



WHEREtoGIVE midsouth.org

Required Fields

Below are the required fields that must be completed before you can submit your organization's profile for review. Please gather the information prior to attempting to complete the profile to ensure the best use of personnel time and completion of the profile.

Check Box	Category	Section	Field/Grid Name	Notes
<input checked="" type="checkbox"/>	General	Basic Information	Organization name	Enter your organization name as you would like it to appear on your profile
<input type="checkbox"/>	General	Basic Information	Legal Name	Enter your organization name as it appears on IRS letter
<input type="checkbox"/>	General	Basic Information	EIN	Your EIN may have imported from Guidestar
<input type="checkbox"/>	General	Basic Information	Year of Incorporation	Year may have imported from Guidestar
<input type="checkbox"/>	General	Basic Information	Year Founded	
<input type="checkbox"/>	General	Basic Information	Organization E-mail	Enter your organization's email
<input type="checkbox"/>	General	Mailing Address	Main Address	Enter your organization's main address, if main address differs from physical address, enter physical address as well
<input type="checkbox"/>	General	Contact, Phone	First Name	Enter name of primary contact
<input type="checkbox"/>	General	Contact, Phone	Last Name	Enter name of primary contact
<input type="checkbox"/>	General	Contact, Phone	Email Address	Enter email address of primary contact
<input type="checkbox"/>	General	Contact, Phone	Area Code	Enter your primary area code
<input type="checkbox"/>	General	Contact, Phone	Number	Enter your primary phone number
<input type="checkbox"/>	General	Web and Social Media	Website	Enter your organization's web address
<input type="checkbox"/>	Statements and Search Criteria	Mission	Mission Statement	<i>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.</i>
<input type="checkbox"/>	Statements and Search Criteria	Impact	Impact Statement	<i>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.</i>

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	Statements and Search Criteria	Background	Background Statement	<i>History and overall description of organization. Character limit of 2,500, including spaces.</i>
	Statements and Search Criteria	Needs	Needs Statement	<i>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.</i>
	Statements and Search Criteria	Organization Type	Primary Organization Type	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 (http://nccsdataweb.urban.org/PubApps/nteeSearch.php?gQry=all&codeType=NTEE). These focus areas will give donors a better idea of your organization's mission focus. Work with your Community Foundation representative to choose the code that best describes your organization
	Statements and Search Criteria	Organization Type	Primary Organization SubType	Enter your primary organization subtype
	Statements and Search Criteria	Organization Type	Keywords	<i>Please 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.</i>
	Statements and Search Criteria	Geographic Areas Served	Geographic Areas Served	Select geographic areas served by international, national, state, and county (TN, MS, and AR only) levels
	Statements and Search Criteria	Geographic Areas Served	Geographic Areas Served Narrative	<i>If applicable, identify the specific town, neighborhood, or zip code your organization serves. Character limit of 500, including spaces.</i>
	Programs	Programs	Programs	Enter your organization's programs
	Governance	Board Members	Board Members	Manually add or upload a list of your organization's board members
	Governance	Board Chair	Prefix	You must enter in a board chair prefix
	Governance	Board Chair	First Name	You must enter a board chair first name
	Governance	Board Chair	Last Name	You must enter a board chair last name
	Governance	Board Chair	Company Affiliation	You must enter a board chair company affiliation
	Governance	Board Chair	Start Month	You must enter a board chair term start month
	Governance	Board Chair	Start Year	You must enter a board chair term start year

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	Governance	Board Chair	End Month	You must enter a board chair term end month
	Governance	Board Chair	End Year	You must enter a board chair term end year
	Governance	Board Term	Number of times full board meets in a year	You must enter in number of meetings
	Governance	Board Term	Board Meeting Attendance %	You must enter in Attendance %
	Governance	Board Term	Board Term Lengths	Enter board term lengths
	Governance	Board Term	Board Term Limits	Enter board term limits
	Governance	Board Demographics	African American/Black	You must enter in number of African Americans/Blacks
	Governance	Board Demographics	Asian American/Pacific Islander	You must enter in number of Asian Americans/Pacific Islanders
	Governance	Board Demographics	Caucasian	You must enter in number of Caucasians
	Governance	Board Demographics	Hispanic/Latino	You must enter in number of Hispanic/Latinos
	Governance	Board Demographics	Native American/American Indian	You must enter in number of Native Americans/American Indians
	Governance	Board Demographics	Female	You must enter in number of Females
	Governance	Board Demographics	Male	You must enter in number of Males
	Governance	Governance Practice	Percentage of Board Members Making Monetary Contributions	Enter in percentage of monetary contributions
	Governance	Governance Practice	Written Board Selection Criteria	Select whether organization has Written Board Selection Criteria
	Governance	Governance Practice	Written Conflict of Interest Policy	Select whether organization has Written Conflict of Interest Policy
	Management	CEO/ Executive Director	First Name	You must enter in first name
	Management	CEO/ Executive Director	Last Name	You must enter in last name
	Management	CEO/ Executive Director	E-mail Address	You must enter in an email address

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	Management	CEO/ Executive Director	Start Month	You must enter in start month
	Management	CEO/ Executive Director	Start Year	You must enter in start year
	Management	CEO/ Executive Director	CEO/Executive Director Experience	Enter CEO/Executive Director Experience
	Management	Staff Information	Number of Full-Time Staff	You must enter in the Number of Full-Time Staff
	Management	Staff Information	Number of Part-Time Staff	You must enter in the Number of Part-Time Staff
	Management	Staff Information	Number of Volunteers	You must enter in the Number of Volunteers
	Management	Staff Information	Number of Contract Staff	You must enter in the Number of Contract Staff
	Management	Management Plans	Fundraising Plan	Select whether organization has Fundraising Plan. <i>If yes, attach a current copy of this document. If you are unable to upload files, the document may be e-mailed, faxed, or mailed to The Foundation. This document will not be viewable by donors. It will be used by foundation staff for verification purposes only.</i>
	Management	Management Plans	Strategic Plan	Select whether organization has Strategic Plan. <i>If yes, attach a current copy of this document. If you are unable to upload files, the document may be e-mailed, faxed, or mailed to The Foundation. This document will not be viewable by donors. It will be used by foundation staff for verification purposes only.</i>
	Management	Management Plans	Years Strategic Plan Considers	Enter years strategic plan considers
	Management	Management Plans	Month Strategic Plan Adopted	You must enter in a month
	Management	Management Plans	Year Strategic Plan Adopted	Enter year strategic plan adopted
	Management	Policies and Procedures	Organization Policy and Procedure Plan	Select whether organization has Policy and Procedure Plan
	Management	Policies and Procedures	Management Reports to Board	Select whether management reports to board

Check Box	Category	Section	Field/Grid Name	Notes
	Management	Policies and Procedures	CEO/Executive Director Formal Evaluation	Select whether there is a CEO/Executive Director Formal Evaluation
	Management	Policies and Procedures	Nondiscrimination Policy	Select whether organization has Nondiscrimination Policy. <i>If yes, attach a current copy of this document. If you are unable to upload files, the document may be e-mailed, faxed, or mailed to The Foundation. This document will not be viewable by donors. It will be used by foundation staff for verification purposes only.</i>
	Financials	Current Fiscal Year	Fiscal Year Start Month	You must enter in Fiscal Year Start Month
	Financials	Current Fiscal Year	Fiscal Year Start Day	You must enter in Fiscal Year Start Day
	Financials	Current Fiscal Year	Fiscal Year Start Year	You must enter in Fiscal Year Start Year
	Financials	Current Fiscal Year	Fiscal Year End Month	You must enter in Fiscal Year End Month
	Financials	Current Fiscal Year	Fiscal Year End Day	You must enter in Fiscal Year End Day
	Financials	Current Fiscal Year	Fiscal Year End Year	You must enter in Fiscal Year End Year
	Financials	Current Fiscal Year	Current Income Projections	You must enter in Current Income Projections
	Financials	Current Fiscal Year	Current Expense Projections	You must enter in Current Expense Projections
	Financials	Current Fiscal Year	Do you have a credit line?	
	Financials	Current Fiscal Year	Do you have reserve fund?	
	Financials	Form 990s	Does your organization have an IRS Tax Form 990, 990EZ, 990-N, 990 PF?	<i>If you are creating your profile/portrait for the first time, please upload the three most current years of IRS Form 990s. Also upload the three most current years of schedules and attachments (separately due to file size). Uploaded Form 990s must be in final format and signed by a representative of your nonprofit. Uploaded Form 990 years should coincide with uploaded audit years (if applicable). Form 990s will be displayed in consecutive fiscal year order on the live site.</i>

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	Financials	Audit/ Financial Documents	Does your organization have an audited financial statement?	<i>If you answered yes, please upload your three most current years of audited financial statements. If you answered no, please work with WHEREtoGIVE Staff to find acceptable alternative.</i>
	Documents	IRS Documentation	IRS Letter of Determination of Tax Exempt Status	<i>You must upload IRS Letter of Determination. We cannot publish your profile without this document.</i>
	Documents	State Documentation	State Charitable Solicitations Permit	<i>Select whether organization has State Solicitations Permit. If you select exempt, you must provide an exemption letter. If yes, attach a current copy of this document. We cannot provide a "Donate Now" button for your profile without this document.</i>