Everything You Need to Know to Apply for, Create and Update Your Organization’s Profile

November 15, 2021
Agenda

• What is The Giving Partner? (slides #3-10)
• Steps to Having a Profile in The Giving Partner (slides #11-30)
  o Qualify – Organizations that don’t yet have a profile (slide #12)
  o Apply – Organizations that don’t yet have a profile (slide #13)
  o Get Prepared - All organizations (slides #14-16)
  o Create Your Organization’s Profile – Organization’s that don’t yet have a profile (slides #17-30)
  o Update (Maintain) Your Organization’s Profile – Organization’s that already have a profile (slides #18-30)
• Foundation Review & Profile Statuses (slides #31-34)
• Collect & Manage Donations (slides 35-38)
• Promote Your Organization through The Giving Partner (slides #39-40)
• Search & Reports Interface (slides #41-42)
• Eligibility for Opportunities through the Community Foundation of Sarasota County (slides #43-44)
• Assistance & Resources (slides #45-46)
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**
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>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.</td>
</tr>
<tr>
<td>2013-2018</td>
<td>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.</td>
</tr>
<tr>
<td>2019</td>
<td>The Giving Partner transitioned to a new platform, hosted by GiveGab, an online giving platform designed exclusively for nonprofits.</td>
</tr>
<tr>
<td>2020</td>
<td>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 666 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.</td>
</tr>
</tbody>
</table>
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
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

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

Slide 9
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.
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 both 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.
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 and click the link to Apply for a profile.
  • 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 all profiles must be completed/updated **online**.

- Use a **compatible internet browser** to ensure the best experience (**Google Chrome is suggested**)!

- Go to the [Nonprofit Toolkit](https://www.thegivingpartner.org/info/nonprofit-toolkit), click on the **CHECKLIST** link, and follow instructions within (**always refer to the Nonprofit Toolkit for the most comprehensive instructions and information, and utilize the CHECKLIST within**).

- **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 need to 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

- Go to the Nonprofit Toolkit (https://www.thegivingpartner.org/info/nonprofit-toolkit),
- Utilize the CHECKLIST link when you initially create your profile and anytime you make updates (this is the best way to ensure you’ve not overlooked a key requirement).

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Organizations Creating a New Profile</th>
<th>Organizations That Already Have a Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission</td>
<td>Required</td>
<td>Update (optional)</td>
</tr>
<tr>
<td>Mission Category</td>
<td>Required</td>
<td>Update (optional)</td>
</tr>
<tr>
<td>Achievement Definition</td>
<td>Required</td>
<td>Update (optional)</td>
</tr>
<tr>
<td>Background</td>
<td>Required</td>
<td>Update (optional)</td>
</tr>
<tr>
<td>Primary Organization Type &amp; Sub-Type</td>
<td>Required</td>
<td>Update (optional)</td>
</tr>
<tr>
<td>Secondary Organization Type &amp; Sub-Type</td>
<td>Optional</td>
<td>Update (optional)</td>
</tr>
<tr>
<td>Street Address and Mailing Address</td>
<td>Required</td>
<td>Update (as needed)</td>
</tr>
<tr>
<td>Geographical Areas Served - Overall Organization</td>
<td>Required</td>
<td>Update (as needed)</td>
</tr>
<tr>
<td>Geographical Areas Served - By Zip Code</td>
<td>Required</td>
<td>Update (as needed)</td>
</tr>
<tr>
<td>Specific Areas Served</td>
<td>Optional</td>
<td>Update (as needed)</td>
</tr>
<tr>
<td>Formal Collaborations</td>
<td>Optional</td>
<td>Update (as needed)</td>
</tr>
<tr>
<td>Unit/In Profile</td>
<td>Optional</td>
<td>Update (as needed)</td>
</tr>
</tbody>
</table>

**MANAGE ORGANIZATION (left sidebar)**
- Add Administrator (add/remove users authorized to make edits)
- Edit Information - Organization Name (must be the legal name as appears on your IRS Letter of Determination)
- Update (as needed) 
- Do Not Alter (unless nonprofit status changed)

**PROFILES SETUP Tab**
- ADD YOUR CAUSES:
  - Website
  - Logo
  - Causes
- ADD YOUR STORE:
  - Cover Photo
  - Tell Your Story
  - Video

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

**FINANCIAL Tab**
- Current / Projected:
  - Your Current Fiscal Period Begin
  - Your Current Fiscal Period End
  - Projected Annual Revenue
  - Projected Annual Expenses

Page 2 of 6
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).
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).
    - Deadline is by 5:00 pm January 31, 2022 to participate in the Giving Challenge!
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.
    - **Deadline is by 5:00 pm February 28, 2022** to participate in the Giving Challenge!
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:
  
  o 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
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)
  o 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*
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
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
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*
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** - 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.
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.**

- **Re-verification Pending** - Profile has one or more **key required updates** incomplete
- **Submitted for Re-verification** - Profile is in line for review
  - **Note:** Ability to make additional updates after you’ve submitted your profile.
- **Re-verification (In Review)** - Profile is being reviewed
  - **Note:** Ability to make additional updates while it is awaiting review.
- **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)
  o 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

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**Example Donation Details:**
- **Donation ID:** 2874957
- **Date:** 8/5/2020 3:24PM
- **Donor:** Anonymous Donor
  - Email: anonymousdonor@givegab.com
- **Intended Donation:** $5.00
- **Amount Charged:** $5.57
- **Bank Fees:** $0.42
- **Platform Fees:** $0.15
- **Covered Fees:** Yes
- **Payout Amount:** $5.00

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**Additional Details:**
- **Payout Date:** 8/11/2020 8:41PM
- **Payout ID:** po_iHEirSLJaySt7Ss7m4QTr0b
- **Anonymous?** Yes
- **Recurring?** No
- **Giving Day or Site:** The Giving Partner
- **Campaign:** The Giving Partner

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**Referral Information:**
- **Donation Type:** Online
- **Referral Info:** Source: www.givegab.com, Medium: referral
- **In Memory/Honor of:** In honor of Test
STEP 7. PROMOTE YOUR ORGANIZATION THROUGH THE GIVING PARTNER
If your nonprofit is looking for a way to bridge the fundraising-technology gap, you can easily utilize the following features (which are integrated within your profile) to enhance and streamline your organization's fundraising opportunities!

- **Share Your Profile on Socials**

- **Peer-to-Peer (P2P) Fundraising**
  - Before you begin, we encourage you to explore the [Webinars & Trainings](https://www.thegivingpartner.org) page, located at the bottom of the [Nonprofit Toolkit](https://www.thegivingpartner.org) to learn more.

- **Boost Fundraising Suite (Opt-In only)**
  - Before you begin, we encourage you to explore the [Webinars & Trainings](https://www.thegivingpartner.org) page, located at the bottom of the [Nonprofit Toolkit](https://www.thegivingpartner.org) to learn more.
SEARCH & REPORTS INTERFACE
Search for Profile(s) & Download Results
ELIGIBILITY FOR OPPORTUNITIES THROUGH THE COMMUNITY FOUNDATION OF SARASOTA COUNTY
Eligibility for Opportunities

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

- Grant Applications, Trainings, Workshops
- Giving Challenge - The next Giving Challenge will be held April 26-27, 2022.

*** 2022 GIVING CHALLENGE Eligibility ***

Be sure to have your profile in The Giving Partner submitted on time so that once we review it, it will have the Approved/Current profile status which is required in order to be eligible for the 2022 Giving Challenge!

- Deadline for NEW profiles to be fully completed and Submitted: 5:00 pm EST Jan 31, 2022
- Deadline for EXISTING profiles to be fully updated and Submitted: 5:00 pm EST Feb 28, 2022

Note: If your organization wants to be eligible for the Get it Current! Keep it Current! Prizes - Deadline for any profile to be fully completed/updated and Submitted to be eligible: 5:00 pm EST Jan 31, 2022
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**

• 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, such as:
  o **Webinars & Trainings**
  o **Recent Enhancements**
Thank You!