THE GIVING PARTNER

Everything You Need to Know

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

November 15, 2021

Presented by

COMMUNITY FOUNDATION of Sarasota County

Powered by

GiveGab® Nonprofit Giving Platform

INTRODUCTION

THE GIVING PARTNER

Today’s Presenters

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Nonprofit Data Manager,
Knowledge and Equity

THE GIVING PARTNER

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)
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THE GIVING PARTNER

WHAT IS
THE GIVING PARTNER?

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**

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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.

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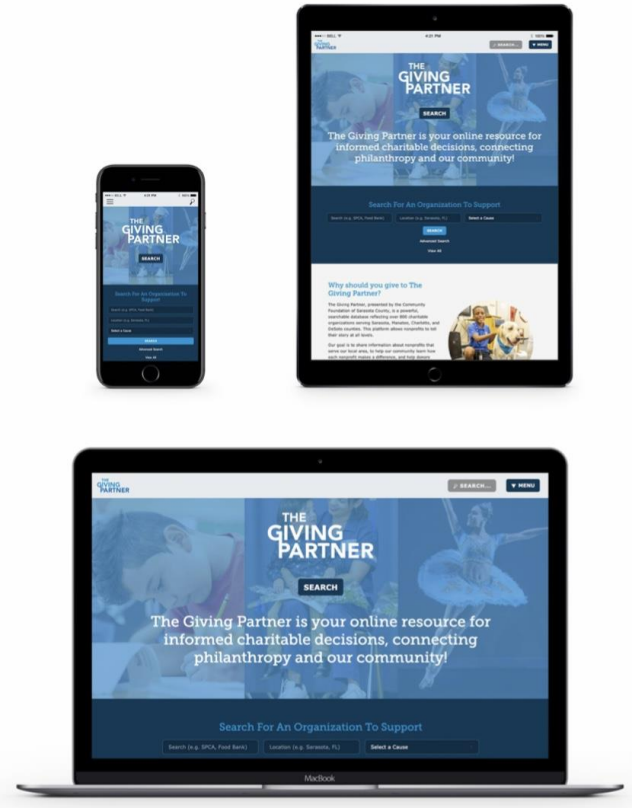
Powering The Giving Partner – GiveGab

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

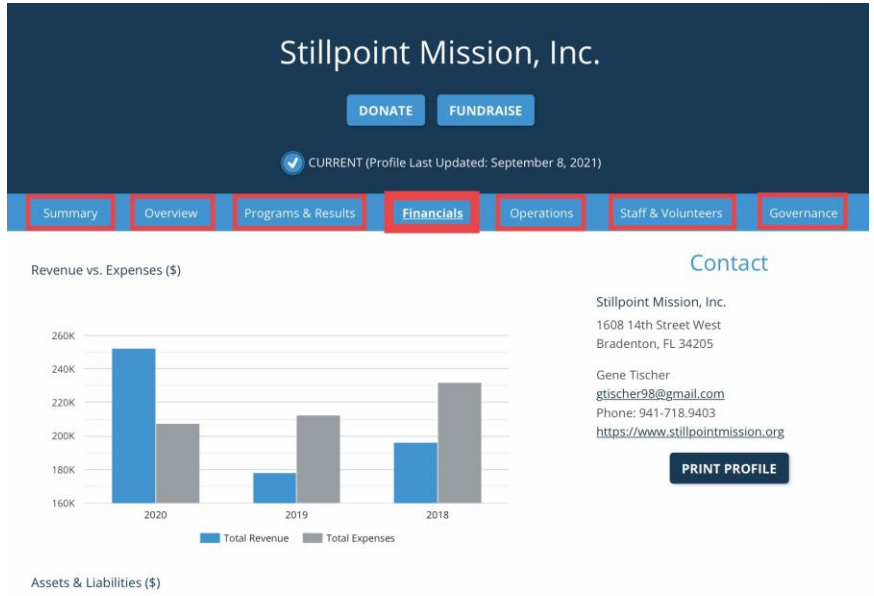
- Fail-safe redundancy
  - Load testing
  - Cloud services
  - Backup plans
- Partnered with **Stripe** (**PCI Level 1** payment processor)
- Participating organizations verified as IRS and State recognized nonprofit
- Profiles are **mobile responsive** on every page
- Visible on any internet enabled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

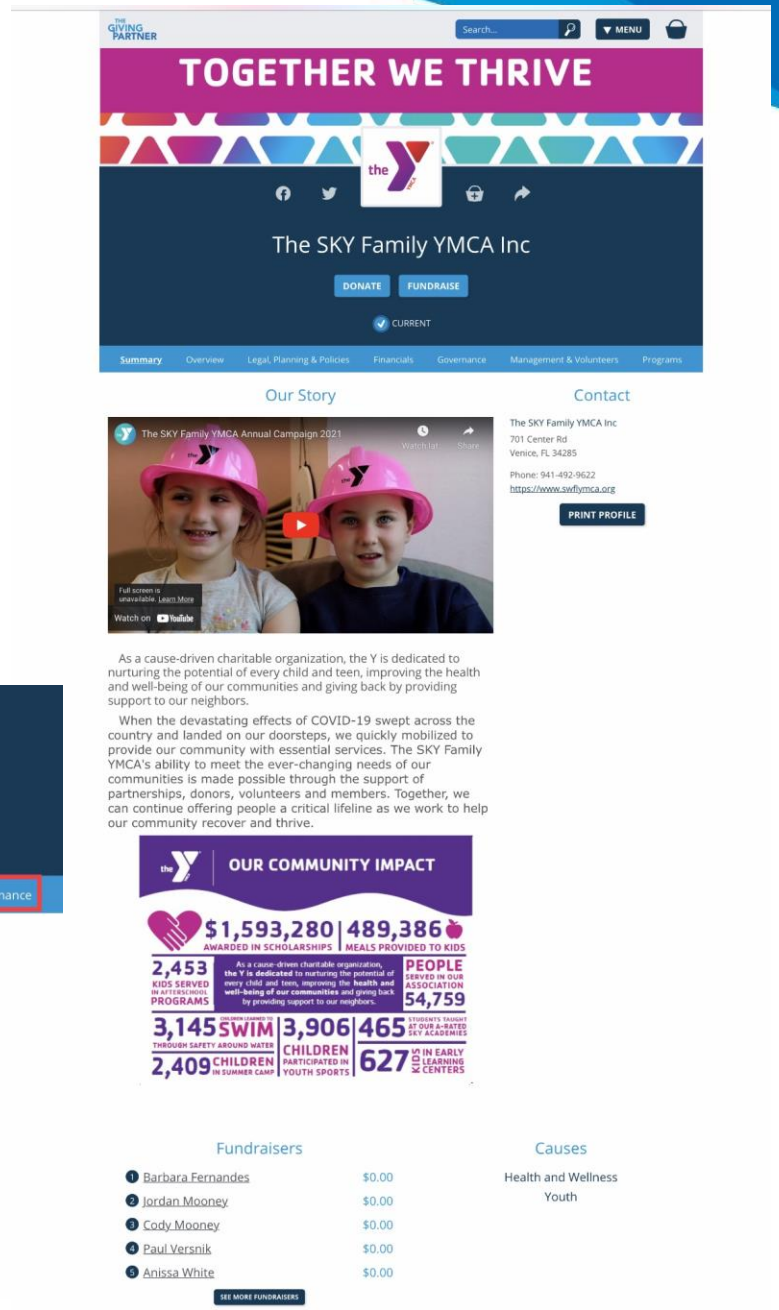


The Giving Partner - Public Interface

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

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How is The Giving Partner Utilized?

Assists **Funders** with strategic grant-making:

- Community Foundation of Sarasota County:
  - To share in one-on-one work with donors – matching the impact that donors want to have with the impact of nonprofit programs and services
  - To learn who's who – how each organization is different
- Several other local foundations and organizations

Helps **Donors** explore nonprofits and make informed charitable choices

Informs **Community Members** and **Other Stakeholders**

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Provides **Nonprofit Organizations** a platform to present engaging and meaningful data:

- Increases external/ community awareness
- Nonprofits gain insight on progress and results, and how to increase their capacity

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

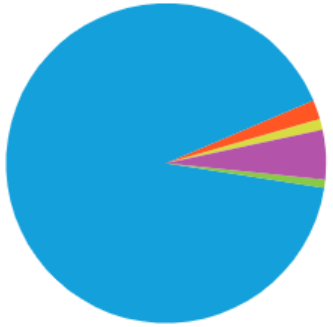
TOP FIVE REVENUE GENERATORS:

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

Board Demographics of the Sector

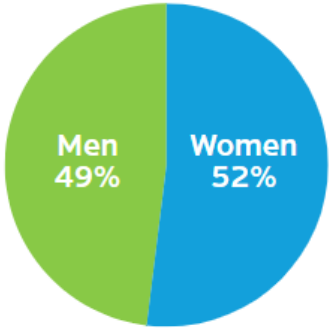
Nonprofit profiles on The Giving Partner include a breakdown of board members demographics for each organization. Over 1,400 board members' demographic information was included in the 127 pulled profiles.

BOARD MEMBERS BY ETHNICITY



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

BOARD MEMBERS BY GENDER

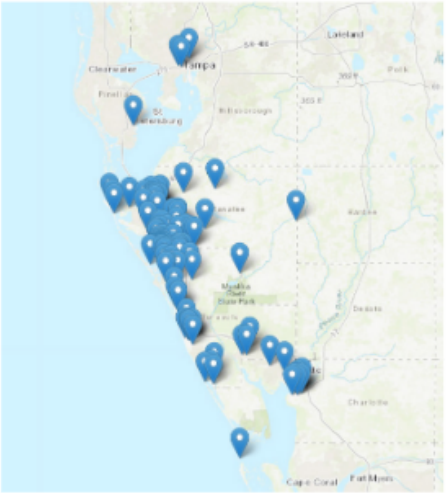


The Giving Partner

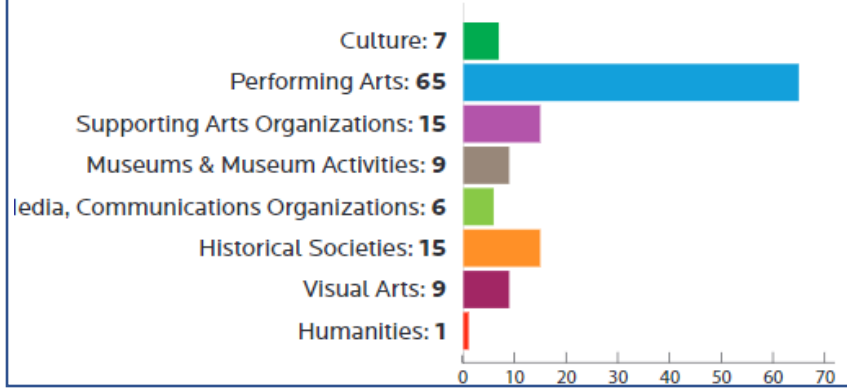
The Giving Partner allows local nonprofits to tell their stories at all levels and community members to explore how each nonprofit is making a difference. The Giving Partner is a powerful database containing profiles of over 700 501(c)(3) charitable organizations. In February 2021, the Community Foundation 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.

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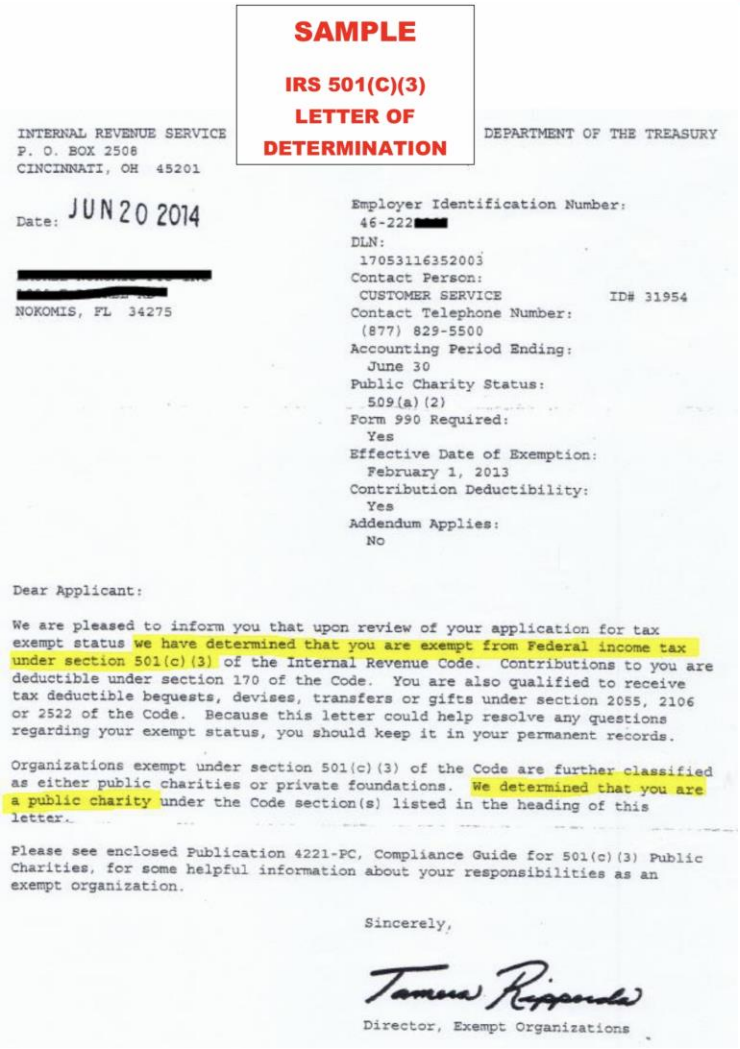
STEP 1. Qualify

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

[redacted]
NOKOMIS, FL 34275

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,

Director, Exempt Organizations

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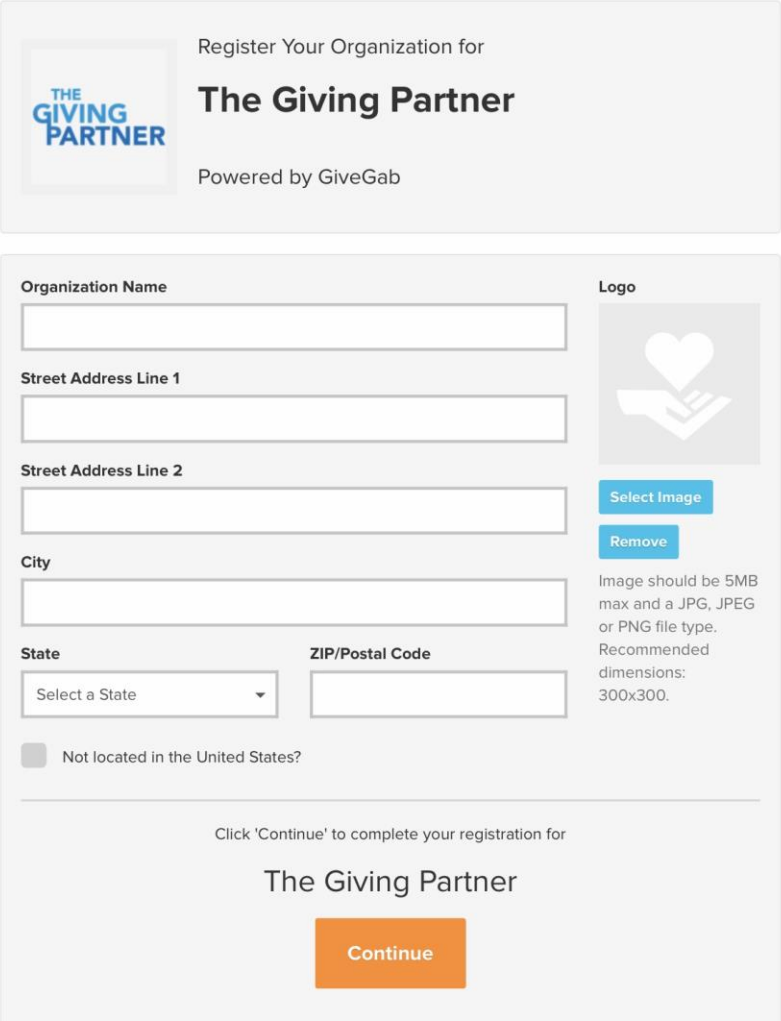
STEP 2. Apply

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:

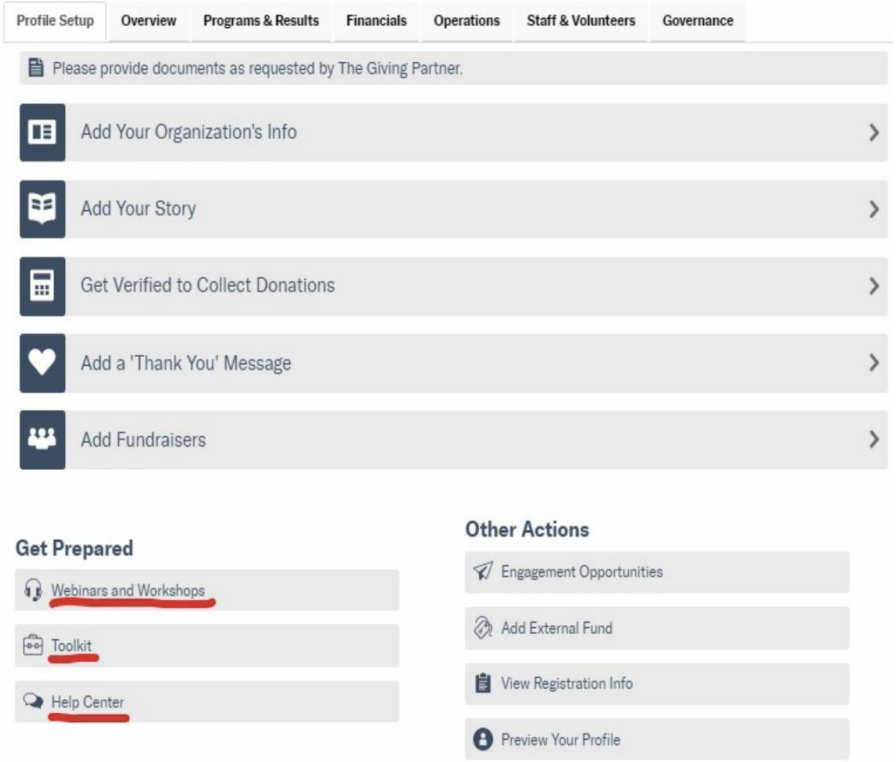
- Go to the Nonprofit Toolkit to utilize our *custom link* to Apply for a profile (you'll provide contact information, set up your login and password, along with some very basic information about your organization).
- After you've submitted your Application, your profile will be in a **Pre-Pending** 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



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.

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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!

1. **LOGIN**: Click here to login to your organization's profile.
2. **FOLLOW THIS CHECKLIST:** Utilize either the blue (**new** profiles) or yellow (**existing** profiles) column below.
   - **Required** fields must be completed in order to have an Approved/Current status.
   - Fields denoted below as KEY UPDATE must be updated **when documents/content have expired or are due (this oc on different dates throughout each year)**. For all other fields, please refresh/update these as needed.
3. DETAILED INSTRUCTIONS: In your profile, view instructions by clicking on the Info Bubbles that appear.
4. **DOCUMENT UPLOADS**: During document uploads (after clicking SAVE), a "**Success**" banner will briefly flash and a "**No Document Uploaded**" message will appear - **Please know that your document did save successfully** (we **can** see the document). Certain fields require our review and approval before being finalized; this is to ensure that correct documents uploaded. *(Note: Currently, the platform doesn't allow for this "No Document Uploaded" message to be changed.)*
5. **SUBMIT FOR REVIEW**: After your work is **fully** completed, click **SUBMIT PROFILE FOR REVIEW / SUBMIT FOR RE-VERIFICATION** (top right of profile). Please **DO NOT** submit a ***partially*** completed/updated profile!

NOTE: If you encounter any technology issues, need clarification, or help uploading documents, connect with the Custome 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
MANAGE ORGANIZATION (left sidebar)		
• Add Administrator *(add/remove users **authorized to make edits**)*	❑ Optional	❑ Update (as needed)
• Edit Information - Organization Name *(**must be the legal name as appears on your IRS Letter of Determination**)*	❑ **Required**	❑ **Do Not Alter** *(email nonprofits@cfsarasota.org if any changes)*
PROFILE SETUP Tab		
ADD YOUR CAUSES:		
• Website	❑ **Required**	❑ Update (as needed)
• Logo	❑ Optional	❑ Update (as needed)
• Causes	❑ **Required**	❑ Update (as needed)
ADD YOUR STORY:		
• Cover Photo	❑ Optional	❑ Update (as needed)
• Tell Your Story	❑ **Required**	❑ Update (as needed)
• Video	❑ Optional	❑ Update (as needed)

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Field Name	Organizations Creating a New Profile	Organizations That Already Have a Profile
OVERVIEW Tab		
• Mission	❑ **Required**	❑ Update (optional)
• Mission Category	❑ **Required**	❑ Update (optional)
• Achievement Definition	❑ **Required**	❑ Update (as needed)
• Background	❑ **Required**	❑ Update (optional)
• Primary Organization Type & Sub-Type	❑ **Required**	❑ Update (optional)
• Secondary Organization Type & Sub-Type	❑ Optional	❑ Update (optional)
• Street Address and Mailing Address	❑ **Required**	❑ Update (as needed)
• Geographical Areas Served - Overall Organization	❑ **Required**	❑ Update (as needed)
• Geographical Areas Served - Overall (by zip code)	❑ Optional	❑ Update (as needed)
• Specific Areas Served	❑ Optional	❑ Update (as needed)
• Formal Collaborations	❑ Optional	❑ Update (as needed)
• Unite Us Profile	❑ Optional	❑ Update (optional)
PROGRAMS & RESULTS Tab		
*Must have **at least one** local, active program (in existence for at least six months) to have a profile.*		
• Program Name	❑ **Required**	❑ Update (as needed)
• Program Description	❑ **Required**	❑ Update (as needed)
• Success Looks Like	❑ **Required**	❑ Update (as needed)
• Program Type	❑ **Required**	❑ Update (as needed)
• Program Start Date *(program originally began)*	❑ **Required**	❑ Retain **Original** Date
• Program End Date *(if permanently ended; retains historical outcomes data)*	❑ Required (if ended)	❑ Update (if ended)
• Program Costs (Annual)	❑ **Required**	❑ **Required** KEY UPDATE
• $ Amount of Need	❑ **Required**	❑ **Required** KEY UPDATE
• Program Category	❑ **Required**	❑ Update (as needed)
• Program Sub-Category	❑ **Required**	❑ Update (as needed)
• Top 3 Populations Served	❑ **Required**	❑ Update (as needed)
• Population Served Description	❑ **Required**	❑ Update (as needed)
• Geographical Areas Served by Program	❑ **Required**	❑ Update (as needed)
• Geographical Areas Served by Program (zip code)	❑ Optional	❑ Update (as needed)
• Projected Number to be Served	❑ **Required**	❑ **Required** KEY UPDATE
• Date Outcomes Achieved or Reported *(should be updated at least annually, or quarterly if desired)*	❑ **Required**	❑ **Required** KEY UPDATE
• Outcomes Achieved	❑ **Required**	❑ **Required** KEY UPDATE
• Number Served by this Program *(overall)*	❑ **Required**	❑ **Required** KEY UPDATE
• Number or % that Achieved Intended Outcomes	❑ **Required**	❑ **Required** KEY UPDATE
• Outcome was Measured/Confirmed by	❑ **Required**	❑ Update (as needed)
FINANCIALS Tab		
CURRENT / PROJECTED:		
• Your Current Fiscal Period Begins	❑ **Required**	❑ **Required** KEY UPDATE
• Your Current Fiscal Period Ends	❑ **Required**	❑ **Required** KEY UPDATE
• Projected Annual Revenue	❑ **Required**	❑ **Required** KEY UPDATE
• Projected Annual Expenses	❑ **Required**	❑ **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*).

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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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STEP 4.

- CREATE YOUR ORGANIZATION’S PROFILE
- UPDATE (MAINTAIN) YOUR ORGANIZATIONS PROFILE

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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.

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

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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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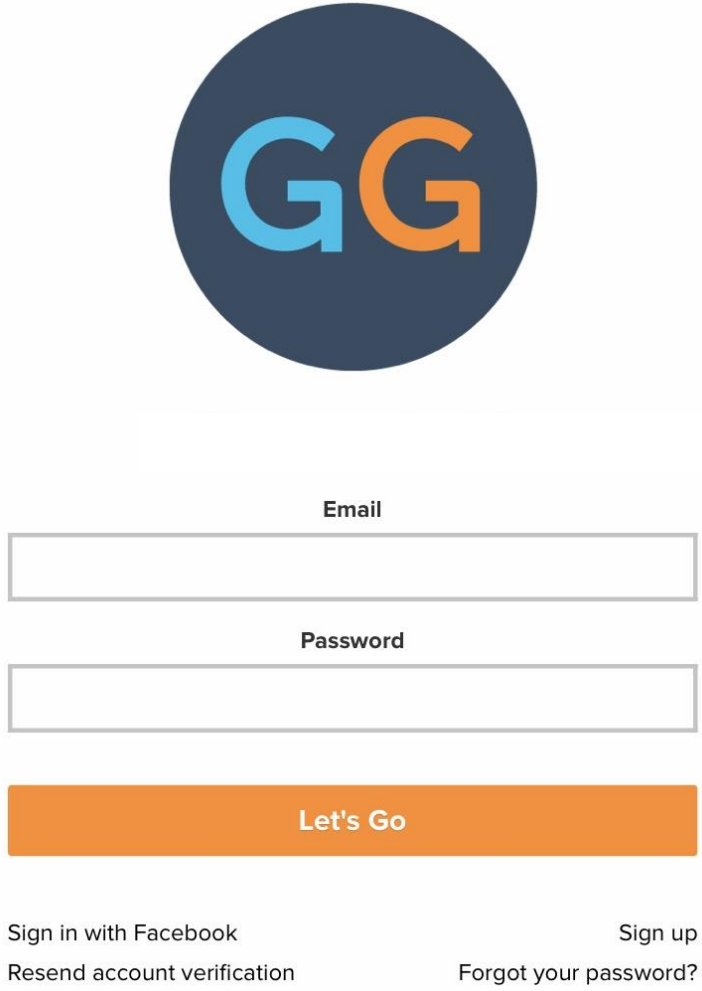
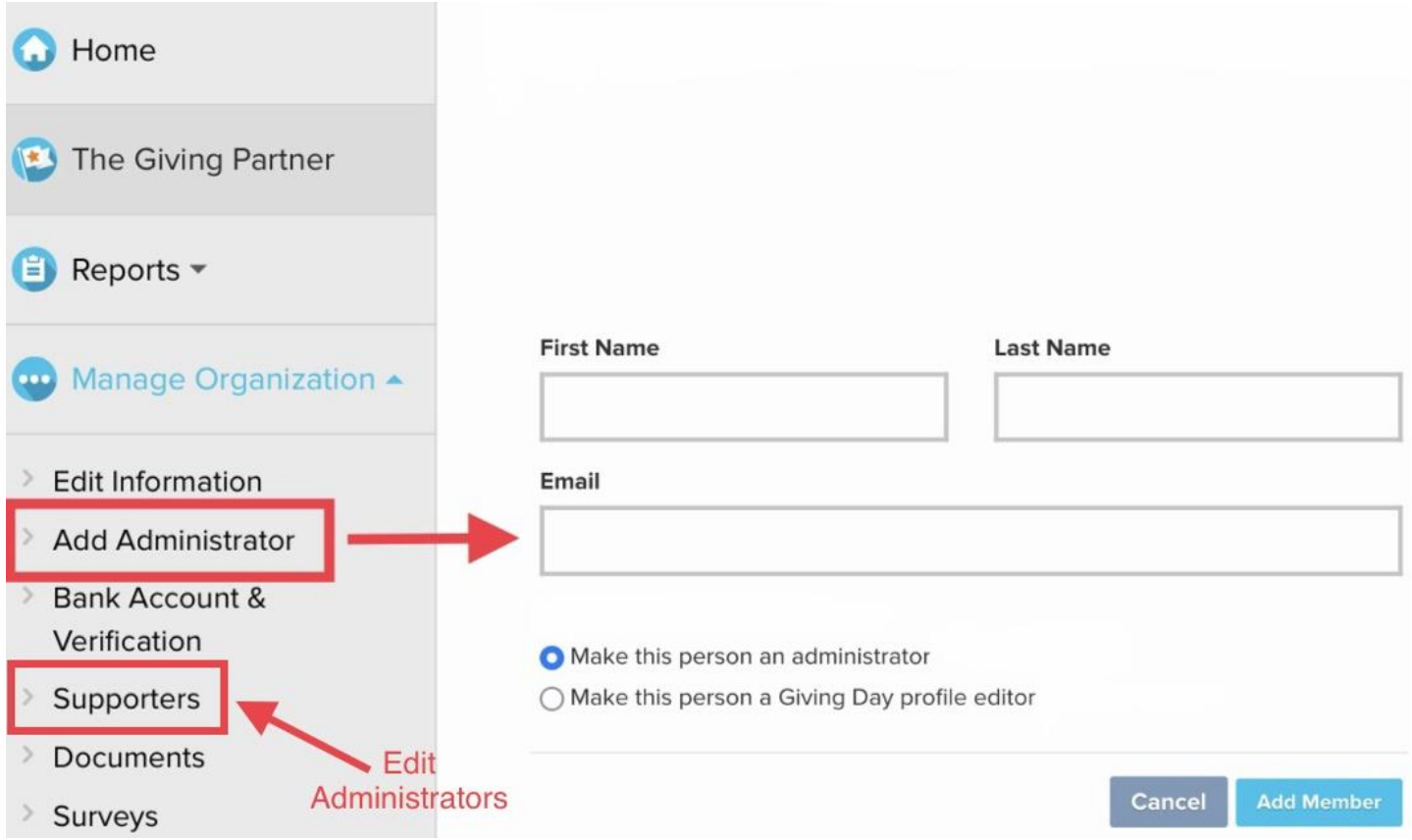
Login to Your Organization's Profile

- 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.



Assign and Update Administrators

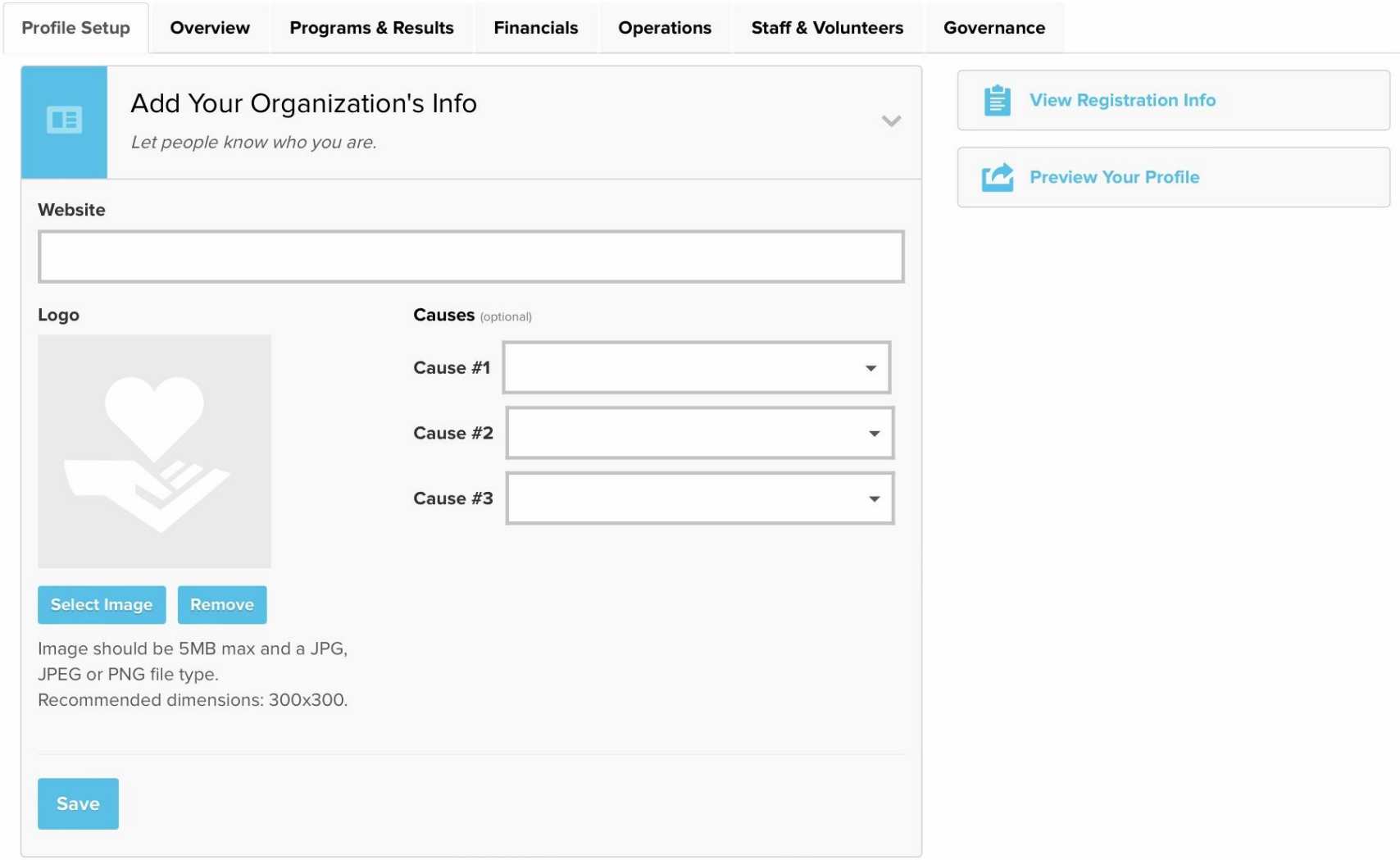
- **Assign/update Administrators** from your organization to work on your profile:
  - They should have access to detailed knowledge about your organization, along with very basic technical skills, in order to **accurately** complete and make updates to the profile. *Be mindful about who is chosen for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



Profile Set-up Tab

Add Your Organization's Info / Update as Needed:

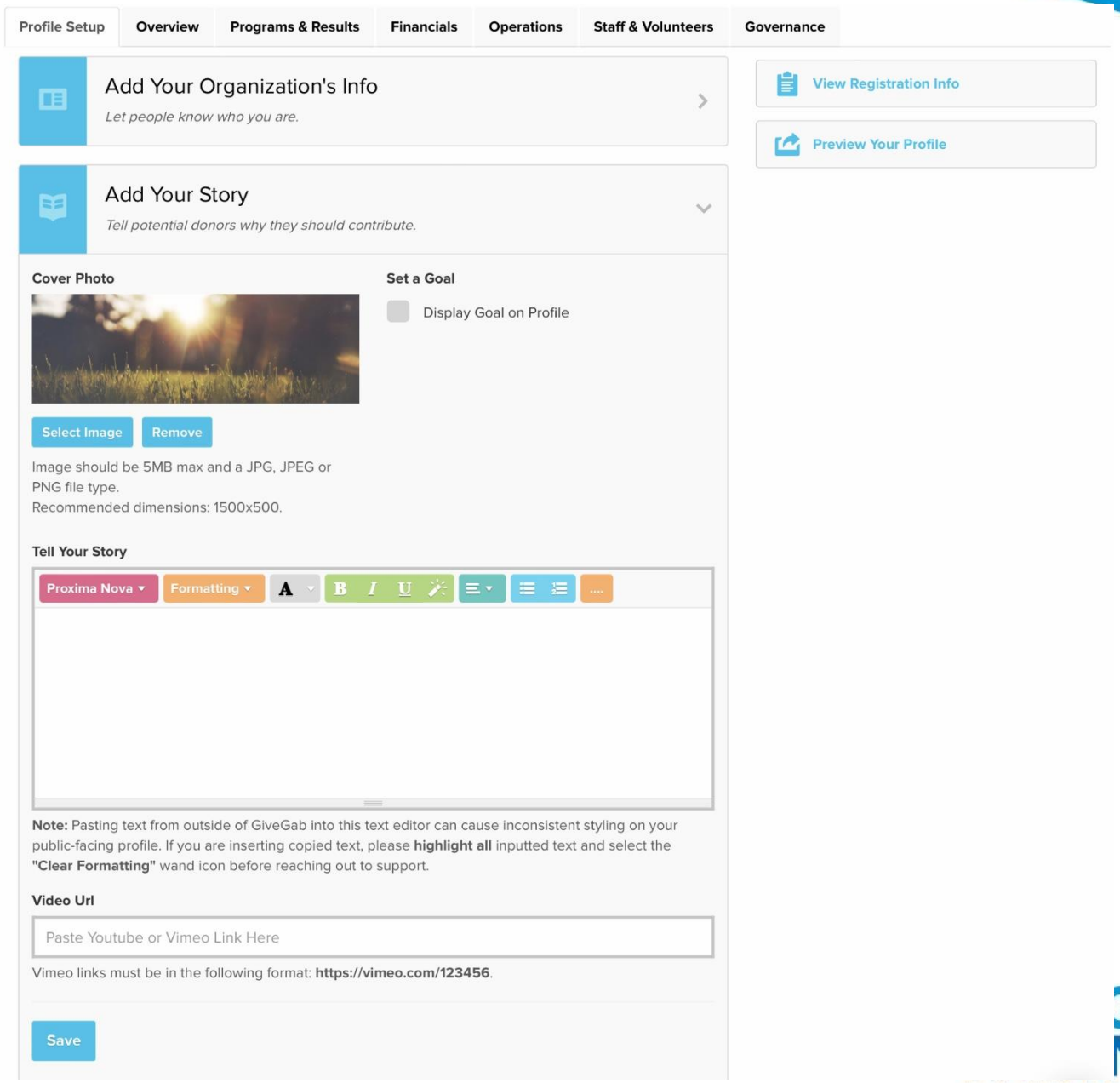
- Website
- Logo
- Causes



Profile Set-up Tab

Add Your Story / Update as Needed:

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

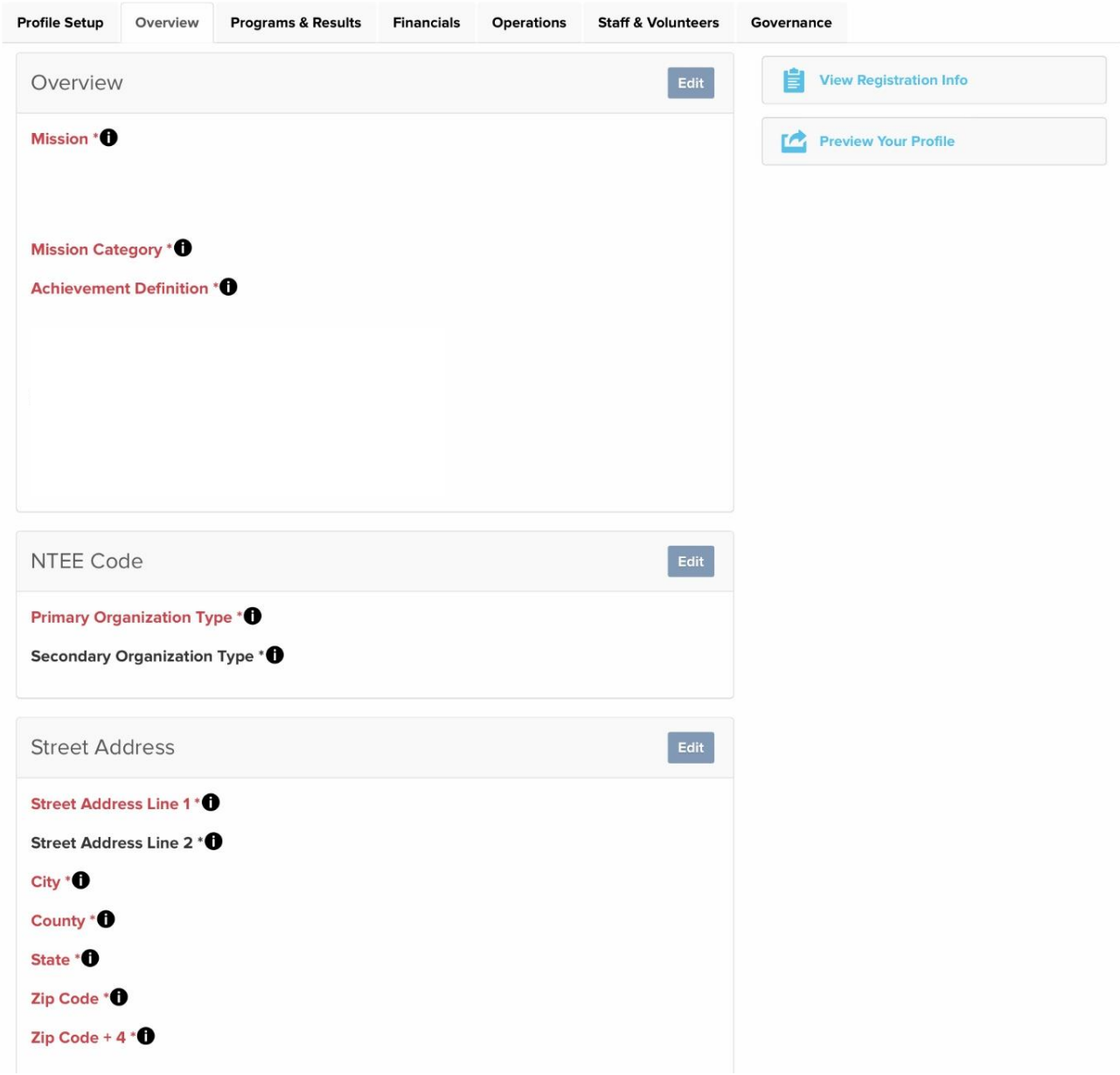


Overview Tab

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



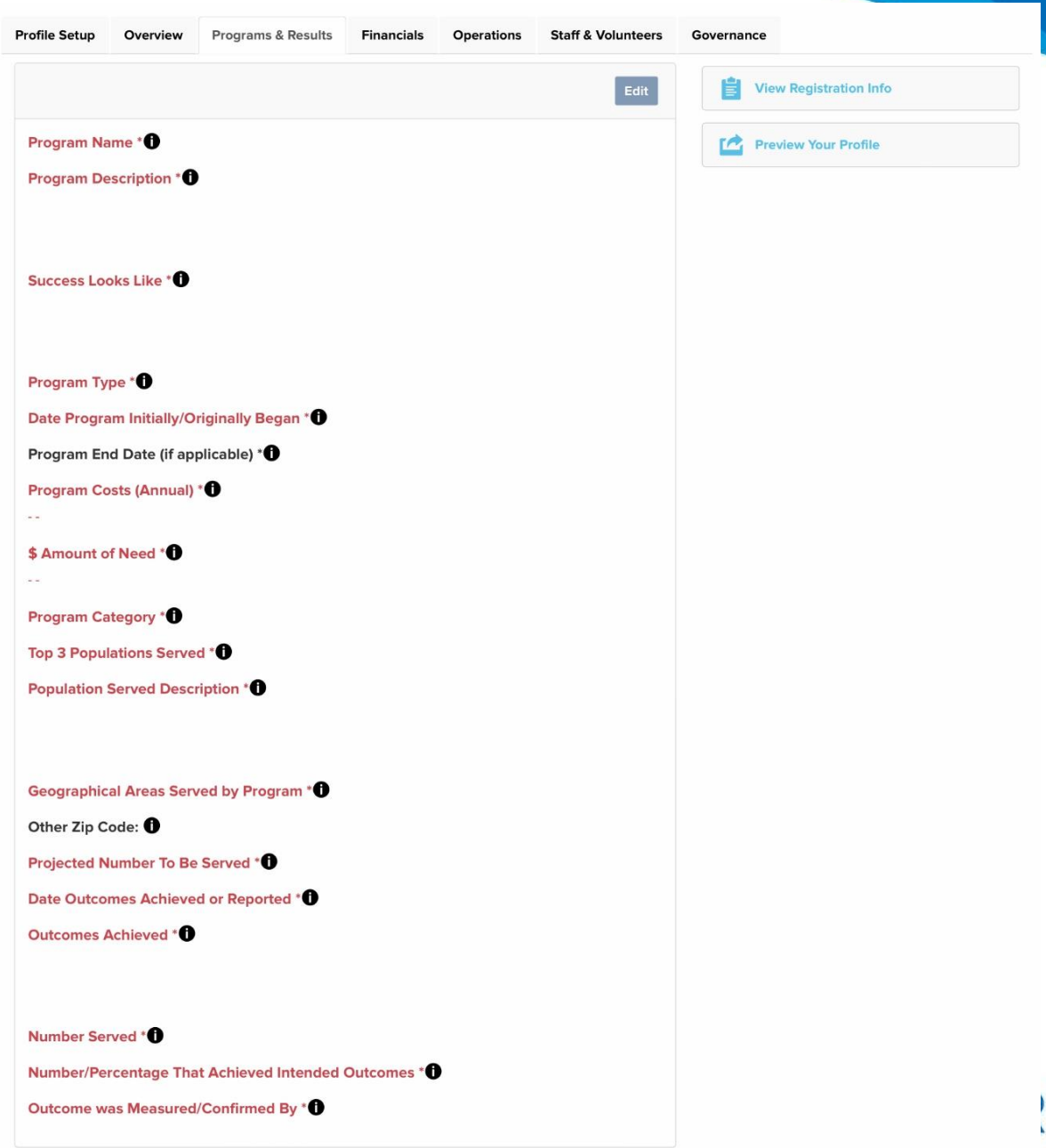
THE GIVING PARTNER

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

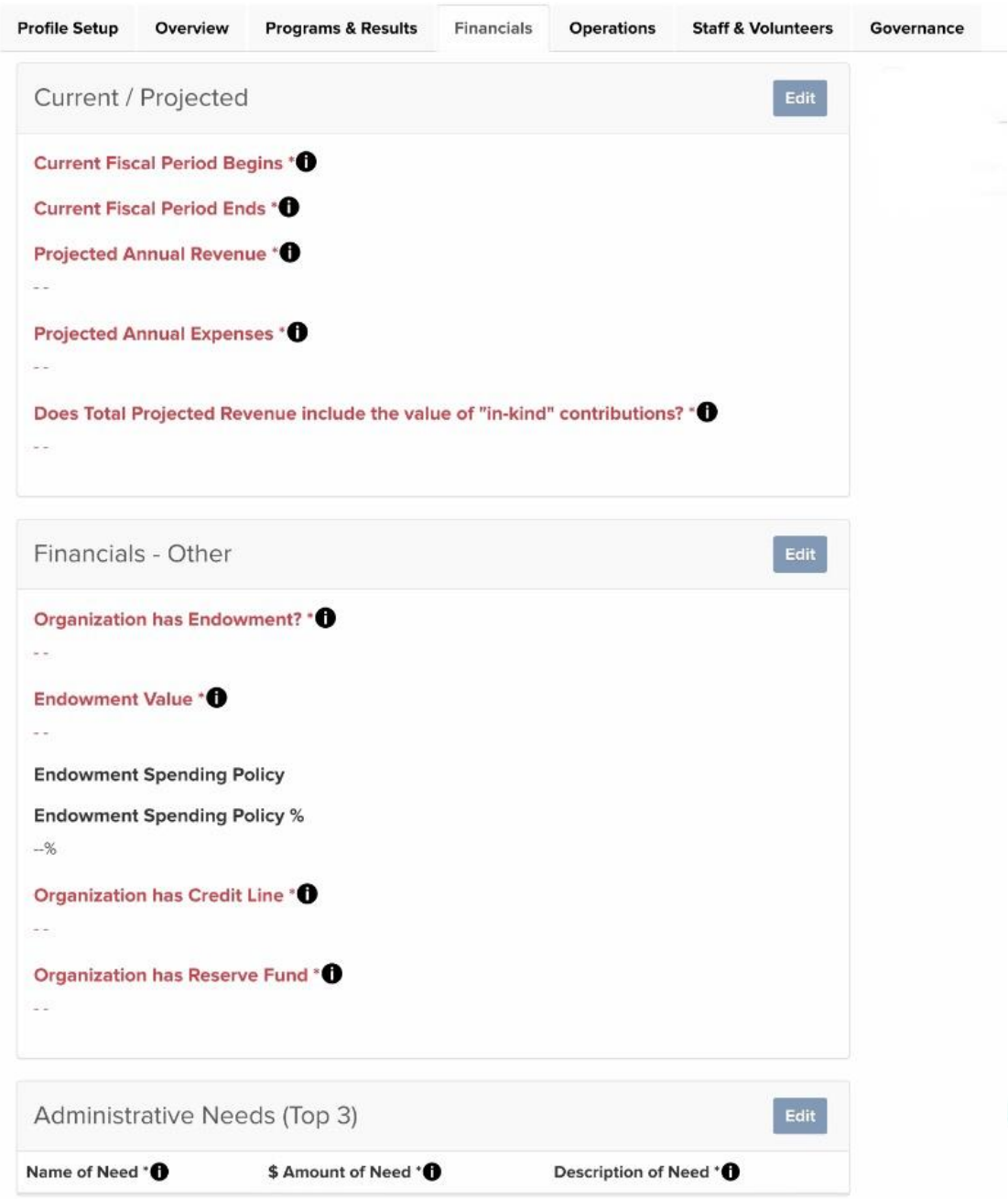


Financials Tab

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



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

Edit

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

Edit

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

Edit

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

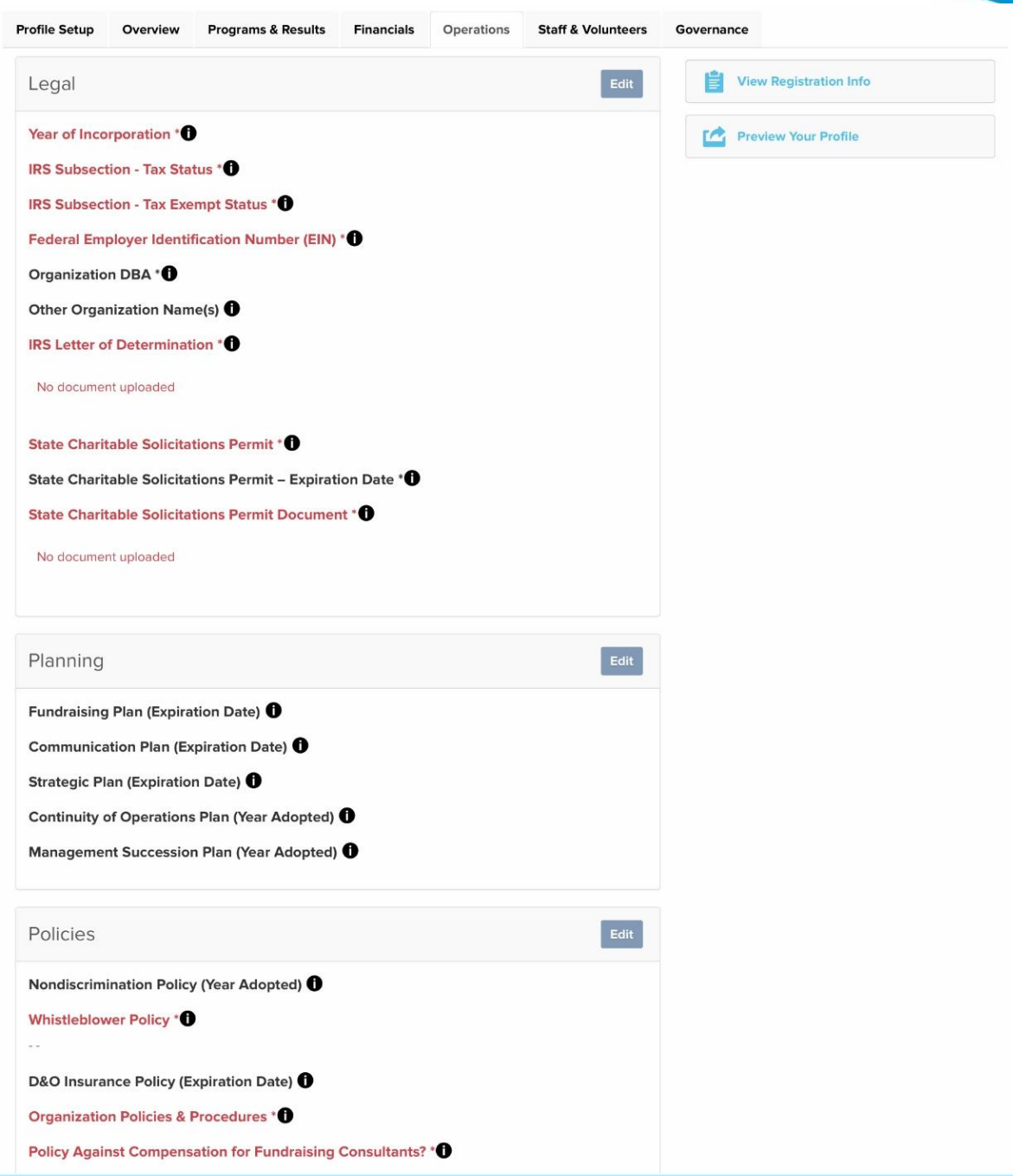
THE GIVING PARTNER

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



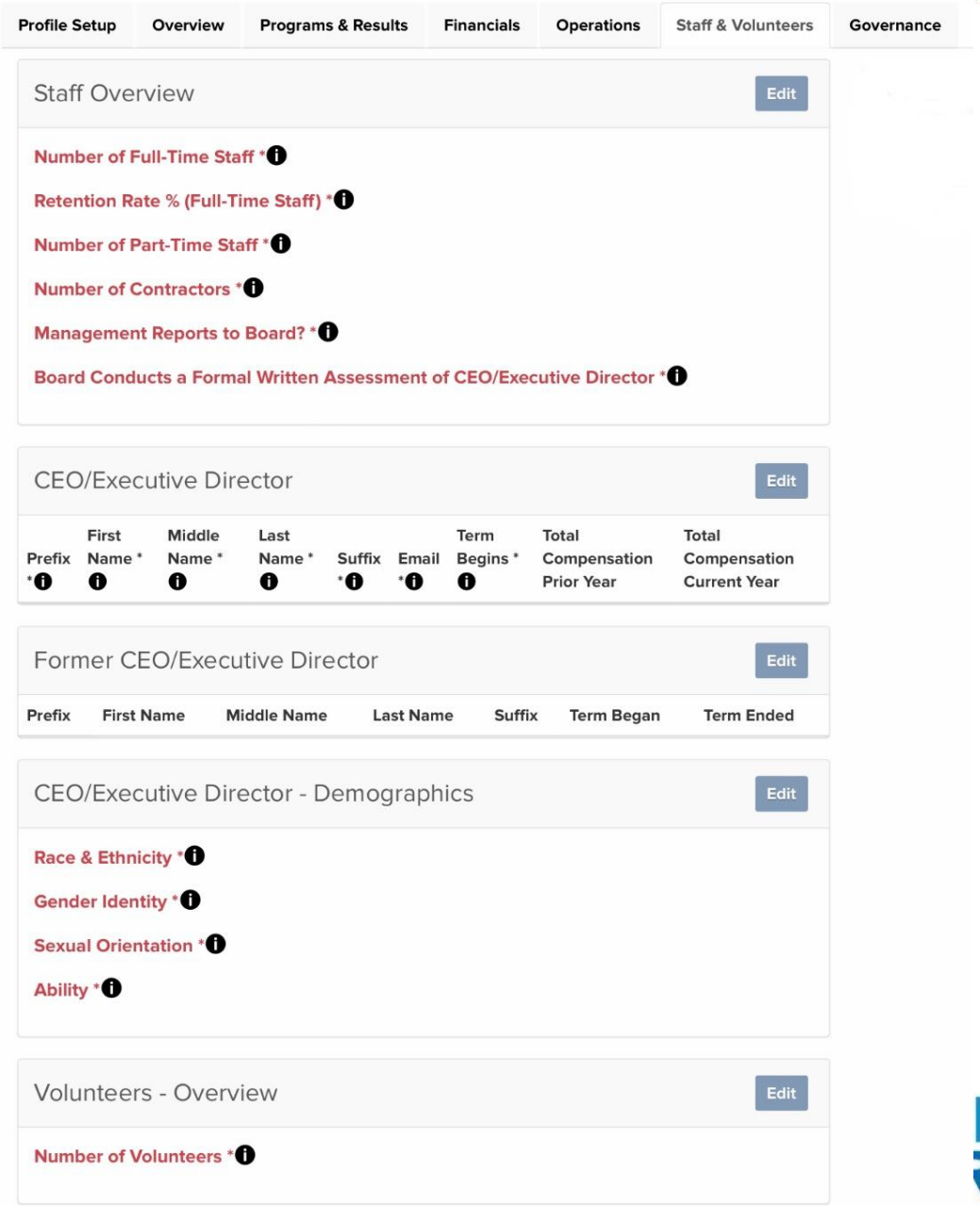
THE GIVING PARTNER

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

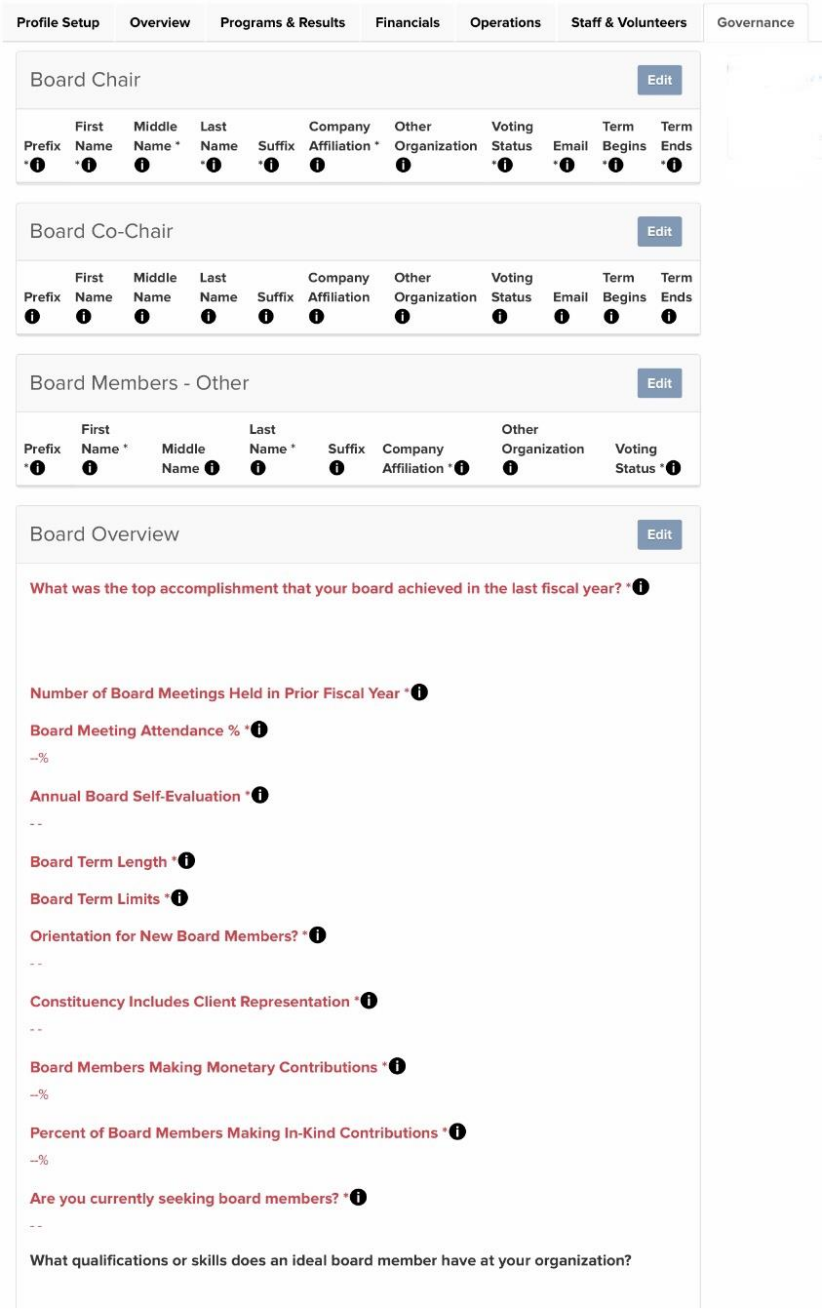


Governance Tab

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



THE GIVING PARTNER

STEP 5. FOUNDATION REVIEW & PROFILE STATUSES

THE GIVING PARTNER

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.**

THE GIVING PARTNER

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
Submitted
In Review
Approved

- **Pending -** Profile is awaiting your completion *and submission* of required fields
- **Submitted -** Profile is in line for review
- **In Review -** Profile is being reviewed
- **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.

THE GIVING PARTNER

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.

THE GIVING PARTNER

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

THE GIVING PARTNER

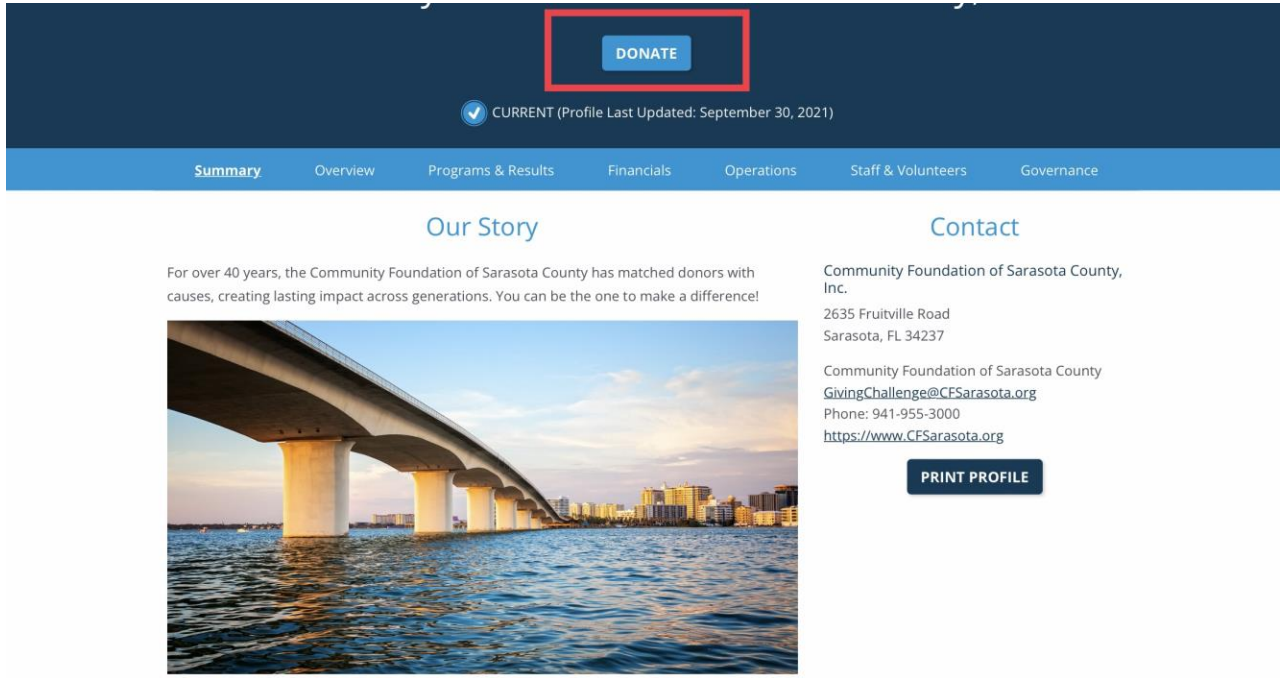
Collect Donations through The Giving Partner

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!

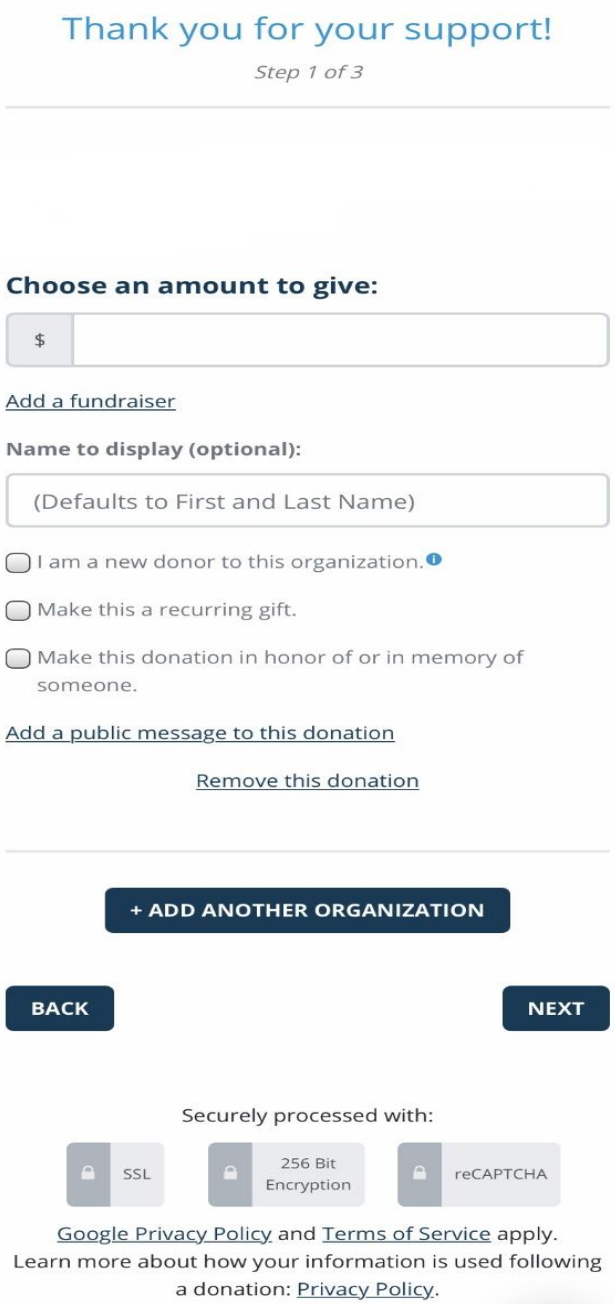
Before you begin, we encourage you to explore the ***Webinars & Trainings*** page, located at the bottom of the Nonprofit Toolkit to learn more.

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

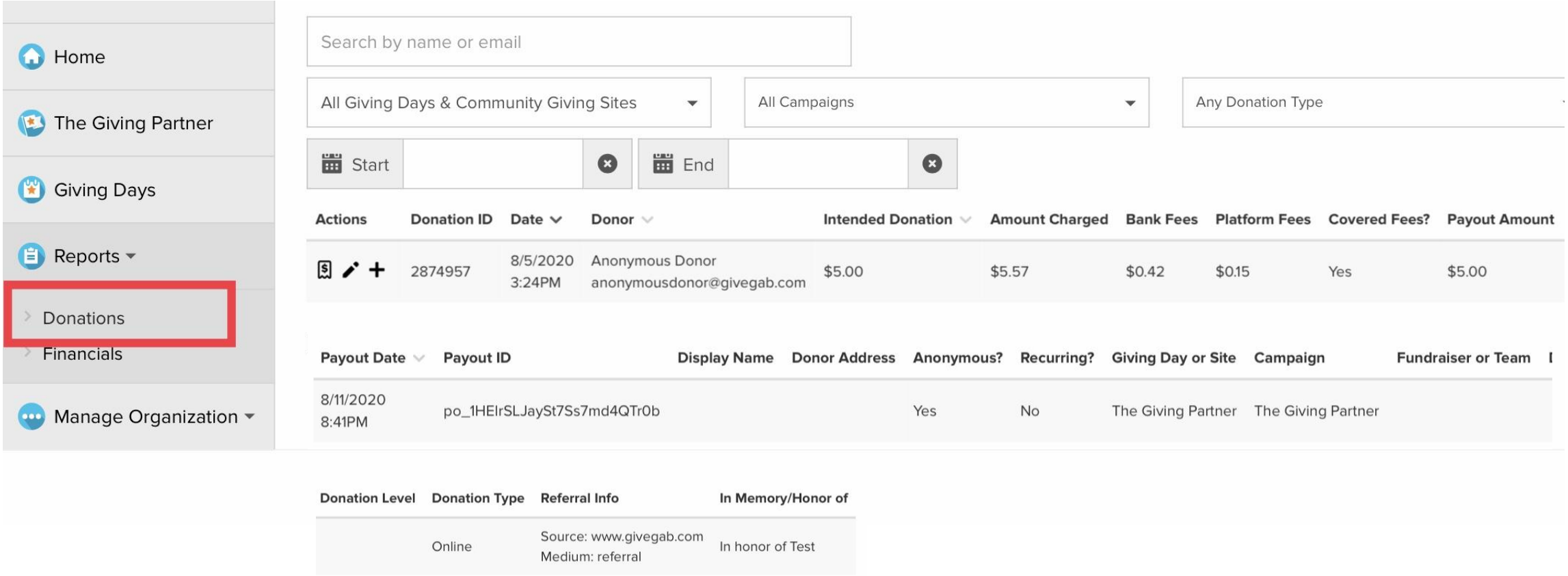


How to Make a Donation

- 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.



Manage Donations through The Giving Partner



STEP 7. PROMOTE YOUR ORGANIZATION THROUGH THE GIVING PARTNER

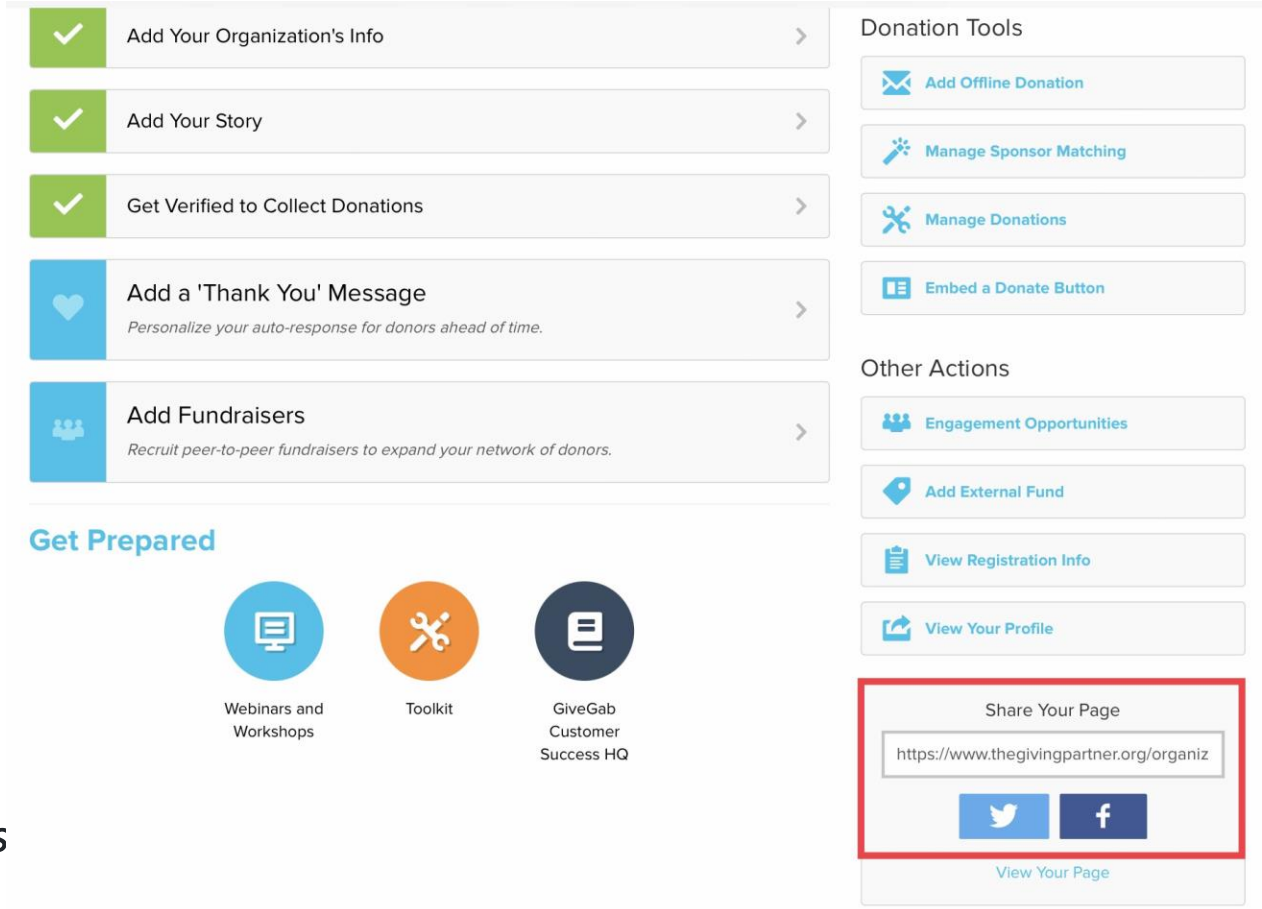
THE GIVING PARTNER

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)*

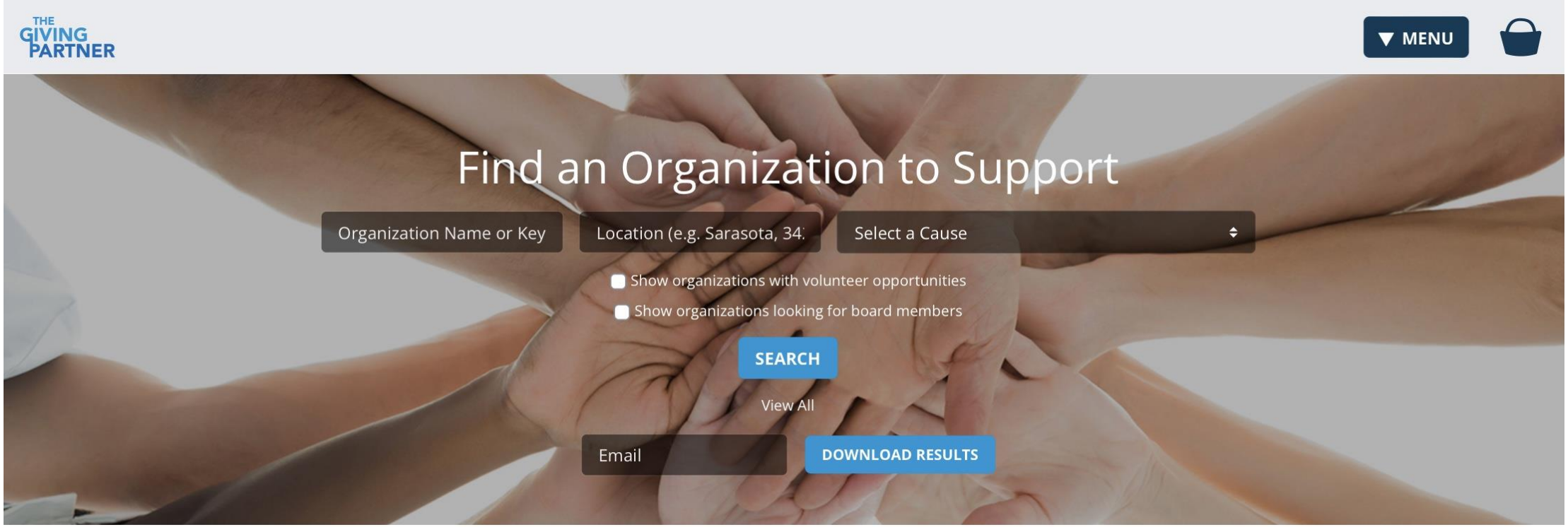
***Note**: Before you begin, be sure to explore the **Webinars & Trainings** page (located at the bottom of the Nonprofit Toolkit) to learn more.*



SEARCH & REPORTS INTERFACE

THE GIVING PARTNER

Search for Profile(s) & Download Results



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

THE GIVING PARTNER

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

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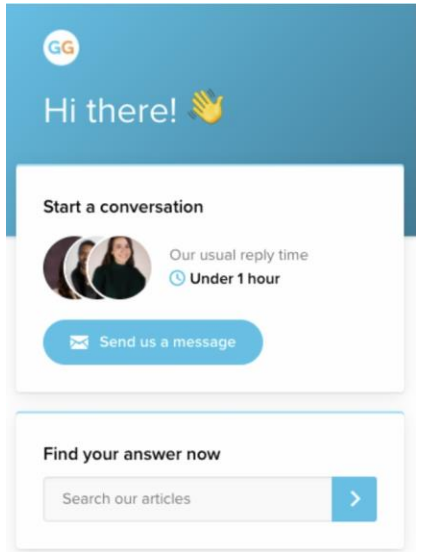
ASSISTANCE & RESOURCES

THE GIVING PARTNER

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
- If you have any further questions, please contact 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.

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Thank You!

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