

Top 5 Tips from GivingEdge Profile Reviewers



The purpose of this handout is to help nonprofits build the best GivingEdge profiles possible and ensure all profiles meet the necessary criteria to participate in the Sacramento Region Community Foundation's Big Day of Giving in 2019! Have questions about GivingEdge? Email the reviewing team at givingedge@sacregcf.org!

1. OVERVIEW TAB | Leadership vs. Background vs. Needs Statements

Statement	Description	Recommended Length	Author	Common Errors
Leadership	Addresses current and potential donors about organization's impact and importance and why donors should support you	3-4 paragraphs – (or a length that best fits your needs) a personalized greeting and sign-off, as if writing a letter	CEO, Board Chair, Executive Director, etc.	- Missing - No attribution - Incorrect content
Background	Explains organization history, evolution, scope of work	2-3 paragraphs (or a length that best fits your needs)	Team Captain	- Missing - Revision
Needs	Addresses organization's current financial needs, funding goals, and what program funding supports	1-2 paragraphs (or a length that best fits your needs)	Team Captain	- Missing

2. PROGRAM TAB | Complete all 6 sections for at least one program.

Current and potential donors want to know what your organization is working on! Ensure that you complete all sections for at least one program.

Section	Description
1. Active	Is your program currently active? If a program has ended (especially for returning organizations), deselect this box. Only active programs will appear on your published profile.
2. Program Name*	What is your program called?
3. Budget*	What is this program's budget? If there is not budget for a program, please enter 0.
4. Program Description*	What is the scope, outreach, and description of this program?
5. Program Successes	What are the outcomes, successes, and major accomplishments of this program? Who benefits from this program? Has this program received any awards or recognitions?
6. Demographics served*	Who is the target demographic for this program's outreach? Select up to five (5) demographics that reflect this information. (Added in 2018)

***This is a required field.**

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3. MANAGEMENT TAB | Executive Director field is a required field.

If your organization does not have an Executive Director, please complete with your **board chair, most senior staff member, or someone with similar responsibilities**. If your management structure is different from what is shown on your profile, please explain in the 'Management Structure Narrative' section.

Executive Director Fields	
Required	Recommended
*First Name	Prefix
*Last Name	Suffix
*Email	Ethnicity
*Gender	Age

The screenshot shows the 'Executive Director' form with the following fields: Prefix (dropdown), Suffix (dropdown), *Gender (dropdown, highlighted), Ethnicity (dropdown), *First Name (text input, highlighted), *Last Name (text input, highlighted), *Email (text input, highlighted), and Age (dropdown). A 'Management Structure Narrative' link is also visible.

4. GOVERNANCE TAB | Board Member counts must match demographic counts.

When listing counts for race/ethnicity and gender under "additional board information," they must total up to the amount of board members listed (including your board chair). For example, if you have 15 board members and 1 board chair listed (16 total members), then the demographic and gender counts on your profile must total 16 (see example at right).

The screenshot shows the 'Demographics' section with the following counts: African American (4), Caucasian (12), Native American (0), Not Specified (0), and Other (0). A callout box states: **Demographics: 4+12=16**. The 'Gender' section shows Female (7) and Male (9), with a callout box stating: **Gender: 7+9=16**.

5. FINANCIALS TAB | Provide your two most recent years of 990 or 990EZ tax forms.

The Sacramento Region Community Foundation can only accept **Form 990 or 990EZ** as forms of financial reporting. The Foundation no longer accepts 990N postcards or any alternate form of reporting.

Financial Document Requirements	
Fiscal Year	Calendar Year
2016-17	2016
2017-18	2017
	2018 (if available)

Enter the correct financial numbers.

Please use the following table to report your financial numbers, found under the 'Financials Tab':

Financials Section Line	Tax Form 990	Tax Form 990EZ
Administration Expenses	Part IX, Line 25, Column C	Part I, Lines 10-16 (amounts will vary based on what items you assign to which category)
Fund Raising Expenses	Part IX, Line 25, Column D	
Program Expenses	Part IX, Line 25, Column B	
Total Assets	Part I, Line 20 end of year	Part II, Line 25 end of year
Net Assets	Part I, Line 22 end of year	Part II, Line 27 end of year
Total Liabilities	Part I, Line 21 end of year	Part II, Line 26 end of year
Total Expenses	Part I, Line 18 current year	Part I, Line 17
Total Revenues	Part I, Line 12 current year	Part I, Line 9