



A program of Community First Foundation

GivingFirst

Admin Instruction Manual

Creating Your GivingFirst.org Profile

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Welcome to GivingFirst.org. This manual provides detailed instructions on how to use the GivingFirst.org admin tool to create your GivingFirst.org profile. It is best to use this manual in conjunction with the [Quick Profile Completion Schedule \(http://goo.gl/UT8v9\)](http://goo.gl/UT8v9) which highlights the required field you will need to complete in order to be able to submit the profile for review.

A GivingFirst profile features four broad categories:

1. **General Information**—includes contact information for the nonprofit organization, as well as its mission, impact and background statements;
2. **Management and Governance**—outlines the involvement of the nonprofit organization’s board, management, staff and volunteers;
3. **Financial Information**—focuses on the nonprofit organization’s financial health, taken from financial statements; and
4. **Programs**—describes the nonprofit organization’s programs and target population.

In addition to the information noted above, the GivingFirst profile also captures the following:

- **Statement from the Executive Director**—provides an opportunity for the leader of your organization to add or emphasize information, such as what is important and distinctive to your organization. These comments give a donor an insider’s perspective about your activities and uniqueness.
- **Statement from the Board Chair**—provides an opportunity for the board chair to add or emphasize information, such as what is important and distinctive to your organization.
- **Executive Director Comments**—allows your Executive Director to provide explanations for any discrepancies or inconsistencies in each of the three major sections of your profile (Management & Governance, Financials, and Programs).
- **Testimonials** – allows you to share positive comments from your constituents.

The presence of information on a nonprofit does not mean that Community First Foundation endorses or supports it. The information provided on each profile is provided by your organization. Community First Foundation does not guarantee the accuracy of any data or make any representations or warranties about your organization.

All of the information provided is voluntary. You can update your profile in GivingFirst Admin at any time with a valid email address and password.

Each organization is unique. If information is lacking or unavailable for a specific category, it may not indicate low effectiveness in that area. And some elements requested for your GivingFirst profile may not be applicable to your organization. Use the **Executive Director Comments** section to explain any variance you think might concern donors.

Information included in GivingFirst profiles often varies by interest area, size and age of the organizations. For example, start-up organizations will typically not have audited financials simply because their small budgets cannot afford them, and their small operations do not necessitate them.

If you do not have a specific document for your initial profile, you should not create one. You can consider how these documents might help your organizational advancement and develop a document in the future if you and your board choose to do so.

As always, if you have any questions, contact Dana Rinderknecht, Online Giving Manager, at 720.898.5911 or drinderknecht@CommunityFirstFoundation.org.

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WELCOME TO GIVINGFIRST.ORG

To create your profile, it is helpful to have the following documents available:

1. Current board roster with names, affiliations and prefixes (Mr., Ms., Rev., Dr., etc.)
2. Board-approved mission statement
3. Background/history of your organization
4. Organization development documents, if your organization already has them, such as Strategic Plan, Fundraising Plan, Management Succession Plan, etc.
5. Resume or brief biographical information on the Executive Director and top management staff.

General Info

- Only one user can access your profile at a time.
- We encourage you to use a short and concise writing style. It is easier for a donor to read short, bulleted information versus long narrative paragraphs. Remember, this is a Website that will primarily be scanned by visitors.
- Once you have completed information for each page, click “Submit” to retain the information.
- After completing your entire profile, please submit by clicking the “Submit for review” button on the Overview section.
- Begin working with your CEO/ED and Board Chair *now* to get their comments. These sections usually take time to revise, so start early!
- If you want to print a draft review of all of the information you are waiting to submit in order to proofread it, choose the “Printable Views | Complete” report on the Overview section.
- Keywords section: You are asked to list up to eight (8) keywords for your organization to help identify you in searches. Please note that the search already pulls keywords from your organization name, mission statement, background statement, program names, and program descriptions. Do not redundantly list keywords that are already in these statements.
- We suggest that you begin filling out your profile in this order:
 1. General Information
 2. Management and Governance
 3. Financials
 4. Programs
 5. Upcoming Events
 6. Manage Documents
 7. Manage Multimedia

Remember to SUBMIT any changes you make to a tab in order to save those changes before moving to another tab.

GETTING STARTED

1. Go to www.GivingFirst.org and click on “Sign In.”
2. On the next page, select “Nonprofit Login.”

Donate Now
by searching hundreds of Colorado charities

Looking for a specific charity?
Keywords or Charity Name **GO**

Want to give to a type of charity or cause?
Select a category **GO**

Seeking a charity near you?
Enter City or Zip Code **GO**

Sign In
Sign in on this page if you have donated previously on GivingFirst.org.

Donor Account Login

Email

Password

[Forgot Password?](#)

Select “Nonprofit Login” to access your account.

Nonprofit Login
If you are a non-profit and you want to access your profile, go [here](#).

Create a Donor Account

3. Log in by using the **E-mail Address** and **Password** assigned to you by the Online Giving Manager. Please do not share this password with other staff members. If you need an additional password for another person on your staff, contact the Online Giving Manager.

Menu...

User Login

Email

Password

[Forgot Password?](#)

This e-mail address is associated with the password you were provided by the Online Giving Manager.

This password will be provided to you by the Online Giving Manager. Once you are logged in, you can enter your own password by clicking on ‘Menu...’, and selecting “Users.”

CHANGE PASSWORD

1. On the green bar below the image of the world, on the left hand side, click on “Menu...”

2. Select “Users” and click on it.
3. On the right, click “edit.”
4. Enter your new password and confirm it.

Lori S

Basic Info Organizations (1)

* - Required field

Submit Cancel

* First Name

* Last Name

* Email

* Password

* Confirm Password

Receive Donation Letters

Submit Cancel

Enter your new password on both lines

5. Click “Submit.”

ORGANIZATION OVERVIEW

1. On the green bar below the image of the world, on the left hand side, click on “Menu...”
2. Select “Organizations” and click on it
3. On the right, select “View” and your organization overview will appear.

Take a moment and review this screen.

GivingFirst Sample Profile

Organization Overview

Your organization's name will appear here.

Profile Approval

Users

Showing 1 record(s).

First Name	Last Name
Lori	S

The left navigation bar helps you edit sections of your profile.

Profile Sections

- Overview
- Donation Information
- General Information
- Management and Governance
- Financials
- Programs
- Upcoming Events
- Manage Documents
- Manage Multimedia

- *Left Navigation Bar*: Helps you navigate the main profile categories (Donation Information, General Information, Management and Governance, Financials, Programs, Upcoming Events, Manage Documents, Manage Multimedia). Each section has been further broken down into more specific sub-categories. For example, to input changes to your phone numbers, first click the main category of General Information, then click the Phone Numbers tab.

GENERAL INFORMATION

Profile Sections

- Overview
- Donation Information
- General Information**
- Management and Governance
- Financials
- Programs
- Upcoming Events
- Manage Documents
- Manage Multimedia

GivingFirst Sample Profile

General | Addresses (1) | Phone Numbers (2) | Statements (6) | Search Classifications

Updated 01/13/2012 by [User]

Begin with **General Information**.
Click on each section.

Click on edit to begin adding information to this section.

Basic Info	
Active	Yes
Organization Name	GivingFirst Sample Profile
Acronym	GFSP
URL Link	http://givingfirst.org/Sample
Incorporated Date	01/31/2007
Tax Id	51-1333322
Email	givingfirst@communityfirstfoundation.org
Website	www.communityfirstfoundation.org

GivingFirst Sample Profile

Profile Sections

- Overview
- Donation Information
- General Information**
- Management and Governance
- Financials
- Programs
- Upcoming Events
- Manage Documents
- Manage Multimedia

General
Addresses (1)
Phone Numbers (2)
Statements (6)
Search Classifications

** - Required field*

Hide
Basic Info

Active	<input checked="" type="checkbox"/>
Acronym	<input type="text" value="GFSF"/>
* URL Link ?	<input type="text" value="http://givingfirst.org/Sample"/>
Logo file Name ?	No file is currently uploaded. <input type="button" value="Upload File"/>
Incorporated Date	<input type="text" value="01/31/2007"/> 📅
Tax Id	<input type="text" value="51-1333322"/>
Email	<input type="text" value="givingfirst@communityfirs"/>
Website	<input type="text" value="www.communityfirstfoun"/>
Facebook Link	<input type="text"/>
Twitter Link	<input type="text"/>

Donation Locations

General Operating	<input checked="" type="checkbox"/>
Endowment	<input checked="" type="checkbox"/>
Capital	<input type="checkbox"/>
Program	<input checked="" type="checkbox"/>
Other	<input checked="" type="checkbox"/>

Testimonials

This is an amazing organization! They have helped me so much with all of their resources. -- Donald Duck

Whats New

New profiles on GivingFirst! More every day!

Hide
Former Names

Former Name	<input type="text" value="Original Name DonorEdge"/>	<input type="button" value="Delete"/>
Last Used (Year)	<input type="text" value="2004"/>	

Former Name	<input type="text" value="Test former"/>	<input type="button" value="Delete"/>
Last Used (Year)	<input type="text" value="1979"/>	

Acronym

Enter any additional acronym by which your organization is known.

URL Link (Public Link)

Used during the linking process from your website to the GivingFirst site. You can list in your marketing materials – “Learn more about us at www.GivingFirst.org/YOURAGENCY”.

Logo

Upload your logo to appear on the Overview tab of your profile and at checkout.

Incorporated date

You must fill out the Year of Incorporation before you can save this page. If you have filled out the other information, but don't have your Year of Incorporation, enter 2000 and remember to come back and change it once you have the correct year.

Tax ID

Also known as the Employer Identification Number (EIN) or Federal Identification Number (FIN), it is used to identify a business entity by the IRS. You can find it on your 501(c)(3) determination letter or 990.

E-mail

Enter the e-mail you would like to use for potential donors to contact you.

Website

Enter the website address you would like people viewing your profile to link into from the GivingFirst site.

Facebook Link

Enter the link to your Facebook page for potential donors to learn more about your programs.

Twitter Link

Enter the link to your Twitter page where potential donors can learn more about your programs.

Donation Locations

Allows you to choose the options to which donors can direct their donation. You can choose all or just one from the list of General Operating, Endowment, Capital, Program or Other.

Testimonials

Gives you a place to enter testimonials about your organization and its impact on the community and those you serve.

What's New

Enter highlights of what is happening with your organization. This will appear to the public on the Overview tab under “Mission.”

Former Names

Enter any former names that your organization may have used in the past. Be sure to enter the last year it was used.

***Be sure to click the “Submit” button at the bottom of the screen before going to another category.
Please note that a “Save” reminder will not appear each time you leave a page.
Once you have saved your work, click on the next tab, “Addresses.”***

Addresses

GivingFirst Sample Profile

Address Type	Line 1	Line 2	City	State	Zip	
Geographical Location	6870 W 52nd Ave	Ste 103	Arvada	Colorado	80002	edit delete

Click on “edit” to make any changes to the location of your organization

Address Type: Geographical Location

* Line 1: 6870 W 52nd Ave

Line 2: Ste 103

City: Arvada

State: Colorado

Zip: 80002

Plus 4:

Comments:

Geographical Location is the geographic postal address where your office is located. This will be linked to Google Maps. Confidential locations, such as battered spouse shelters, may provide a post office box.

Phone Numbers

GivingFirst Sample Profile

Showing 2 record(s). + Add entry

Type of Number	Phone Number	Comments
Business	720-898-5900	edit delete
Business	720-898-5901	edit delete

Click on "edit" to make any changes to the phone numbers for your organization

Type of Number: Business

*** Phone Number**: 720-898-5900

Extension: [Empty]

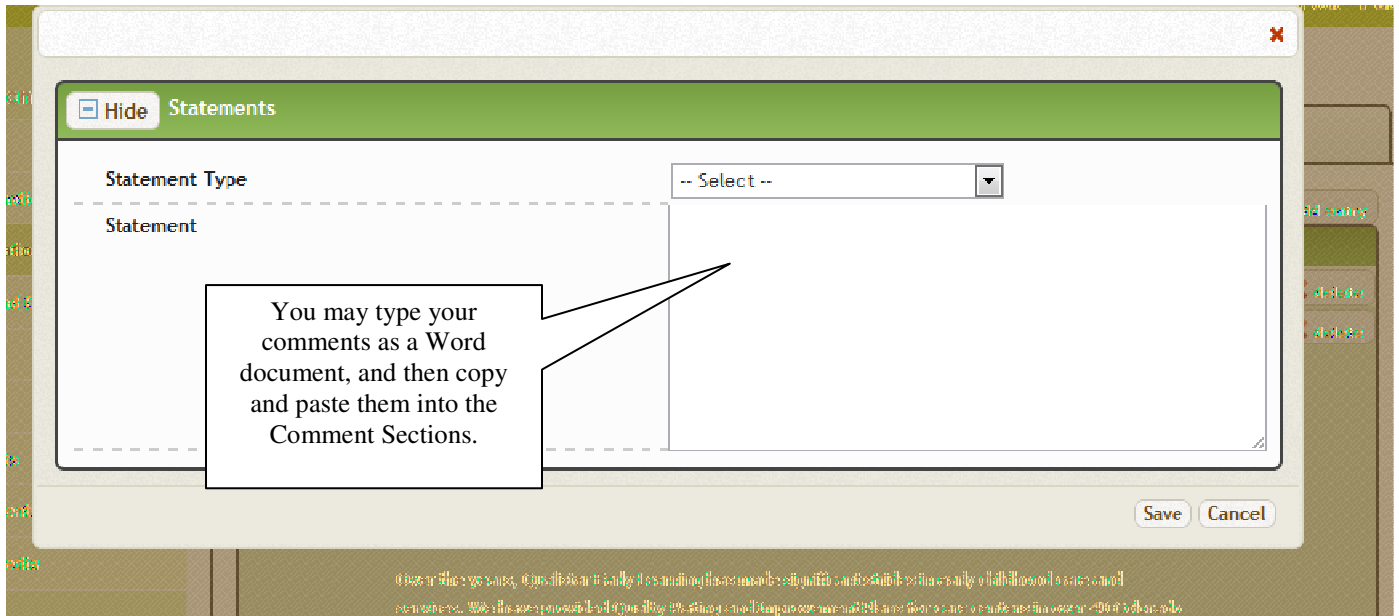
Comments: [Empty]

Save Cancel

Your organization's primary or main telephone number is required. You may also choose to input the executive director, development director or key staff person's direct phone number as the alternate telephone number. Only the primary number will be displayed to the public.

Statements

Click on “Add entry” to begin entering all of your required statements or click on “edit” for any statement that is entered and needs to be changed or updated.



The screenshot shows a web application window titled "Statements". At the top left, there is a "Hide" button and the title "Statements". Below this, there is a "Statement Type" dropdown menu with "-- Select --" as the current selection. Underneath the dropdown is a large text area labeled "Statement". A callout box with a pointer to the text area contains the text: "You may type your comments as a Word document, and then copy and paste them into the Comment Sections." At the bottom right of the window, there are "Save" and "Cancel" buttons. The background of the application is a light green color.

Select the type of statement you’re entering. Enter statement text. Remember to click on “Save” when done!

Required Statements include:

Mission Statement

Enter your board-approved mission statement in this field. A good mission statement articulates the end result for which an organization is striving. It is typically a few sentences.

Impact Statement

Describe your top accomplishments for the previous fiscal year and your goals for the current year.

Needs Statement

List the top five (5) most pressing needs of your organization. These needs may include financial or physical needs, including (but not limited to) additional volunteers, staff, board members, physical materials, etc.

Background Statement

Add organization’s history and an overall description.

Executive Director Statement

Take this opportunity to give an insider’s perspective about your organization’s uniqueness. Add or emphasize information about your organization that is important and distinctive.

Board Chair/President Statement

From the governance perspective, the board chair should discuss the successes and challenges facing your organization. Include how challenges are being addressed.

Search Classifications

GivingFirst Sample Profile

General | Addresses (1) | Phone Numbers (2) | Statements (6) | **Search Classifications**

* - Required field

Submit Cancel

Primary 1: Civil Rights, Social Action & Advocacy

Sub type 1: Civil Rights

Primary 2: Employment

Sub Type 2: -- Select --

Primary 3: Education

Sub Type 3: Elementary & Secondary Education

Colorado Counties Served

<input checked="" type="checkbox"/> Denver	<input checked="" type="checkbox"/> Arapahoe	<input checked="" type="checkbox"/> Jefferson
<input checked="" type="checkbox"/> Adams	<input type="checkbox"/> Alamosa	<input type="checkbox"/> Archuleta
<input type="checkbox"/> Baca	<input type="checkbox"/> Bent	<input checked="" type="checkbox"/> Boulder
<input checked="" type="checkbox"/> Broomfield	<input type="checkbox"/> Chaffee	<input type="checkbox"/> Cheyenne
<input type="checkbox"/> Clear creek	<input type="checkbox"/> Conejos	<input type="checkbox"/> Costilla
<input type="checkbox"/> Crowley	<input type="checkbox"/> Custer	<input type="checkbox"/> Delta
<input type="checkbox"/> Dolores	<input checked="" type="checkbox"/> Douglas	<input type="checkbox"/> Eagle
<input type="checkbox"/> El paso	<input type="checkbox"/> Elbert	<input type="checkbox"/> Fremont
<input type="checkbox"/> Garfield	<input type="checkbox"/> Gilpin	<input type="checkbox"/> Grand
<input type="checkbox"/> Gunnison	<input type="checkbox"/> Hinsdale	<input type="checkbox"/> Huerfano
<input type="checkbox"/> Jackson	<input type="checkbox"/> Kit carson	<input type="checkbox"/> La plata
<input type="checkbox"/> Lake	<input type="checkbox"/> Lake county	<input type="checkbox"/> Larimer
<input type="checkbox"/> Las animas	<input type="checkbox"/> Lincoln	<input type="checkbox"/> Logan
<input type="checkbox"/> Mesa	<input checked="" type="checkbox"/> Metropolitan denver area	<input type="checkbox"/> Mineral
<input type="checkbox"/> Moffat	<input type="checkbox"/> Montezuma	<input type="checkbox"/> Montrose
<input type="checkbox"/> Morgan	<input type="checkbox"/> Otero	<input type="checkbox"/> Ouray
<input type="checkbox"/> Park	<input type="checkbox"/> Phillips	<input type="checkbox"/> Pitkin
<input type="checkbox"/> Prowers	<input type="checkbox"/> Pueblo	<input type="checkbox"/> Rio blanco
<input type="checkbox"/> Rio grande	<input type="checkbox"/> Routt	<input type="checkbox"/> Saguache
<input type="checkbox"/> San juan	<input type="checkbox"/> San miguel	<input type="checkbox"/> Sedgwick
<input type="checkbox"/> Summit	<input type="checkbox"/> Teller	<input type="checkbox"/> Washington
<input type="checkbox"/> Weld	<input type="checkbox"/> Yuma	<input checked="" type="checkbox"/> National
<input type="checkbox"/> Kioria		

States Served

<input type="checkbox"/> Alabama	<input type="checkbox"/> Alaska	<input type="checkbox"/> Arizona
<input type="checkbox"/> Arkansas	<input type="checkbox"/> California	<input type="checkbox"/> Colorado
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Delaware	<input type="checkbox"/> District of Columbia
<input type="checkbox"/> Florida	<input type="checkbox"/> Georgia	<input type="checkbox"/> Hawaii
<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois	<input type="checkbox"/> Indiana
<input type="checkbox"/> Iowa	<input type="checkbox"/> Kansas	<input type="checkbox"/> Kentucky
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maine	<input type="checkbox"/> Maryland
<input type="checkbox"/> Massachusetts	<input type="checkbox"/> Michigan	<input type="checkbox"/> Minnesota
<input type="checkbox"/> Mississippi	<input type="checkbox"/> Missouri	<input type="checkbox"/> Montana
<input type="checkbox"/> Nebraska	<input type="checkbox"/> Nevada	<input type="checkbox"/> New Hampshire
<input type="checkbox"/> New Jersey	<input type="checkbox"/> New Mexico	<input type="checkbox"/> New York
<input type="checkbox"/> North Carolina	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Ohio
<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Oregon	<input type="checkbox"/> Pennsylvania
<input type="checkbox"/> Puerto Rico	<input type="checkbox"/> Rhode Island	<input type="checkbox"/> South Carolina
<input type="checkbox"/> South Dakota	<input type="checkbox"/> Tennessee	<input type="checkbox"/> Texas
<input type="checkbox"/> Utah	<input type="checkbox"/> Vermont	<input type="checkbox"/> Virginia
<input type="checkbox"/> Washington	<input type="checkbox"/> West Virginia	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Wyoming		

Services Provided Internationally?

Search Tags ?

Submit Cancel

Select the counties in which your organization serves

Select the states in which your organization serves.

Organization serves foreign countries in addition to the United States

Use key words or phrases similar to a Google® search. Remember that it will already search for words in your organization name, mission statement, background statement, program names, and program description. Use key words that do not appear in any of those sections to maximize your appearance in search results.

Organizational (NTEE) Classifications

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 Internal Revenue Code 501(c)(3). The system, developed by the National Center for Charitable Statistics (NCCS) with the guidance of leading nonprofit scholars and practitioners, is used by the IRS, as well as Independent Sector, the Foundation Center, AAFRC Trust for Philanthropy and many grant makers, foundations, researchers and others working with nonprofit organizations. For more information about the NTEE codes, visit <http://nccsdataweb.urban.org/FAQ/>.

Search Tags

These are words to help a donor find your organization as if he or she were doing a Google© search. Text from your organization name, mission statement, background statement, program names, and program description is also scanned during searches, so you do not need to repeat words used in those fields.

- Use only one- or two-word phrases
- Consider listing special events, well-known founders' names, etc.

Consider if any terminology has changed with the times; include outdated terminology if you think donors might still be using it (example: handicapped)

MANAGEMENT AND GOVERNANCE

Persons

To complete the **Management and Governance** section, add names of your current CEO/Executive Director(s), senior staff members, and board members. You must add each person individually in the Person tab by clicking on “Add New Person.” Then you can designate each individual according to their position. Completing the **Persons** section for an individual adds that person’s name to a drop down list in the **Boards** and **Management Capacity** tabs.

Start by clicking on “Add New Person.”

The screenshot shows the 'GivingFirst Sample Profile' interface. On the left is a sidebar with 'Profile Sections' including Overview, Donation Information, General Information, Management and Governance (highlighted), Financials, Programs, Upcoming Events, Manage Documents, and Manage Multimedia. The main content area has tabs for Persons (21), Boards (1), Management Capacity, Risk Management, and Comments. The 'Persons' tab is active, showing a form with a 'Submit' and 'Cancel' button at the top. Below is a 'Basic Info' section with a 'Hide' button. Fields include: Active (checkbox), Prefix (text), * First Name (text), Middle Name (text), * Last Name (text), Suffix (text), Email (text), and * Position (dropdown menu). A callout box points to the Position dropdown, stating: 'Your choice here of either CEO/Executive Director, Artistic Director, Board Member, Co-CEO, Senior Staff, Former CEO/Executive Director, Board Members or Other will determine the additional required fields necessary.'

Active

Indicate if the current individual is active in your organization. If this is checked, this person will appear in lists.

Prefix

Enter the individual's prefix (e.g., Mr., Ms., Dr., etc.). This field is optional.

First Name - Required

Enter the individual's first name.

Middle Name

Enter the individual's middle name. This field is optional.

Last Name - Required

Enter the individual's last name.

Suffix

If applicable, enter a suffix for the individual (e.g., Jr., Sr., etc.). This field is optional.

E-mail

Enter the individual's e-mail address. This field is optional.

Position - Required

Enter the individual's position with your organization. Once this has been chosen, additional fields may appear depending on the choice.

CEO/Executive Director/Artistic Director/Co-CEO/Former CEO**Company Affiliation**

Enter the individual's company affiliation. This field is required because it shows on your profile if the CEO sits on the Board of Directors.

Start Date

Provide month/year in which the current CEO/Executive Director/Artistic Director/Co-CEO/Former CEO started his/her term of CEO/Executive Director/Artistic Director/Co-CEO/Former CEO service.

Salary

Enter the individual's salary range or you may choose N/A. We encourage you to fill out the CEO/ED Salary Range as part of our dedication to transparency.

Bio and Summary of Experience

Please provide a narrative of the individual's experience, education, training, etc. This field is required of all CEO/Executive Director/Artistic Director/Co-CEO/Former CEO.

Senior Staff**Title**

Enter the individual's title.

Bio

Please provide a narrative of the individual's experience, education, training, etc. This field is required of all senior staff. This information can often be found on your organization's website and easily copied and pasted.

Board Member

Company Affiliation

Enter the individual's company affiliation. If the individual is retired, please enter "community volunteer" in this field. This field is a required field for all board members and board chairs.

Title

Enter the individual's title on the Board of Directors (e.g., President, Secretary, or Trustee).

Other

Position Other

Enter the individual's position with your organization.

You may then click on "Submit" to continue entering all appropriate persons.

Boards

In nearly all nonprofit organizations, the board plays a critical role by providing oversight and guidance. According to the Better Business Bureau Wise Giving Alliance, “indication of adequate oversight includes, but is not limited to, regularly scheduled appraisals of the CEO’s performance, evidence of disbursement controls such as board approval of the budget, fundraising practices, establishment of a conflict of interest policy and establishment of accounting procedures sufficient to safeguard charity finances.” Each board member and the board chair will be listed with their company affiliation and title on the public side.

To begin, click on “Add Entry.”

GivingFirst Sample Profile

Persons (21) Boards (1) Management Capacity Risk Management Comments

* - Required field
Submit Cancel

Board Info

* Board Type -- Select --

Is Primary

Client Representative

Meetings Per Year

Attendance % *Attendance WorkSheet*

Contributing Dollars (%)

Contributing In Kind (%)

Management Reports Provided

Committees

<input type="checkbox"/> Academic and Student Affairs	<input type="checkbox"/> Communications / Promotion / Publicity / Public Relations
<input type="checkbox"/> Development / Fund Development / Fund Raising / Grant Writing / Major Gifts	<input type="checkbox"/> Inclusiveness/Diversity Committee
<input type="checkbox"/> Special Events (Golf Tournament)	<input type="checkbox"/> N/A
<input type="checkbox"/> Financial Analysis	<input type="checkbox"/> Research/Evaluation
<input type="checkbox"/> Human Resources / Personnel & Finance & Marketing & Nominating & By-laws	<input type="checkbox"/>
<input type="checkbox"/> Advisory Board / Advisory Council	<input type="checkbox"/> Affordable Housing
<input type="checkbox"/> Alumni	<input type="checkbox"/> Audit
<input type="checkbox"/> Bid	<input type="checkbox"/> Board Development
<input type="checkbox"/> Board Development / Board Orientation	<input type="checkbox"/> Board Governance
<input type="checkbox"/> Building	<input type="checkbox"/> Legal/Litigation
<input type="checkbox"/> Business Partnerships	<input type="checkbox"/> By-Laws
<input type="checkbox"/> Campership	<input type="checkbox"/> Capital Campaign
<input type="checkbox"/> Civil Rights	<input type="checkbox"/> Clinical Health
<input type="checkbox"/> Collections	<input type="checkbox"/> Communications / Promotion / Publicity / PR
<input type="checkbox"/> Community Investment	<input type="checkbox"/> Artistic
<input type="checkbox"/> Community Land Trust	<input type="checkbox"/> Community Outreach / Community Relations
<input type="checkbox"/> Compensation	<input type="checkbox"/> Development
<input type="checkbox"/> Development / Funds / Grants/ Gifts	<input type="checkbox"/> Education
<input type="checkbox"/> Endowment	<input type="checkbox"/> Ethics

Board type

Boards can be categorized by type (governing, advisory, youth, constituent, faculty and other) and geographic representation (local, national, regional, international). You may enter more than one board. However, you are required to choose one as your primary. This is the board you will be asked to provide statistics on such as board attendance rate, racial/ethnic demographics, etc.

Is Primary

Check this box if this is the primary board. This is the board you will be asked to provide statistics on such as board attendance rate, racial/ethnic demographics, etc.

Client Representative

Check box if your organization's board constituency includes client representation. Some nonprofits include clients on their board of directors, allowing them to be responsive to their clients' needs and in-tune with changes in the community. However, in some cases, the nature of the nonprofits' services prevents clients from serving on the board for safety or confidentiality reasons.

Meetings Per Year

Input how many times your full board meets each year.

Attendance %

Enter the percent that represents the cumulative annual attendance of board members. To open a copy of the spreadsheet, click on "Attendance Worksheet." You will need to submit the board attendance spreadsheet online in the "Manage Documents" section. The spreadsheet calculates the cumulative annual board attendance by calculating the percent of total board membership attending each board meeting and finding the average of the results. This Board Attendance Spreadsheet is required to verify Board Member Attendance.

Contributing Dollars (%)

Please enter the percentage of board members who have contributed a cash gift to the organization in the past fiscal year. It is understood that board members contribute in many important ways (e.g., contributing subject expertise, volunteering time, fundraising) and that some organizations include target beneficiaries on their boards, who may not be in a position to contribute financially.

Contributing In Kind (%)

Enter the percentage of board members contributing in-kind. In-kind contributions may include contributing subject expertise, volunteering time, and/or donation of non-cash items.

Management Reports Provided

Check box if staff provides written management reports to the board. Management reports may include financial reports, progress towards organizational goals and objectives and client feedback.

Committees

Select or remove committees as appropriate to reflect the board's committee structure by checking or unchecking the appropriate boxes next to each committee.

Board Member Demographics

Please provide the gender and ethnic backgrounds of board members. Input the numbers for each category, so if you do not have a category, please enter 0.

Board Terms

Term Limit – Enter the number of terms a board member may serve before being required to rotate off the board. If your organization does not have term limits, please enter “0.”

Term Length – Input the length of a board term in number of years. If your organization has different term lengths depending on the position held by a board member, please enter the shorter of the term limits. Our current system does not allow for ranges or multiple term lengths. If your organization does not have set term lengths, please enter “0.”

Select Board Members

Click on the name of the individual serving on the board in the “Name” dropdown menu. Indicate if this person is a member, chair or co-chair in the “Type” dropdown menu. Provide month/year in which the board chair took office. Provide month/year in which the board chair will leave office. To add another board member, click “Add New.”

Remove Board Members

Click “Delete” for any member listed who is no longer a member of the board.

*Click “Submit” at the bottom of the page before leaving the Boards tab.
You may then click on “Add Entry” to add another board.*

Management capacity

GivingFirst Sample Profile

Persons (21) Boards (1) Management Capacity Risk Management Comments

* - Required field

Hide **Executive Director**

Formally evaluated by the board against goals and objectives Yes No Not Applicable

If yes frequency of these review

Hide **Senior Management**

Formally evaluated by the board against goals and objectives Yes No Not Applicable

If yes, frequency of these review

Hide **Non-Management Staff**

Formally evaluated by the board against goals and objectives Yes No Not Applicable

If yes, frequency of these review

Executive Director

Formally evaluated by the board against goals and objectives?

Indicate whether your organization's Executive Director is formally evaluated by the board against goals and objectives. If yes, please indicate the frequency of these reviews.

Senior Management

Formally evaluated by the board against goals and objectives?

Indicate whether management is formally evaluated by the Executive Director against goals and objectives. If yes, please indicate the frequency of these reviews.

Non-Management Staff

Formally evaluated by the board against goals and objectives?

Indicate whether non-management staff is formally reviewed. If yes, please indicate the frequency of these reviews.

Collaborations

List the names of all organizations with whom you collaborate.

Staff Information

Number of Full-Time, Part-Time and Contract Staff

Please indicate the number of full-time, part-time and contract staff in your organization at the close of your most recent fiscal year. Seasonal staff should not be included in full-time staff, but may be included as part-time staff.

Number of Volunteers Annually

Please indicate the number of annual volunteers for your organization at the close of your most recent fiscal year.

Staff Retention Rate

Your staff retention rate should be calculated using the following formula: Staff Retention Rate = x/y , where “x” equals the number of full-time staff employed as of fiscal day 1 last year that are still employed as of fiscal day 1 this year and “y” equals the total number of full-time staff employed as of fiscal day 1 last year.

Example:

Fiscal year is January 1, 2004 – December 31, 2004.

1. $x = 18$ full-time staff persons employed as of January 1, 2004 are still employed as of January 1, 2005.
2. $y = 25$ full-time staff employed as of January 1, 2004.
3. $18 \div 25 = .72$ $.72 \times 100 = 72\%$

Staff retention rate = 72%

Licensing

Indicate whether your organization is licensed by the government.

Government Licenses

Community First Foundation maintains a list of areas in which a nonprofit organization may be licensed by a government entity. Please indicate any areas in which your organization has a license and the year the license was issued. You may suggest a new license area to be added by emailing

GivingFirst@CommunityFirstFoundation.org.

Accreditations

Please indicate any national external accreditations your organization has, and the year that accreditation was received. In general, an organization becomes accredited when it meets rigorous standards for service and quality as designated by the accrediting body. The accreditation process usually includes a self-evaluation as well as an on-site evaluation by peers and/or experts in the field. For many organizations this does not apply because there is no relevant accreditation or assessment. Community First Foundation maintains a list of authorized accreditations to be included in the profile. You may suggest a new accreditation to be added by emailing GivingFirst@CommunityFirstFoundation.org.

Affiliations

Please indicate any affiliations your organization has, and the year that affiliation began. Community First Foundation maintains a list of authorized affiliations to be included in the profile. The organizations on this list generally have some criterion for affiliation beyond the payment of annual dues including, but not limited to, an application review process, organizational assessments, monitored compliance with standards/guidelines and specific requirements of member organizations. You may suggest a new affiliation to be added by emailing GivingFirst@CommunityFirstFoundation.org. A general category (Affiliate/Chapter of National Organization, i.e. Girl Scouts of the USA, etc.) has been provided for those organizations that are a chapter or affiliate of a national organization.

Awards

Indicate any awards your organization has received in the past three years including the years they were received and who they were awarded by. You may list up to seven.

Before leaving the Management Capacity section, click “Submit” at the bottom of the page.

Risk Management

Community First Foundation maintains a list of risk management provisions a nonprofit organization may carry for risk management. Select or remove types of insurance by checking and unchecking the appropriate boxes so as to reflect the types of insurance your organization carries. You may suggest that a new risk management provision be added to the list by emailing GivingFirst@CommunityFirstFoundation.org.

Before leaving the Risk Management section, click “Submit” at the bottom of the page.

Comments – Management & Governance

Comment Type - Executive Director Comments

“Comments” is an opportunity for you to describe something that was not captured or to highlight or explain a particular issue in the **Management and Governance** section (e.g., board diversity, staff retention rate, etc.). This section may also be used to discuss challenges and opportunities facing your organization and how these are being addressed. Additionally, you will need to use this section to provide details regarding anticipated completion dates of documents you may indicate are “in development” in the Manage Documents section.

*Before leaving the Comments tab, click “Submit” at the bottom of the page.
You may then click on Financials in the menu bar to proceed to the next section.*

FINANCIALS

The financial data you provide will be validated using IRS Form 990s and/or audited financial statements. Please upload these to the manage documents section of your profile.

Requirements for filing Forms 990, 990-EZ, and 990-N

Requirements for the filing of the Form 990 vary according to the size of the organization. The following are excerpts from the IRS requirements for the filing of returns by tax-exempt organizations:

- “An organization that normally has \$25,000 or more (\$50,000 for tax years ending on or after December 31, 2010) in gross receipts and that is required to file an exempt organization information return must file either Form 990, Return of Organization Exempt from Income Tax, or Form 990-EZ, Short Form Return of Organization Exempt from Income Tax. See Filing Phase-In for more information about which return to file. The return is due on the 15th day of the 5th month after the end of the organization's fiscal year. (For example, the 2008 return of an organization whose fiscal year ends on June 30, 2009, would be November 15, 2009.) The due date may be extended for three months, without showing cause, by filing Form 8868 before the due date; an additional three-month extension may be requested on Form 8868 if the organization shows reasonable cause why the return cannot be filed by the extended due date.¹”
- “Organizations with gross receipts and assets below certain thresholds at the end of their tax years may file Form 990-EZ, Short Form Return of Organization Exempt from Income Tax. In addition, certain other church-affiliated organizations and governmental organizations are not required to file annual information returns. Finally, organizations whose annual gross receipts are normally less than \$25,000 are not required to file an annual return, but may be required to file an annual electronic notice - e-Postcard - beginning in 2008.²”
- “Beginning in 2008, small tax-exempt organizations that previously were not required to file returns may be required to submit an annual electronic notice, Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations not Required To File Form 990 or 990-EZ. This filing requirement applies to tax periods beginning after December 31, 2006. Organizations that fail to meet their annual filing requirement for three consecutive years are subject to losing their tax-exempt status. Small tax-exempt organizations, whose gross receipts are normally \$50,000 or less, are not required to file Form 990, Return of Organization Exempt From Income Tax, or Form 990-EZ, Short Form Return of Organization Exempt From Income Tax. These small tax-exempt organizations are required to file electronically the e-Postcard, Form 990-N, with the IRS annually. Exceptions to this requirement include organizations that are included in a group return, private foundations required to file Form 990-PF, and section 509(a)(3) supporting organizations required to file Form 990 or Form 990-EZ. In addition, this filing requirement does not apply to churches, their integrated auxiliaries, and conventions or associations of churches.³”

¹ <http://www.irs.gov/charities/article/0,,id=139222,00.html>, accessed March 5, 2012

² <http://www.irs.gov/charities/article/0,,id=139223,00.html>, accessed March 5, 2012

³ <http://www.irs.gov/charities/article/0,,id=170550,00.html>, accessed March 5, 2012

Audited or Reviewed Financials

Only upload audited or reviewed financial statements if you have not filed or are not required to file a 990, or if the 990 does not indicate \$50,000 in revenue or \$25,000 in net assets.

Three years of financial information are viewable to donors in order to provide a more complete picture of your organization's financial situation. By observing three years of data, trends can be more easily recognized and a great deal can be learned about the financial stability of the organization. For example, if an organization has received significant revenue from one source (such as Program/Earned Revenue) in the three previous years, it is likely that funding from the same source will continue in the future.

Current Fiscal Year

GivingFirst Sample Profile

Current Fiscal Year	Previous Fiscal Years (5)	Comments
* - Required field		
<input type="button" value="submit"/> <input type="button" value="cancel"/>		
Hide Current Year		
Current Year Start Date	<input type="text" value="01/01/2010"/>	<input type="button" value="calendar"/>
Current Year End Date	<input type="text" value="12/31/2010"/>	<input type="button" value="calendar"/>
Hide Fiscal Projections		
Current Income Projections	<input type="text" value="\$ 750000"/>	
Current Expense Projections	<input type="text" value="\$ 350000"/>	
Hide Endowment Info		
Do you have an endowment	<input type="button" value="No"/> <input type="button" value="dropdown"/>	
Endowment Value	<input type="text" value="\$ 0"/>	
What is your spending policy?	<input checked="" type="radio"/> N/A <input type="radio"/> Percentage <input type="radio"/> Income Only <input type="radio"/> Income plus capital appreciation	
Hide Capital Campaign Info		
Currently in a Capital Campaign?	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Purpose of the Capital Campaign	<input type="text"/>	
Campaign Goal	<input type="text" value="\$ 0"/>	
Campaign Start Date	<input type="text" value="01/01/2001"/>	<input type="button" value="calendar"/>
Campaign End Date	<input type="text" value="01/01/2001"/>	<input type="button" value="calendar"/>
Hide Tax Credits		
Does Organization qualify for a tax credit?	<input type="button" value="Neither"/> <input type="button" value="dropdown"/>	
<input type="button" value="submit"/> <input type="button" value="cancel"/>		

Start Date/End Date

Enter the current Fiscal Year's Start and End Dates

Fiscal Projections

Enter income projections and expense projections for the current year.

Endowment Information

An endowment is a pool of funds designated to provide long-term funding for a charitable cause. When a pool of funds is endowed, the principal - or corpus - cannot be spent and is left to grow in perpetuity. The spending policy is typically contained in the guidelines of the endowment.

Capital Campaign

If your organization is engaged in a capital campaign, the information may be entered in this section.

Tax Credits

Please indicate if your organization offers tax credits for Child Care Credit, Enterprise Zone, Both or Neither.

Previous Fiscal Years

Enter your organization's financial information for previous years based on your 990 tax returns and using the guide below to fill in the appropriate information in the correct section.

Start Date/End Date

Enter the previous Fiscal Year's Start and End dates. These can be found in Line A.

Financial Documents

Indicate if your organization has an IRS Tax Form 990, 990EZ or 990PF, what type of audit your organization participated in, who the auditing company was and whether the auditor gave an unqualified opinion.

Total Revenue From

Note that you will not be able to complete the "Total Revenue" section. This will be completed by Community First Foundation.

Foundations and Corporations

This amount can be found in Part VIII, Line 1f (2008 990s and newer), Part I, Line 1a (2007 990s and older) or Part 1, Line 1 (990EZ)

Government-Federal

There is not a line item on the 990s for this. If you want to enter an amount as classified on your audit, you may do so. Please note that if you choose to enter an amount here as reported in your audit, then you ought to also enter all of the amounts for all Government Revenue types based on the audit rather than the suggested 990 sections listed under Government-Unspecified.

Government-State

There is not a line item on the 990s for this. If you want to enter an amount as classified on your audit, you may do so. Please note that if you choose to enter an amount here as reported in your audit, then you ought to also enter all of the amounts for all Government Revenue types based on the audit rather than the suggested 990 sections listed under Government-Unspecified.

Government-Local

There is not a line item on the 990s for this. If you want to enter an amount as classified on your audit, you may do so. Please note that if you choose to enter an amount here as reported in your audit, then you ought to also enter all of the amounts for all Government Revenue types based on the audit rather than the suggested 990 sections listed under Government-Unspecified.

Government-Unspecified

This amount can be found in Part VIII, Line 1e (2008 990s and newer) or Part 1, Line 1d (2007 990s and older). There is not a line item on the 990EZ for this.

Individuals

This amount can be found in Part I, Line 1b (2007 990s and older)

Indirect Public Support

This amount can be found in Part VIII, Line 1a (2008 990s and newer) or Part 1, Line 1c (2007 990s and older). There is not a line item on the 990EZ for this.

Earned Revenue

This amount can be found in Part VIII, Line 2g + Line 6d + Line 10c (2008 990s and newer), Part I, Line 2 + Line 6c + Line 10c (2007 990s and older) or Part I, Line 2 (990EZ).

Interest and Dividend Income

This amount can be found in Part VIII, (sum of Lines 3 to 5) + Line 7d (2008 990s and newer), Part I, Line 4 + Line 5 + Line 7 + Line 8d (2007 990s and older) or Part I, Line 4 + Line 5c (990EZ).

Membership Dues

This amount can be found in Part VIII, Line 1b (2008 990s and newer), Part I, Line 3 (2007 990s and older) or Part I, Line 3 (990EZ).

Special Events

This amount can be found in Part VIII, Line 1c + Line 8c + Line 9c (2008 990s and newer), Part I, Line 9c (2007 990s and older) or Part I, Line 6c (990EZ).

Other Revenue Amount

This amount can be found in Part VIII, Line 11e + Line 1d (2008 990s and newer), Part I, Line 11 (2007 990s and older) or Part I, Line 8 + Line 7c (990EZ).

Other Revenue Description

Indicate where the amounts in the “Other Revenue Amount” came from. This information may be listed on 990 or audit schedules.

Total Expenses For

Note that you will not be able to complete the “Total Expenses” section. This will be completed by Community First Foundation.

Programs

This amount can be found in Part IX, Line 25, Column B (2008 990s and newer), Part I, Line 13 (2007 990s and older) or Part I, sum of lines 10 to 12 (990EZ)

Administration

This amount can be found in Part IX, Line 25, Column C (2008 990s and newer), Part I, Line 14 (2007 990s and older) or Part I, sum of Lines 13 to 15 (990EZ)

Fundraising

This amount can be found in Part IX, Line 25, Column D (2008 990s and newer), Part I, Line 15 (2007 990s and older) or Part I, Line 16 (990EZ)

Payments to Affiliates

This amount can be found in Part I, Line 16 (2007 990s and older). There is not a line item on the 990EZ or 2008 990s and newer for this.

Assets & Liabilities

Note that you will not be able to complete the “Net Assets” section. This will be completed by Community First Foundation.

Total Assets

This amount can be found in Part X, Line 16 (2008 990s and newer), Part IV, Line 59 (2007 990s and older) or Part II, Line 25 (990EZ)

Current Assets

This amount can be found in Part X, sum of lines 1 to 9 (2008 990s and newer), Part IV, sum of lines 45 to 53 (2007 990s and older) or Part II, Line 22 (990EZ)

Long Term Liabilities

This amount can be found in Part X, sum of Lines 23 to 25 (2008 990s and newer) or Part IV, Line 64 + Line 65 (2007 990s and older). There is not a line item on the 990EZ for this.

Current Liabilities

This amount can be found in Part X, sum of Lines 17-22 (2008 990s and newer), Part IV, sum of Lines 60 to 63 (2007 990s and older) or Part II, Line 26 (990EZ)

Top Three Funding Sources

Indicate the three largest funders and the amount from each. We recommend just entering “Funder 1”, “Funder 2”, etc. and the corresponding amounts rather than the funder’s names.

Comments – Financials**Comment Type - Executive Director Comments**

The Executive Director should use this section to explain any variances or discrepancies from year to year that a donor might notice and question. Fundraising plans and objectives and receivables may also be discussed in this section.

Comment Type – Foundation Staff Comments

This is the only area where Foundation Staff will comment. Comments will explain how the Financials were vetted by the staff and note any anomalies discovered.

PROGRAMS

The Programs category allows you to list all of the programs your organization coordinates, but you must list at least one. We recommend keeping the list to the top five. These may be programs which your organization wishes to highlight because of the number of people served, the type of service provided, or because your organization has experienced challenges that you feel may interest donors.

GivingFirst Sample Profile

The screenshot shows a web form for adding a program. At the top, there are tabs for 'Programs (6)' and 'Comments'. Below the tabs is a 'Required field' section with 'Submit' and 'Cancel' buttons. The main form area is titled 'Programs' and contains several sections: 'Active' with a checkbox; 'Program Name' with a text input; 'Program Description' with a large text area; 'Class' and 'Sub Class' with dropdown menus; 'Budget' with a text input and a dollar sign; and 'Beneficiaries' with a grid of checkboxes for various demographic groups.

The screenshot shows the 'Success' section of the form. It includes a 'Define Long Term Success' section with a text area, a 'Define Short Term Success' section with a text area, a 'How Do you Monitor Progress?' section with a text area, and an 'Evidence of Program Success' section with a text area. There are also 'Submit' and 'Cancel' buttons at the bottom.

Programs

Active

If this is an active program, please check the box.

Program name

Enter the name of the program. If combining programs, you might want to denote that fact.

Program Description

This is an overview of the program in general terms.

Class

Enter the type of program. If combining programs, you might want to denote that fact.

Sub-Class

Enter the sub-type of program. If combining programs, you might want to denote that fact.

Budget Amount

Enter the budget of the program. If combining programs, you might want to denote that fact.

Beneficiaries

Enter who benefits from the program. If combining programs, you might want to denote that fact.

Define Long Term Success

Describe the ultimate goal or changes that will result from this program, and how that directly relates back to your mission. This is the impact you hope to achieve.

Define Short Term Success

Describe the goals or changes that are planned for in the next year or two. These are measurable outcomes that your organization tracks.

How do you Monitor Progress?

Describe the process you use to ensure that you are meeting your goals.

Evidence of Program Success

Tell real life success stories of the program, including data and/or anecdotes from clients.

Once you have entered your basic information and clicked on the submit button, you will be able to add up to four photos per program.

GivingFirst Sample Profile

The screenshot shows a web interface for a GivingFirst profile. At the top, there are two tabs: 'Programs (7)' and 'Comments'. Below these, there are two sub-tabs: 'Basic Info' and 'Programs Photos'. The 'Programs Photos' tab is active, showing a form with a title field and a photo upload area. The form includes a 'Submit' button and a 'Cancel' button at the top left. The title field is labeled 'Title' and has a text input box. Below the title field, there is a dashed line indicating the photo upload area. The photo area is labeled 'photo' and contains the text 'No file is currently uploaded.' and an 'Upload File' button. At the bottom of the photo area, there are 'Submit' and 'Cancel' buttons.

Photo Title

This is the title that will be shown with the picture to the public, so please make it short but descriptive.

Photo

Click the “Upload File” button to search your personal computer for the photo, click “Submit.”

Comments - Programs

Comments may be recorded by the Executive Director, Board and Foundation Staff. You may wish to add additional information about the programs listed, or provide information about additional programs.

Comment Type – Executive Director Comments

Please enter the Executive Director’s Comments. These may include additional information about the programs listed, or provide information about additional programs not listed.

FINAL STEPS

Using the Left Navigation Bar, click on the **Overview** link in the top left corner of your screen under Profile Sections. Then click on “Printable Views - Complete” to review your updated data. We encourage you to print this report and review it thoroughly for accuracy. If further changes are required, use the Left Navigation Bar to return to the section(s) that need(s) correction and follow the same process as previously directed in this instruction manual.

If the data contained in the “Complete Printable View” is correct, then you need to upload your supporting documents.

MANAGE DOCUMENTS

Please note that the **ONLY** documents that will be visible to the public are those that you mark as such.

Policies/Plans

Profile Sections

- Overview
- Donation Information
- General Information
- Management and Governance
- Financials
- Programs
- Upcoming Events
- Manage Documents**
- Manage Multimedia

GivingFirst Sample Profile

Documents (3) Policies and Plans

* - Required field

Submit Cancel

Does Organization have Board Selection Criteria	No
Does Organization have a Conflict Of Interest Policy	No
Does Organization have a Whistleblower Policy	No
Does Organization have a Non-Discrimination Policy	In Development
Does Organization have Organization policies/procedures	No
Does Organization have a Management Succession Plan	No
Does Organization have a Strategic Plan	No
Does Organization have a Fundraising Plan	No
Does Organization have Certificate of Good Standing	No

Submit Cancel

For each of the policies and plans, select if you have them or if they are in development. For each of these to which you answer ‘yes,’ the document must be uploaded.

Board Selection Criteria

Indicate whether your organization has written board selection criteria. These criteria indicate the board’s purpose as well as organizational needs and selection procedure. If yes, you will need to upload the board selection criteria document online.

Conflict of Interest Policy

Indicate whether your organization has a written Conflict of Interest Policy for board members that is reviewed on a regular basis. A Conflict of Interest Policy demonstrates an effort by your agency to prevent

perceived, potential or actual conflicts of interest in your operations. If yes, you will need to upload the Conflict of Interest Policy document online.

Whistleblower Policy

Indicate whether your organization has a Whistleblower Policy that is reviewed on a regular basis. If yes, you will need to upload the Whistleblower Policy document online.

Non-Discrimination Policy

Indicate whether your organization has a Non-Discrimination Policy that is reviewed on a regular basis. If yes, you will need to upload the Non-Discrimination Policy document online.

Organization Policies and Procedures

Please indicate whether your organization has written Organizational Policies and Procedures. Policies and procedures should be set forth for subjects such as financial management, client confidentiality, work with minors, personnel, sexual harassment and program administration. If yes, you will need to upload the Organizational Policies and Procedures document online.

Management Succession/Training Plan

Indicate whether your organization has a written management succession/training plan. A management succession/training plan helps to ensure that an organization's activities continue as usual if the Executive Director is unable to complete his/her duties. It should address who will take over the Executive Director's duties, including budgeting, program administration, etc. If yes, you will need to upload the Management Succession/Training Plan document online.

Strategic Plan

Indicate whether or not your organization has a Strategic Plan. A Strategic Plan provides an organization with opportunities to both measure its current effectiveness and plan future actions in pursuit of their mission. Therefore, as explained in the Better Business Bureau's Wise Giving guide, each organization should "have a board policy of assessing, no less than every two years, the organization's performance and effectiveness and of determining future actions required to achieve its mission." If yes, you will need to upload the Strategic Plan document online.

Fundraising Plan

Indicate whether your organization has a written Fundraising Plan. A Fundraising Plan demonstrates that the organization, and specifically their development person, knows what actions to take, where to go for funds, for what projects and for what amounts. It also gives the board, the Executive Director and the funders a good sense of how an organization is doing from a fundraising standpoint, without having to wait until year's end. If yes, you will need to upload the Fundraising Plan document online.

Certificate of Good Standing

Indicate whether your organization has a Certificate of Good Standing from the Secretary of State. This can be obtained by visiting the Colorado Secretary of State's Record Identification or ID Search, <http://www.sos.state.co.us/biz/BusinessEntityCriteria.do>. Enter your agency's name and click on "Search." Click on your agency's ID Number. On the left side bar, you will see Certificate of Good Standing, click on that. Save the PDF to your hard drive. Once you have obtained a copy, you will need to upload the Certificate of Good Standing document online.

Before leaving the Policies/Plan tab, click "Submit" at the bottom of the page.

Documents

Documents (3) Policies and Plans

* - Required field
Submit Cancel

Hide Documents

Document Type -- Select --

* Document Name

Date Adopted

Years Considered

Public

* File Name No file is currently uploaded.
Upload File

Upload Date

Document Year

Submit Cancel

Upload any other documents by clicking on “Manage Documents” in the Left Navigation Bar, choosing “Documents” and then “Add entry.” You will need to select the type of document:

- Audit document
- Board Attendance Worksheet
- Contact Information Form
- IRS 990
- IRS Letter of Determination of Tax Exempt Status
- SOS Certificate of Registration
- Terms of Service
- Other

Complete the additional information:

- Name the document
- The date adopted is the date the board approved the document
- Years Considered is tied directly to what the document is. For example, strategic plan may cover three years, while a fundraising plan may only cover one year. If not applicable, then please enter n/a.
- Click the box next to Public if you would like for the document to be available to the public.
- Filename – click the “Upload File” button to search your personal computer for the document. Follow this process to upload all your supporting documents.
- Document Year is the year the document was created.
- Click “Submit” after each complete entry.

MANAGE MULTIMEDIA

In this section you can upload more photos as well as a YouTube video.

To upload a photo:

1. Click on “Add entry”
2. Title the photo.
3. Click on “Upload File” to browse your computer for the picture you want to upload.
4. Once you’ve selected a picture, click “Submit.”

To upload a video that is already on YouTube:

1. Enter in the name of the video.
2. Enter the date the video was made.
3. Enter in the URL link to the YouTube video.
4. Click on “Submit.”

To upload a video that is not yet on YouTube:

1. Create a YouTube Account by following this link: <http://www.youtube.com/signup?next=/>
2. Once you have a YouTube account, follow the instructions on the YouTube site to upload your video to YouTube.
3. Then follow steps 1-4 above.

Submit for Review Button

Use the left navigation bar and click on **Overview**. The “Submit for Review” button is in the upper left corner of the Organization Overview Tab. Again, you will only be able to click on the “Submit for Review” button once you have input all of the required profile information in the required fields and uploaded all of the required documents. The required fields and documents are listed on the [Quick Profile Completion Schedule](http://goo.gl/UT8v9) (<http://goo.gl/UT8v9>). Please note that the “Submit for Review” button will not immediately grey out even though you click on it.

COMPLETION

After you have clicked “Submit for Review,” your updated data will be submitted to the GivingFirst Team. They review the information on a regular basis, but you can always let them know you have submitted new data by notifying them via e-mail at GivingFirst@CommunityFirstFoundation.org.

The GivingFirst Team will review the profile you submitted, and enter in the previous fiscal years’ Total Revenue, Total Expenses and Net Assets that you provided. They will then send you an email requesting that you review the financial information for accuracy and let you know if any sections of your profile need further attention.

Once you have confirmed that the financial information is correct and you have made any necessary changes based on the feedback from the GivingFirst Team, you must email GivingFirst@CommunityFirstFoundation.org to let them know you have addressed the issues, so that they can do the second review of your profile. The GivingFirst Team will conduct the second review of your profile, and if all of the issues have been satisfactorily addressed, then your profile will be live and visible to the public at which point you will be sent a Welcome New Participant email from GivingFirst.

WHAT'S NEXT?

Now that you are live, what happens next? You can begin receiving donations immediately. We suggest that you link into our website using the “Donate Now through GivingFirst.org” Button.



Monthly, you will receive the donations that have been made to your organization via GivingFirst.org. We encourage you to send an acknowledgement letter from your organization to each donor on the list. Please note that we have sent these donors a tax receipt acknowledging their gift (sample included in this document). However, if your organization is participating in a tax credit program, you will need to provide a receipt and credit to the donor directly. For a list of all donations, go to your profile on the administrative side of GivingFirst.org and click on Donation Reports. A sample is included at the end of this document.

Thank you!

Thank you for completing your GivingFirst profile. We appreciate and greatly value your participation in GivingFirst, and sincerely welcome your input in improving GivingFirst technology.

Nonprofit Resources

The Nonprofit Resources section in the admin section provides a variety of resources to help you work with and promote GivingFirst.org. Below is a sample of resources in this continually-growing section.

To get to the Nonprofit Resources:

1. Log in to your profile account on the administrative side of GivingFirst.
2. Click on the “Menu…” button located on the left hand side of the green bar below the picture of the earth.
3. Select “Nonprofit Resources.”

“Donate Now” Button & Logos

- “Donate Now” button
- GivingFirst.org Logos
- Colorado Gives Day Logos

Documents

- Board Attendance Worksheet
- Contact Information Form
- GivingFirst Admin Instruction Manual: Creating Your GivingFirst.org Profile
- Instructions on How to Download Your Certificate of Registration and Good Standing
- Overview of Process to Create a Profile
- Quick Profile Completion Schedule
- Terms of Service
- Updating Your GivingFirst Profile

Marketing Tools

- Community First Foundation Boilerplate
- GivingFirst.org Boilerplate
- How to Promote Your Profile
- Newsletter/Promotional Copy
- Successful Marketing Tactics for Promoting Your GivingFirst Profile
- Tips for Integrating GivingFirst Into Your Organization’s Messaging
- The Value of Recurring Donations

E-Newsletter Archives

Webinar Archives

- Colorado Gives Day Webinars
- General Webinars

Sample Donation Receipt for a *Non-Tax Credit Organization*

[Date]

[Name]

[Address 1]

[Address 2]

[City], [State] [Zip]

Dear [First Name]:

Thank you for using GivingFirst.org to make your generous donation. Community First Foundation developed GivingFirst.org to make donating to Colorado charities easy and informative and we hope your experience was a good one.

When you receive your credit/debit card or bank statement, please remember that your total donation will appear as a charge of \$[Total Amount] from Community First Foundation (labeled as CmtyFirstFdn/GivingFirst or COGivesDay/GivingFirst on the statement).

DONATION INFORMATION

We will send your donation and related information (such as Special Instructions, Fundraising Page Information, etc.) to the following organization(s) for the following amount(s):

- [NPO that does not offer additional tax credits] - \$[Amount]

This donation is tax deductible as a charitable contribution to the full extent permitted by law.

LEVEL OF ANONYMITY

If you did not elect to be completely anonymous, then we will share your contact information with the nonprofit(s) as well as the level of anonymity you did request. We share this information because we believe in strengthening the relationship between nonprofits and donors and giving the nonprofits you support the opportunity to thank you directly.

EMPLOYER MATCHING

If your employer will be matching your contribution, please ask your employer to send the matching funds directly to the appropriate nonprofit(s) and not to Community First Foundation.

GivingFirst.org is available for you 24 hours a day, 365 days a year. Thank you for making a difference and using GivingFirst.org to do it!

Sincerely,



Marla J. Williams
President/CEO
Community First Foundation
MW/bw

Please keep this letter as your receipt for tax purposes and confirmation that Community First Foundation (Tax ID number: 51-0157964) did not provide any goods, services or other privileges to you for your contribution. If you have any questions, please contact us by e-mail at GivingFirst@CommunityFirstFoundation.org, or call 720. 898.5900.

Sample Donation Receipt for a *Tax Credit Organization*

[Date]

[Name]

[Address 1]

[Address 2]

[City], [State] [Zip]

Dear [First Name]:

Thank you for using GivingFirst.org to make your generous donation. Community First Foundation developed GivingFirst.org to make donating to Colorado charities easy and informative and we hope your experience was a good one.

When you receive your credit/debit card or bank statement, please remember that your total donation will appear as a charge of \$[Total Amount] from Community First Foundation (labeled as CmtyFirstFdn/GivingFirst or COGivesDay/GivingFirst on the statement).

DONATION INFORMATION

We will send your donation and related information (such as Special Instructions, Fundraising Page Information, etc.) to the following organization(s) for the following amount(s):

- [NPO that does offer additional tax credits] - \$[Amount]

This letter is not a receipt of your contribution for tax purposes because your contribution may qualify for a child care or enterprise zone tax credit. Instead, your receipt for tax purposes will be issued by the organization(s) named above and the organization(s) will also determine the extent to which your contribution is eligible for any child care or enterprise zone tax credit.

LEVEL OF ANONYMITY

For contributions to child care or enterprise zone tax credit nonprofits, you can elect to be anonymous in publications but we do need to share your contact information with the nonprofit(s) for you to be receipted properly.

EMPLOYER MATCHING

If your employer will be matching your contribution, please ask your employer to send the matching funds directly to the appropriate nonprofit(s) and not to Community First Foundation.

GivingFirst.org is available for you 24 hours a day, 365 days a year. Thank you for making a difference and using GivingFirst.org to do it!

Sincerely,



Marla J. Williams
President/CEO

MW/bw

If you have any questions, please contact us by e-mail at GivingFirst@CommunityFirstFoundation.org, or call (720) 898-5900.

Sample Donation Report

Date	Amount	Anonymous	First Name	Last Name	Phone Number	Email	address1	Address2	City	State	Zip Code	Country
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Special instructions or comments	Campaign Name	Where do you want these funds to be directed?	Start Date	Recur Every Other	Next Run Date	Last Run Date	End Date	Total Donated	Donation For
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Donation For First Name	Donation For Last Name	Gives Day Year
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