Nonprofit User Guide

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Table of Contents: GivingMatters.com User Guide

Welcome to GivingMatters.com!

Thank you for initiating a GivingMatters.com profile. This in-depth database of information on the Middle Tennessee nonprofit community was created in 2004 by a group of local funders who saw a need for a current, transparent source of information to assist with charitable decision-making. Through their work, GivingMatters.com was developed to:

- Encourage more strategic giving from Middle Tennessee's philanthropic community;
- Increase the number of community donors by helping match donor interest with need;
- Increase the number of dollars given by identifying pressing needs; and
- Strengthen the nonprofit sector as a whole by strengthening individual agencies and encouraging collaborative partnerships.

In addition, GivingMatters.com can benefit nonprofits and the community by:

- Increasing your organization's visibility to existing donors;
- Introducing your organization to new donors;
- Telling your story at all levels: Program, Management/Leadership, and Finance;
- Linking donors and volunteers to your website;
- Simplifying application processes to participating funders (saving your staff time);
- Providing a free source of marketing, outreach, and public relations;
- Exposing smaller, lesser-known nonprofits to a broader range of the community;
- Helping high-profile nonprofits communicate the full scope of their service and success;
- Providing your organization with a self-assessment tool to drive internal improvements;
- Processing secure online donations made through GivingMatters.com at no additional cost to your organization. Processing fees apply.

While initiating a GivingMatters.com profile is a time-consuming process, the profile will be a valuable resource to you once completed, and the minimum requirement to maintain a Reviewed and Complete profile is to make quick updates on an annual basis. We allow up to 8 weeks for the completion of the profile from the start date.

Points to Keep in Mind:

- All information in a GivingMatters.com profile is provided by nonprofits voluntarily, though some information is *required*. Required sections will be noted in this User Guide, as well as by red asterisks within the profile.
- Nonprofits profiled in GivingMatters.com vary greatly by service area, size, and age; profiles will, and should, appear differently as a result. For example, start-up organizations will typically not have audited financials statements, as their small budgets cannot afford them and their small operations do not necessitate them. If your organization does not possess a requested document, **do not feel you must create one**. Instead, consider how the document might help your organizational advancement, and develop it in the future if your staff and board choose to do so.
- Donors have different interests and will consider different information when looking at nonprofit organizations (i.e. interest area, size of organization, life stage, management, and impact that their dollars will have on your organization). Because of this, it benefits your organization to keep all areas of the profile up-to-date, not just the required ones.
- Accurate, timely information about an organization provides the best tool for donors. If an organization's profile indicates gaps in a specific business category, it may present an avenue for the right donor to make an impact.
- **GivingMatters.com is *not* intended to be a nonprofit's sole guide for building and sustaining an effective organization.** Many resources are available in our communities including the Center for Nonprofit Management, your local United Way or, for arts organizations, the Tennessee Arts Commission or Metro Nashville Arts Commission.
- The presence of information on a GivingMatters.com nonprofit profile does not mean that The Community Foundation of Middle Tennessee (CFMT) endorses or supports that nonprofit organization. Information is self-reported by nonprofits, and CFMT does not guarantee the accuracy of any such data. However, CFMT staff seeks to include the most accurate data available through document verification and a due diligence process.
- Your organization will be assigned a Coach to be your contact for initial profile set-up as well as annual updates. To receive help as quickly as possible, contact your Coach directly.
- When the profile has been completed, it will be assigned an expiration date. You will receive email reminders before your expiration date. However, **you can provide updated information (such as new financial documents or board lists) at any time** during the year.

Documents and Data to Gather Before You Begin Filling Out Your Profile

To simplify the process of entering data into GivingMatters.com, gather the following documents and information before beginning the profile. **Note: Documents must be uploaded as PDF files to prevent unauthorized editing of the document.**

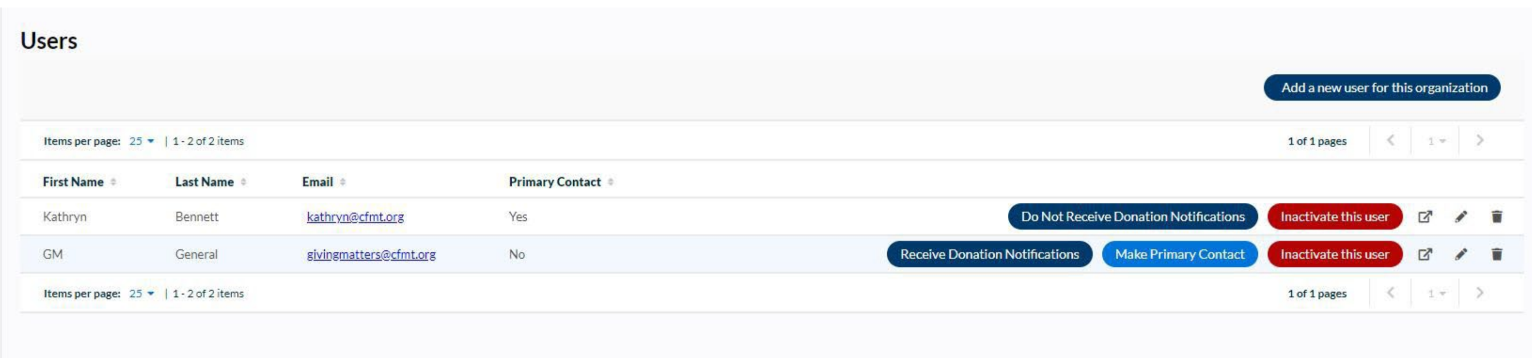
- Impact Statement, Needs Statement, Organizational History, Examples of Success, and any other messaging your organization might *already* be using for marketing or fundraising purposes
- Descriptions of your primary programs (up to 5) including brief overviews, target beneficiaries, and budgets
- Senior Staff biographies
- Current Board Roster including names and company affiliations
- Board Selection Criteria *(if they exist)*
- Conflict of Interest Policy (*if one exists*)
- Your organization's logo, along with any photos and/or videos that you would like to include on your profile

Part 1: Creating Your Profile

Logging In

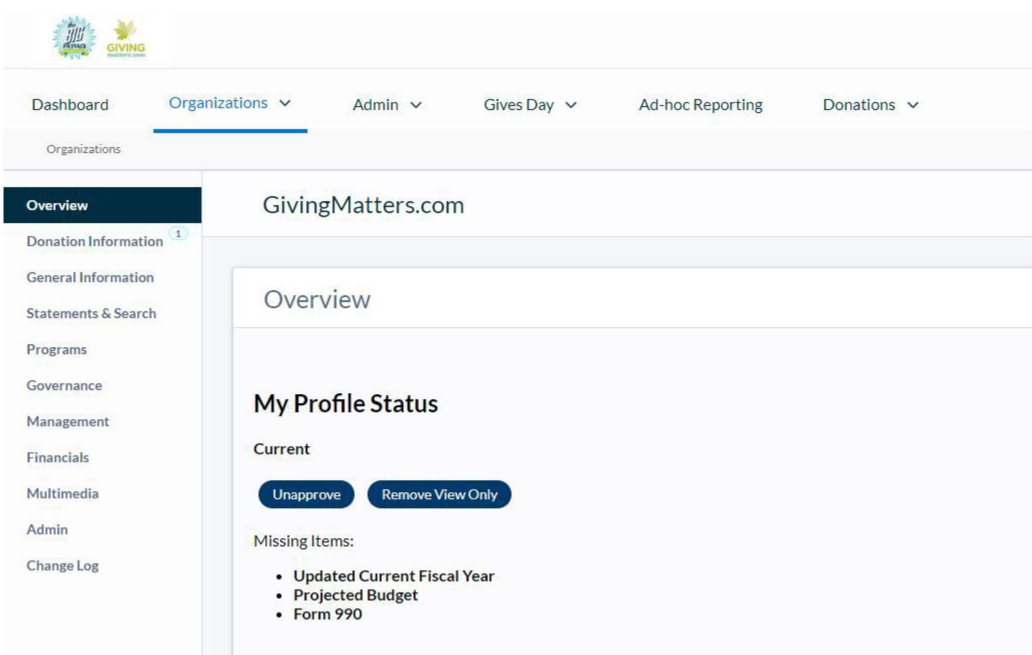
At www.GivingMatters.com, click Login -> Nonprofit at the top right corner of the screen. Enter your email address and password. **If you forget your password, enter your email address and click *Forgot Password*** to have a password emailed to you. You will then be able to reset it to the password of your choice. Passwords must be at least eight characters and include a capital letter.

After logging in, you have the option to change your password by clicking on the edit icon next to your name and email address in the Users section. If another person at your organization would like administrative access to edit your organization's profile, you can add them by clicking on the "Add a new user for this organization" button.



Nonprofit Home Overview

Once logged in, you are automatically redirected to your organization's Nonprofit Admin Dashboard. The left column of this page is where you can update your profile and view donation information.



Editing Your Profile
You can navigate through the sections of your profile using the menu bar on the left side of your screen. When you click on a section header, you will first be able to review all of the information entered about your organization. If you need to make any changes, you can do so by clicking on the green Edit button at the top of the page. With the exception of your Annual Update fields, any changes that you make and save will automatically be published to your public profile.

Speaking of Annual Update fields, you can locate a list of these items at the top of your dashboard (see Missing Items section in screenshot above). When you make updates to these fields, your Coach will be notified to review and approve them. Once you have completed your Annual Update, you will receive a notification letting you know that your profile has been renewed through the next year.

Please note, some sections will have subpages. For example, the Governance page has a Basic Info section and a Governance Details section. You can navigate between the two using the menu bar on the left side of your screen.

Required Fields
Certain fields are required. These can be identified by the red asterisk which appears next to the field name. **You must fill out each required field in order to have a complete profile.** If you are unsure how to answer a required field, contact your Coach for assistance.

Character Limits:
We recommend keeping your statements concise, as fields have a maximum character limit. The character limit is found in the help text above the field. If you exceed the maximum character limit, you will receive an error message when you attempt to save and will not be able to move on to the next section.

Uploading Documents:
You will need to upload several documents to your GivingMatters.com profile. Please review the following important notes on uploading documents:

- **Documents must be PDF files**. If your documents are not currently in PDF form, you can convert them using Adobe or a free online .pdf converter such as cutepdf.com or freepdfconvert.com, or simply scan a copy of a physical document.
- **Oftentimes your 990 will end up being a really, really large document.** If the document you are trying to upload is larger than 10MB, you might run into technical difficulties. Your Coach can assist you in resizing your files if you run in to this issue.
- **Not all documents that are requested are required**. Please do not feel that you need to create documents which are not required (such as Board Selection Criteria or Strategic Plans) solely for the purposes of the profile.
- **Required documents include the charitable solicitations permit or exemption letter, Form 990 and annual budget**. These documents are viewable by the public.

- **Please make every effort to convert and upload documents to your profile yourself.** If you receive an error message when trying to upload a document, double-check that it is a PDF and is a reasonable file size. If you're not able to convert and upload the document, contact your Coach.
- **Be sure to also edit the information connected to a new financial document, if applicable.** For example, when you upload a new annual budget make sure to also edit the fiscal year dates and projected income and expense numbers found in that section of the profile.

Saving Your Work

When you are finished making edits to a section of your profile, scroll down to the bottom of the page and click the Save button. With the exception of your Annual Update fields, any changes that you make and save will automatically be published to your public profile.

Speaking of Annual Update fields, you can locate a list of these items at the top of your dashboard. When you make updates to these fields, your Coach will be notified to review and approve them. Once you have completed your Annual Update, you will receive a notification letting you know that your profile has been renewed through the next year.

Profile Completion and Expiration Dates

When you have completed your GivingMatters.com profile for the first time, your Coach will email you information about how to use your profile for marketing, fundraising, and outreach purposes, and will provide you with graphics and links that you can place on your nonprofit website.

Your Coach will also email you the profile expiration date. Your profile will not disappear at this date. We give each profile an annual expiration date as a reminder to nonprofit and GivingMatters.com staff to review the profile for accuracy. The expiration date is usually six months after the end of the nonprofit's fiscal year, but may be adjusted upon request. You will be contacted by email the month before this annual deadline. When all outdated information has been updated and reviewed, the expiration date will be extended for another year.

Annual Profile Updates

While you are required to update your information at least once annually in order to maintain a Reviewed and Complete profile, **you may log on to your profile to update information as often as you'd like**. **The new budget, Form 990, Tennessee charitable solicitations permit or exemption letter, and Audited Financials (if applicable) should be uploaded to the profile as soon as they are available.**

When making updates to your profile, be sure to review all narrative information for accuracy. In addition, pay particular attention to the following sections when making annual updates:

- **General**
    - Is the contact information listed still accurate?
- **Governance**
    - Has your board roster changed?
    - Are the board chair name and term dates current?
- **Financials**
    - Are the current fiscal year dates with projected income/expenses reflected?
    - Is the current budget uploaded in PDF format?
    - Are the most recent Form 990 and Audited Financial Statements uploaded?
    - Is the current charitable solicitations permit or exemption letter uploaded?

Times to update your profile:
- When your new Board of Directors and officers are elected
- When your audit is received and Form 990 is prepared
- When you have a new Executive Director
- When your program outcomes and service numbers are complete
- When you apply for funding
- When you obtain a new charitable solicitations permit or exemption letter

Reviewed and Declined to Update Icons

The *Reviewed by Your Community Foundation* icon is placed at the top of every completed, up-to-date profile. This icon lets website visitors know that the information was reviewed by GivingMatters.com staff, and information is current.

If you do not update your organization's information within 90 days of the profile's expiration date, a *Declined to Update* icon will be placed on your profile and the *Donate Now* button will be removed. When the information is fully updated, the icon will be removed and the button will be restored.

We take this step to ensure that the site remains an accurate and thorough resource for users. **Falling under Declined to Update status does not mean your profile is being removed from the site. We will remove your profile from the site only at your request, or if the organization closes, merges, or has its 501(c)3 status revoked by the IRS.**

Online Donations

All up-to-date nonprofits may accept donations through their GivingMatters.com profiles. To make a secure online donation, your supporters can visit your profile and click the *Donate Now* button.

Any gifts made through your profile will be reflected in donation reports accessible by clicking *Donation Information* on your Nonprofit Home page. These reports include donor name, contact information, gift amount after fees, and any special instructions. **Reports are generated monthly, and generally become available during the first week of a new month.**

Donation reports allow you to thank your donors in a timely manner. **Donors receive automatically-generated tax receipts via email from CFMT. You should not send an additional tax receipt.**

Credit card gifts are processed and distributed to nonprofits on a monthly basis. Donations, once approved, are transferred to nonprofits via ACH direct deposit in the form of one lump sum. Some fees are assessed from each gift by payment processors and vendors. Donors are made aware of the following costs at the time of donation:

- Approximately 2.89% of each gift is assessed for credit card processing fees
- 2.8% per transaction is used to cover fees to online donation software provider CiviCore.

Gifts made through GivingMatters.com cannot be used to support a political campaign, purchase raffle tickets, pay for tickets or other activity that provides a benefit to the donor, pay for personal expenses incurred by a relative, or to provide any other private benefit to an individual.

Social Media

We want to connect with you on social media! If your organization has a Facebook, Twitter, Instagram, or YouTube presence, be sure to enter this information on the General Information page of your profile. Please also follow GivingMatters.com's social media pages, to get the latest nonprofit news and funding updates:

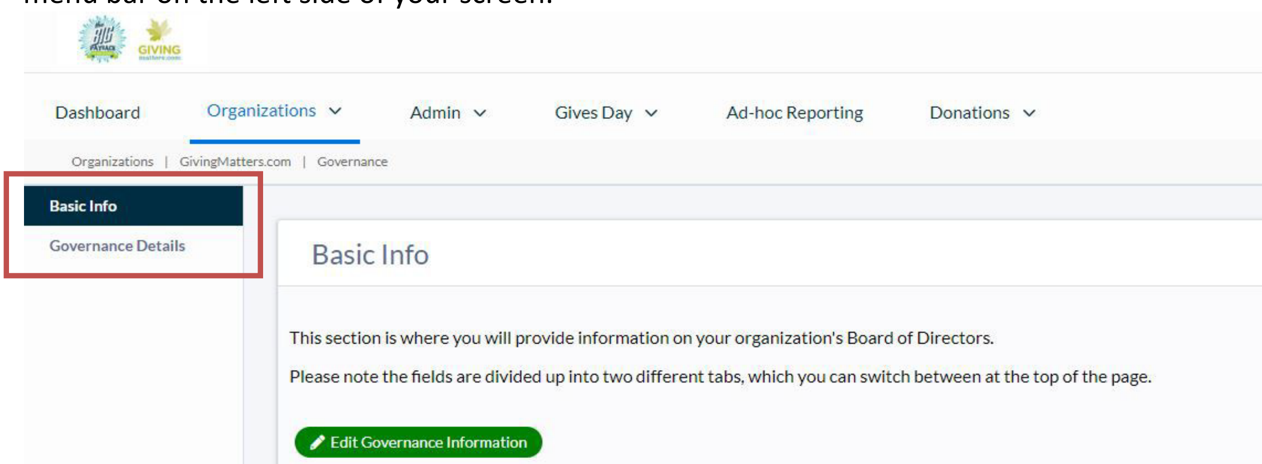
- Facebook: GivingMatters.com
- Twitter: GvngMattersCFMT
- LinkedIn: GivingMatters.com

Part 2: GivingMatters.com Profile Sections

The following pages will explain each section of your profile in detail. Many, but not all, fields of the profile are required. A required field is marked by a red asterisk.

Some sections include a *CEO/Executive Director/Board Comments* box at the bottom. This allows you to explain any of the information on the page, include additional information not asked elsewhere in the profile, or proactively answer any potential questions donors may have.

Please note, some sections will have subpages. For example, the Governance page has a Basic Info section and a Governance Details section. You can navigate between the two using the menu bar on the left side of your screen.



Section #1: General Information

Before giving you access to your profile, the GivingMatters.com staff will complete certain fields, using the information provided in the Nonprofit Information Form. If any of this information appears incorrect, please make the necessary updates.

Complete all remaining fields which are relevant to your organization, including any previous names, or any DBA (Doing Business As) names that are different from the legal name on your IRS letter.

You will notice there are several fields for addresses. GivingMatters.com is meant to showcase the nonprofit work being done in Middle Tennessee, so if you are a national organization, be sure to list a Tennessee address in one of the sections. The Grant Address is where official communications from The Community Foundation will be sent, so be sure that it is accurate.

Section #2: Statements and Search Criteria

Please draft statements in Word or Notepad then copy/paste the information into the profile. If you draft statements in the profile without saving your work frequently, you run the risk of the site timing out. To ensure that statements appear correctly, add bullets or any special formatting **after** you paste the statement into the box. If you are copying and pasting text from an existing web page or document, we recommend pasting the text into Notepad first.

Impact Statement: This should inform donors of the practical purpose of your organization and should refer back to your mission statement. The impact statement should answer the questions, "What immediate effects will the organization make on the community/individual?" and "What community needs will the organization meet?"

Needs Statement: Communicating organizational needs to donors is essential for sustaining your organization. This section should communicate your needs clearly and concisely. Complete this statement by listing 3-5 of the most pressing needs of your organization. Each organization has the discretion to list small and/or large needs, and to determine their order of priority.

Organizational Categories – NTEE: Nonprofit organizations cover a wide range of activities, services, and programs. The National Taxonomy of Exempt Entities (NTEE) is a definitive classification system for nonprofit organizations recognized as tax exempt under IRS Code 501(c)3. For more information about NTEE codes, and to choose the most appropriate one to describe your organization, visit http://nccs.urban.org/classification/NTEE.cfm.

Keywords: These are words you might use if you were doing an online search for your agency, including your organization "type" (animals, youth, housing, etc.), former names, acronyms, or common misspellings of your organization's name. Both single words and short phrases may be used. C*ommunity service* and *after school* are examples of short phrases. Enter each word separated only by one space. **You do not need to use commas or semi-colons.**

It is important to give careful thought to the selection of these keywords. View the selection of keywords as answering the question "what word, words, or group of words identify my organization, besides its name", and "if I knew nothing about my organization, what are likely words someone would use to find organizations like this one."

Statement from the CEO/Executive Director: Take this opportunity to give an insider's perspective about your organization's uniqueness. You can add or emphasize what makes your organization important and distinctive. When developing the Executive Director's Statement, think about:

- How can you best sell your organization to donors visiting GivingMatters.com?
- When you are sitting with a donor, what are the key issues you tell them about?
- What about your organization is unique, distinctive, strong, and defines its importance?
- How can you communicate your passion about the work that you do?

- You might want to provide a short vignette or human-interest story showing donors how your organization benefits individuals and the community.

Statement from the Board Chair/President: From the board perspective, discuss the successes and challenges facing your organization. Include in your statement how challenges are being addressed.

Section #3: Programs

Programs: You must enter at least one program, but the site will display up to five on your profile. They will appear in the order entered. You can use the icon with three horizontal lines next to the Program Name to reorder your programs. If you would like to enter more than five programs, you can choose which five will display by utilizing the "Make this Program Inactive" button. **Please draft descriptions in a word processing program or Notepad and copy/paste them into GivingMatters.com to avoid timing out.**

To add a new program, click on the "Add New Program" button. In the window that appears, scroll down to see all of the fields. While not all of these fields are required to be completed, we strongly recommend completing the sections on evaluation of program success.

Program Name: What is this program called? If it doesn't have a name, how would you refer to it when speaking to a donor?

Program Description: Describe, in 1,000 characters or less, a primary program.

Program Budget: Give donors an approximate idea of what it costs to run this program annually. **Do not enter symbols** ($ or ,), only a number. If your organization has unified budgeting and does not budget by program, you may approximate the budget numbers by dividing total operating expenses by the percent of organizational resources (staff, volunteers, funding) going to this program area.

Class Code, Class Subcode, Target Population Served: From the drop-down menus, choose both a type of program, and the primary population(s) served. Select up to three target beneficiary groups for each program.

Program Success: In these sections, describe long-term and short-term changes that will result from the program. Tracking should be plausible but may require use of public data in some cases. (Ex: Of women completing classes, 70% will deliver healthy, full-term babies). Describe how you know what is working and what is not working with the program. Report the actual tools used to measure or track progress; these may include surveys, counselor notes, interviews with consumers or persons impacted by action, test scores, etc. (Ex: Random drug screening for XYZ substances; Women self-report changes in diet and exercise; Birthing scores and baby's weight as reported in hospital records). Provide information or data that accurately reflects how the program is doing. Provide a case scenario or examples of changed behaviors or testimonies of impact. Statistics are helpful.

Note: Programs should be added individually. The fields in the pop-up box should all be used to describe a single program. Click *Save* to save information on your first program.

Additional tips for completing the Programs section:

- Give evidence of the need that your program meets in the community including information from studies or statistics.
- Address service capacity (Ex. number of shelter beds, number of performances annually, number of participants, number of rescued animals or spayed/neutered animals, or number of housing units developed/renovated).
- Mention previous year actual totals (Ex. In 2016, the organization provided outpatient substance abuse treatment to 100 adolescents. Of those, 65 completed treatment, and 48 remained clean and sober for six weeks following treatment.)
- Add a more detailed description of the population served if *Target Beneficiary Codes* do not accurately reflect who you serve.
- Articulate your program goals, focusing on outputs (things you can count) and outcomes (changes in knowledge, skills, or behavior). What are you trying to accomplish? How do you measure success?

Section #4: Governance

Board Chair: Enter all requested information for the Board Chair and Co-Chair, if applicable.

Board Members: On the Governance Details page, click on the “Add Board Member” button to enter information for a given member, including Name, Company Affiliation, and Board Status (Voting, Nonvoting, or Exofficio). If the board member is not affiliated with a company, list “Retired" or "Community Volunteer."

Number of times full board meets in a year: Enter the number of times your full board meets each year.

Board Meeting Attendance: Enter the average percentage of board members in attendance during the past fiscal year.

Board Term Lengths: How many years is a new board member asked to commit to service? A typical board term length is three years.

Board Term Limits: How many terms can a board member serve before they leave the board as a matter of regular business practice? Boards typically allow for two or three terms, depending on the length of the term.

Board Demographics: Enter a number of board members represented in each field of requested demographic information. If a board member does not wish to disclose gender, choose “not specified.”

Constituency Includes Client Representation: Does a board member represent your target population served? For example, if your organization serves veterans, do one or more veterans serve on the board?

Percentage of Board Members Making Monetary Contributions: Enter the percentage of board members who made personal financial contributions to the organization during the most recent fiscal year.

Percentage of Board Members Making In-Kind Contributions: Enter the percentage of board members who made non-monetary donations. Examples include pro-bono work or volunteering in one of the nonprofit's programs.

Additional Boards and Committees: Boards can be categorized by type (governing, advisory, youth, constituent, other) and by board members' geographic representation (local, national, regional, international). You may enter more than one board, as well as advisory committees.

Written Board Selection Criteria Document: Has the organization created such a document? Answer Yes, No, or Under Development.

Written Conflict of Interest Policy Document: Indicate whether or not your organization has a written conflict of interest policy that is reviewed on a regular basis. Answer Yes, No, or Under Development.

Section #5: Management

Staff Counts: Enter the number of staff in each category requested. If you'd like to do so, enter your staff retention (as a number), following the help text instructions.

Senior Staff: Click the "Add Senior Staff" button to enter the names and experience of your senior staff team. Members must be added and saved individually.

Plans, Policies & Procedures: The remaining fields on this page ask questions about several organizational documents that your nonprofit may or may not have in place. These documents are not required. You are simply required to answer that Yes, your organization has created this document, No, it has not, or it is Under Development.

Evaluation: Indicate whether your organization's Executive Director and staff are formally evaluated against goals and objectives. If yes, indicate the frequency of these reviews.

Affiliations, Accreditations, and Awards: If applicable, choose the appropriate affiliations, accreditations, and/or awards from the drop-down menus. If you do not see a particular affiliation or accreditation listed, contact your Coach to have it added.

Management Comments: This section may be used to discuss challenges your organization is

Facing, and solutions you are considering or opportunities that you currently exploring. You could also use this section to provide details regarding anticipated completion dates of documents you indicated were *Under Development*.

Section #6: Financial Information

Current Financials: **When an amount is asked for, enter only the number. Do not use symbols ($ or ,).**

IRS Letter of Determination: This document is required to initiate a profile, and is uploaded by your Coach. If your organization changes its name with the IRS, send a copy of your new IRS letter of determination to your Coach.

State Charitable Solicitations Permit: **A current charitable solicitations permit or letter of exemption** from the Tennessee State Division of Charitable Solicitations and Gaming **is required** for any nonprofit organization soliciting funds within the state of Tennessee.

- Your state sales tax exemption letter is **not** the document we need. If you have any questions about this document or the registration process, contact the Division of Charitable Solicitations at 615-741-2555 or visit http://state.tn.us/sos/charity/index.htm.
- If you select *Yes*, upload a copy of the permit.
- If you select *Exempt,* upload a copy of the exemption letter.
- If you select *Under Extension,* please indicate the date that your extension was granted through.
- Anytime you upload a new Charitable Solicitations letter, be sure to edit the dates so that they match what is listed in the document.

Form 990: Your organization's IRS Form 990s are required documents. These documents should be copies of those filed with the IRS, and should be signed by your Executive Director or CEO.

- All nonprofit organizations are required to file this form, though the type of 990 that an organization files is dependent on its budget size. If your organization files the 990-N, or e-postcard, upload a copy of this electronic document or the receipt of confirmation emailed to you by the IRS. A copy of your 990-N may also be found here: https://apps.irs.gov/app/eos/
- To correspond with nonprofit accounting practice, **all financial documents should be labeled according to the fiscal year end date**. A Form 990 for 2016-2017 should be labeled on the profile as "2017," even though the document itself may have "2016" at the top.

Audit Document: Upload all audits or financial statements to correlate with uploaded Form 990s. Audits must be in final format and signed by the auditor on official letterhead, and must include Audit Notes.

Projected Budgets & Other Documents: Upload a copy of the organization's projected budget for the current fiscal year, showing estimated projections of revenue and expense categories.

Be sure to save your budget as a PDF before uploading. **Once the new budget has been uploaded, adjust the fiscal year dates and projected income and expense numbers to match what is listed in the document.**

Previous Fiscal Period Financial Information: This section is completed by your Coach, using the prior year financial data found in the Form 990 and audit you provide. If you would prefer that one document be used over the other, inform your Coach, but please note that the same document (Form 990 or audit) will be used to complete this section *every* year, for the purposes of consistency.

Section #7: Multi-Media

We encourage you to utilize photos and videos to share the exciting work being done by your organization. You can add an unlimited amount of photos and YouTube videos, however best practice would be to include just a few photos and videos, as to not overwhelm users that visit your profile. You can also upload your organization's logo.

Any videos that you would like to display on your profile must be uploaded to YouTube and must be publically viewable. Videos are added by copying and pasting the YouTube URL.