INSTRUCTIONS FOR COMPLETING THE ORGANIZATIONAL PROFILE

GENERAL INFORMATION

Accessing the Form: Organizations must complete an Organizational Profile through the Foundation’s Nonprofit Online Portal to qualify for the Foundation’s grantmaking opportunities.

Recommended Internet Browser: The Nonprofit Online Portal is optimized for Google Chrome. Other web browsers may not work as well. If you do not currently have Google Chrome installed, you can download it here.

Completion Rules: A completed Organizational Profile has data in the response field for each required question, which is denoted by an asterisk or “*”. If a required question does not apply to your organization, enter “N/A” if it is a text field or “0” if it is a numerical field.

Tip: Collecting needed information in advance will save time completing the profile.

Deadline: Organizational Profiles can be completed and updated at any time throughout the year, but they must be completed in advance of any application deadline for the organization to be considered eligible for funding.

Contact: For questions about or troubleshooting the Nonprofit Online Portal, please contact grants management staff at grants@cfgreateratlanta.org or 404.688.5525.

OVERVIEW

Organization Details:

- **Legal Name***: Enter the full legal name of your organization.
- **DBA**: If your organization does business under a different name, enter the different name.
- **Street Address 1***: Enter the street address of your organization. If your organization has multiple locations, enter the street address of your headquarters.
- **Street Address 2**: If your organization’s address includes a suite or unit number, enter the suite or unit number.
- **Phone***: Enter the main phone number for your organization.
• **Website**: Enter the main website address for your organization.

**Incorporation Details:**

• **Type of Entity**: Select the type of entity your organization is from the drop-down menu.

• **EIN**: Enter your organization’s Employer Identification Number (EIN), designated by the IRS. Please follow the designated numerical format of two letters separated by a dash followed by seven letters.

• **Secretary of State Control #**: Enter your organization’s Control Number, designated by the Secretary of State. If you are unsure of the control number, you can use this [link](#) to find your control number for corporations registered in Georgia. Please check your state’s Secretary of State website if your organization is incorporated in another state.

• **Year Founded**: Enter the year your organization was founded.

**Note:** The EIN is the identifying criteria for establishing profiles. If a profile is already set up under a particular EIN, the system may not allow the user to move forward. If you are unsure whether your organization already has a profile, contact the Foundation’s grants management staff to verify.

**MISSION**

**Mission, History and Vision:**

• **Mission**: Enter your organization’s mission statement. A mission statement describes the purpose of an organization – its reason for existing. Enter only the mission statement.

• **History**: Provide a brief history of your organization’s evolution. Highlight important organizational historical milestones and include information related to when and why the organization was established. Do not describe the organization’s programs.

• **Vision**: Enter your organization’s vision 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.

**PROGRAMS**

**Program Areas:**

• **Primary Equity of Opportunity Pathway**: Select the Equity of Opportunity pathway that best aligns with your organization’s mission and programs.
• **Secondary Equity of Opportunity Pathway**: If your organization’s mission and programs intersect another Equity of Opportunity pathway, select that pathway.

• **Tertiary Equity of Opportunity Pathway**: If your organization’s mission and programs intersect a third Equity of Opportunity pathway, select that pathway.

• **Area of interest**: Select the NTEE code that best aligns with the work of your organization. If you are unsure of which code to select, you can find the IRS-assigned code on Guidestar.

*Note: The Foundation is committed to grounding our work in our Equity of Opportunity Architecture, a combination of proven practices to combat the opportunity disparity in our region and increase economic and social mobility.*

**Program 1:**

• **Program Name**: Enter the name of your program.

• **Program Description**: Provide a general description of the program’s purpose, model, experience and activities.

• **Program Impact**: Provide quantitative and qualitative data that demonstrates the program’s impact and effectiveness.

*Note: Your organization may include information on up to three programs.*

**POPULATION SERVED**

**Population Served:**

• **# of people served in the last fiscal year**: Enter the number of people served in your organization’s in last completed fiscal year.

• **The population figures below are**: Select the characteristic that best describes the population figures provided using the drop-down menu.

• **What is the source of these figures?**: Name or briefly describe the source of the population figures provided.

• **How do you collect population data?**: Describe the methods used by your organization to collect data on the population served.

**Gender**:

Select the gender(s) that best describe the priority population served by your organization. To select more than one choice, hold the “Ctrl” key as you click on your selections.

**Race**:


Select the race(s) that best describe the priority population served by your organization. To select more than one choice, hold the “Ctrl” key as you click on your selections.

Age*:
Select the age range(s) that best describe the priority population served by your organization. To select more than one choice, hold the “Ctrl” key as you click on your selections.

Age Groups*:
For each age group, enter the number of people served by your organization in the last fiscal year. If your organization does not know or collect this information, enter the number of people served by your organization in the “Unknown” field.

Top Counties Served:
- **#1 Top County***: Select the top county served by your organization (in terms of number of people served) using the drop-down menu.
- **# Served***: Enter the number of people served in that county in the last completed fiscal year.

*Note: Your organization may include information for up to three counties. If your organization only serves one county, select “Other” from the drop-down menu for the other two Top County fields and enter “0” for the # Served fields.*

Geography:
- **Barrow/Bartow/Butts...Walton***: Enter the number of people served by your organization within each county. The counties listed reflect the Foundation’s 23-county region.
- **Other County***: If your organization serves people in other counties in Georgia that are not listed, enter the number of people served by your organization in other counties.
- **Other State***: If your organization serves people in states other than Georgia, enter the number of people served by your organization in other states.
- **Other Country 1/2/3***: If your organization serves people in countries other than the United States, enter the number of people served in other countries. You may provide information for us to three other countries.

*Note: If your organization does not collect this data by geography, enter the number of people served by your organization in the “No data” field.*

Population Characteristics*:
Describe characteristics important to note about the population served by your organization that are not captured by the previous questions in the section.
Financial Details:

- **Current FY Operating Expense**: Enter your organization’s current fiscal year operating expenses as approved by the board of directors.
- **Current FY End Date**: Indicate the full date on which your organization’s current fiscal year ends (e.g. 6/30/2020). Left clicking on the text box will open a small calendar widget from which you can select the date.
- **Operating Reserve**: Use the drop-down menu to indicate if your organization has an 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.
- **Operating Reserve Amount**: Enter the dollar amount in your organization’s operating reserve. If your organization does not have an operating reserve, enter “0”.
- **Endowment**: Use the drop-down menu to indicate if your organization has an endowment. A true endowment 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.
- **Endowment Amount**: Enter the dollar amount in your organization’s endowment. If your organization does not have an endowment, enter “0”.

Financial Snapshot:

- **Total Revenue**: Enter your organization’s total revenue for the past three completed fiscal years. This 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**: Enter your organization’s total expenses for the past three completed fiscal years. This is a measure of the total costs associated with managing and operating your organization.
- **Surplus/Deficit**: Enter the difference of your organization’s reported revenue and expenses for each of the past three fiscal years. A positive balance is a surplus, and a negative balance is a deficit.
- **Net Assets/Fund Balance**: Enter the total amount of assets available to the organization at the end of each of the past three fiscal years. This includes the value of the organization’s cash, investments and other fixed assets such as land, furniture, equipment and property.
- **How were year-end financials reported**: Use the drop down menu to indicate how your organization obtained and reported year-end financials.
• **Fiscal Year end date***: Indicate the full date on which the organization’s fiscal year ended for the reported financials (e.g. 6/30/2020). Left clicking on the text box will open a small calendar widget from which you can select the date.

**Clarification***:

Provide an explanation regarding any significant or abnormal surpluses, deficits and/or other details captured by the information provided in this section. If no explanations are needed, enter “N/A”.

**DIVERSITY**

**Diversity**:

This section includes a table on race, gender, sexual orientation, transgender identity and person(s) with disabilities across the five stakeholder categories: 1) CEO or executive director(s), 2) staff leadership, 3) all staff, 4) board of directors and 5) people served.

• **CEO or executive director(s)***: Enter the demographic data for your organization’s CEO or executive director. This should be one person unless your organization has a co-director model.

• **# on staff leadership***: Enter the demographic data for the members of your organization’s staff leadership team. This is the equivalent to an organization’s executive leadership team, often made up of senior vice presidents in the organization and includes the CEO or executive director. If your organization is small and does not have a staff leadership team, enter the demographic data for your organization’s CEO or executive director.

• **# of staff***: Enter the demographic data for all members of your organization’s staff team. This includes all full-time and part-time staff. This does not include contractors or consultants.

• **Board of directors***: Enter the demographic data for all members of your organization’s board of directors.

• **# served by organization***: Enter the demographic data for people served by your organization.

*Note*: When you enter numbers, percentages are automatically calculated.

*Note*: If your organization does not collect this information, enter your organization’s data into the “Unknown” fields.

**Diversity, Equity and Inclusion**:

• **How do you collect diversity data***: Describe the method(s) used by your organization for collecting the diversity data.

• **How does your thinking about racial equity inform how you develop and implement programs***: Describe the ways in which your organization’s
thinking and approach to racial equity informs and impacts how it develops and implements its programs.

- **How does your organization engage with communities that experience oppression or discrimination?***: Describe the ways in which your organization engages with communities that experience oppression or discrimination.
- **What challenges does your organization face in advancing diversity, equity and inclusion?***: Describe the challenges and barriers that your organization faces in advancing diversity, equity and inclusion in its operations and work.

**PRIORITIES**

**Priorities***: The Foundation is interested in learning about your organization's top strategic priorities over the next 12 months. Use the text boxes to describe your current top three strategic priorities. These priorities can be operational or programmatic. If your organization has a strategic plan, you may use it to inform this section. Please note that you can and should update your strategic priorities throughout the year as they change and evolve.

**CONTACTS**

**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. To remove a contact, click on the green “Delete” button next to the contact’s name.