

### How to Begin

#### Create a Login

1. Go to [www.WHEREtoGIVEmidsouth.org](http://www.WHEREtoGIVEmidsouth.org)
  - a. Click on “Create an Account” at the top of the homepage
2. Register for a WHEREtoGIVEmidsouth.org login.
3. In order to begin to work on your profile, you must be paired with your organization by WHEREtoGIVE staff. After registration, send an email with your EIN to [WTGinfo@cfgm.org](mailto:WTGinfo@cfgm.org) to be paired. Please allow 48 hours to pair your organization.

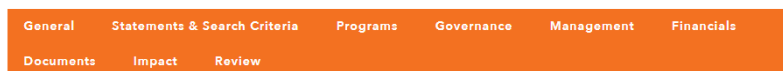
#### Begin your profile

1. You will receive a notification from WHEREtoGIVE staff after you have been paired with your organization
2. Go to [www.WHEREtoGIVEmidsouth.org](http://www.WHEREtoGIVEmidsouth.org) to login
3. Click on “Update Profile”

### Notes and Tips

1. You must provide an IRS Letter of Determination of Tax Exempt Status. **If a copy of this document is NOT provided, we will not be able to publish your profile.**
2. You must provide a Tennessee State Charitable Solicitations Registration Permit. **If a copy of this document is NOT provided, we will not provide your profile with a “Donate Now” button.**
3. **You must complete ALL of the required fields in order to submit your profile.** Please see attached document “Required Fields” for a list of all required fields.
4. If you select “Yes” that you have the following documents, they must be uploaded.
  - Strategic Plan
  - Fundraising Plan
  - Nondiscrimination Policy
  - Business Continuity of Operations Plan
5. Collect the necessary information before you sit down to fill out your profile.
6. Save your work before continuing on to a new page. Changes to the profile are not automatically saved.
7. Refer to the subscript below the field for help on how to complete it.
8. Fields requesting dates, dollar amounts, and counts are often numeric fields, meaning only numerals can be entered into those fields.
9. The “Email Coach” button is located at the top of every page in the profile editor. Email your coach, if you have any questions while completing your profile.

Category Tabs →



Basic Information



PREVIEW EMAIL COACH

10. You may preview your profile, or see what the published version of your profile will look like, by clicking on “Preview” at the top of the profile editor.
11. Comments provided in one section of a Category Tab, will be viewable on all sections of a Category Tab. (Category Tabs are the tabs at the top of the profile editor)

## General

### Basic Information

- Organization Name is the name that will appear on your profile. If you are unable to edit the field, email your Profile Coach with the name that you would like to have there.
- Legal Name: Must be the Name on your IRS documentation

### Mailing Address

- If your mailing address is not your physical address, please provide your physical address.

### Contact

- Please provide the contact information for the person that you would like to receive general inquiries.

### Web and Social Media

- Facebook: If the URL is <http://www.facebook.com/NonprofitXYZ>, enter ONLY "NonprofitXYZ" in the above data field. Do not include <http://www.facebook.com/>. There should be no spaces between the words of your Facebook account name.
- Twitter: Enter your twitter handle only. If the URL is <https://twitter.com/#!/NonprofitXYZ>, enter ONLY "NonprofitXYZ" in the above data field. Do not include 'https://twitter.com/#!/'.

### Multimedia

- Logo:
  - Enter in .jpg or .gif format. File should be 150 pixels wide by 150 pixels high. The image will be distorted if it does not meet these specifications and may cause the PDF version of the profile to not function properly or be printable.
  - You must provide a name for the logo when uploading.
- Picture:
  - Enter in .jpg or .gif format. File should be 320 pixels wide by 240 pixels high. The photo should be wider than it is tall with an aspect ratio of 4:3 roughly. The image will be distorted if it does not meet these specifications.
  - Only one photo will be viewable at a time.
  - You must provide a name for the picture when uploading.
- Video: Only videos already posted online can be added.
  - Videos can come from any online source; you will need the embed code to upload it to the page.
- To Embed a Video on your WHEREtoGIVE Profile:
  - Click on the YouTube logo
  - Copy and paste the embed code into the pop-up box

## Statements & Search Criteria

### Mission Statement

A mission is a brief statement of your ultimate goals or the "big idea" behind your programs/activities. It is often broader than your impact statement. Character limit of 2,000, including spaces.

### Impact Statement

Describe your organization's impact on its target population or community. List your organization's top three to five accomplishments from the past year and your organization's top three to five goals for the current year. Accomplishments and goals can relate to programs, management, and/or finances. Character limit of 2,000, including spaces.

## Background Statement

History and overall description of organization. Character limit of 2,500, including spaces.

## Needs Statement

List your organization's top 5 most pressing needs. Needs can relate to programs, volunteers, management, and/or finances. Be specific with dollar amounts and cost, if known. Character limit of 1,300, including spaces.

## Organization Type

- Organization Categories (NTEE): As defined by the National Center for Charitable Statistics, the Focus Areas are linked to the National Taxonomy of Exempt Entities (N.T.E.E.) coding system. These focus areas will give donors a better idea of your organization's mission focus. Please see attached Document "NTEE Codes" for full list of NTEE Codes.
- Keywords: Provide key words or short phrases that best describe your organization. Key words might include: acronyms, name misspellings, informal names, event names and outdated language. Separate keywords or phrases by commas.
- Other Statements: If you have any additional information about your organization to share or reiterate, you can do so in this space.

## Programs

- Click to "ADD" button to add programming information.
- Fill out the fields for each program as you see fit. Program Name and Description are required.
- Program Class code allows you to select a NTEE code for the specific program.
- After completing the fields for each specific program, be sure to click "SAVE", located under the list of program questions before continuing.



## Governance

### Board Members

- Uploading Board Members:
  1. Click "Upload"
  2. Click "Download Template"
  3. Enter Board Members into template.
    - a. No edits can be made to the template.
    - b. Please only use titles of Mr., Mrs, Dr., etc., and not Finance Committee Chair.
    - c. Only enter the options of "Voting", "Non-voting, and "Ex-officio" for Board Member Status
  4. Save file and upload.
- Manually Adding Board Members:
  1. Click "ADD"
  2. Enter board member information.
  3. Click "SAVE", below list of board member questions.

## Board Term

- Only enter numerals into the board term information fields. If there are no defined board terms or limits, enter 0.

## Board Demographics

- Enter the number of board members that fall in each of the demographic categories. Only numerals can be entered into the fields.

## Governance Practice

- Practices: Constituency Includes Client Representation asks if your board includes anyone who represents the client or population your organization serves.
- Contributions: Only enter numbers into the field. Percent signs are not necessary.

## Management

### Staff Information

- Only enter numerals into the staff information fields. If no employee falls into the category, enter 0.
- Professional Development: Offering professional development is defined as allowing employees to receive any professional development opportunities including trainings, workshops, etc.

### Management Plans

- **Fundraising Plan:** A written plan that defines the focus of an organization's fundraising efforts, plans out its fundraising calendar, and gives guidance on the strategies and tactics that will be used to achieve fundraising goals. **If you denote that you have this plan, you must upload it.**
- **Strategic Plan:** A strategic plan reflects an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy. **If you denote that you have this plan, you must upload it.**
- **Management Succession Plan:** Succession planning is a process for identifying and developing internal people with the potential to fill key business leadership positions in the company.
- **Business Continuity of Operations Plan:** A business continuity plan is a document that contains the critical information an organization needs to stay running in spite of adverse events, such as a natural disaster. **If you denote that you have this plan, you must upload it.**

For further information and additional resources on these plans, please see attachment "Document Definitions and Resources".

### Policies and Procedures

- **Organization Policies and Procedures:** Policies and procedures provide the framework within which an organization operates. They define what your organization does and how you do it.
- **Document Destruction Policy:** A document retention and destruction policy identifies the record retention responsibilities of staff, volunteers, board members, and outsiders for maintaining and documenting the storage and destruction of the organization's documents and records.
- **Nondiscrimination Policy:** A document that outlines your organization's policies in regards to discrimination in hiring and management practices. **If you denote that you have this document, you must upload it.**

For further information and additional resources on these plans, please see attachment "Document Definitions and Resources".

## Affiliations or Accreditations

If you have any Affiliations or Accreditations that you would like to add, but are not listed, email your coach.

## Financials

### Current Fiscal Year

- The following fields will only accept numeric values:
  - Fiscal Start/ End Year
  - Revenue and Expense Projections
  - Endowment Value
  - Percentage

### Form 990s

- You must have the last 3 years of form 990s available.
- Your form 990s may already have imported from Guidestar.
- If your most recent 990s have not imported, you must upload them.

### Audited Financials

- You must upload the last 3 years of audited financials.
- If your organization does not have audited financials, please work with the WHEREtoGIVE staff to find an acceptable alternative.

### Prior Fiscal Year Audits

- The information available in this section is generated from digitized copies of your imported form 990s.
- If your 990s did not import, this information will not be available.
- You may manually enter the information by clicking “ADD”.

## Documents

### IRS Documentation

- You **MUST** upload your IRS Letter of Determination of Tax Exempt Status. This document states that your organization has been granted exemption from federal income tax under section 501(c)(3) of the Internal Revenue Code. Please see attached document “IRS Letter of Determination”.
- **If a copy of this document is NOT uploaded, we will not be able to publish your profile.**

### State Documentation

- You **MUST** upload your Tennessee State Charitable Solicitations Registration. The Arkansas, Mississippi and/or, Tennessee State Solicitation letter allows a 501(c)3 to legally solicit financial support. Please see attached document “State Solicitations Permit Example”.
- **If a copy of this document is NOT uploaded, we will not provide your profile with a “Donate Now” button.**
- If your organization is Exempt from registering for the Tennessee State Charitable Solicitations Permit, please provide a letter of exemption. Please see attached document “State Solicitations Permit Exemption Example”.

For further information and additional resources on the State Solicitations Permit, please see attachment “Document Definitions and Resources”.

## Government Licenses

If you have any Government Licenses that you would like to add, but are not listed, email your coach.

## Impact

The fields in this section will not be visible to the public. They will only be visible to funders and those with administrative capabilities.

## Review

### Required Fields

- All of the required fields that you have not yet completed will be listed here.
- Click on the missing field to go directly to it in the profile.
- You will not be able to submit if there are any missing required fields.

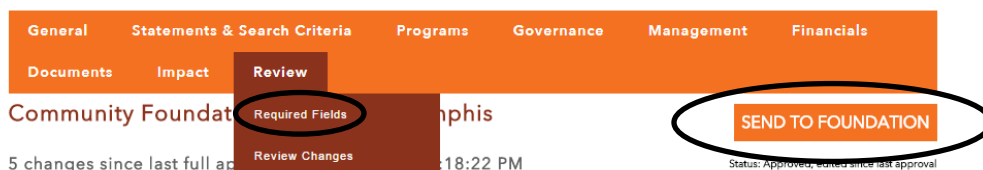
### Review Changes

- All of the fields that you have completed are listed here.
- You can also see any changes made, who made them and when.

## To Submit

In order to submit:

1. Go to the “Review Changes” section under the “Review” tab, you can also access this page on the NPO Homepage by clicking on “Review & Submit”
2. Click on “Send to Foundation”
3. You should receive a notification that your profile has been Submitted



## After Submitting

Please note that your profile will not be immediately published after submitting.

Each profile must go through the Review Process. A member of the WHEREtoGIVE staff should contact you within 3 business days about your Profile Review. The purpose of the Review is to ensure that your profile accurately represents what you do and how you do it. Once the Review is complete, your profile will be approved and available to be seen by anyone visiting the website.



All reviewed profiles will receive the “Reviewed Checkmark” icon.

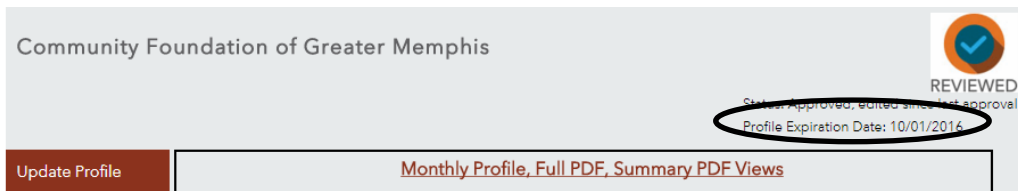
## Editing a Submitted Profile

You can make edits to your profile at any time after submitting. Please note that edits made to your profile will not be immediately published after submitting.

- After editing your profile, you must Re-Submit.
- Edits must be approved and published by WHEREtoGIVE staff.

## Profile Expiration Date

Once your profile has been approved, WHEREtoGIVE staff will set an Expiration Date. Profiles must be updated annually. To view your Expiration Date, look under the Review Checkmark on your NPO Homepage.



Please contact WHEREtoGIVE staff, if you would like to discuss setting a certain date as your Expiration Date.

## Annual Review

Profiles must go through the Review Process annually. Please update your profile with all necessary information before your Profile Expiration Date. WHEREtoGIVE staff will contact you as your Expiration Date approaches.

Items to Update:

- *Most recent Form 990- required*
- *Most recent financial information- required*
- *State Solicitations Permit, if expired- required*
- Changes to the Board
- Programming changes
- Other changes as needed

**If your profile is not updated at the time of your Annual Review, both the “Reviewed Checkmark” and the “Donate Now” button will be removed.**