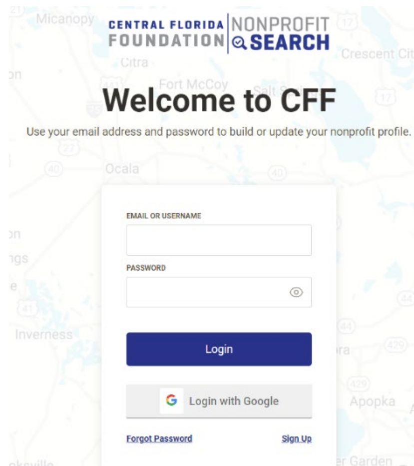
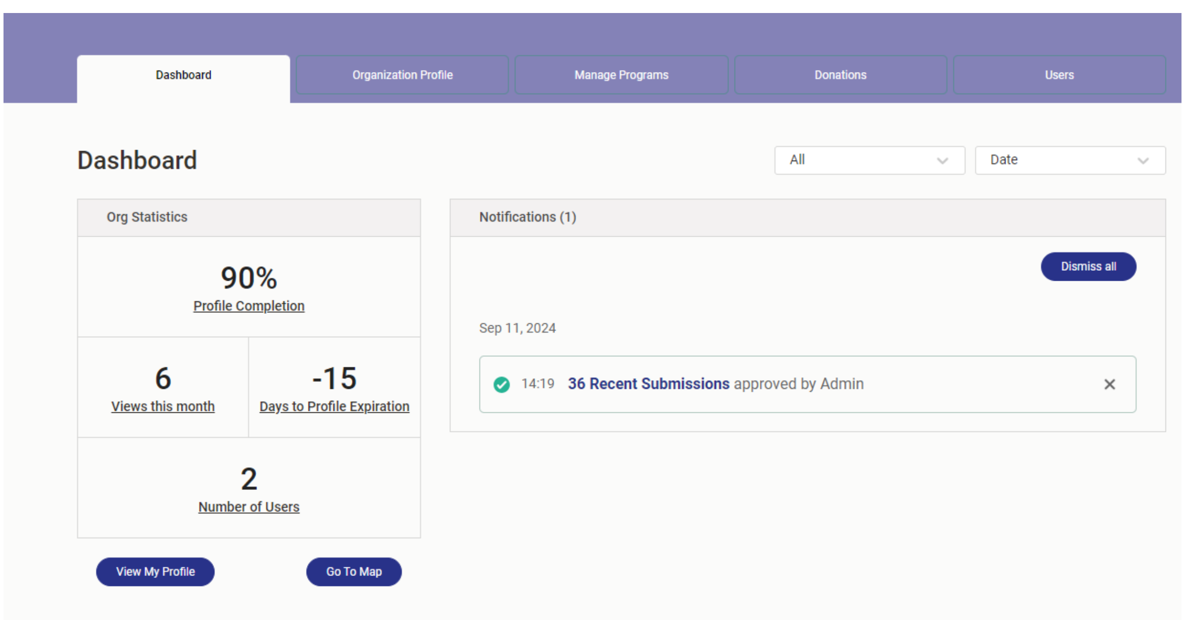
Instructions for Completing Your Nonprofit Profile

The Central Florida Foundation is excited to bring you a new platform for Nonprofit Search. The profiles will have new features including mapping tools, a donation page, and a banner.

These instructions will help you complete your profile on Nonprofit-Search.org
If you have questions, please email nps@cffound.org.

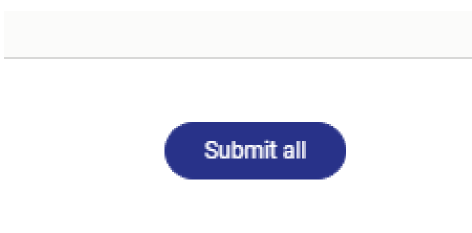
Steps:



- If you had an existing profile on nonprofit-search.org, you will need to claim your profile by creating a login on http://nonprofit-search.org. In the transition period, please email Susan Ponce at nps@cffound.org with your name, your title/position, organization's name, and EIN #.
- If you did not previously have a profile, you can click the sign-up button on the lower right corner.
- Once you have created your login, Central Florida Foundation will confirm it, and you can start updating your profile.
- Click the 3 vertical bars on the top left-hand side of the screen to update your password and to view your Dashboard.
- Your Dashboard will give you your organization statistics including completion level, views, the expiration date, and the number of users. Please let us know if a user is no longer valid. There is also a spot for notifications where you may see if additional information is needed.
- The top tabs are where you can access your **Organization Profile** and manage your **Programs**. The **Donations** button will not work, but there is an option to connect directly to your donation page on your website. You will find this under Receive Donations on the left tab of your profile.
- 

- Before you start, it is a good idea to gather key information/documents (See documents to upload section).
- Click on **Organization Profile** to start updating your profile.
- Your profile will be divided into several tabs including **Basic Information, Governance, Management, Financials, Receive Donations, and Manage Programs.** The Manage Programs section is on the top, whereas the other tabs are on the left side of the screen.
- Go through each section to complete the fields and upload any required documentation. If a field is required, you'll see a red asterisk on the left side of the field. ALL program fields must be completed.
- On the right side under the purple ribbon, there is a drop-down menu where you can change how you view the fields you are updating. The options are all fields, to be saved, saved, pending, approved, and rejected.

- Complete optional fields to make your nonprofit stand out.
- Use the "?" each field to guide your answers.
- Once you add information to a field, hit the save button. This will submit the information entered to the Foundation for review and approval. You can do this individually or **Submit All** at the



bottom of the page.

- Fields requiring narrative such as impact statement (formerly accomplishments), program descriptions, etc.) should be clear, succinct, and compelling. Don't be afraid of bullet points. *Think:* "Is this too long for a donor to read and remember?"
- After each field has been completed and the required documents have been uploaded, click the button at the bottom of the field that says save, you may have also to hit it a second time to submit.

Helpful Tips

- Accomplishments is now Impact Statement
- You must put a physical address- this is for the new map feature.
- For needs- be specific. What do you need, why, and how much will it cost.

Required and Optional Fields

Some fields in Nonprofit-search are optional, and other fields are required. Required fields will have a red asterisk*. Before your organization receives "Reviewed by Your Community Foundation" status, you must complete all required fields. A "required field" means that your organization must address that question. For instance, if you do not have a strategic plan, you may simply answer "no" in the "strategic plan" field. If you have a strategic plan, you must answer "yes" and upload your plan so Foundation staff can verify that you have the document.

** Note: Some fields are not required for the rollout but will be required starting January 2, 2025.

Basic Info:

- EIN
- Organization Name *
- Legal Name *
- Former Organization Name(s)
- Year Organization Formed
- Year of Incorporation
- IRS Ruling Year
- Main Address (will be mailing)
- Impact Statement **
- Mission Statement*
- Needs Statement*
- NTEE Codes*
- Logo File **
- Service Areas**
- Service Area Description
- Affiliations
- Search Keywords and Tags
- Contact Name
- Contact Email **
- Phone *
- Services in Spanish
- Service days/hours
- Annual Budget
- Physical Address (all fields)*
- Background statement*
- Impact section
- Strategies Statement
- Primary Areas of Impact
- Population Served
- Banner Image
- Social Media
- External Assessments
- Videos

Governance:

- List Board Members*
- Board Demographics*
- Board Co-Chair Information
- Standing Committees
- Advisory Board Members
- Board Chair Information*
- Board Information*
- Board Attendance Sheet (will be added at a later date)**

Management:

- Fundraising Plan*
- Strategic Plan*
- Continuity of Operations Plan*
- Technology Plan*
- Nondiscrimination Policy*
- Government Licenses
- CEO/ED Information*
- Evaluations**
- Management Report to Board
- Staff & Volunteers*
- Staff Demographics*
- Staff Gender Demographics*
- Director's Policy*
- Management Succession Plan*
- Policy and Procedures**
- Document Destruction Policy*
- Whistleblower Policy**

Note:
All uploads for plans will be required after January 2, 2025.
CEO compensation and phone number will be required, but not externally visible

Financials:

- ☐ Form 990*
- ☐ Audits or Financial Documents
- ☐ Capital Campaign**
- ☐ IRS Letter of Determination*
- ☐ Current Fiscal Year*
- ☐ Financial Info
- ☐ Endowment*

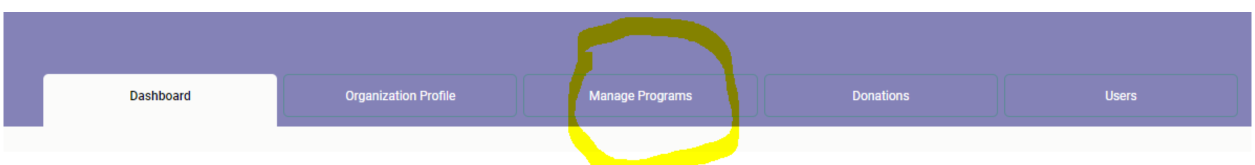
Note:
For anyone who files a Postcard 990, a Profit and Loss Statement will be required.
Audit will not be required – **if it has not been updated, please upload a Budget.**
The Foundation will complete the Financial Info section for you.

Donations:

- ☐ State Charitable Solicitations*
- ☐ Donation Page URL

Programs:
Manage Programs is a separate tab on the top. To add programs, click on the tab.
Click Add New Program and fill out the sections.
You can add a thumbnail picture and banner for your program.

- ☐ Program Title*
- ☐ Program Thumbnail
- ☐ Program Description*
- ☐ Banner
- ☐ Population Served*
- ☐ Impact Measured
- ☐ Contact info
- ☐ Anecdote
- ☐ Disaster Relief?
- ☐ Program Budget*
- ☐ Areas of Impact*
- ☐ Regions Served*
- ☐ Short-term Goal*
- ☐ Long-term Goal*
- ☐ Website
- ☐ Keywords
- ☐ Pilot



Current Known Bugs:
- ☐ Some uploads are not working
- ☐ EIN may not show – This is ok
- ☐ Some fields are not showing in preview/published view
- ☐ CEO information may be incorrect – check names
- ☐ The Board of Directors may include past board members with no way to delete
- ☐ 990 and Audit uploads need to be deleted and re-uploaded