

## INSTRUCTIONS FOR COMPLETING THE ORGANIZATIONAL PROFILE

### Completing the Organizational Profile:

- **Access to the Form:** Beginning in 2016, Organizations will be asked to complete an Organizational Profile and Common Grant Application through the Foundation's online [Nonprofit Online Portal](#) in order to be eligible for any of the Foundation's competitive grantmaking opportunities.
- **Recommended Internet Browser:** Please make sure to use the Google Chrome web browser when accessing the application. Other web browsers do not work as well. If you do not currently have Google Chrome installed, you can [download it here](#).
- **Navigating the Application Form:** With your mouse, left click the boxes to activate the drop-down menus or to type in or paste in your answers. Use the Tab key or your mouse to go to the next line or section.
- **Format Rules:**
  - You will have to adhere to the required word limits for written answers. The box titled "Words remaining" will count down the remaining words available as you type.
  - All field must be completed in order to save and return to information entered at a later date.
  - A completed application has data in the response box for each question. If a question does not apply to your organization, please enter "N/A" if it's a text field or "0" if it's a numerical field.
  - If you receive the following error message and you have copied and pasted text in the fields from a PDF or MS Word document, this is a warning that the text entered in one of the fields is using an illegal character that the system does not recognize. When pasting data, select "Paste Special" and "Unformatted text" to remove any illegal characters, such characters maybe bullets, accents, shapes, etc.

### Organizational Profile

The Organizational Profile is set up once and should be kept updated by the organization. Your Organizational Profile will ask you to include the following information:

#### **ORGANIZATIONAL INFORMATION:**

- **Organization Name:** Enter the full legal name of your organization. If your organization does business under a different name, provide that name in the cell labeled DBA.

- **Organization Address:** Enter the full address of your organization. Be sure to include apartment or suite number of your organization on the Street Address 2 line, if applicable. Use the drop-down buttons to select State/Province, County and Country.
- **Social Media:** Enter your organization's social media information. Please double check all entries to make sure the address information is correct.
- **Organization Information:** Enter details to identify what type of entity your organization is. Enter your organization's tax ID number and EIN/501(c)3 number. For EIN and 501(c)3 numbers, please follow the designated numerical format of two letters separated by a dash followed by seven letters. Enter the year your organization was founded. *Organizations are only allowed one account. The EIN# is the identifying criteria for establishing accounts. If an account is already set up the system will not allow the user to move forward. Contact the grants administration staff at the number below to verify if your organization already has an existing account.*
- **Organizational Contacts:** You are required to add your organizational leader and board chair and may add as many other organizational contacts as desired. Please identify the person responsible for any grant requests as the "request contact". To add a contact, click on the green "Add Contact" button. This will add a line with fields for name, phone, email and contact type.
- **Organizational Details:** Arts, Community Development, Education, Nonprofit Effectiveness and Well-being (Health & Human Services) are the Community Foundation's Impact Areas, please select the one that best aligns with your organization's mission. You will also need to select a category that best describes the work your organization does from the list of taxonomy codes.
- **Financial Details:** This section asks a variety of questions about your organization's finances.
  - **Current FY operating expenses:** Enter the organization's current fiscal year operating expenses as approved by the board of directors.
  - **Current FY end date:** Indicate the full date on which the organization's fiscal year ends (e.g. 6/30/17). Left clicking on the text box will open a small calendar widget from which you can select the date.
  - **Total Revenue, Total Expenses, Operating Reserve and Endowment:** Provide these four amounts for each of the organization's last fiscal year; you should use figures from your audit/review.
    - **Total Revenue** includes *earned revenue* (revenue or income that an organization receives in exchange for a service or product) and *contributed revenue* (revenue or income received from individual, foundation, corporate or government donations).
    - **Total Expenses:** A measure of the total costs associated with managing and operating your organization. These costs consist primarily of management fees, salaries, legal fees and operational expenses; use the total amount AFTER depreciation.
    - **Operating Reserve:** A true operating reserve is funding that the organization has accumulated in unrestricted assets that is liquid and available to use at the discretion of the organization's board.

- **Endowment:** A true endowment fund is a restricted investment fund. An endowment will pay out a small portion of interest (e.g. 4%) per year, which goes to operations and programs.
- **Mission, Vision & History:** Enter your organization's mission and vision statements, and provide a brief history of your organization's evolution.
  - A mission statement describes the purpose of an organization – its reason for existing. Enter only the mission statement.
  - A vision statement is a description of where an organization wants to be in the future. It also explains what the organization wants to accomplish.
  - Highlight important organizational milestones and include information related to when and why the organization was established. *Do not describe the organization's programs.*
- **Programs:** The Foundation is interested in learning about your organization's programs. The Foundation understands an organization may have more than three unique programs. In that case, group your programs as best as possible and provide a general description of their activities. Please include program details.
- **Demographic Information:** the system prompts you to enter a variety of information on the population served by your organization. For the questions that have drop-down menus, you should select all the options that apply. To do so, hold down the Control button on your keyboard and use your mouse to select the different choices that best represent the individuals served by your organization. If your organization only serves individuals in one county, select that county each time; if your organization primarily serves individuals outside of the Foundation's 23-county service area, select a county and enter 0 in the number served field.
- **Additional Details:** This section asks you to share other details about your organization. Identify if your board of directors had 100% giving (a [best practice](#) for nonprofits). Identify if your organization participated in civic activities and if your organization has a strategic plan. If your organization does not have a current strategic plan, include a detailed explanation as to why this is the case.
- **Priorities:** The Foundation is interested in learning about your organization's top funding needs as these needs are presented to Community Foundation donors who request our guidance and funding recommendations. Use the text boxes to describe your current top three funding priorities; include the dollar amount needed, the timeframe related to the opportunity and any other pertinent details that would clearly communicate the funding opportunity and demonstrate its priority within your organization. Please note that you can and should update your funding priorities throughout the year.

### **Submitting your Organizational Profile**

- **Deadline:** Organizational Profiles are accepted at any time, but they must be completed in advance of any application deadline for the organization to be eligible for funding.
- **Blank Fields:** All fields must have information within in order for the system to recognize that your Organizational Profile is complete and for you to successfully submit it. **If a question is not pertinent to your organization enter "n/a" for text fields or "0" for numeric fields.**

### **Questions?**

**For questions about or troubleshooting the Nonprofit Online Portal, please contact one of the following staff members at 404.688.5525:**

- Anna Theodore, Grants Associate ([atheodore@cfgreateratlanta.org](mailto:atheodore@cfgreateratlanta.org))
- Hannah O'Neil, Program Assistant ([hklemm@cfgreateratlanta.org](mailto:hklemm@cfgreateratlanta.org))