![giveGreater.org® - Your *Local* Resource for Learning and Giving]

Nonprofit User Guide

A Guide to Creating an Organizational Profile on giveGreater.org®

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The Community Foundation
for Greater New Haven

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I.   Introduction

Who
The Community Foundation *for* Greater New Haven provides the giveGreater.org® site in partnership with GuideStar (www.guidestar.org). GuideStar connects people and organizations with information on the programs and finances of more than 1.7 million IRS-recognized nonprofits. In 2008, users seeking nonprofit information visited the GuideStar website 10.8 million times.

What
An online knowledge and giving resource, giveGreater.org® features the profiles of nonprofit organizations that provide services in The Community Foundation's twenty-town region. The information on giveGreater.org helps donors and the public learn about, connect with, and give to nonprofits online. The Community Foundation provides giveGreater.org as a free resource to the community, pays an annual licensing fee for the online platform, and maintains the database and website. Nonprofits are **not** charged a fee to have a profile on giveGreater.org®.

Where
Via its online presence at **www.giveGreater.org** nonprofit profiles are accessible to potential donors 24 hours a day, 7 days a week.

Why
It is The Community Foundation's mission to create positive and sustainable change in Greater New Haven by increasing the amount of, and enhancing the impact of, community philanthropy. It is our belief that giveGreater.org® will help us achieve our mission by providing knowledge to donors and strengthening the organizations in the nonprofit sector. The goals of giveGreater.org® are to:
- Increase the amount of charitable giving to local causes
- Strengthen the nonprofit sector
- Increase transparency

As a nonprofit organization you can benefit from a giveGreater.org® profile because it:
- Enables you to receive your designated grant from The Community Foundation *for* Greater New Haven without having to submit the remittance form;
- Exposes you to more potential donors including The Community Foundation's donors;
- Provides you with the ability to receive online donations;
- Increases the public's understanding and confidence in your organization and the nonprofit sector;
- Links your organization to The Community Foundation *for* Greater New Haven's website;
- Streamlines your efforts when submitting applications to The Community Foundation, as your profile will be used as part of the grant application and grant monitoring processes;
- Gives your organization access to exclusive news, events and capacity building opportunities;
- And, it is all FREE!

How
- This *User Guide* will take you through the steps to setting up your detailed profile. Let's begin with some important tips.

giveGreater.org® Profile Tips

IMPORTANT INFORMATION
Before getting started please review these important tips which will help you in creating or editing a profile.

> ∗ **giveGreater.org® is maximized for use with [Internet Explorer](#) and [FireFox](#) browsers.**
>
> ∗ **Please save your information frequently. The system will time-out after 30 minutes of no activity and your content will be lost. Typing is not considered activity so use the "Save for Later" button often to ensure your work does not get lost.**

- All fields marked with a green bar require an answer.

- Grayed-out text areas beneath data fields cannot be edited. If any information in the shaded area is incorrect, please make Foundation staff aware and the information will be corrected.

- Any of the information pre-populated in your profile came from what was available in your organization's GuideStar profile.

- You can copy text from your website and other documents for your giveGreater.org® profile. We encourage you to paste the text into Notepad and then copy and paste it into your profile from there. This will ensure that any underlying formatting will not affect the way text appears in your profile.

- Budget numbers in **"Program"** and **"Financial"** sections must be whole numbers without $, decimals, % or words.

- Use the "Preview" button to see how your information will appear when published. Your profile will not be available to the public until The Community Foundation reviews the final content.

- All the data fields available in giveGreater.org® are based on nonprofit best practice. We understand that organizations are in different stages of their lifecycle and may not have all the information or documents requested. If you do not have something in place, then you can answer "no" or "under development" to that question. These answers will not prevent your profile from being published.

- The Community Foundation staff will be responsible for entering your organization's previous three years of financial data after you upload your 990s and audits. It is important that you provide these documents as soon as possible so the data can be entered.

- If your organization is not required to file a 990 then we will accept an audit or other financial statements approved by your Board of Directors

- Profiles will need to be updated at least annually.

II.   Overview of the giveGreater.org® Site

Home Page - www.giveGreater.org, or (http://givegreater.guidestar.org/)

The above screen shot is the public **"Home"** (or landing) page for giveGreater.org® as of July 15, 2013. Please keep in mind the content is always being updated!

Points of Interest:

- The **"Find"** tab located on the grey bar on the left-hand side (and also near the upper-right corner) will bring you to the search page. "Find" is the search function whereby a user can search for a nonprofit by name, geography, keywords or NTEE code areas.

- The **"Learn" (or "Learn & Share)** tab, also located on the grey bar and upper-right corner, will bring you to an area where The Foundation publishes issue briefs of various topics (i.e. health, student achievement). This area will also contain links to the profiles of organizations doing work in those areas of interest.

Log-In Page - https://givegreater.guidestar.org/Login.aspx

Logging In

From the **"Home"** page, click on **"LogIn"** in the upper-right corner and enter your user credentials in the **"Existing The Community Foundation for Greater New Haven Users"** box. *Nonprofits will be assigned user credentials (email, password) for accessing your organization's profile. Contact Stephanie Cheung if you are unsure of your LogIn information.*

Note: The **"Create Login"** feature is not required, but it is available to public users so they can set favorites and preferences on the site.

Nonprofit Home Page - Dashboard

Points of Interest:

- The **"Nonprofit Home"** page (also known as the **"Dashboard"**) will contain information on the status of completed fields in the nonprofit profile and the number of times the profile has been viewed.
- Under **"My Profiles"** is the list of profiles the nonprofit user has access to. In most cases nonprofit users will have only one organizational profile, but there are some cases where a user might be managing and editing more than one nonprofit profile.
- To change your password or other information click **"My Account"** and **"Edit my Information."**
- The green **"Edit"** button to the right of the organization's name enables you to access the tabs in which you can enter your profile information.
- Once the profile is viewable to the public, click on the green **"Donation Reports"** button to receive a list (by month, as gifts are processed) of donors who have made a gift to the organization. Please keep in mind that donors have the option to give anonymously.
- In the left-hand column there will be links to resources for information that may help with the creation and marketing of the profile. This area will be updated with new information and resources as they become available.

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for Greater New Haven

III. Creating and Editing Your Nonprofit Profile

Components of a giveGreater.org® Profile

Your giveGreater.org® profile enables you to provide detailed information so donors can give with confidence. This information is organized into eight areas (green tabs on the left of your profile) as follows:

General Information – Ways to contact you (addresses, phone numbers, fax, email, website links, social media accounts, etc.).

Statements and Search Criteria – Your mission, impact, needs, and background statements, along with NTEE codes, keywords, and geographic areas served.

Programs – A list and description of 1 to 5 programs.

Governance – Details on your Board of Directors and planning information.

Management – Staff and policy information.

Financials –Three years of financial information in an easy-to-read format.

Other Documents - if available, you can include the following documents in PDF format; IRS letter of nonprofit determination, Budget, IRS form 990 (nonprofit tax reporting form), audit or financial review. This information is provided on a voluntary basis. The Community Foundation staff verifies some information (i.e. financial data is verified against the 990 and audit), but much of the data is self-reported. Profiles will need to be updated at least annually.

Multi-media – A place for uploading your logo, photos, and videos.

NOTE: If a nonprofit organization has a profile on GuideStar, then some basic information from the GuideStar profile will pre-populate the giveGreater.org® profile once it is created. Conversely, there will be a data transfer of information from the giveGreater.org profile to the GuideStar profile roughly once a year. You will receive advanced notice of the data transfer.

You may wish to assemble all of the above information into electronic folders and Word or Text documents before proceeding with the creation of your new profile as this will save you time.

Steps for Creating a New Profile

Remember to use either **Internet Explorer** or **FireFox** as your browser.

1. Review the **"Important Information"** on page 4 before beginning.

2. From the **"Nonprofit Home"** page click the **"Edit"** button.

3. Then click on the tab on the left that you would like to work on first. Type or cut and paste the required information into each text box, or chose the correct response from the dropdown box. (Detailed information on the tabs is included in Section IV from page 10 – 21 of this guide.)

4. You do not have to complete all the required fields to move on and work in another tab. You might prefer to click the **"Save for Later"** button, and then click the tabs at the left to navigate through the profile in whatever order you choose.

5. As you work on the profile remember to click **"Save for Later"** regularly since the system will time-out after 30 minutes.

6. When you are ready to submit the profile for review and publishing, click on the **"Review Changes or Send to Foundation"** button, and then double click on the blue **"Send to Community Foundation"** button which is near the top right corner. You are also encouraged to send Stephanie Chung (schung@cfgnh.org) an email when the profile is ready to be reviewed.

7. Once the profile has been published, it will be viewable to the public. You should only submit your profile if you are comfortable with the content being published. The Foundation will notify you once the profile is published.

Steps for Editing an Existing Profile

1. From the **"Nonprofit Home"** page click the **"Edit"** button.

2. Click on the tab on the left that you wish to edit. Then click in the field or dropdown box that you want to change. When you are satisfied with your edit, click **"Save and Continue."**

3. When you are ready to submit the profile for review and publishing, click on the **"Review Changes or Send to Foundation"** button and then double click on the blue **"Send to Community Foundation"** button which is near the top right corner.
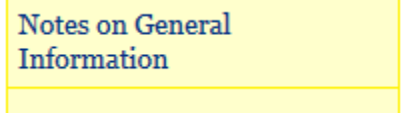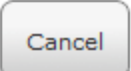
IV.   Tools / Tips / Tabs

Site Navigation Tools

▌   - **Required Fields** are marked with a green vertical bar which is located to the left of the field name.

[Preview]   - The blue **"Preview"** button (near the top left of the page) will allow you to see what the public viewer will see once the profile has been published. This preview button opens up a new window. You must close the preview window in order to go back to the edit window.

[Save for Later]   - The **"Save for Later"** button located on the top and bottom of each tab/page, will allow you to save your changes. This button will save your work and keep you on the same page. It does not navigate away to another page. You can **"Save for Later"** then navigate to another page by selecting the appropriate green tab on the left. You should use the **"Save for Later"** button even if you did not complete all the required information on the page, as it will prevent you from losing your work.

[Save and Continue]   - The **"Save and Continue"** button, which is also located on the top and bottom of each tab/page, will save your work and automatically take you to the next section. If you use this button and there are incomplete required fields (look for the green vertical bar) you will get an error message and your work will not be saved. Be sure to click the **"Save for Later"** button if this happens otherwise your information will be lost.

[Notes on General Information]   - The yellow note pad in the left hand column is a place for you to keep notes. A note **cannot** be deleted or edited once it has been entered. The notes will be saved and appear as a running list. The information in the notes is not viewable to the public, and Foundation staff will not be notified when you post a note.

[Cancel]   - The **"Cancel"** button can be used if you make a mistake which you don't want to save. Clicking on this button will revert to the previous version of a page.

Tab Details

There are 8 tabs that you will enter information into in order to have a complete profile.

General Information Tab

This tab contains basic information on your organization including name, DBA (Doing Business As) names, former names, addresses, website and other contact information. This section of the profile should be the easiest and quickest to complete. Much of this information is pre-populated from GuideStar.

Statements and Search Criteria Tab

This section contains several text boxes. Each text box has a character limit which includes spaces. You can copy and paste text from other sources like MS Word documents or your website. However, when you copy and paste from another document often times there is formatting that gets pasted with your content. If you find that the text you pasted from somewhere else is not displaying correctly in the public view or that you have run out of character space, you should check for HTML coding by using the "**HTML**" view button on the bottom of the text box. In this view HTML coding will appear as symbols or nonsense text. You can delete this coding as needed. You can also paste the text in Notepad first which will remove all the HTML coding before you paste it into the field.

Required Fields in the Statement and Search Criteria Tab:

- **Mission Statement**
- **Impact Statement**
- **Needs Statement**
- **Background Statement**
- **NTEE Codes**
- **Geographic Areas Served** – Provided as a dropdown menu. In that menu you can choose multiple selections by holding down the "ctrl" button. If a user is searching for organizations that serve a specific geography this is how the system will determine if your organization meets that search criteria. Make sure you select all the options that apply to the organization. The geography narrative allows you to expand on the dropdown if needed. For example, you may target your work towards a specific neighborhood or demographic. There is also an opportunity in the program section to talk about the target population for specific programs.
- **Keywords** – Please provide five keywords or short phrases that best describe your organization. Keywords might include acronyms, name misspellings, informal names, event names and outdated language. Note the "Search/Find" feature of the site does not search the mission statement, program title or descriptions, but it does include organization name, DBA, Former names, Primary NTEE code, and Primary NPC code (program code).

Strongly Recommended Fields in the Statement and Search Criteria Tab:

- **CEO/Executive Director Statement** and the **Board Chair Statements** (different from comments at the bottom of each page) – there will be other opportunities for the CEO to make comments in certain areas but this tab is where the CEO and Board Chair should make an overall statement about the organization. They should speak from their heart with passion for the work of the organization. These can be powerful statements and we have learned that visitors/donors are very often interested in reading these statements. You can view published profiles to see examples of CEO and Board Chair Statements.

Programs Tab

You can have a minimum of one and a maximum of five programs listed in your organization's profile. If your organization has more than five programs then you can periodically rotate the programs in your profile or group them together.

Note: When you open the **"Programs Tab"** for the first time you might see some programs displaying that transferred from GuideStar when The Foundation initially created the profile.

Required Fields in the Programs Tab:

If you receive a grant from The Foundation for a specific program, please make sure that program is listed in this section.

- **Category –** NPC (Nonprofit Program Classification)
- **Program is linked to organization's mission and strategy –** yes or no
- **Program is frequently assessed based on predetermined program goals –** yes or no
- **Program Short-Term Success –** These will be annual indicators of success, such as outcome statements that are measureable. If you have a logic model then these will be the outcomes and measures coupled with targets. If you are using Result Based Accountability (RBA) then this will be your performance measures. For example: "70% of participants will quit smoking"; or "50% will remain nonsmokers after six months." If you do not have baseline data then you do not have to set a target. Other examples include: "Program participants will improve their nutrition and exercise"; or "% of participants that will exhibit changed behavior"; or "% of participants that go on to college". **You are not reporting your progress and success here you are articulating what outcomes you are tracking and what you expect.**
- **Program Long-Term Success –** The ultimate impact of your program. This section should include goals and longer term outcomes from your program logic model. If you are using RBA then the long-term success will be your results statement. Programs do not always have to have a long-term goal or outcome that is measurable. Your long-term outcomes may sometimes describe more of an ideal scenario. For example "All New Haven kids enter Kindergarten ready to succeed"; or "The Quinnipiac River will be free of pollution"; or "Infant mortality in New Haven will be decreased." You will have to demonstrate that you are making progress towards the long-term goal under "Examples of Program Success."
- **Program Success Monitored By –** How will you measure the goals and outcomes outlined in your short-terms and long-term success descriptions? What tools will you use: focus groups, surveys, random drug screenings, self-reported data, medical records, school records, etc.?
- **Examples of Program Success –** You should report on the actual achievement of long-term and short-term success. Report on the results so far. It is also nice to include an anecdote/story. If you are not making progress then you can provide information on what you are doing to address this area.
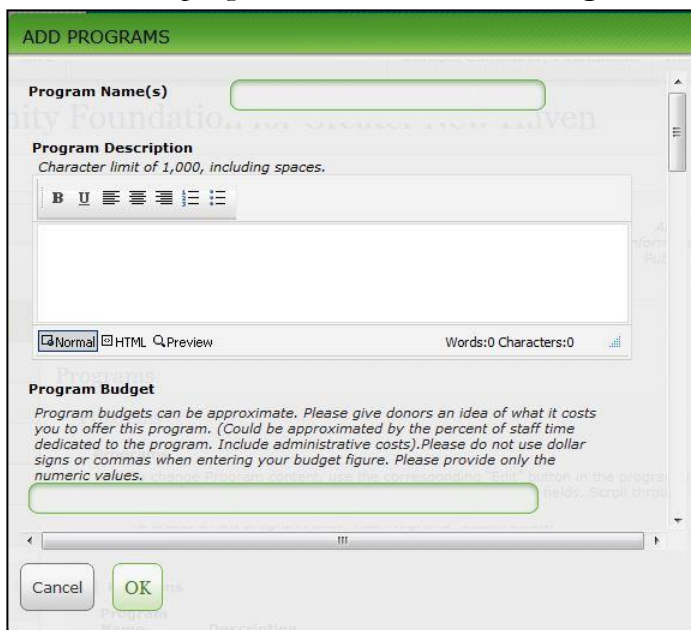
Optional Fields in the Programs Tab:

- **Budget** – You can leave the budget blank as many organizations do not have their budgets broken down by program.
- **Comments (Program, CEO, Foundation)**

The Community Foundation
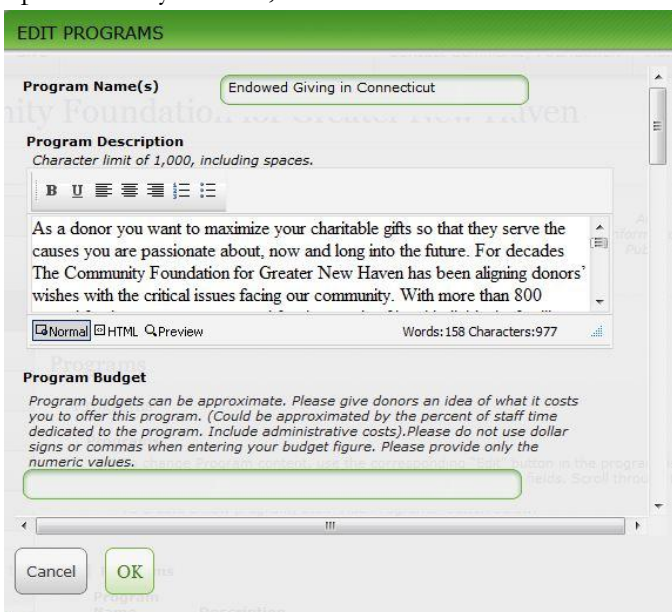*for* Greater New Haven

Adding a Program

To add a new program, click on the **"Add Programs"** button and this dialogue box will open:

- You must put information in the **"Program Name"** and **"Program Description"** fields in order for all the program information to be saved.
- Once you have completed filling in the dialogue box for one program then click **"OK"** to close the box. To add more programs simply click on the **"Add Programs"** button again.

Editing a Program

To edit a program, click on the **"Edit"** button to the right of the program, and the following box will open. Make your edit, and click the **"OK"** button. Then **"Save and Continue"** to save the change.

Governance Tab

This is where you will enter information on the Board of Directors of your organization.

Required Fields in the Governance Tab:

- **Board Members** – To add a board member to the list click on **"Add Board Members"** and a dialogue box will open. In that box you must enter the name and company affiliation for that board member. To delete an existing board member simply click on the **"Delete"** button next to their name. ***Do not include the board chair in this list of board members.***
- **Board Chair** – Enter the board chair's information in the designated space. ***Do not enter the board chair in the list of all board members.***
- **Board Chair Term**
- **Demographics** – Enter in the actual whole number (not the percentage) of board members that fall into each ethnicity and gender category.
- **Board Self-Evaluation**
- **Board Orientation**
- **Written Conflict of Interest Policy** – If you answer "yes" you are required to upload the policy
- **Percentage of Board Members Making Monetary Contributions**

Optional Fields in the Governance Tab:

- **Board Co-Chair**, **Board Attendance Spreadsheet**, **Written Board Selection**, **Standing Committees**, **Additional Boards**
- **Governance Comments** - At the end of this tab and others there is an opportunity for the CEO/Executive Director to enter comments. This enables your organization to provide further explanation regarding any of the information entered on the page. This is different from the CEO and Board Chair Statements under the **"Statement and Search Criteria"** tab.

Management Tab

In this section you will be asked to upload several documents for verification purposes only. It is important to note that these documents will only be viewable to Foundation staff and not the public under any circumstances. Whenever you answer "yes" to having a specific document or policy then you must upload that document for verification purposes. The only documents that will be viewable to the public are the organization's IRS letter of determination, 990s and audited financial statements.

Required Fields in the Management Tab:

- **Management Info** – Include CEO/Executive Director name and contact information, along with start date and bio. It is recommended that you answer the CEO salary question although that information will not be published on giveGreater.org®. The information is available to the public in the organization's 990.
- **Number of Full Time Staff**
- **Number of Part Time Staff**
- **Number of Volunteers**
- **Staff Retention Rate %** - Calculation excludes those employees who have been laid off, terminated or who have died.
- **Professional Development**
- **Staff Demographics** – Specify both ethnicity and gender as a number.
- **Fundraising Plan***
- **Communication Plan**
- **Strategic Plan***
- **Management Succession/Training Plan***
- **Organization Policy and Procedures Plan*** - Only the Table of Contents is required.
- **Whistle Blower Policy*** - This document should be uploaded to the "**Other Documents**" tab ("Other 1" or "Other 2").
- **Management Reports to Board**
- **Nondiscrimination Policy***

* If you answer "yes" to these fields you will need to upload the document.

Optional Fields in the Management Tab:

- **Senior Staff, Strategic Plan Info, State Information, Insurance Policies, Risk Management, Government Licenses Info.**
- **Management Comments** – This section offers an opportunity for the CEO/Executive Director to make comments or provide further explanation about information in this tab.

Financials Tab

This section is where you will enter data regarding current fiscal year projections, capital campaigns, endowments, etc. Foundation staff will enter the previous three years of financial data based on the 990s, audits or other financial documents. The **"Preview"** button is especially helpful in this section as it shows how your organization's financial data will display.

Required Fields in the Financials Tab:
Do not enter dollar signs or decimals in this section or any other section of the profile.

- **Current Fiscal Year Start/End Dates**
- **Current Year Projected Revenue and Expenses**
- **Endowment Value and Spending Policy**
- **Do you have a credit line?**
- **Do you have a reserve fund?**
- **Capital Campaign Information**
- **Does your organization have an IRS Tax Form 990, 990EZ, 990-N, 990 PF?**

Required Documents to Be Uploaded:
- **IRS Letter of Determination of Tax Exempt Status**

- **Form 990s** – From the most recent 3 years. If your organization is exempt from completing a 990 then you do not have to upload anything here. *When uploading 990s there is a 10MB file size limit.*
- **Audit Documents** – The most recent three years of audited financial statements. If your organization does not have audited financial statements then you do not have to upload anything here. Instead, add a comment to the CEO/Executive Director/Board Comments fields located near the bottom of the page explaining why you do not have annual audits.

Optional Fields in the Financials Tab:

- **Financials Comments –** Here you can share any financial information or organizational challenges that have not already been addressed in other sections.

Other Documents Tab

Documents uploaded into the "Other 1" or "Other 2" section will **not** be viewable to the public. Only documents uploaded to "Other 3" will be viewable to the public.

If available, you can include the following documents in PDF format in this section:
- **IRS Letter of nonprofit determination**
- **Budget**, **IRS Form 99**0, **Audit** or **Financial Review Documents**.
- **Whistle Blower Policy (**from the **"Management"** tab**)**

Multi-media Tab

Fields in the Multi-media Tab:

Including multi-media items is optional; however, they are very valuable tools in showcasing your organization.

- **Logo* –** The logo should be 150 pixels wide and 150 pixels high.
- **Picture* –** The picture/graphic should be 320 pixels wide and 240 pixels high.
- **Video –** If you would like to upload a video, send the embed code for your YouTube video to schung@cfgnh.org and Stephanie Chung will upload the video. ***Do not try to upload the YouTube video yourselves.***

Resizing Images

*If you do not resize your logos and photos to the suggested specifications they will appear stretched and distorted on your profile. Feel free to send Stephanie Chung (schung@cfgnh.org) the logo and/or photo. She will resize the image and upload it for you.

You can also resize the image yourself using a simple online tool. Just start a free account at www.photoshop.com and you can use their online tool to resize your pictures

- Go to www.photoshop.com and click "**Join Now**"
- Provide the required information and click "**Continue**"
- You will receive an email at the address provided asking you to confirm you have applied to create a free account.