GIVING matters.com

an initiative of The Community Foundation of Middle Tennessee

Nonprofit User Guide

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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 you are only required to make quick updates (30 minutes to an hour) on an annual basis following the completion of your profile. 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 Guidebook, 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).
- 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.

<u>Documents and Data to Gather Before You Begin</u>

To simplify the process of entering data into GivingMatters.com, gather the following documents and information before beginning the profile. **Note: Document file sizes are limited to 10MB, and 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 one photo and/or video that you would like to include on your profile

Part 1: Creating Your Profile

Logging In

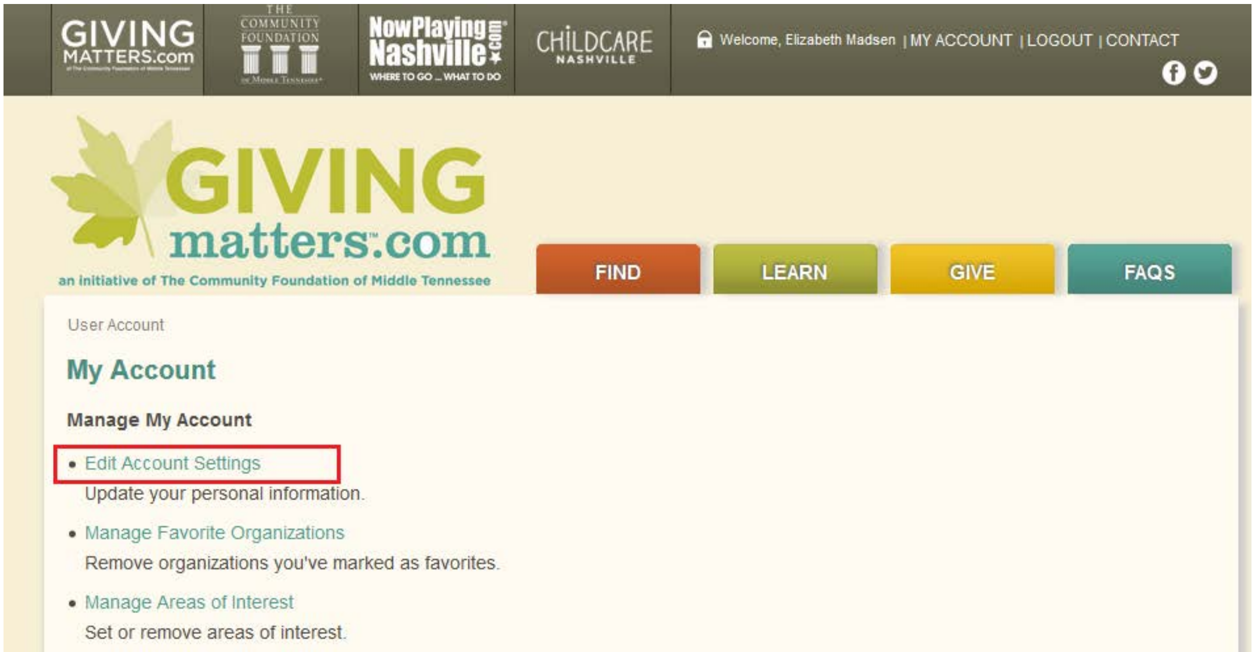
By this point, you should have received an email containing your GivingMatters.com sign-in information. If you have not received this information, email your Coach.

At www.GivingMatters.com, click the white *Sign In* link in 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 your password emailed to you.

After logging in, you have the option to change your password by clicking the *My Accoun*t link at the top of the page.

Then click *Edit Account Settings*.



If another person at your organization would like administrative access to edit your organization's profile, use the "Contact Us" link to submit a request to add the user.

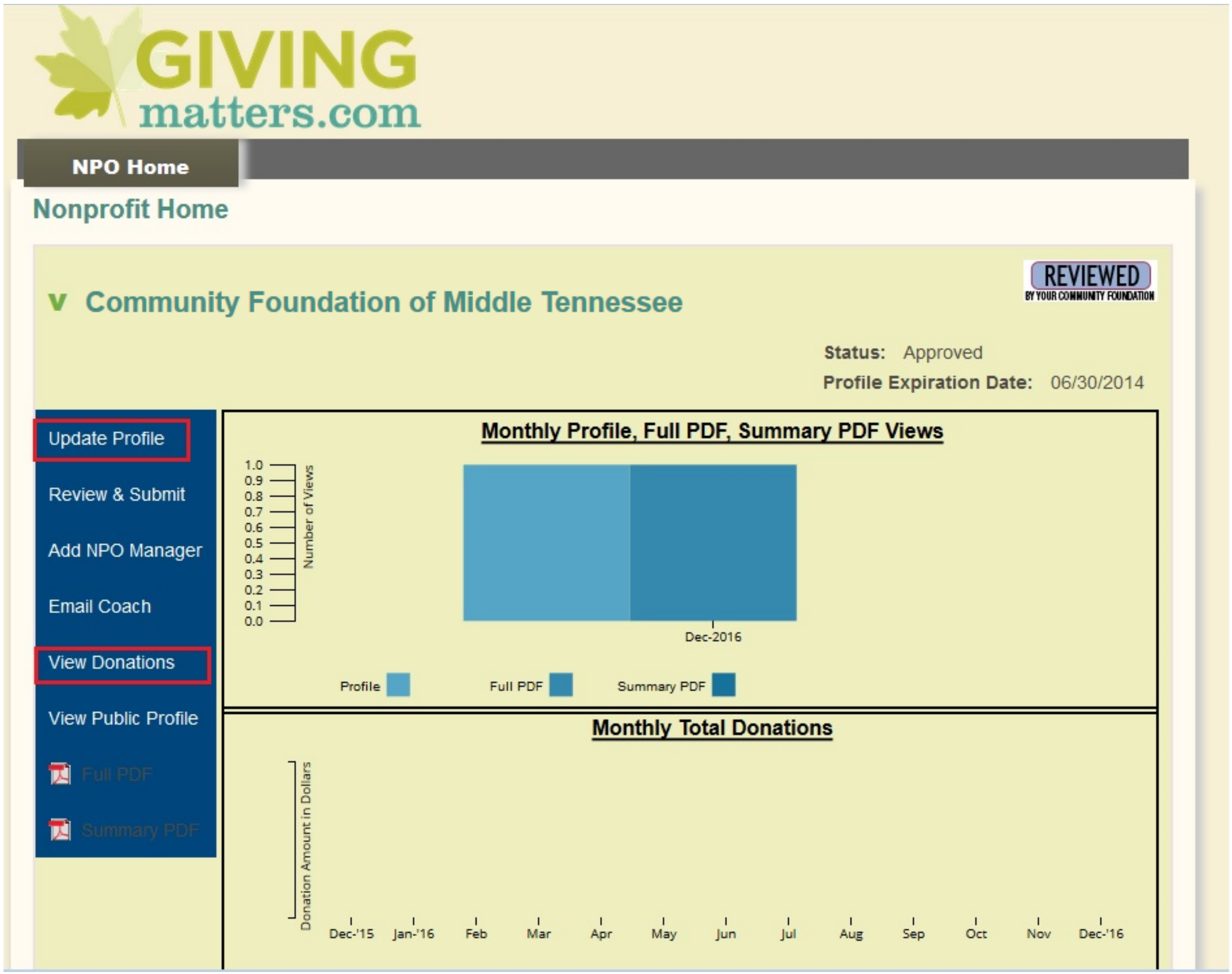
Nonprofit Home Overview

Once logged in, you are automatically redirected to the Nonprofit Home page. The left column of this page is where you can update your profile and view financial donation reports. A dashboard of graphs provides you with an overview of your profile and its traffic:

- The *Monthly Profile, Full PDF, Summary PDF Views* graph shows a breakdown of views of each of these items in the current month.
- The *Monthly Total Donations* graph reflects donations processed through the GivingMatters.com *Donate Now* button in the last twelve months.

To display detailed donation reports: Click on *View Donations* on the left-hand menu. Reports are posted at the beginning of each new month. If your organization does not receive a gift in a given month, you will see no report for that month.

To edit profile: Click on *Update Profile*.

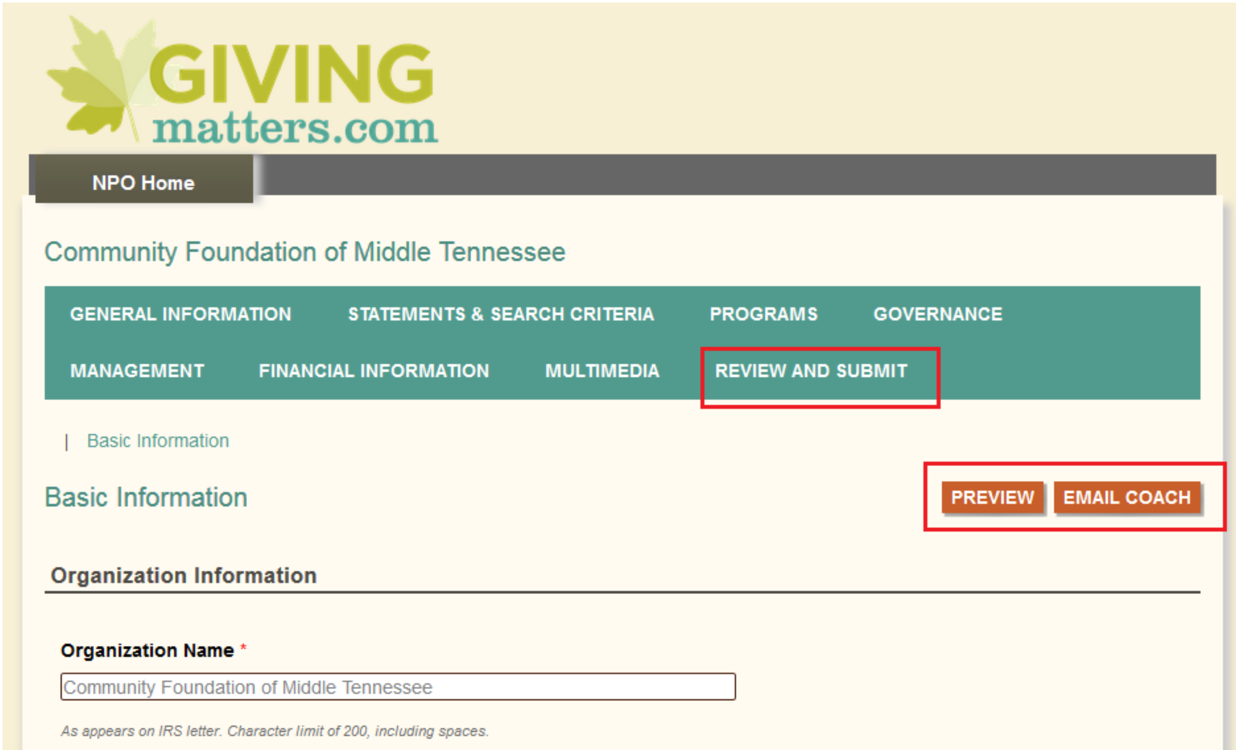


Editing Your Profile

You can navigate through the sections of your profile using the teal headers on the top of the page. **Moving from section to section using these headers will automatically save any changes**. The *Save* and *Save and Continue* buttons at the bottom of each page will also save your progress.

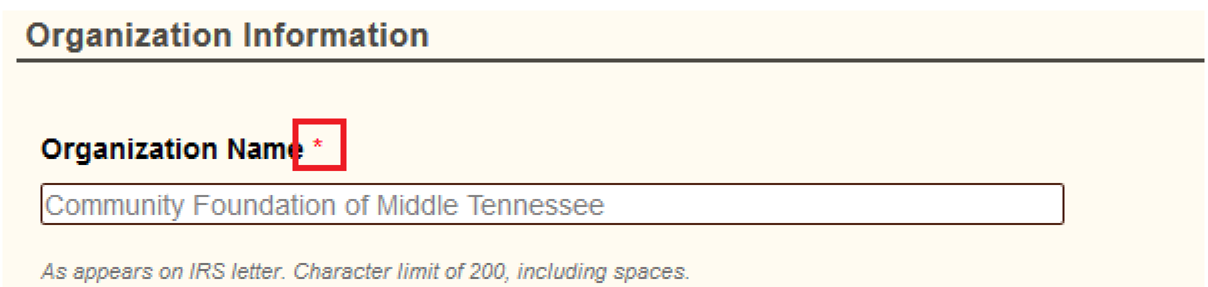
At the top of the screen, note the *Preview* and *Email Coach* buttons. Click on the *Preview* button at any time to view the public version of your profile as it will appear with the changes you have made. Click the *Email Coach* button to contact your Coach.

When you are ready for your changes to be reviewed by your Coach, click on *Review and Submit* at the top of the page. Clicking this button lets you review all of the edits you have made before sending the profile to the GivingMatters.com staff to be published.

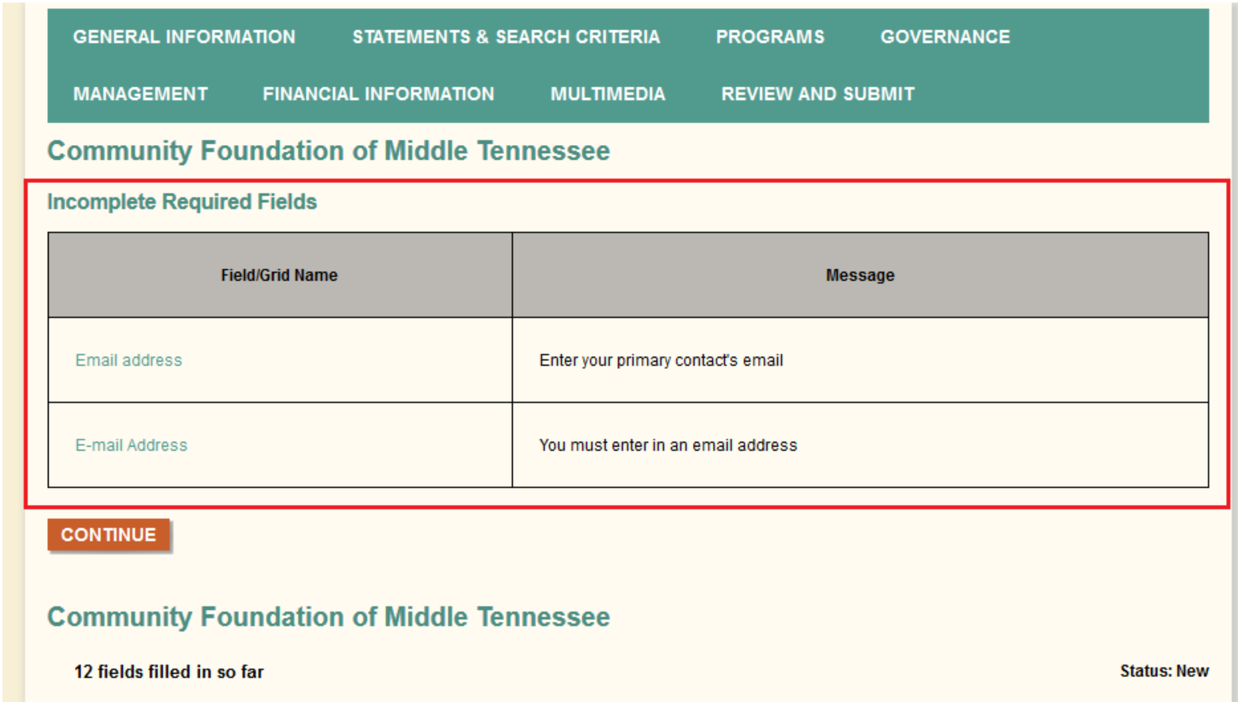


Required Fields

Certain fields are required. These can be identified by the red asterisk which appears next to the field name. **You must complete each required field before you can submit the finished profile.**

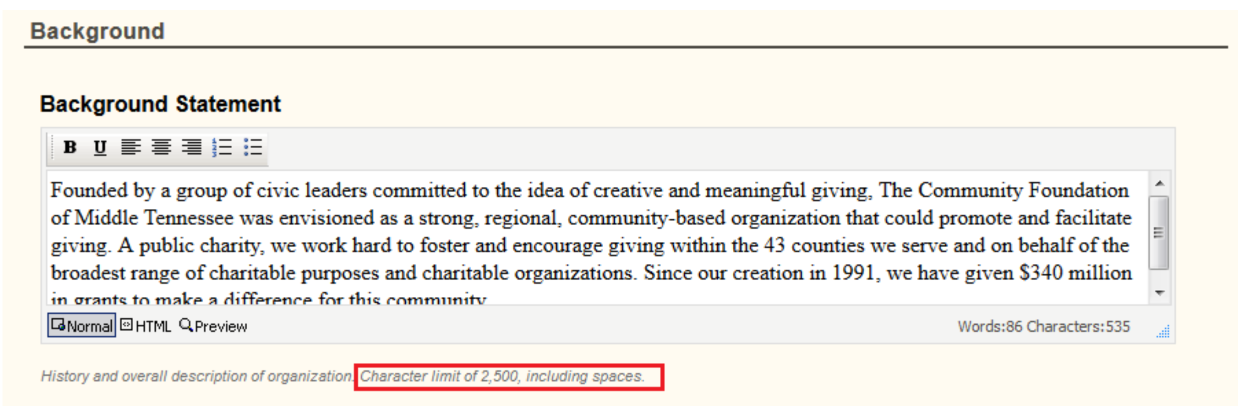


Incomplete required fields are listed at the top of the *Review and Submit* page. To complete a required field, click on the field name, fill in the required information, then click *Review and Submit*.



Character Limits:

We recommend keeping your statements concise, as fields have a maximum character limit. The character limit is found in the help text underneath 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.

- **Documents must be smaller than 10MB** to upload successfully. While this is a very large file size, some older versions of Adobe may create files that are too large. Contact your Coach if you encounter this problem.
- **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 smaller than 10MB. If you're not able to convert and upload the document, contact your Coach.

Saving Your Work

You can save your work in one of three ways:

- The *Save and Continue* button at the bottom of the page will save your changes and move you to the next page **IF** the page you're leaving is complete. If you have not yet completed all required fields on that page, the *Save and Continue* button will not let you move to the next page without first completing those required fields.
- The *Save* button at the bottom of the page will save whatever changes you have made (whether or not the page is complete), allowing you to then either log out and return later, or to move to another page using the headers at the top of the page.
- Clicking another header at the top of the page will automatically save any changes made, and will take you to another profile page.

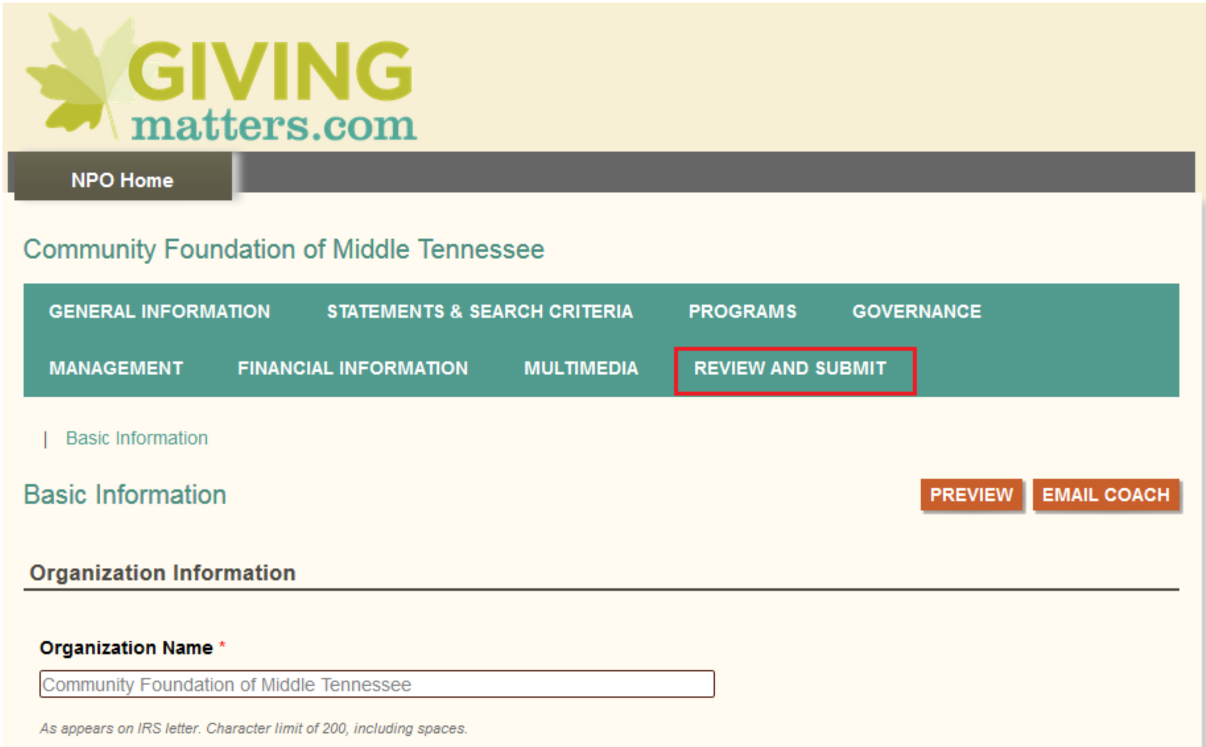
We recommend navigating through the profile via the headers at the top rather than the *Save and Continue* button.

For security reasons, **the system automatically logs you off after 30 minutes of inactivity**, resulting in the loss of any unsaved work. Activity is defined as saving a change or moving between pages of the profile. Simply typing in a field is not considered activity. Meaning even if you have been entering text on one page for 30 minutes, you will lose that work if you have not saved. **TIP: Click the *Save* button at the bottom of the page frequently to prevent the loss of any unsaved work.**

Submitting Changes for Review

Saving your work saves changes to the profile internally only. You will see your changes when you are logged in to your profile; however, **edits will not be reflected on the public website until they are submitted by you, and published by your Coach.**

When you have completed all required sections and wish for them to be published to your public profile, click on *Review and Submit* at the top of the page.



From here, click *Send to Foundation* to submit your work to be approved and published. **You must click on *Send to Foundation* to notify the staff that you have changes for review.**

When you submit your changes, your Coach will be notified that you have completed work on the profile, and are ready for your changes to be published. **Your Coach reviews, approves, and publishes nonprofits' changes in the order that they are submitted. Generally, your updates**

will become public within one week. During peak times, however, (such as before a major grant deadline), it may take several days for your changes to be processed. You will receive an automatically generated email when your profile edits have been published.

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 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. Your profile status and expiration date are viewable on the Nonprofit Home page.

Annual Profile Updates

While you are required to update your information at least once annually before this expiration date, **you may log on to your profile to update information as often as you'd like**. **The new budget, Form 990 and Tennessee charitable solicitations permit or exemption letter should be uploaded to the profile as soon as they are available. Remember to submit your changes, via the process detailed above, any time you edit the profile.**

When making updates to your profile, 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. **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 *View Donations* 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:

- 2.89% of each gift is assessed for credit card processing fees
- $3.25 covers fees to online donation software provider Kimbia, and the cost of processing each donation.

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

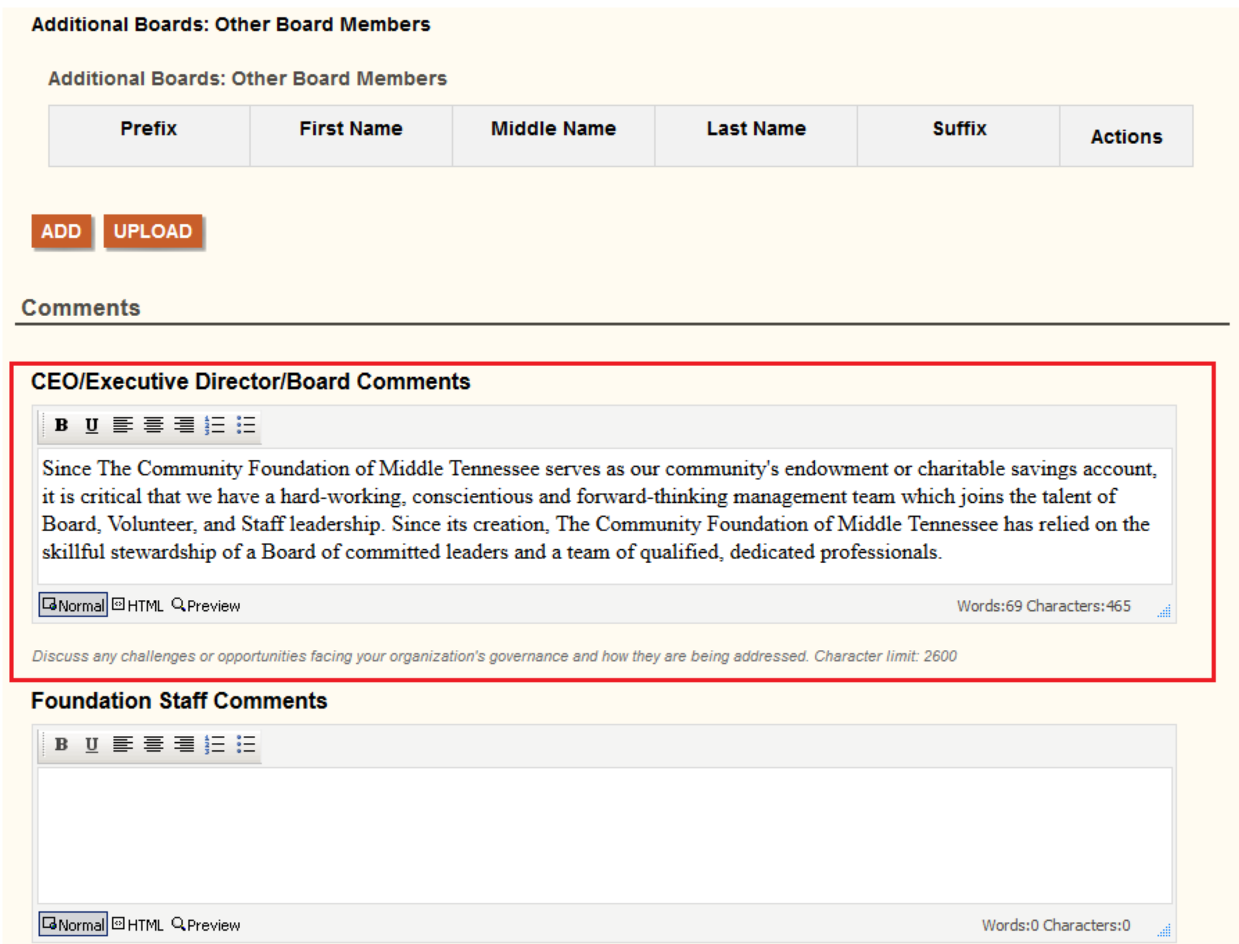
We want to connect with you on social media! If your organization has a Facebook and/or Twitter presence, be sure to enter this information on the General Information page of your profile. Please also follow GivingMatters.com's social media pages, to get the latest nonprofit news and funding updates:

- Facebook: GivingMatters.com
- Twitter: GvngMattersCFMT

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. Thanks to a partnership with GuideStar.org, some of your organization's information may automatically transfer into your GivingMatters.com profile when it is created by the GivingMatters.com staff. Even if a section appears complete, we encourage you to review it for accuracy. Each month, the GivingMatters.com staff sends updates to Guidestar. If the GivingMatters.com profile was updated more recently than the Guidestar profile, changes will be uploaded to Guidestar. **If the Guidestar profile was updated more recently, no changes will be made.**

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.



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, contact your Coach.

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.

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 timing out after 30 minutes. To ensure that statements appear correctly, add bullets or any special formatting after you paste the statement into the box.

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.”

Geographic Area Served: Select all that apply.

- *Tennessee* – Organization serves the entire state.
- *International* – Organization serves foreign countries.
- *National* – Organization serves states in addition to Tennessee.
- *TN* – Organization serves counties listed on the profile. You may select more than one county.

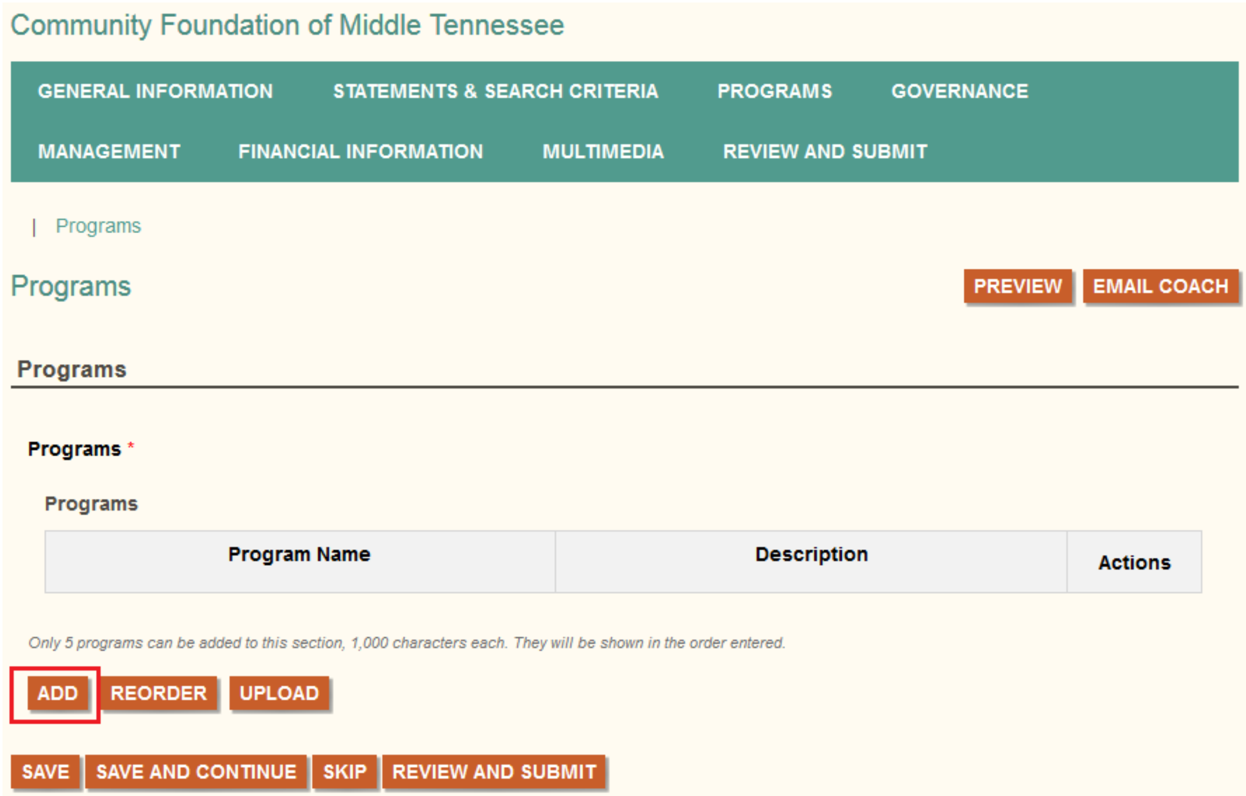
Statement from the CEO/Executive Director: Take this opportunity to give an insider's perspective about your organization's uniqueness. You can add or emphasize what makes your organization important and distinctive. When developing the Executive Director's Statement, think about:

- 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 may add up to five programs in this section; they will appear in the order entered unless you reorder them. Please draft descriptions in a word processing program or Notepad and copy/paste them into GivingMatters.com to avoid timing out.
To add a program, click the *Add* button.



In the pop-up 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.

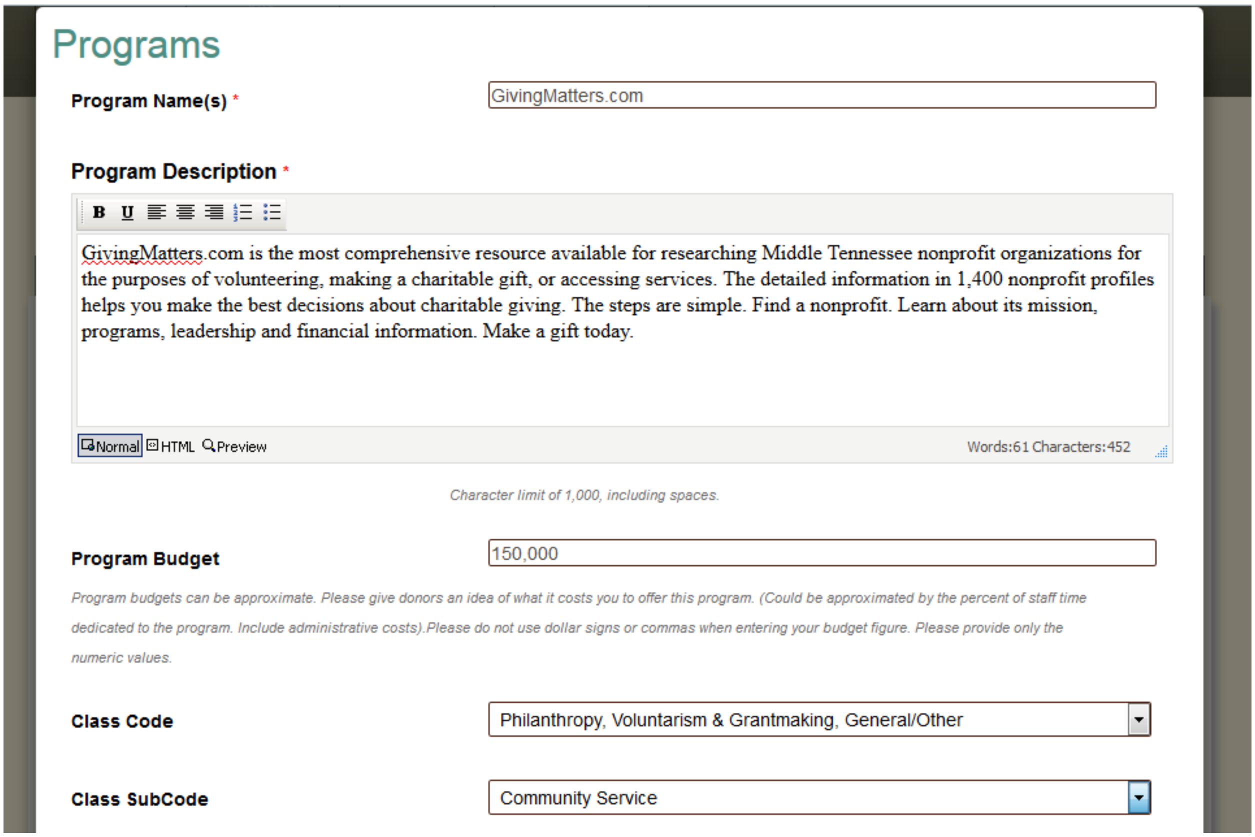
Program Name: What is this program called? If it doesn't have a name, how would you refer to it when speaking to a donor? There is a 150 character limit.

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

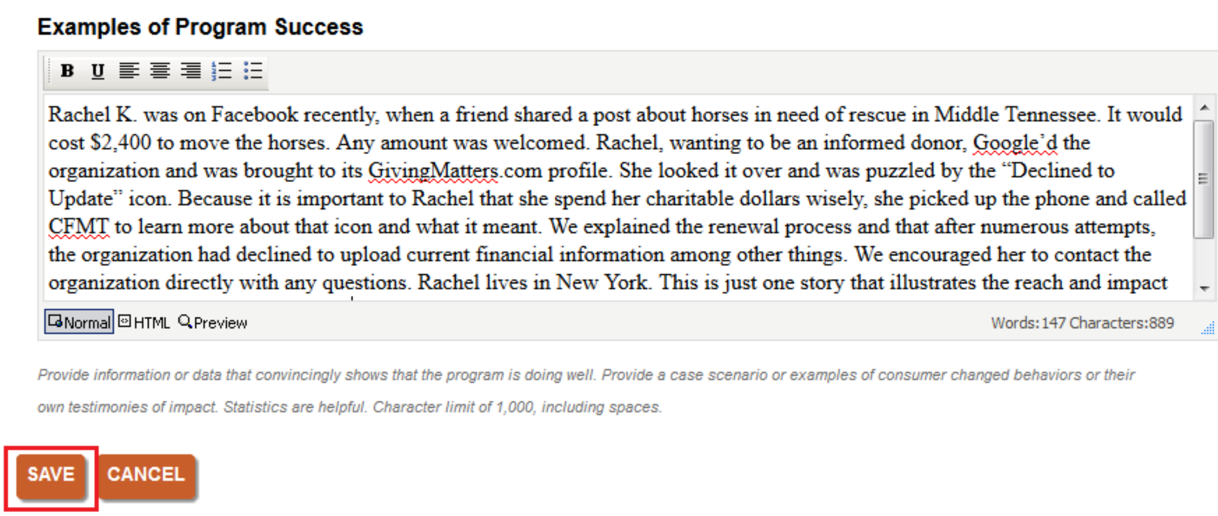
Program Budget: Give donors an approximate idea of what it costs to run this program annually. **Do not enter symbols** ($ or ,), only a number. If your organization has unified budgeting and does not budget by program, you may approximate the budget numbers by dividing total operating expenses by the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



Click *Add* to enter additional programs.

Programs will appear on the public site in the same order that is reflected on the administrative site. To change which program shows up first, click on *Reorder.*

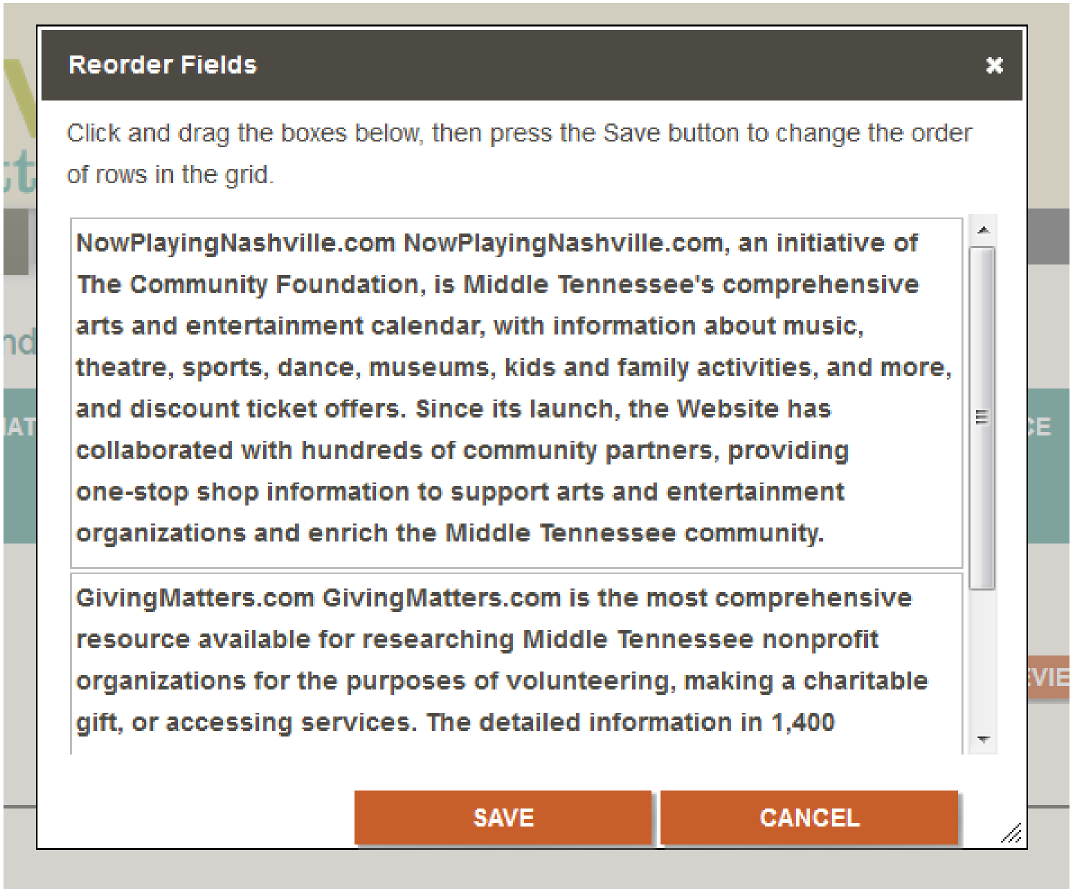
Programs

Program Name	Description	Actions
GivingMatters.com	GivingMatters.com is the most comprehensive resource available for researching Middle Tennessee nonprofit organizations for the purposes of volunteering, making a charitable gift, or accessing services. The detailed information in 1,400 nonprofit profiles helps you make the best decisions about charitable giving. The steps are simple. Find a nonprofit. Learn about its mission, programs, leadership and financial information. Make a gift today.	Edit Delete
NowPlayingNashville.com	NowPlayingNashville.com, an initiative of The Community Foundation, is Middle Tennessee's comprehensive arts and entertainment calendar, with information about music, theatre, sports, dance, museums, kids and family activities, and more, and discount ticket offers. Since its launch, the Website has collaborated with hundreds of community partners, providing one-stop shop information to support arts and entertainment organizations and enrich the Middle Tennessee community.	Edit Delete

Only 5 programs can be added to this section, 1,000 characters each. They will be shown in the order entered.

ADD REORDER UPLOAD

In the pop-up window, click on the program you want to move up in the list. Press the mouse button, and drag the program up, without taking your finger off of the mouse button. Follow the same procedure to move programs down the list. Once the programs are in the desired order, click *Save.*



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.
- If you have more than five programs, find five unifying themes to consolidate them into five categories or program areas. Use the program description field to name the programs within the categories.
- 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?

Click the *Save and Continue* button, or choose a new header from the top.

Section #4: Governance

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

Board Members: Click *Add* 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." When you have finished entering information for one member, click *Save.* Click *Add* to enter another.

Board Members *

Board Members

Prefix	First Name	Middle Name	Last Name	Suffix	Voting Status	Actions
Mr.	Kerry		Graham		Voting	Edit Delete
Mrs.	Cathy		Jackson		Voting	Edit Delete
The Honorable	William		Koch		Voting	Edit Delete
Mrs.	Betsy		Walkup		Voting	Edit Delete

Enter each board member's information by clicking "Add Board Members" button. Members will display in alphabetical order on the live site.

ADD UPLOAD

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.

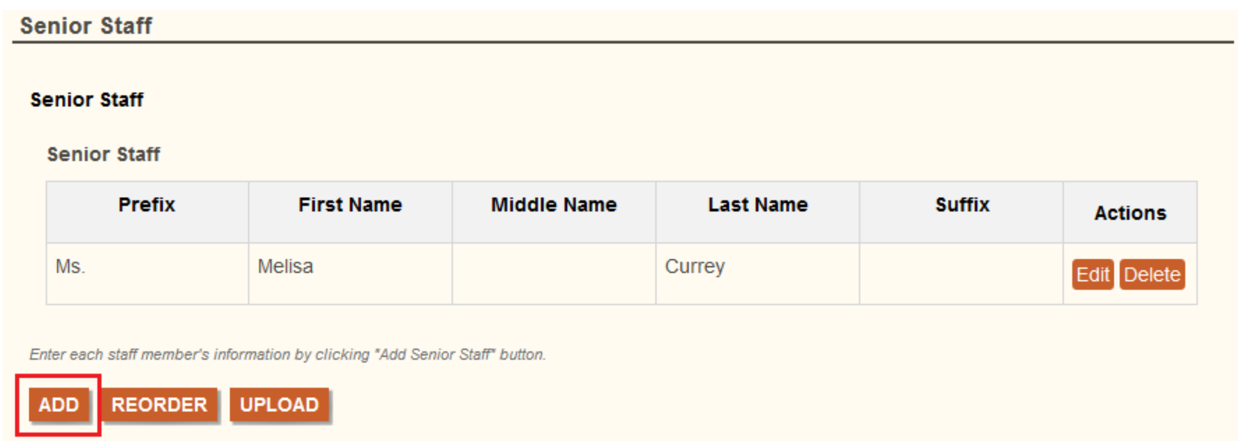
Written Board Selection Criteria Document: Has the organization created such a document? Answer Yes, No, or Under Development.

Written Conflict of Interest Policy Document: Indicate whether 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 *Add* button to enter the names and experience of your senior staff team. Members must be added and saved individually.


Senior Staff

Senior Staff

Senior Staff

Prefix	First Name	Middle Name	Last Name	Suffix	Actions
Ms.	Melisa		Currey		Edit Delete

Enter each staff member's information by clicking "Add Senior Staff" button.

ADD REORDER UPLOAD

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*. Don't forget to include your name and the date.

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.

Form 990: Your organization's most recent three 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: http://apps.irs.gov/app/ePostcard/
- 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.

Note: Uploaded documents should be smaller than 10MB, and must be PDF files. Form 990 and Audit will appear in consecutive fiscal year order on the public site, no matter what order they are uploaded in.

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.

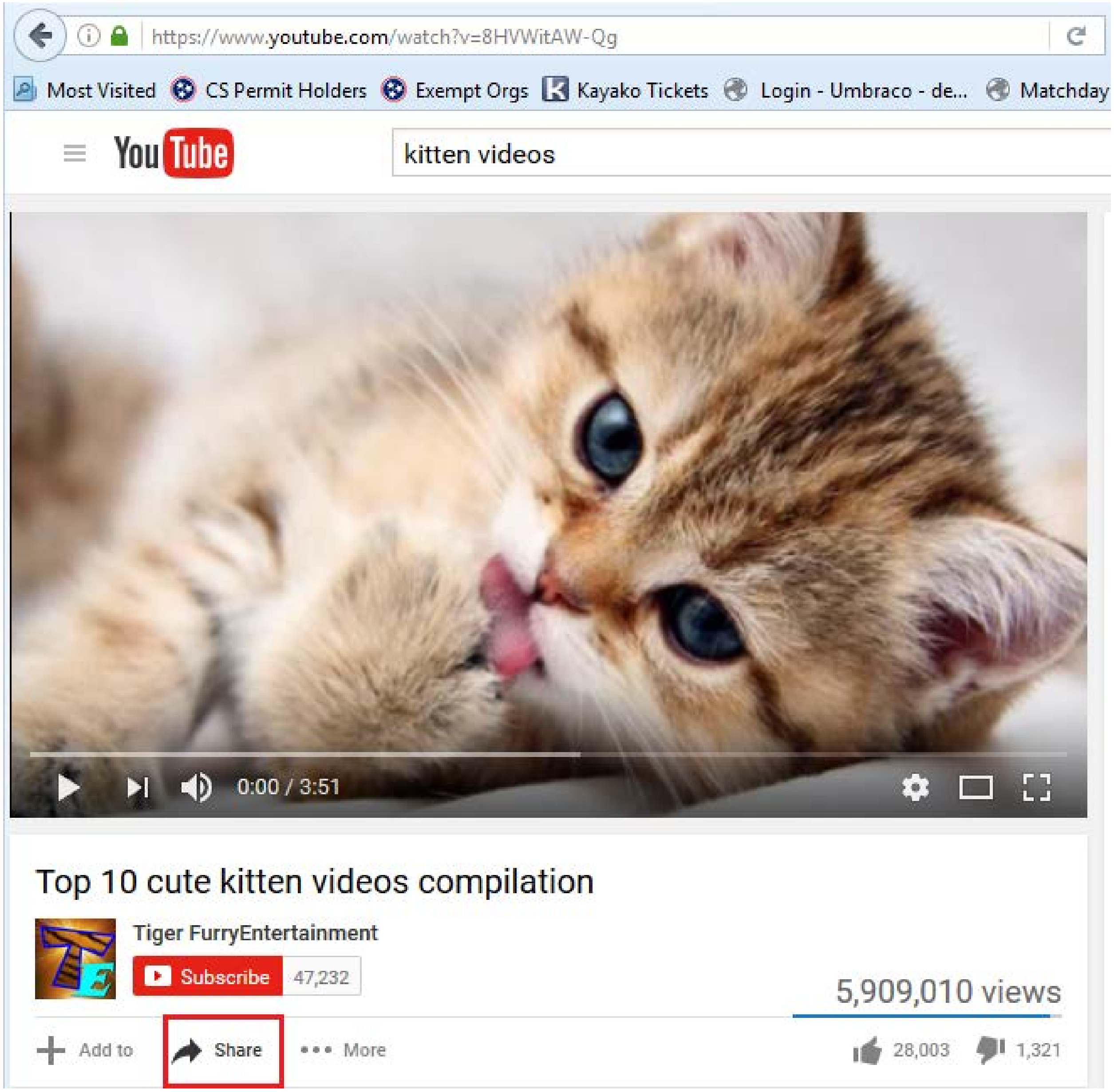
Previous Fiscal Period Financial Information: This section is completed by your Coach, using the prior year financial data found in the Form 990 and audit you provide. If you would prefer that one document be used over the other, inform your Coach, but please note that the same document (Form 990 or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

Section #7: Multi-Media

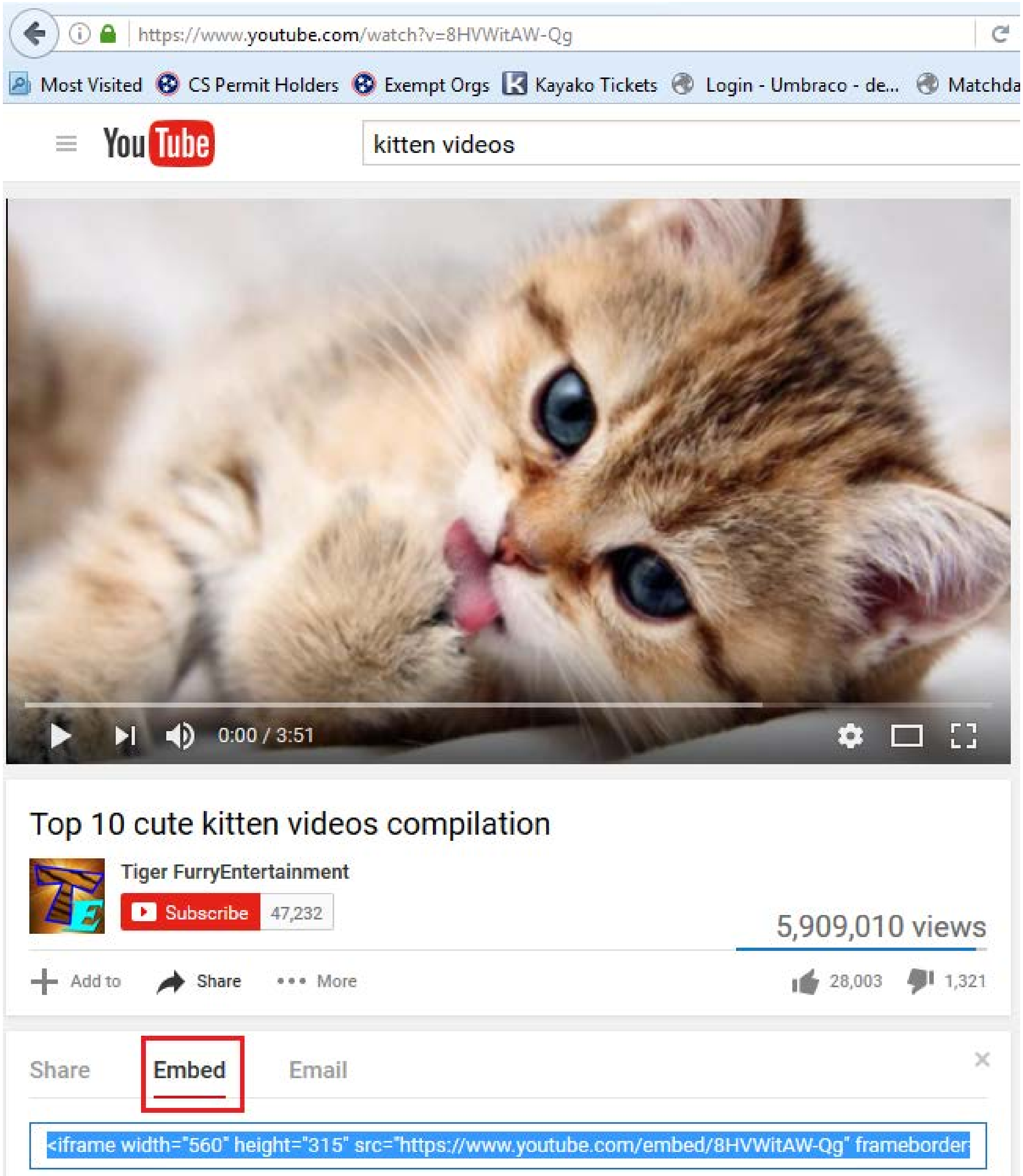
We encourage you to include your organization's logo and a photo on your profile. Logos are required to be jpg or gif files, and should be approximately 150 pixels wide x 150 pixels high to avoid distortion. Photos are required to be jpg or gif files and approximately 320 wide x 240 pixels high to avoid distortion. Only one photo will be viewable at a time. All logos and pictures should be smaller than 100K if possible.

Any videos that you would like to display on your profile must "live" online. Videos are added by copying and pasting the YouTube embed code. You must get the embed code for the video to display correctly. If you use the URL (Ex. www.youtube.com/...), the video will not display.

First, visit YouTube.com and locate the video you would like to place on your profile. Click on *Share*.



Click on *Embed*.



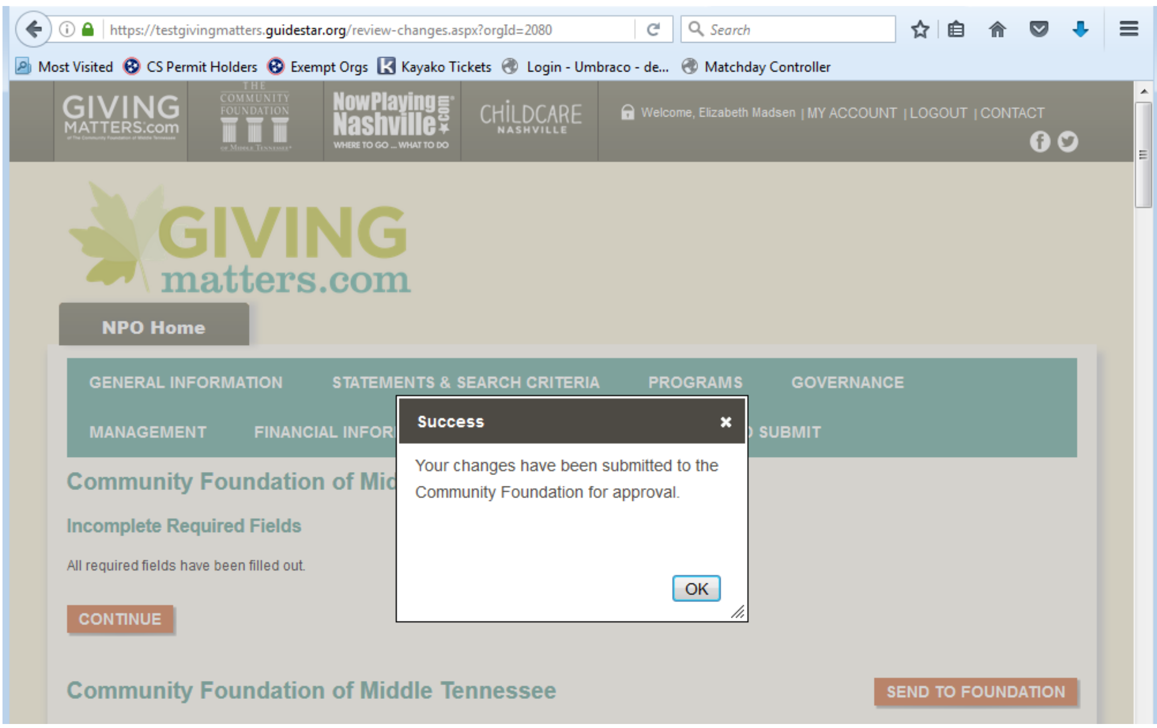
The Embed Code will appear below the word Embed and should be highlighted blue. If it is highlighted blue as above, hold down the Ctrl key on your keyboard and hit the C key to copy the code. If the code is not highlighted blue, double-click it with your mouse until it turns blue. Then copy it.

Paste the embed code into the YouTube Code box by holding down the Ctrl key on your keyboard and hitting the V key or by right-clicking on your mouse and selecting Paste.

Section #8: Review and Submit Changes

This section allows you to view the unpublished changes made to the profile, including the field that was changed, the change that was made, who made it, and the date and time of the change.

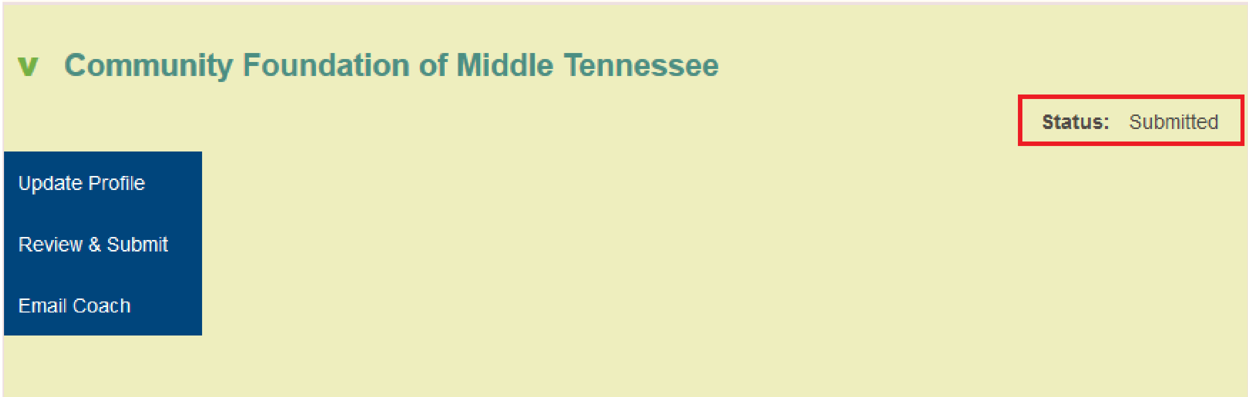
When you are satisfied with the changes you have made, click *Review and Submit* in the top header. A confirmation message will appear on the screen.



The profile will be reviewed, and you will receive an automated email response when the changes have been approved and published.

You must submit your changes in order for your Coach to know about them.

If you are unsure whether or not your changes have been successfully submitted, refer to the Status on your Nonprofit Home page.



Your Coach reviews, approves, and publishes changes in the order that they are submitted. Generally, your updates will become public within one week. During peak times, however, (such as before a major grant deadline), it may take longer for your changes to be processed.