

GUIDE TO EDITING YOUR PROFILE ON THE NEW NONPROFIT SEARCH PLATFORM

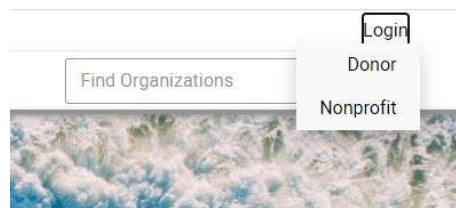
Below are instructions on how to edit your profile on the NEW nonprofit search platform.

Please review **ALL** sections of the profile to make sure your information is up to date.

Getting Started:

Go to <https://www.nonprofit-search.org/>

On the top right - hand side you will see the Login tab. When you hover mouse over it, you will see a dropdown menu. Click Nonprofit.



You will land on the new login page for nonprofit search. Your login is your email. You will need to reset your password, by clicking Forgot Password?



Nonprofit Login

Email

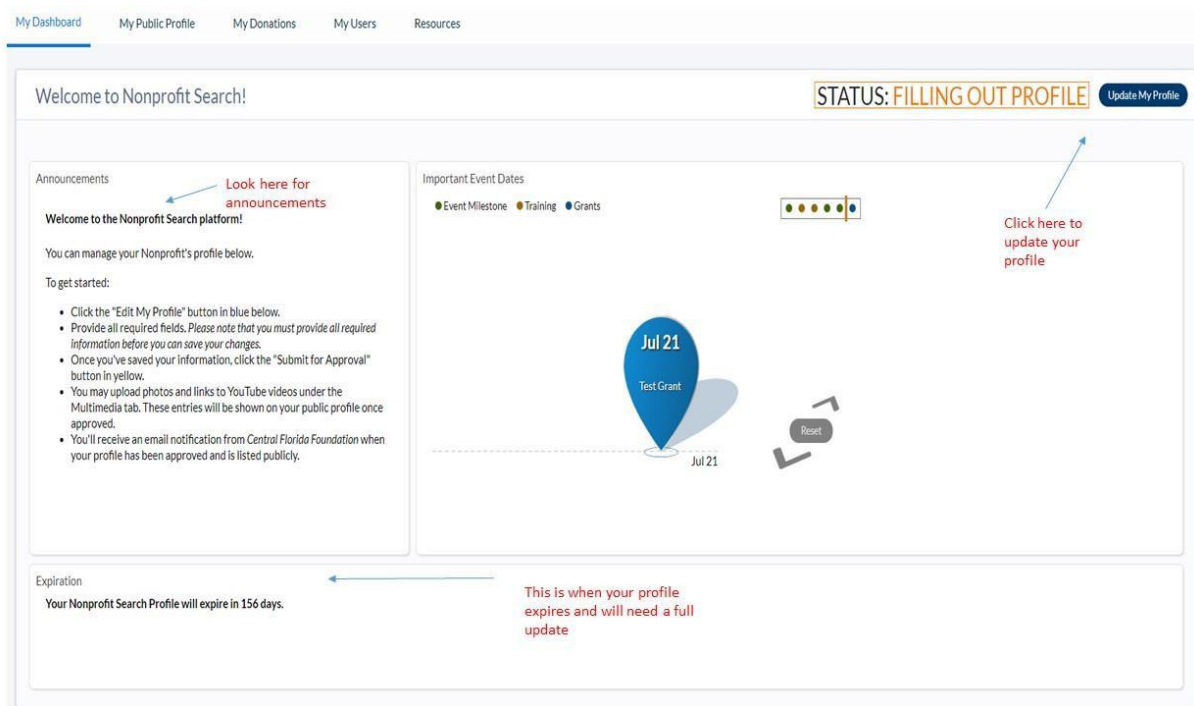
Password

[Forgot Password?](#)

Login

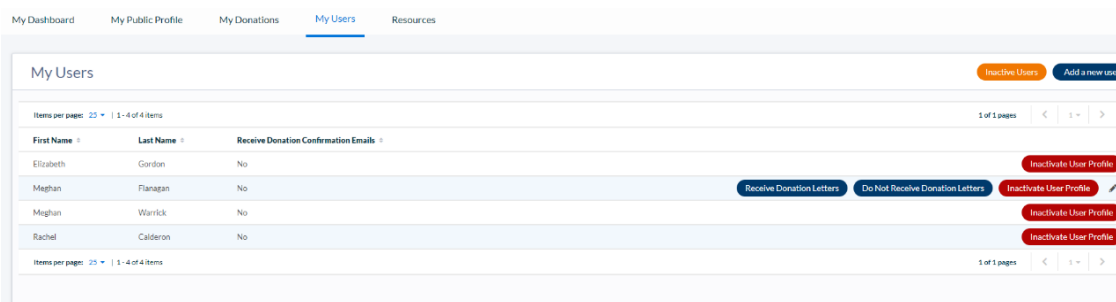
[Click here to submit an inquiry for a Nonprofit Search profile](#)

Once you sign in, you will be on your landing page. This will look a bit different from the landing page you are used to.



To add/delete users:

Go to the My Users tab on the top of the dashboard page



Follow the buttons to add or inactivate users. Please inactivate anyone who is currently not using the system or who no longer works for you.

To edit your profile

Hit the 'Update My Profile' button on the top right side of the dashboard to start making your updates.

The screenshot shows the 'About Us' profile page in the Nonprofit Search system. The sidebar on the left lists various sections: Overview, Statements & Impact, Programs, Disaster Relief Programs, Governance, Management, Financials, Multimedia, Events, and Documents. The 'About Us' section is currently active. The main content area has a header 'About Us' and a welcome message. Below this is a section titled 'Organization Information' which contains several input fields and dropdown menus for providing organizational details. The fields include Organization Name, Organization Legal Name, Acronym, EIN (Federal Tax ID Number), EIN Suffix, IRS Ruling Year, Organization's type of tax exempt status, Organization Supporting, Logo, URL Link, and Operating Budget. Some fields are pre-filled with information for the Central Florida Foundation, Inc.

On the left side you will see the menu of all of the tabs that contain your profile information. You will need to go through each of the tabs and complete all required information. This is indicated by a red *.

You may need to save or submit at the bottom of the page. Some pages do not have this button.

Currently, you can update the About Us page in About Us or in Overview. These are the only 2 sections that have a SUBMIT button.

DO NOT submit for approval until you have gone through all of the pages to make your updates.

In the future, you will only need to use this 'Submit Button' when you add financials, upload documents, or complete your annual updates.

About Us or Overview

Here are the fields to make sure you fill in:

- ☐ Organization Name- this can be a DBA*
- ☐ Organization Legal Name- even if it is the same as your Organization name*
- ☐ Acronym- if your organization is known by an Acronym

- ☐ EIN*
- ☐ EIN suffix- use zero unless you are a chapter of an organization with the same EIN. Use 1 if you are a chapter or affiliate.*
- ☐ IRS ruling year from your IRS determination letter*
- ☐ How many years the organization has been in business- optional
- ☐ Organization's type of tax-exempt status- use the dropdown. The majority of organizations are Public Supported Charity
- ☐ If you are a Supported Organization, add your fiscal sponsor
- ☐ If your organization is part of a VOAD, list yes from the dropdown menu
- ☐ Upload your logo
- ☐ Add a short name for your URL such as your organization name *
- ☐ Add your organization's mission category *
- ☐ Your operating budget*
- ☐ Add the demographics of who your organization serves*
- ☐ Add your DBA or Former name if you have one- this section can be deleted if it is not applicable
- ☐ Add your general office contact email*
- ☐ Phone number*
- ☐ Choose your primary mailing address- physical or mailing. You can fill out one or both below.*
- ☐ Add your social media channels. **PLEASE NOTE** the format it asks you to put each one in. If this is not done correctly, your social media will not show when the icons are clicked. If you do not have a link, please leave the space blank.
- ☐ Add your mission statement *, More About Us and any Testimonials.

All of the above information will be displayed on your public landing page.

You also have the ability to add pictures and videos in the Multimedia section at any time.

Once you have completed making edits, please hit Submit.

If there are any errors or something has been left blank that is required, you will get an error message telling you what needs to be fixed before your able to submit. If you leave the page without submitting, your work will be lost.

Statements

- ☐ Accomplishments
- ☐ Mission*
- ☐ Needs - to show what you need, WHY you need it and how much it costs
- ☐ Background - include a statement on the history/background of your organization
- ☐ Fill in statements as appropriate
- ☐ Add your theory of change.
- ☐ Add any independent research
- ☐ Add any collaborations- describe HOW you collaborate with other organizations.

- ☐ Choose your primary and subcategories from the dropdown menu *
- ☐ Add your geographic areas served.*
- ☐ Choose keywords and them. If you are in the city of Orlando or Winter Park, please add this to your keywords.*

Hit Save at the bottom of the page to save your work.

Impact

- ☐ Top 3 goals- we encourage the use of bullet points here and for your goals to be in the [SMART goal format](#).
- ☐ Strategies - list how you plan to accomplish your goals
- ☐ Capabilities - what are the barriers and qualifications you have to achieving your goals
- ☐ Indicators - how do you know if you are on the right track?
- ☐ Progress - list progress made towards achieving your goals

Programs

The screenshot shows the 'Programs' section of the Nonprofit Search interface. At the top, there is a header 'Programs' and a description: 'Enter Programs your Organization operates to achieve its mission. 'Active' Programs will populate on your Organization profile, and can help demonstrate the scope of your work.' Below this is a table of programs. The table has columns for 'Program Name', 'Make this Program Inactive', and icons for search, edit, and delete. The programs listed are: Grant-making, Managing Charitable Funds, Nonprofit Search, Rally: The Social Enterprise Accelerator, and Central Florida Regional Housing Trust. Annotations with arrows point to specific elements: 'Add a new program' points to the 'Add New Program' button; 'Preview, edit, delete' points to the icons in the table; and 'Keep the program, but keep it from being viewed' points to the 'Make this Program Inactive' button.

Programs

Enter Programs your Organization operates to achieve its mission. 'Active' Programs will populate on your Organization profile, and can help demonstrate the scope of your work.

Add New Program

Program Name: Show All Active: Yes

Items per page: 25 | 1 - 5 of 5 items

Program Name	Make this Program Inactive	Search	Edit	Delete
Grant-making	Make this Program Inactive	Q	✎	🗑
Managing Charitable Funds	Make this Program Inactive	Q	✎	🗑
Nonprofit Search	Make this Program Inactive	Q	✎	🗑
Rally: The Social Enterprise Accelerator	Make this Program Inactive	Q	✎	🗑
Central Florida Regional Housing Trust	Make this Program Inactive	Q	✎	🗑

Items per page: 25 | 1 - 5 of 5 items

1 of 1 pages

Annotations:

- Add a new program (points to Add New Program button)
- Preview, edit, delete (points to icons in table)
- Keep the program, but keep it from being viewed (points to Make this Program Inactive button)

- ☐ Check your programs to make sure your information is current if you have no programs you will need to add at least 1. *
- ☐ Add category and subcategory *
- ☐ Add or delete any programs
- ☐ If you have an impact genome scorecard, check yes and you will also be able to upload the scorecard.
- ☐ If your program is a disaster program. When you check the box on the top right and it will populate the Disaster program tab.

Any changes made here go automatically to live profile. You will not see a Save or Submit.

Governance

- ☐ Update all of your board members - there is no save or submit button- you will select their type of board.
- ☐ Update current Board Member List (include Board Chair) - You will need to select your board chair under the Governance Details. *
- ☐ Update current Board Chair/Co-chair, if necessary
- ☐ Indicate if your board member email should be public or not. You may have to check this for deleted members as well. We have asked for this to not be a required field.
- ☐ Make sure board demographics (ethnicity and gender) match the total number of board members in your main board listing. Ex – if you have 10 board members, then the demographics should equal 10. *
- ☐ Update current Board Attendance Spreadsheet with board meetings from last fiscal year ([download here](#)). Also, make sure to update the % in the field above the spreadsheet in the profile. *
- ☐ Indicate if you have Directors and Officer's insurance and the year. *
- ☐ Indicate board member contributions % *
- ☐ Add any other information about your board.
- ☐ Indicate if client constituency is represented
- ☐ Update Board Selection Criteria and Conflict of Interest policy as Under Development to 'yes' or 'no.' If yes, upload document **with board approval date** *

Click **save** at the bottom of the page.

Any changes made here go automatically to Live profile. You will not see a Save or Submit.

Management

- ☐ Indicate if organization is volunteer led
- ☐ Update CEO information (salary will not be publicly visible). *
- ☐ Add Co-CEO if appropriate
- ☐ Add staff counts *
- ☐ Add demographics- not required
- ☐ Upload current Strategic Plan, *if you have one*
- ☐ Upload current Management Succession plan, *if you have one* *
- ☐ Upload current Fundraising Plan, *if you have one* *
- ☐ Upload current Business Continuity Plan, *if you have one* *
- ☐ Upload current Organization Policies and Procedures, *if you have one* *
- ☐ Upload current Whistle Blower Policy, *if you have one* *
- ☐ Upload current Document Destruction Policy, *if you have one* *
- ☐ Upload current Nondiscrimination Policy, *if you have one* *
- ☐ Fill out the evaluation section *

If Plans and Policies are marked as Under Development, change to 'yes' or 'no.' If yes, upload document **with board approval date**

Hit Save at the bottom of the page to save your work.

Staff, Affiliations & Awards

- ☐ List any former CEO/ED
- ☐ List senior staff- you can include their bios here. Click on the pencil to edit.
- ☐ Select any of the Risk Management items you have from the dropdown- delete any lines that show up blank by clicking the trash can to the right on the line.
- ☐ List any Affiliations
- ☐ Add any External Assessments/Accreditations
- ☐ Add any Awards/Recognitions
- ☐ Add any CEO comments

Any changes made here go automatically to Live profile. You will not see a Save or Submit.

Return to the profile by clicking your agency name.

Financials

- ☐ Update current Fiscal Year start and end dates and your current Fiscal Year income and expense projections (comes from budget) *
- ☐ Check the box to certify your IRS determination letter and upload the document *
- ☐ Upload most recent 990, **signed by preparer and organization's officer – if 990 includes schedule B, please remove it from your 990 before you upload to profile. Upload the schedule B separately in 'Other Documents'** *
- ☐ Select from the dropdown whether or not you have an audit and what type of financials you have *
- ☐ Add your most recent financial audit / review/ compilation
- ☐ Upload current State [Charitable Solicitations Permit](http://freshfromflorida.com) (freshfromflorida.com) – This letter comes from the Department of Agriculture. **This is not your Tax Exemption Certificate.** *
- ☐ Endowment Information, if applicable *
- ☐ Capital Campaign details, if applicable *

Hit the Save button. You will return to the menu by clicking on your agency name over the menu.

Multimedia

- ☐ You can add pictures and videos here
- ☐ Add any comments you would like to add (optional)

Any changes made here go automatically to Live profile. You will not see a Save or Submit.

Events (new section!)

- ☐ Add your events or volunteer opportunities

Any changes made here go automatically to live profile. You will not see a Save or Submit.

Documents

- ☐ You can add documents here or access saved documents
- ☐ Documents can also be archived such as older audits and 990
- ☐ Put your schedule B from your 990 here.

Any changes made here go automatically to live profile. You will not see a Save or Submit.

➤ **Profile tips:**

- **Check all of your narratives for any computer language that came over and delete it.**
- **Collaborations** – explain the ‘what’ and ‘why’ of those collaborations. This is not intended to be a list.
- **Bios for senior staff** – make sure to include bios of each senior staff member.

Did You Remember to:

- ☐ Upload **signed** copies of your 990
- ☐ Add **board approval dates** to any plans or policies uploaded
- ☐ **Save** your work

Questions? Use the help button on the bottom of the page or contact Sandi Vidal at svidal@cffound.org or call 407-872-3050.