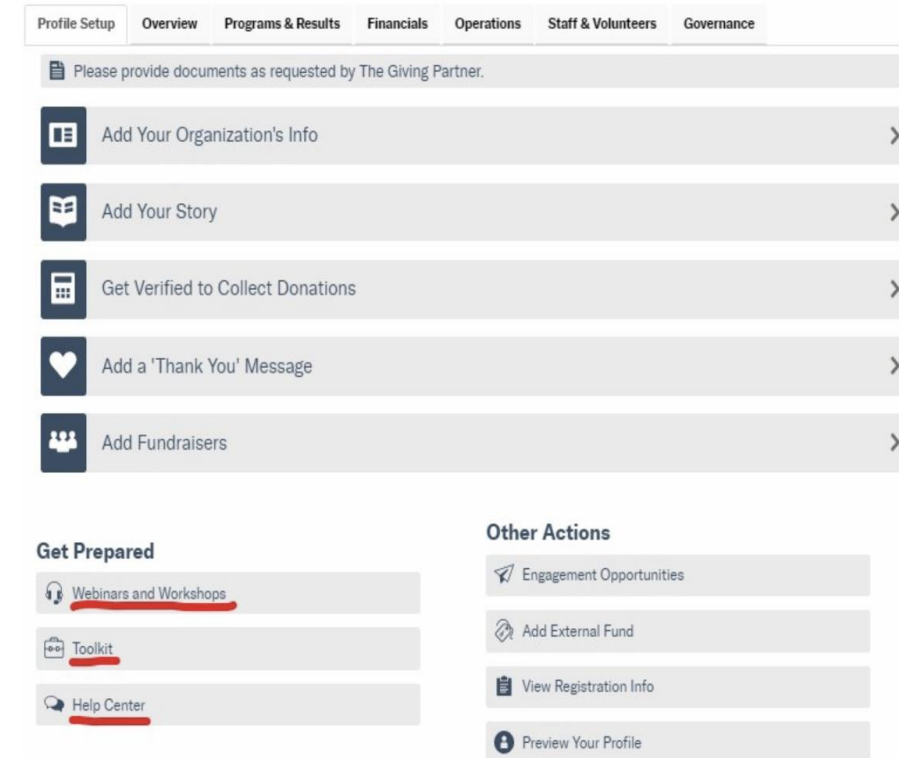
[Continue](#)



# STEP 3. Get Prepared


- If you aren't comfortable with technology, please reach out to a friend or family member who can assist, as you will **complete everything online**.
- Use a **compatible internet browser** for the best experience (we highly suggest Google Chrome)!
- Always utilize the **Nonprofit Toolkit and CHECKLIST** (<https://www.thegivingpartner.org/info/nonprofit-toolkit>) for the most comprehensive information and instructions (the Toolkit link also lives on the admin dashboard of your profile).
- **Gather** required documents in **digital format** (IRS 501(c) Letter of Determination, 990s, Profit & Loss Statements, Balance Sheets, State Charitable Solicitations Permit), as you will upload these initially, and then update most of these when they expire or become due.

*NOTE: Having a profile with an **Approved (Current)** status in **The Giving Partner** is a **prerequisite** to eligibility for grants and other opportunities available through the Community Foundation of Sarasota County.*



# Checklist

- When you initially create your organization's profile and any time that you make updates, be sure to always utilize the **CHECKLIST** link (*this is located within the Nonprofit Toolkit*).
- Be sure to follow instructions within the **CHECKLIST** as this is the best way to ensure you've not overlooked a key requirement.



**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 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
<b>MANAGE ORGANIZATION (left sidebar)</b>		
Add Administrator ( <i>add/remove users authorized to make edits</i> )	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
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 (email <a href="mailto:nonprofits@cfsarasota.org">nonprofits@cfsarasota.org</a> if any changes)
<b>PROFILE SETUP Tab</b>		
<b>ADD YOUR CAUSES:</b>		
Website	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
Logo	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
Causes	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
<b>ADD YOUR STORY:</b>		
Cover Photo	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)
Tell Your Story	<input type="checkbox"/> Required	<input type="checkbox"/> Update (as needed)
Video	<input type="checkbox"/> Optional	<input type="checkbox"/> Update (as needed)

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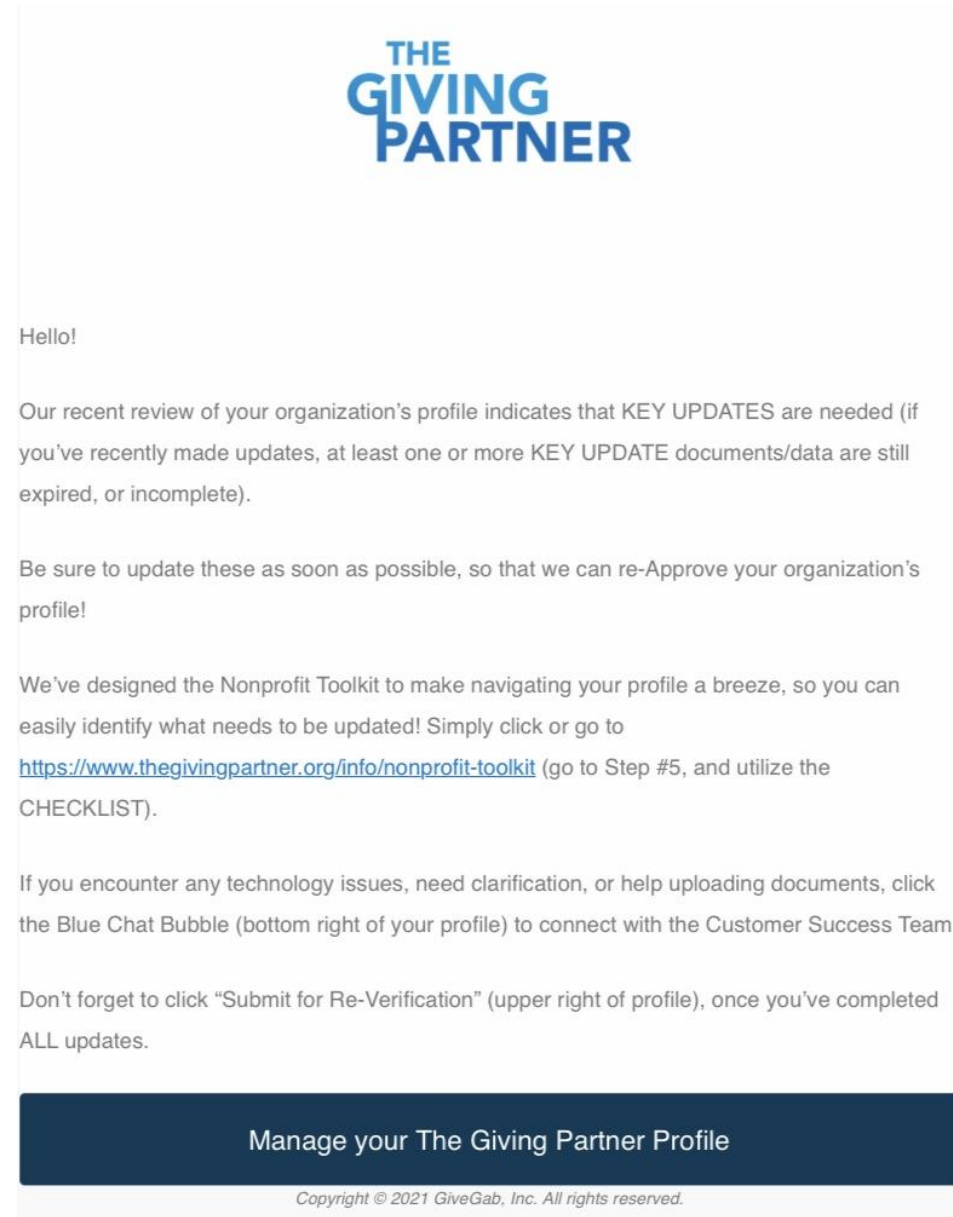
Field Name	Organizations Creating a New Profile	Organizations That Already Have a Profile
<b>OVERVIEW Tab</b>		
Mission	<input type="checkbox"/> Required	<input type="checkbox"/> Update (optional)
Mission Category	<input type="checkbox"/> Required	<input type="checkbox"/> Update (optional)
Achievement 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)
<b>PROGRAMS &amp; RESULTS Tab</b>		
<i>Must have at least one local, active program (in existence for at least six months) to have a profile.</i>		
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)
<b>FINANCIALS Tab</b>		
<b>CURRENT / PROJECTED:</b>		
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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# Email Notifications

- All **admin** users will receive **important** email notifications (similar to this image) about the status of their organization's profile:
  - Please do NOT “Unsubscribe” to any emails from GiveGab or you will no longer receive these **IMPORTANT** notifications about your profile
  - Be sure you mark **notifications@givegab.com** as a **safe sender** so that these important emails make it to your inbox (*this is how you will be informed of changes to your profile status*).

Slide 18



## **STEP 4.**

- **CREATE YOUR ORGANIZATION'S PROFILE**
- **UPDATE (MAINTAIN) YOUR ORGANIZATIONS PROFILE**



# How to Create a Profile

For Organizations that **Don't Yet** have a Profile.

After our review of your **Application**, you will receive an email indicating if your organization can get started with creating a profile (*see example*). Once you receive this, your next step is to begin creating a profile. It is important to follow the steps below to ensure you've not missed anything necessary for us to Approve your profile:

- **Create** your organization's profile **online**:
  - Utilize the ***Nonprofit Toolkit*** and follow the **CHECKLIST**.
  - Check for grammatical errors. It is also helpful to ask a friend or family member for their perspective (do things make sense?).
  - **After your work is fully completed, click SUBMIT PROFILE FOR REVIEW**
  - **Deadline:** Submit your **new** profile for review/approval **AS SOON AS POSSIBLE** (preferably within 30 days of application acceptance).



Welcome to The Giving Partner!

Thank you for your patience while we verified your Application; you may now proceed with creating your organization's profile.

We've designed the Nonprofit Toolkit to make navigating your profile a breeze, so you can easily identify what needs to be completed! Simply click or go to <https://www.thegivingpartner.org/info/nonprofit-toolkit> (go to Steps #3 and #4, and utilize the CHECKLIST).

If you encounter any technology issues, need clarification, or help uploading documents, click the Blue Chat Bubble (bottom right of your profile) to connect with the Customer Success Team!

Manage your The Giving Partner Profile



# How to Update (Maintain) Your Profile

## For Organizations That **Already Have** a Profile

After **initial** approval, it is important to follow the steps below to ensure you've not missed anything necessary to retain the **Approved (Current)** status:

- **Update** your organization's profile **online**:
  - Be proactive rather than reactive.
  - Utilize the *Nonprofit Toolkit* and follow the **CHECKLIST**.
  - Set a **monthly recurring calendar reminder** to review your profile against the **CHECKLIST**, to retain an **Approved (Current)** status *year-round*.
  - Profiles must be updated on a *rolling basis* (**anytime something expires or becomes due**) as key fields expire and become due on different dates throughout each year.
  - **After your work is fully completed, don't forget to click SUBMIT PROFILE FOR RE-VERIFICATION**
  - **Deadline:** Submit your **updated** profile for review/approval **AS SOON AS POSSIBLE** **when KEY UPDATE** items have expired or become due, and anytime that you wish to make other organizational updates.



Hello!

Our recent review of your organization's profile indicates that KEY UPDATES are needed (if you've recently made updates, at least one or more KEY UPDATE documents/data are still expired, or incomplete).

Be sure to update these as soon as possible, so that we can re-Approve your organization's profile!

We've designed the Nonprofit Toolkit to make navigating your profile a breeze, so you can easily identify what needs to be updated! Simply click or go to <https://www.thegivingpartner.org/info/nonprofit-toolkit> (go to Step #5, and utilize the CHECKLIST).

If you encounter any technology issues, need clarification, or help uploading documents, click the Blue Chat Bubble (bottom right of your profile) to connect with the Customer Success Team!

Don't forget to click "Submit for Re-Verification" (upper right of profile), once you've completed ALL updates.

Manage your The Giving Partner Profile

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# Login to Your Organization's Profile

- You should have received an email from GiveGab when you initially applied containing your login. The link to **login** is within this email. If unable to locate this, connect with the Customer Success Team using the little blue chat bubble (*bottom right of any page on the GiveGab platform*).
- The link to **login** can also be found at the top of the **CHECKLIST**
- **Bookmark/save the login page** to your favorites to easily find this in the future when you need to make updates.



Email

Password

Let's Go

Sign in with Facebook  
Resend account verification

Sign up  
Forgot your password?

THE  
GIVING  
PARTNER



# Assign and Update Administrators

- Assign/update Administrators from your organization to work on your profile:
  - They should have access to detailed knowledge about your organization, along with very basic technical skills, in order to **accurately** complete and make updates to the profile. *Be mindful about who is chosen for this responsibility.*

The screenshot displays the 'Manage Organization' menu on the left, which includes options like 'Edit Information', 'Add Administrator', 'Bank Account & Verification', 'Supporters', 'Documents', and 'Surveys'. The 'Add Administrator' option is highlighted with a red box, and a red arrow points from it to the right-hand form. The form contains fields for 'First Name', 'Last Name', and 'Email'. Below these fields are two radio button options: 'Make this person an administrator' (selected) and 'Make this person a Giving Day profile editor'. At the bottom right of the form are 'Cancel' and 'Add Member' buttons. A red arrow also points from the 'Supporters' option in the menu to the 'Edit Administrators' text.

Home

The Giving Partner

Reports ▾

Manage Organization ▲

> Edit Information

> Add Administrator

> Bank Account & Verification

> Supporters

> Documents

> Surveys

First Name

Last Name

Email

☒ Make this person an administrator

☐ Make this person a Giving Day profile editor

Cancel Add Member

Edit Administrators

# Profile Set-up Tab

Add Your Organization's Info / Update as Needed:

- Website
- Logo
- Causes

Profile Setup

Overview


Programs & Results

Financials

Operations

Staff & Volunteers

Governance




Add Your Organization's Info

Let people know who you are.

Website

Logo



Select Image

Remove

Image should be 5MB max and a JPG, JPEG or PNG file type.

Recommended dimensions: 300x300.


Causes (optional)


Cause #1

Cause #2

Cause #3

Save

 View Registration Info

 Preview Your Profile

# Profile Set-up Tab

Add Your Story / Update as Needed:

- Cover Photo
- Set a Goal
- Tell Your Story
- Add a Video Link

Profile Setup

Overview

Programs & Results

Financials

Operations

Staff & Volunteers

Governance


Add Your Organization's Info

Let people know who you are.

Add Your Story

Tell potential donors why they should contribute.

Cover Photo



Select Image

Remove

Image should be 5MB max and a JPG, JPEG or PNG file type.  
Recommended dimensions: 1500x500.

Set a Goal

☐ Display Goal on Profile

Tell Your Story

Proxima Nova

Formatting

A

B

I

U

Note: Pasting text from outside of GiveGab into this text editor can cause inconsistent styling on your public-facing profile. If you are inserting copied text, please **highlight all** inputted text and select the "Clear Formatting" wand icon before reaching out to support.

Video Url

Paste Youtube or Vimeo Link Here

Vimeo links must be in the following format: <https://vimeo.com/123456>.

Save

View Registration Info

Preview Your Profile

# Overview Tab

Complete all fields in **red** (update as needed):

- Mission
- Mission Category
- Achievement Definition
- Primary Organization Type
- Addresses
- Geographic Areas Served (Overall)
- Formal Collaborations

*Note: Click the Info Bubble beside each field for detailed instructions*

The screenshot shows the 'Overview' tab of a profile setup interface. At the top, there are seven tabs: 'Profile Setup', 'Overview', 'Programs & Results', 'Financials', 'Operations', 'Staff & Volunteers', and 'Governance'. The 'Overview' tab is active. The main content area is divided into three sections, each with an 'Edit' button in the top right corner. The first section, 'Overview', contains three fields: 'Mission \*', 'Mission Category \*', and 'Achievement Definition \*'. The second section, 'NTEE Code', contains 'Primary Organization Type \*' and 'Secondary Organization Type \*'. The third section, 'Street Address', contains 'Street Address Line 1 \*', 'Street Address Line 2 \*', 'City \*', 'County \*', 'State \*', 'Zip Code \*', and 'Zip Code + 4 \*'. All fields are marked with a red asterisk and an information bubble icon. On the right side of the interface, there are two buttons: 'View Registration Info' and 'Preview Your Profile'.

Profile Setup Overview Programs & Results Financials Operations Staff & Volunteers Governance

Overview Edit

Mission \* ⓘ

Mission Category \* ⓘ

Achievement Definition \* ⓘ

NTEE Code Edit

Primary Organization Type \* ⓘ

Secondary Organization Type \* ⓘ

Street Address Edit

Street Address Line 1 \* ⓘ

Street Address Line 2 \* ⓘ

City \* ⓘ

County \* ⓘ

State \* ⓘ

Zip Code \* ⓘ

Zip Code + 4 \* ⓘ

View Registration Info

Preview Your Profile

# Programs & Results Tab

Complete all fields in **red** (update as needed):

- The information entered on this tab should capture each of the top programs that your organization has, along with detailed results and outcomes for **those served** by each program (*do not list more than ten programs*)
- You will want to keep this tab updated with the results of how the program has performed (as of your **last** fiscal year-end or more recently)
  - This data is extremely informative for grant-making and funding

*Note: Click the Info Bubble beside each field for detailed instructions*

The screenshot shows the 'Programs & Results' tab in a web application. The navigation bar at the top includes 'Profile Setup', 'Overview', 'Programs & Results' (active), 'Financials', 'Operations', 'Staff & Volunteers', and 'Governance'. The form contains the following fields:

- Program Name \* (red)
- Program Description \* (red)
- Success Looks Like \* (red)
- Program Type \* (red)
- Date Program Initially/Originally Began \* (red)
- Program End Date (if applicable) \* (red)
- Program Costs (Annual) \* (red)
- 
- \$ Amount of Need \* (red)
- 
- Program Category \* (red)
- Top 3 Populations Served \* (red)
- Population Served Description \* (red)
- Geographical Areas Served by Program \* (red)
- Other Zip Code: (red)
- Projected Number To Be Served \* (red)
- Date Outcomes Achieved or Reported \* (red)
- Outcomes Achieved \* (red)
- Number Served \* (red)
- Number/Percentage That Achieved Intended Outcomes \* (red)
- Outcome was Measured/Confirmed By \* (red)

An 'Edit' button is located in the top right corner of the form. On the right sidebar, there are two buttons: 'View Registration Info' and 'Preview Your Profile'.

# Financials Tab

Complete all fields in **red** (update as needed):

- Current/Projected section
- Endowment
- Credit Line
- Reserve Fund
- Administrative Needs (Top 3)

*Note: Click the Info Bubble beside each field for detailed instructions*

Profile Setup

Overview

Programs & Results

Financials

Operations

Staff & Volunteers

Governance

Current / Projected

Edit

Current Fiscal Period Begins \***i**

Current Fiscal Period Ends \***i**

Projected Annual Revenue \***i**

--

Projected Annual Expenses \***i**

--

Does Total Projected Revenue include the value of "in-kind" contributions? \***i**

--

Financials - Other

Edit

Organization has Endowment? \***i**

--

Endowment Value \***i**

--

Endowment Spending Policy

Endowment Spending Policy %

--%

Organization has Credit Line \***i**

--

Organization has Reserve Fund \***i**

--

Administrative Needs (Top 3)

Edit

Name of Need \***i**

\$ Amount of Need \***i**

Description of Need \***i**

# Financials Tab

Complete all fields in **red** (update as needed):

- Capital Campaign
- 990s
- Financial Statements
- Financial Data sections

*Note: Click the Info Bubble beside each field for detailed instructions*

**Capital Campaign** Edit

**Organization is currently in a Capital Campaign \*** ⓘ  
--

**Campaign Purpose ⓘ**  
--

**Campaign Goal Amount**  
--

**Amount Raised To Date**  
--

**Campaign Start Date**

**Campaign End Date**

**IRS Form 990, 990EZ, 990PF, or 990N** Edit

**IRS Letter of Determination requires organization to file Form 990? \*** ⓘ

**2021 990 Document \*** ⓘ  
No document uploaded

**2020 990 Document \*** ⓘ  
No document uploaded

**2019 990 Document \*** ⓘ  
No document uploaded

**2018 990 Document \*** ⓘ  
No document uploaded

Financial Data			
Changes to this table will be sorted by year (newest first) on page reload.			
Fiscal Year ENDING ⓘ	2020	2019	2018
Total Revenue * ⓘ	\$57,695,852.00	\$55,657,158.00	\$86,657,259.00
Total Expenses * ⓘ	\$54,758,216.00	\$26,599,982.00	\$40,435,406.00
Contributions & Grants Received ⓘ	\$51,225,376.00	\$36,625,512.00	\$66,334,322.00
Program Service Revenue * ⓘ	\$3,506,457.00	\$3,270,307.00	\$2,916,204.00
Investment Income * ⓘ	\$8,069,304.00	\$18,429,455.00	\$19,141,817.00
Membership Dues ⓘ	--	--	--
Special Events Revenue ⓘ	--	--	--
Revenue In-Kind ⓘ	--	--	--
Other Revenue ⓘ	\$150,070.00	\$602,191.00	\$1,181,120.00

Financial Data - Expense Allocation			
Changes to this table will be sorted by year (newest first) on page reload.			
Fiscal Year ENDING	2020 ⓘ	2019 ⓘ	2018 ⓘ
Expenses - Program * ⓘ	\$51,493,643.00	\$23,352,467.00	\$36,107,077.00
Expenses - Administrative * ⓘ	\$1,439,904.00	\$1,321,784.00	\$2,685,295.00
Expenses - Fundraising * ⓘ	\$1,824,669.00	\$1,925,731.00	\$1,643,034.00
Expenses - Affiliate Payments ⓘ	--	--	--

Financial Data - Assets & Liabilities			
Changes to this table will be sorted by year (newest first) on page reload.			
Fiscal Year ENDING	2020 ⓘ	2019 ⓘ	2018 ⓘ
Total Assets * ⓘ	\$421,352,367.00	\$417,592,562.00	\$398,382,914.00
Long-Term Liabilities ⓘ	--	--	--
Current Liabilities * ⓘ	\$50,572,335.00	\$49,750,166.00	\$59,597,694.00
Net Assets * ⓘ	\$370,780,032.00	\$367,842,396.00	\$338,785,220.00



# Operations Tab

Complete all fields in **red** (update as needed):

- Year Incorporated (*after initial approval, do not alter this field*)
- EIN (*after initial approval, do not alter this field*)
- IRS Letter of Determination (*after initial approval, do not alter this field*)
- State Charitable Solicitations Permit
- Planning
- Policies

***Note: Click the Info Bubble beside each field for detailed instructions***

Profile Setup

Overview

Programs & Results

Financials

Operations

Staff & Volunteers

Governance

Legal

Edit

Year of Incorporation \* ⓘ

IRS Subsection - Tax Status \* ⓘ

IRS Subsection - Tax Exempt Status \* ⓘ

Federal Employer Identification Number (EIN) \* ⓘ

Organization DBA \* ⓘ

Other Organization Name(s) ⓘ

IRS Letter of Determination \* ⓘ

No document uploaded

State Charitable Solicitations Permit \* ⓘ

State Charitable Solicitations Permit – Expiration Date \* ⓘ

State Charitable Solicitations Permit Document \* ⓘ

No document uploaded

Planning

Edit

Fundraising Plan (Expiration Date) ⓘ

Communication Plan (Expiration Date) ⓘ

Strategic Plan (Expiration Date) ⓘ

Continuity of Operations Plan (Year Adopted) ⓘ

Management Succession Plan (Year Adopted) ⓘ

Policies

Edit

Nondiscrimination Policy (Year Adopted) ⓘ

Whistleblower Policy \* ⓘ

--

D&O Insurance Policy (Expiration Date) ⓘ

Organization Policies & Procedures \* ⓘ

Policy Against Compensation for Fundraising Consultants? ⓘ

View Registration Info

Preview Your Profile

# Staff & Volunteers Tab

Complete all fields in **red** (update as needed):

- Staff Overview section
- CEO/Executive Director (*if organization has this*)
  - CEO/Executive Director Demographics
- Volunteer Overview

*Note: Click the Info Bubble beside each field for detailed instructions*

Profile Setup

Overview

Programs & Results

Financials

Operations

Staff & Volunteers

Governance

Staff Overview

Edit

Number of Full-Time Staff \*

?

Retention Rate % (Full-Time Staff) \*

?

Number of Part-Time Staff \*

?

Number of Contractors \*

?

Management Reports to Board? \*

?

Board Conducts a Formal Written Assessment of CEO/Executive Director \*

?

CEO/Executive Director

Edit

Prefix * <div>?</div>	First Name * <div>?</div>	Middle Name *	Last Name * <div>?</div>	Suffix * <div>?</div>	Email * <div>?</div>	Term Begins * <div>?</div>	Total Compensation Prior Year	Total Compensation Current Year
-----------------------	---------------------------	---------------	--------------------------	-----------------------	----------------------	----------------------------	-------------------------------	---------------------------------

Former CEO/Executive Director

Edit

Prefix	First Name	Middle Name	Last Name	Suffix	Term Began	Term Ended
--------	------------	-------------	-----------	--------	------------	------------

CEO/Executive Director - Demographics

Edit

Race & Ethnicity \*

?

Gender Identity \*

?

Sexual Orientation \*

?

Ability \*

?

Volunteers - Overview

Edit

Number of Volunteers \*

?

# Governance Tab

Complete all fields in **red** (update as needed):

- Board Chair
- Board Co-Chair (*if organization has this*)
- Other Board Members
- Board Overview section
- Board Demographics

*Note: Click the Info Bubble beside each field for detailed instructions*

Profile Setup

Overview

Programs & Results

Financials

Operations

Staff & Volunteers

Governance

Board Chair

Edit

Prefix	First Name	Middle Name	Last Name	Suffix	Company Affiliation	Other Organization	Voting Status	Email	Term Begins	Term Ends
*	*	*	*	*	*	*	*	*	*	*

Board Co-Chair

Edit

Prefix	First Name	Middle Name	Last Name	Suffix	Company Affiliation	Other Organization	Voting Status	Email	Term Begins	Term Ends
*	*	*	*	*	*	*	*	*	*	*

Board Members - Other

Edit

Prefix	First Name	Middle Name	Last Name	Suffix	Company Affiliation	Other Organization	Voting Status
*	*	*	*	*	*	*	*

Board Overview

Edit

What was the top accomplishment that your board achieved in the last fiscal year? \*

Number of Board Meetings Held in Prior Fiscal Year \*

Board Meeting Attendance % \*

--%

Annual Board Self-Evaluation \*

--

Board Term Length \*

Board Term Limits \*

Orientation for New Board Members? \*

--

Constituency Includes Client Representation \*

--

Board Members Making Monetary Contributions \*

--%

Percent of Board Members Making In-Kind Contributions \*

--%

Are you currently seeking board members? \*

--

What qualifications or skills does an ideal board member have at your organization?

# **STEP 5. FOUNDATION REVIEW & PROFILE STATUSES**

# Foundation Review Process

Foundation reviews occur in the order that profiles are submitted.

- So long as you've **not** missed any **required fields or key updates** and have provided the correct **documents/data**, your profile will be published with the status of **Approved (Current)**.
- If you have missed any **required fields or key updates** or have not provided the correct **documents/data**, your profile status will indicate **Pending** or **Pending (Re-Verification)** until you have provided correct documents/data.
- If you aren't sure if you have completed all necessary fields, the best way to determine this is to easily cross-check your profile with the **CHECKLIST**.
- As there are multiple data points in each profile that we must review, we appreciate your patience (especially during peak periods with many profiles awaiting review).

After our review:

- You will receive an email indicating the profile status.

# Profile Statuses – NEW Profiles

One of the following profile statuses will be indicated on your Admin Dashboard (top right). **Anytime the status changes, you will receive a notification email.**

**Pending**

- **Pending** - Profile is awaiting your completion *and submission* of required fields

**Submitted**

- **Submitted** - Profile is in line for review

**In Review**

- **In Review** - Profile is being reviewed

**Approved**

- **Approved** - Profile is up-to-date (status is reflected as **Current** in the Public Interface). An Approved (Current) status signifies that the organization has provided required content and key information was reviewed by our team (this is not a grade, rating, or certification).

## PROFILE EXPIRATION DATE

- This field is an internal control utilized by the Community Foundation of Sarasota County. It is tied to the document/data point in your profile that will **next** be expiring or become due.

# Profile Statuses – EXISTING Profiles

One of the following profile statuses will be indicated on your Admin Dashboard (top right). **Anytime the status changes, you will receive a notification email.**

## Reverification Pending

- **Re-verification Pending** - Profile has one or more **key required updates** incomplete

## Reverification Submitted

- **Submitted for Re-verification** - Profile is in line for review
  - *Note: Ability to make additional updates after you've submitted your profile.*

## Reverification In Review

- **Re-verification (In Review)** - Profile is being reviewed
  - *Note: Ability to make additional updates while it is awaiting review.*

## Approved

- **Approved** - Profile is up-to-date (status is reflected as **Current** in the Public Interface). An Approved (Current) status signifies that the organization has provided required content and key information was reviewed by our team (this is not a grade, rating, or certification).

## PROFILE EXPIRATION DATE

- This field is an internal control utilized by the Community Foundation of Sarasota County. It is tied to the document/data point in your profile that will **next** be expiring or become due.



# **STEP 6. COLLECT & MANAGE DONATIONS THROUGH THE GIVING PARTNER *(optional)***

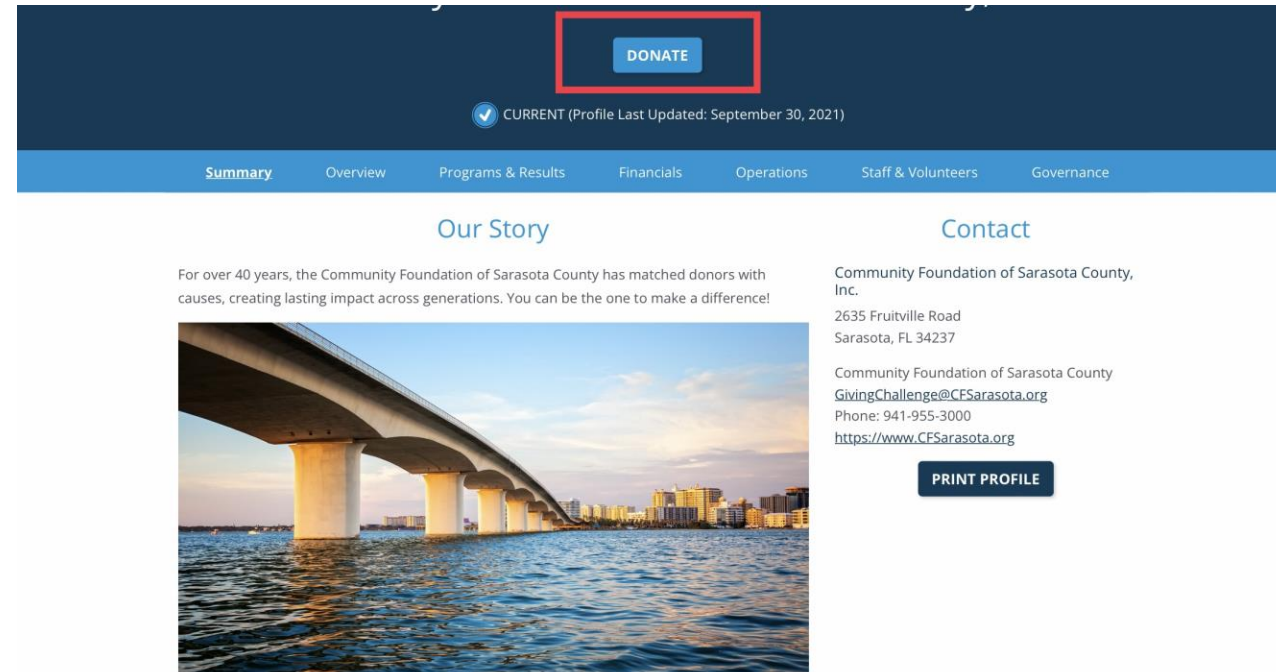
# Collect Donations through The Giving Partner

## HOW TO COLLECT DONATIONS THROUGH THE GIVING PARTNER

If your nonprofit is looking to collect and manage donations online to enhance and streamline your organization's donation opportunities, this is already **integrated** within your profile!

Before you begin, we encourage you to explore the **Webinars & Trainings** page, located at the bottom of the [Nonprofit Toolkit](#) to learn more.

- **Donate Button** (*not required; Opt-In only*)
  - Login to your organization's profile and go to **Profile Setup > Get Verified to Collect Donations**



# How to Make a Donation

- [Making a gift is a breeze](#) for donors when they click on profiles that have the **Donate** button enabled! An email confirmation is automatically sent to the donor that serves as their receipt for tax purposes.
- [Recurring Gift](#) - Donors can choose to automate their giving by checking the box **Make this a recurring gift** (the gift frequency can be monthly, or quarterly)
- [Add Another Organization](#) - Donors can give to multiple organizations by clicking the **Add Another Organization** button
- [Make Changes Before Finalizing](#) – Donors can make changes prior to finalizing their gift(s), by simply clicking the **Back** button.

Thank you for your support!

Step 1 of 3

Choose an amount to give:

\$

[Add a fundraiser](#)

Name to display (optional):

☐ I am a new donor to this organization. [?](#)

☐ Make this a recurring gift.

☐ Make this donation in honor of or in memory of someone.

[Add a public message to this donation](#)

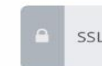
[Remove this donation](#)

+ ADD ANOTHER ORGANIZATION

BACK

NEXT

Securely processed with:



Google [Privacy Policy](#) and [Terms of Service](#) apply.  
Learn more about how your information is used following a donation: [Privacy Policy](#).

THE  
GIVING  
PARTNER

# Manage Donations through The Giving Partner

Home

The Giving Partner

Giving Days

Reports ▾

> Donations

> Financials

Manage Organization ▾

Search by name or email



All Giving Days & Community Giving Sites ▾

All Campaigns ▾

Any Donation Type

Start

End

Actions	Donation ID	Date ▾	Donor ▾	Intended Donation ▾	Amount Charged	Bank Fees	Platform Fees	Covered Fees?	Payout Amount
  +	2874957	8/5/2020 3:24PM	Anonymous Donor anonymousdonor@givegab.com	\$5.00	\$5.57	\$0.42	\$0.15	Yes	\$5.00

Payout Date ▾	Payout ID	Display Name	Donor Address	Anonymous?	Recurring?	Giving Day or Site	Campaign	Fundraiser or Team
8/11/2020 8:41PM	po_1HElrSLJaySt7Ss7md4QTr0b			Yes	No	The Giving Partner	The Giving Partner	

Donation Level	Donation Type	Referral Info	In Memory/Honor of
	Online	Source: www.givegab.com Medium: referral	In honor of Test

# **STEP 7. PROMOTE YOUR ORGANIZATION THROUGH THE GIVING PARTNER**

# How to Promote Your Organization

Looking for a way to bridge the fundraising-technology gap? You can easily utilize the following features (**integrated** within your profile) to enhance and streamline fundraising opportunities!

- Share Your Profile on Socials
- Leverage the Peer-to-Peer (P2P) Fundraisers functionality (*Opt-In only; no subscription fees*)
- Leverage the GiveGab Fundraising Suite (*Opt-In only; subscription fees apply for annual, quarterly or monthly plan*)

**Note:** Before you begin, be sure to explore the **Webinars & Trainings** page (located at the bottom of the [Nonprofit Toolkit](#)) to learn more.

The screenshot displays the GiveGab dashboard interface. On the left, a vertical list of tasks includes 'Add Your Organization's Info', 'Add Your Story', 'Get Verified to Collect Donations', 'Add a 'Thank You' Message', and 'Add Fundraisers'. The first three are marked with green checkmarks. Below this is a 'Get Prepared' section with icons for 'Webinars and Workshops', 'Toolkit', and 'GiveGab Customer Success HQ'. On the right, there are two columns of buttons. The 'Donation Tools' column includes 'Add Offline Donation', 'Manage Sponsor Matching', 'Manage Donations', and 'Embed a Donate Button'. The 'Other Actions' column includes 'Engagement Opportunities', 'Add External Fund', 'View Registration Info', and 'View Your Profile'. At the bottom right, a red-bordered box highlights the 'Share Your Page' section, which contains a text input field with the URL 'https://www.thegivingpartner.org/organiz', social media icons for Twitter and Facebook, and a 'View Your Page' link.

✓ Add Your Organization's Info >

✓ Add Your Story >

✓ Get Verified to Collect Donations >

♥ Add a 'Thank You' Message >  
*Personalize your auto-response for donors ahead of time.*

👥 Add Fundraisers >  
*Recruit peer-to-peer fundraisers to expand your network of donors.*

**Get Prepared**

Webinars and Workshops

Toolkit

GiveGab Customer Success HQ

**Donation Tools**

✉ Add Offline Donation

🔧 Manage Sponsor Matching

🔧 Manage Donations

📄 Embed a Donate Button

**Other Actions**

👥 Engagement Opportunities

📌 Add External Fund

📄 View Registration Info

👤 View Your Profile

**Share Your Page**

<https://www.thegivingpartner.org/organiz>

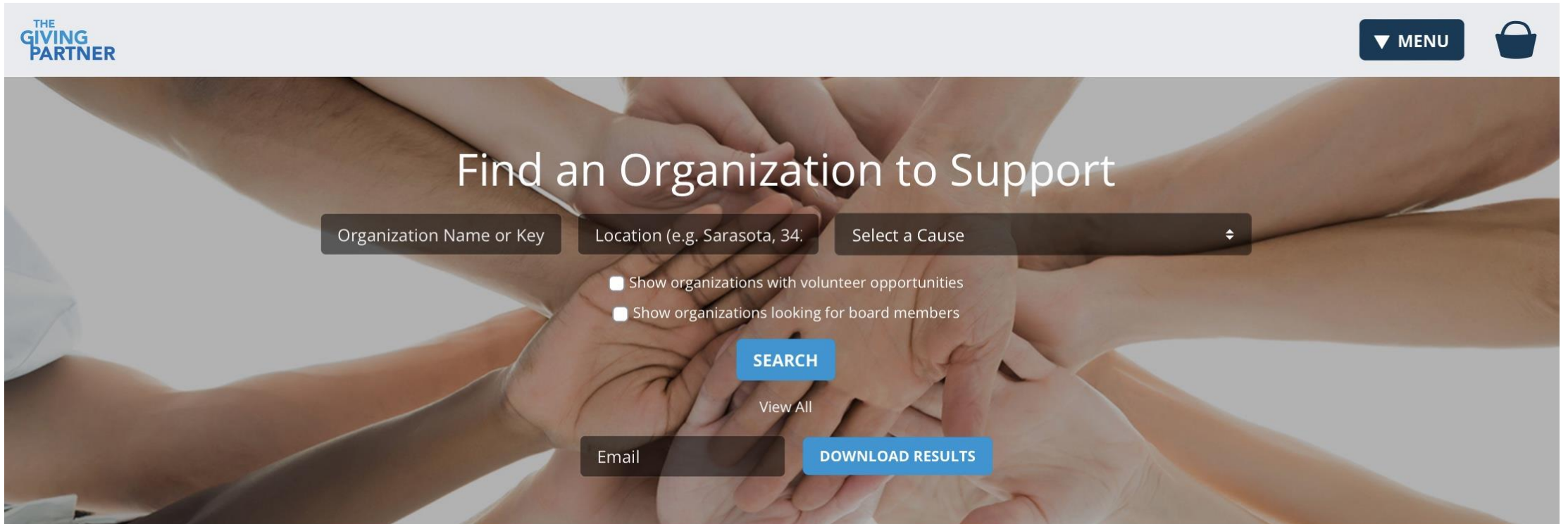
🐦 📘

View Your Page



# SEARCH & REPORTS INTERFACE

# Search for Profile(s) & Download Results

The screenshot shows the search interface of 'The Giving Partner' website. The background is a close-up of many hands stacked together in a circle. At the top left is the logo 'THE GIVING PARTNER'. At the top right are a 'MENU' button with a downward arrow and a shopping cart icon. The main heading 'Find an Organization to Support' is centered. Below it are three search input fields: 'Organization Name or Key', 'Location (e.g. Sarasota, 34)', and 'Select a Cause' with a dropdown arrow. Under these fields are two checkboxes: 'Show organizations with volunteer opportunities' and 'Show organizations looking for board members'. A blue 'SEARCH' button is centered below the checkboxes. Below the 'SEARCH' button is a 'View All' link. At the bottom are an 'Email' input field and a blue 'DOWNLOAD RESULTS' button.

THE GIVING PARTNER

▼ MENU

## Find an Organization to Support

Organization Name or Key Location (e.g. Sarasota, 34) Select a Cause

☐ Show organizations with volunteer opportunities  
☐ Show organizations looking for board members

SEARCH

View All

Email DOWNLOAD RESULTS

# **ELIGIBILITY REQUIREMENTS FOR OPPORTUNITIES AVAILABLE THROUGH THE COMMUNITY FOUNDATION OF SARASOTA COUNTY**

# Eligibility Requirements for Opportunities

An **Approved (Current)** profile status in **The Giving Partner** is ALWAYS required to be eligible for opportunities available through the Community Foundation of Sarasota County, such as:

- Grant Applications, Trainings, Workshops
- Giving Challenge
  - The last Giving Challenge was held April 2022.
  - The next Giving Challenge date has not yet been determined.


**\*\*\* Ensure that your organization's profile in **The Giving Partner** meets eligibility requirements as follows (ideally, before you apply for any of the above) \*\*\***

- Be sure to have your profile in **The Giving Partner** *fully* completed and not missing any updates for data/documents that are expired or are due
- Be sure to have your profile in **The Giving Partner** "*submitted*" *timely* so that upon our review, your profile will have the **Approved (Current)** status

# ASSISTANCE & RESOURCES

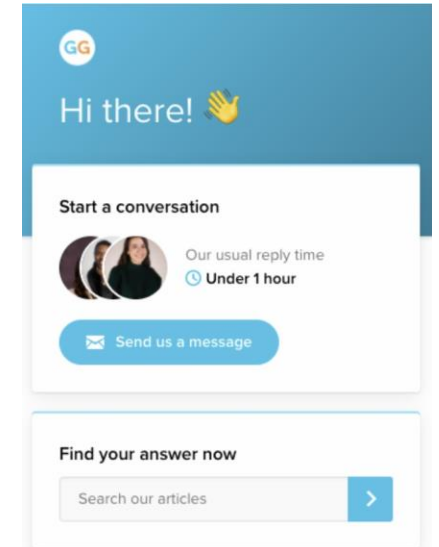
# Questions, Assistance & Additional Resources

## Questions & Assistance

- **Chat** with GiveGab's **Customer Success Team** whenever you have questions or need a hand with uploading documents!
  - Click the **blue chat bubble** (bottom right of your profile) 
- Email GiveGab: [CustomerSuccess@givegab.com](mailto:CustomerSuccess@givegab.com)
- If you have any further questions, please contact [Nonprofits@CFsarasota.org](mailto:Nonprofits@CFsarasota.org)

## Additional Resources

- You can find helpful insights and more information related to **The Giving Partner** by going to the bottom section of the [Nonprofit Toolkit](#) and clicking on the topic of interest.





**Thank You!**

**THE  
GIVING  
PARTNER**