



THE GIVING PARTNER

Presented by the Community Foundation of Sarasota County



Powered by





The Giving Partner

Your online
resource connecting
philanthropy
and our community!

Learning Objectives

What is The
Giving
Partner?

Customizing
and
Completing
Your Profile

Next
Steps

Questions

What is The Giving Partner?

The Giving Partner

- Modern user interface, **easy to navigate**
- Share volunteer and board member opportunities
- Improved financials section and document upload functionality (*coming early 2020*)
- Accept donations year-round (*coming summer 2020!*)

The Basics

- An **online** resource that helps foundations, donors, businesses, media partners, and other investors understand the local charitable marketplace
- Allows nonprofits to share their story
 - Impact in our community, top goals and needs, financial health
 - Who is leading your organization? Does your board show up to meetings, make a financial commitment, and commit to policies that protect your organization?
- **IRS verified 501(c)(3) organizations** serving Sarasota, Manatee, Charlotte, and Desoto Counties
- **Powerful, searchable** database reflecting local charitable organizations who've made a **commitment to transparency**

Transparency

Transparency Grows Trust

A new [Give.org report](#) shows that a nonprofit's accomplishments are the number one factor in establishing donor trust.

Top reasons for trust

- ✓ Accomplishments
- ✓ Reputation
- ✓ Financials

Top reasons for distrust

- ✗ Greed and high compensation
- ✗ Negative reputation
- ✗ Lack of honesty and transparency

Source: Give.org


How We Use The Giving Partner

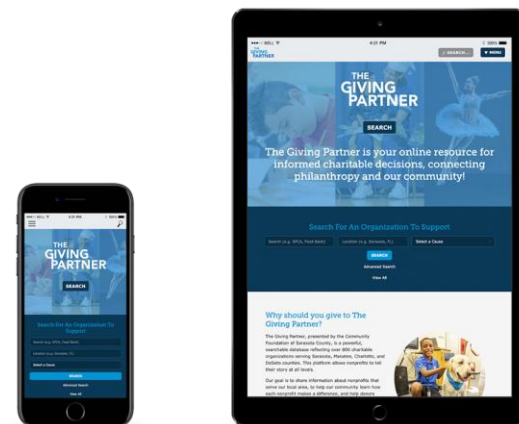
- To inform giving decisions in **one-on-one work with our donors** – matching the impact that donors seek with the impact of nonprofit programs and services
- To learn who's who – **how your organization is different**
- To understand the kinds of support that nonprofits need to be **effective**

The Giving Partner Is NOT

- A grant application or guarantee of funding
- A certification, rating or grade of any kind
- A substitute for human relationships
- The Giving *Challenge*
 - The Giving Challenge is a 24-hour online fundraising event available exclusively to nonprofits with a **CURRENT** profile status in **The Giving Partner**

GiveGab – Our Technology Partner

- Dedicated platform support team
 - **Blue chat bubble!** 
- Easy and accessible!
 - **Completely mobile responsive,** viewable on any internet enabled device
 - Fun fact: On average 61% of all emails are opened on a mobile device
- Safe, secure, and reliable
 - Partnered with Stripe (PCI Level 1 payment processor)
 - Fail safe redundancy (load testing, cloud services, backup plans)



Public View – Search

- Easily search by nonprofit name, location, or cause category.

The screenshot displays the public view of the search functionality on The Giving Partner website. The header features the logo and navigation options. The main banner includes the site name and a central search button. Below the banner is a search section titled "Search For An Organization To Support" with input fields for name, location, and cause, along with a search button and links for advanced search and viewing all results. A dropdown menu for cause categories is open, listing various options. The footer contains a welcome message and a brief description of the platform's mission.

THE GIVING PARTNER

SEARCH

SEARCH

The Giving Partner is your online resource for informed charitable decisions, connecting philanthropy and our community!

SEARCH FOR AN ORGANIZATION TO SUPPORT

Search (e.g. SPCA, Food Bank) Location (e.g. Sarasota, FL) Select a Cause

SEARCH

Advanced Search

View All

Select a Cause

- Animals
- Arts and Culture
- Community Advocacy
- Disability Services
- Disaster Relief
- Education
- Emergency Response
- Entrepreneurship
- Environment
- Health and Wellness
- Homelessness & Housing
- International
- Philanthropy, Voluntarism & Grantmaking
- Politics
- Poverty and Hunger
- Religion
- Seniors
- Social Justice
- Substance Abuse Prevention

Welcome to The Giving Partner!

The Giving Partner, presented by the Community Foundation of Sarasota County, is a powerful, searchable database reflecting over 800 charitable organizations serving Sarasota, Manatee, Charlotte, and DeSoto counties. This platform allows nonprofits to tell their story at all levels.

Our goal is to share information about nonprofits that serve our local area, to help our

Public View - Governance

Summary	Overview	Legal, Planning & Policies	<u>Governance</u>	Management & Volunteers	Programs
Board Chair					
First Name	Last Name	Company Affiliation	Voting Status	Term Begins	Term Ends
Nelle	Miller	Biztank	--	July 1, 2019	June 28, 2020
Board Co-Chair					
First Name	Last Name	Company Affiliation	Voting Status	Term Begins	Term Ends
--	--	--	--	--	--
Board Members - Other					
First Name	Last Name	Company Affiliation		Voting Status	
Richard	Gans	Ferguson, Skipper, Shaw, et. al		Voting	
Michael	Pender	Cavanaugh & Co.		Voting	
Richard	Smith	Christopher, Smith, Leonard, Bristow, Stanell & Wells, P.A.		Voting	
Terri	Vitale	Tandem Enterprises		Voting	
Jeffrey	McCurdy	Guardsman Private Capital Management		Voting	

Contact

Community Foundation of Sarasota County, Inc.

2635 Fruitville Road
Sarasota, FL

Phone: 941-955-3000

<https://www.CFSarasota.org>

Public View - Management

Summary	Overview	Legal, Planning & Policies	Governance	Management & Volunteers	Programs
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Management & Volunteer Statistics

Number of Full-Time Staff	29
Retention Rate (Full-Time Staff)	91%
Number of Part-Time Staff	0
Number of Volunteers	102
Number of Contractors	4
Professional Development Opportunities Provided for Staff?	Yes
Management Reports to Board?	Yes
Evaluation Frequency - CEO/Executive Director	Annually
Evaluation Frequency - Management/Director	Annually
Evaluation Frequency - Non-Management	Annually

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CEO/Executive Director

First Name	Last Name	Email	Term Begins
Roxie	Jerde	Roxie@CFSarasota.org	March 1, 2011

CEO/Executive Director - Experience

Roxie Jerde has served as President and CEO of the Community Foundation of Sarasota County since March 2011. She has been a leader in numerous community collaborations including

Public View - Programs

Summary

Overview

Legal, Planning & Policies

Governance

Management & Volunteers

Programs

Education

Many generous Community Foundation donors share a passion for education. Our approaches leverage national research and initiatives such as the Campaign for Grade Level Reading and the Two-Generation Approach at Aspen Institute's Ascend. We are working to make a lasting impact to: Achieve school readiness. Engage children in summer learning and enrichment. Promote healthy families. Boost grade level reading. Integrate arts & education. Enhance classroom learning and statewide curriculum with arts & science explorations at local museums, theatres, and other science, arts and cultural organizations (EdExplore SRQ). Support high school students and adult learners achieve their dreams for higher education and workforce development with scholarships.

Program Start Year	--
Program Costs (Annual)	\$1,700,000
Program Category	Education, General/Other
Program Sub-Category	Early Childhood Education
Population Served 1	Children and Youth (0 - 19 years)
Population Served 2	Families
Population Served 3	Adults
Program Areas Served	Sarasota, FL; Sarasota County, FL
Population Served Description	--
Number Served Last Year	--
Projected Number Served This Year	--
What outcomes do you seek for participants?	--
How is the extent of outcome achievement confirmed?	--
Define the outcomes achieved in the last completed year of this program.	--

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COMMUNITY
FOUNDATION
of Sarasota County

How to Login and Customize Your Profile

Steps for Success!

- **Pay attention to instructions within the profile**, as these will answer most of your questions.
- Not comfortable with technology? **Find someone who can help!** The person working on your profile needs **basic** computer skills (web navigation, file uploads, copy/paste).
- **Proofread and review!** We do not edit for you. Have someone outside of your organization read the profile – do things make sense from their perspective?
- Once your work is **complete** and ready for our review, use the **blue chat bubble**  **to let GiveGab know you have completed your work!**
- **If you need assistance**, use the **blue chat bubble** to reach out to the GiveGab Customer Success team.



Admin Dashboard Link & Log In



Welcome Back!

Email

Password

Let's Go

Sign in with Facebook

Forgot your password?

- Go to this site in your web browser to get started:

https://www.givegab.com/users/sign_in

New to GiveGab?

GiveGab makes giving more fun and rewarding!

Sign Up

Admin Dashboard – Virtual Tour



The screenshot displays the homepage of 'The Giving Partner'. The background features three panels: a young boy writing, a woman holding a child, and a ballerina. The text 'THE GIVING PARTNER' is centered in large white letters. Below it is a 'SEARCH' button. A main message reads: 'The Giving Partner is your online resource for informed charitable decisions, connecting philanthropy and our community!'. At the bottom, there is a search section titled 'Search For An Organization To Support' with three input fields: 'Search (e.g. SPCA, Food Bank)', 'Location (e.g. Sarasota, FL)', and 'Select a Cause'. A 'SEARCH' button is positioned below these fields. In the top right corner, there are 'SEARCH...' and 'MENU' buttons. A small circular icon is visible in the bottom right corner of the page.

THE GIVING PARTNER

SEARCH

The Giving Partner is your online resource for informed charitable decisions, connecting philanthropy and our community!

Search For An Organization To Support

Search (e.g. SPCA, Food Bank) Location (e.g. Sarasota, FL) Select a Cause

SEARCH

Customizing Your Profile

 The Giving Partner

 Reports

 Manage Organization ▾

Get Set Up

Complete the steps below to be sure that you are set up and ready to participate in The Giving Partner.

Profile Setup

Overview

Legal, Planning & Policies

Governance

Management & Volunteers

Programs

 Please provide documents as requested by The Giving Partner.



Add Your Organization's Info

Let people know who you are.



Add Your Story

Tell potential donors why they should contribute.



Add a 'Thank You' Message

Personalize your auto-response for donors ahead of time.

Add Your Organization's Info

Tagline

The Dream of a More Vibrant Sarasota within our reach

22 Characters Left

Website

www.thegivingpartner.org

Logo



Select Image

Remove

Recommended dimensions 300x300

Max file size 5MB

Save

Causes (optional)

Cause #1

Disaster Relief

Cause #2

Emergency Response

Cause #3

Health and Wellness


- **Tagline** - A quick one sentence overview of your organization (75 character limit)
- Upload new **logo**
- **Causes** - Select up to 3 to help supporters find your organization when searching for causes they're interested in.

Add Your Story

Get Set Up


Complete the steps below to be sure that you are set up and ready to participate in The Giving Partner.


Profile Setup	Overview	Legal, Planning & Policies	Financials	Governance	Management & Volunteers
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Add Your Organization's Info


Let people know who you are.






Add Your Story


Tell potential donors why they should contribute.





Add a 'Thank You' Message

Personalize your auto-response for donors ahead of time.




Add Your Story

- **Cover Photo** – Replace this **default** photo with one of your organization's favorites!
- Tell your **organization's story**
 - Add photos here too!
- Add a **Video!**
- Plenty of opportunities to **add visuals, which are much more engaging!**

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 (optional)

Display Goal on Profile

Tell Your Story

Proxima Nova 14 A B I U

Video Url

Paste Youtube or Vimeo Link Here

Save

Custom URL to Share

Other Actions



Engagement Opportunities



Add External Fund



View Registration Info



View Your Profile

- Each organization will have a Custom URL to share with supporters.
- Social Media buttons allow instant sharing!



Share Your Page

<https://giving-days.herokuapp.com/organize>

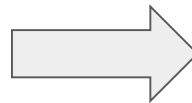


[View Your Page](#)

Adding Administrators

- Home
- The Giving Partner
- Reports
- Manage Organization ▲
 - > Edit Information
 - > Add Administrator
 - > Verification
 - > Supporters
 - > Documents
 - > Surveys

- Located on the left panel
- You can add multiple administrators to your profile
- When you add an administrator, an email containing login information is sent to the individual from notifications@givegab.com.



First Name

Last Name

Email

Make this person an administrator for The Community Foundation of Sarasota County

Add Organization Info to Tabs

Profile Setup Overview Legal, Planning & Policies Financials Governance Management & Volunteers

Overview

[Edit All](#)

Mission

Describes the reason your organization exists (maximum of 100 words).

Almost Home Dog Rescue, Inc. exists to rescue abandoned/unwanted dogs, primarily Jack Russell and other small terriers, that would otherwise be euthanized or live a life of privation on the street. We transport them to shelter in an approved foster home, provide food and veterinary care as needed (including spay/neuter, heartworm test, all necessary vaccinations and microchip), and maintain a website and telephone to facilitate adoptions and raise community awareness.

Mission Category

Overview

- ❑ Mission
- ❑ Background
- ❑ Needs (Top 5: Programs, Overhead, Volunteers)
- ❑ Accomplishments (For the past year)
- ❑ Goals (For the next 1-3 years)
- ❑ Areas Served
 - ❑ Enter one or more of the following local counties in which organization **serves**: Sarasota, Manatee, Charlotte, DeSoto.
 - ❑ Additionally, you may also enter other counties, and/or one or more of the following: Multi-State, Statewide, National, or International.

Legal, Planning & Policies

- ❑ Tax Exempt Status
- ❑ DBA(s)
- ❑ IRS 501(c)(3) Letter of Determination
- ❑ State Charitable Solicitations Permit (800-435-7352 or <http://www.freshfromflorida.com/Business-Services/Solicitation-of-Contributions>)
 - ❑ Exempt from **filing fee**: If less than \$25,000 revenue
 - ❑ Exempt from **registration** (Florida State Statute 496.406): If State determines organization qualifies (i.e., religious, educational, etc.)
- ❑ Conflict of Interest Policy (Florida law requires this for board members)
- ❑ Awards, Affiliations, Accreditations, Collaborations
- ❑ Planning and Policies (sample documents - <https://www.cfsarasota.org/Nonprofits/Nonprofit-Resources>)

Governance

- ❑ Board Members – List all members
 - ❑ Your board must have at least 3 members (Florida law)
 - ❑ If board consists of **related individuals** (family or joint owners), related individuals must make up less than **half** of board (IRS policy)
- ❑ Board Stats
 - ❑ Board Meeting Attendance – Enter total meetings held along with attendance rate for most recently **completed** fiscal/calendar year (the instructions within your profile contain a link to easily calculate this)
 - ❑ Terms and Contributions
- ❑ Are you currently seeking board members?
- ❑ Board Demographics

Management & Volunteers

- ❑ Management & Volunteer Statistics
 - ❑ Full-time
 - ❑ Retention rate
 - ❑ Part-time
 - ❑ Volunteers
 - ❑ Contractors
 - ❑ Development
 - ❑ Staff Evaluation Policies

- ❑ CEO/Executive Director – **If** this individual is not **paid** in **this position** (i.e., board member is **acting** as the ED but is not paid), enter **No Executive** in the **FIRST NAME** field and **Director** in the **LAST NAME** field

Programs

Must have at least one **local, active** program (ideally in existence for at least six months, but can be under development)

- ❑ Program Description – One paragraph maximum
- ❑ Program Budget – actual/estimated annual total
- ❑ Program Start Year
- ❑ Program Areas Served
- ❑ Population Served Description
- ❑ Outcome Questions (3)
- ❑ Projected/Actual Number Served

Financials (coming soon!)

- ❑ Projected Revenue and Expenses (For current fiscal/calendar year).
- ❑ IRS Form 990 (For last 3 years)
 - ❑ If IRS indicates that your organization has a religious, educational, or other Exemption (see your IRS 501(c)(3) Letter of Determination to verify this) or organization files the 990-N (Postcard), then skip this section, and go to the "Financial Statements/Audit" section where you **must** upload organization's Profit & Loss Statement **AND** Balance Sheet, **OR** Income & Expense Statement.
 - ❑ If organization was founded less than 3 years ago, upload the most recent years that you do have.
- ❑ Financials/Audit (For last 3 years)
 - ❑ If IRS indicates that your organization has a religious, educational, or other Exemption (see your IRS 501(c)(3) Letter of Determination to verify this) or organization files the 990-N (Postcard), you **must** upload organization's Profit & Loss Statement **AND** Balance Sheet, **OR** Income & Expense Statement.
 - ❑ If organization has an official Audit, please upload the Audit.

Profile Update Process

- Certain data and documents in your profile **expire at different times throughout the year** and must be updated.
 - A CURRENT profile **qualifies your organization** for opportunities: competitive grant programs, trainings, and the Giving Challenge
- Cross-reference your profile with the **checklist of key updates** to look for, along with new fields that you'll need to complete.
- **Set a recurring calendar reminder** (quarterly, monthly) to login and ensure you've not missed any key updates.
- After we've reviewed your profile, the **status** will update on your Admin Dashboard:

Participation Approval Status

Pending

Welcome to The Giving Partner! Thank you for registering to create your organization's profile. The next step is our review of your registration information. After our review, you will receive a notification email with your next steps so that you can begin creating your organization's profile.

Next Steps

- You'll receive an email from the Community Foundation with:
 - **Link to The Giving Partner website.** After you've registered, you will receive your login and password by email. Once your registration is verified, you'll receive an email notification indicating that you can begin creating your profile.
 - **Resources (including these slides)** to guide you.
- **Your completed profile must be Submitted by 5:00 pm on January 31st**
 - Through this date, our focus is on reviewing your new profiles!
 - If you do not **complete** your profile:
 - If you choose to resume at a later date, please know that much of the content you've entered will have expired and you will need to start over.


What's next?

Giving Challenge

- **All information coming in January 2020!**
 - All information regarding matching, theme, deadlines, etc. will be released in the January info sessions
- Here's what you need to know now:
 - Giving Challenge dates: **April 28-29, 2020**
 - GiveGab is our technology partner for the Giving Challenge
 - Email will be sent to your Executive Director or Board Chair to register for the Giving Challenge training, **so stay tuned**
 - **Get started creating your profile now so you're not rushing at the last minute in order to meet the deadline!**

QUESTIONS?

- **Questions about the Platform**

- **Click the blue chat bubble**  to connect with GiveGab's Customer Success Team, or
- Send an email to **CustomerSuccess@givegab.com**
- Monday-Friday, 8AM-5PM EST