



Nonprofit User Guide...Creating your organization's portrait in DonorEdge®

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Introduction

How to use this guide

You will find that the process for putting your organization's information into the DonorEdge® system is mostly intuitive, thanks to the built-in features of the website that prompt certain actions. **This guide contains information of the data fields or sections that may require a more detailed explanation to help you promptly complete your portrait.**

Where to get assistance

If you experience difficulties completing a section or do not understand what we are asking you to provide, start by carefully reading the explanation provided to you for the field in the text below the field. If the answer to your question is still unclear, try looking in the Frequently Asked Questions (FAQ's) link on the Nonprofit Home Page in DonorEdge®, or look in this Nonprofit User Guide. Finally, if you still need further clarification or cannot find the answer to your question, please send us an email by using the "Contact Us" link on the navigation bar at the top.

Documents and Data to gather before you begin

To simplify the process of entering your data into the DonorEdge® database, we strongly recommend that you have the following documents and data on hand, *if they exist for your organization*, **before** beginning to create your portrait. Please refer to the **Appendix** of this guide to read the guidelines that the Community Foundation of Central Florida (CFCF) has created regarding plans and policies. Note: Document file sizes must be limited to **10MB**, and we strongly recommend that you convert any documents created using word processing software (i.e. Microsoft Word, Works, Mac, etc.) to **PDF** to prevent unauthorized editing of the document:

- Board Selection Criteria, with date of board approval
- Conflict of Interest Policy, with date of board approval
- Fundraising Plan, with date of board approval
- Strategic Plan/ Yr. Adopted/ Yrs. Considered, with date of board approval
- State Solicitations Permit
- Management Succession/Training Plan, with date of board approval
- Organization Polices & Procedures, with date of board approval
- Whistleblower Policy, with date of board approval
- Document Retention/Destruction Policy, with date of board approval
- Directors and Officers Insurance Policy
- Nondiscrimination Policy, with date of board approval
- **Signed** Form 990 Statements for Past Three Fiscal Years - **Be sure to get your 990 and Schedule B in separate documents. (The Foundation requires the Schedule B to separate the foundation/corporation support but we don't want to make it public.)**
- Audited Financial Statements for Past Three Fiscal Years – auditor's signature on letterhead
- IRS 501(c) 3 Determination Letter

Data to gather includes:

- Senior staff bios
- Most recent Board roster with names and company affiliations
- Information on programs including brief descriptions, target beneficiaries and budgets (if they are budgeted separately). You are limited to entering five programs or program areas.

When COPY/PASTING into DonorEdge® Portrait:

We strongly recommend that you keep your statements brief and concise as DonorEdge® fields have a maximum character limit. This means that if you exceed the maximum character limit when you attempt to "Save and Continue" your information you will receive an error message that will not allow you to "save and continue to the next section.

Another instance when you may receive the character limit error message is when attempting to copy and paste information from your word processing program into the DonorEdge® database. This is due to hidden codes common in most word processing programs. **If this error occurs simply copy and paste your information into your computer's Notepad.** *To access your computer's Notepad, click on Start (located on the lower left-hand side of your computer screen), highlight and click Programs, highlight and click on Notepad, and when you have completed drafting your information copy and paste it into the appropriate DonorEdge® field.*

Getting Started

Logging-On - User Name and Password

Please refer to the "Portrait Information Sheet" that you received at the DonorEdge® Information Session. If you did not attend a DonorEdge® Information Session, please contact Michelle Chapin, DonorEdge® Project Director via e-mail at @cfcflorida.org to register to attend an upcoming information session. The website address is [://cfcf.guidestar.org](http://cfcf.guidestar.org). Look for the Log In link at the top right of the home page.

For security reasons, we strongly recommend that you change your password once you log into DonorEdge® for the first time. To change your password, go to NPO Home Page, click on the "My Account" link at the top of the page, click on "Edit My Information", and then click on the "Change Password". If another person in your office requires access to edit your organization's portrait, please use the "Contact Us" link at the top of the page to submit a request to us to add the user.

NPO Home Page Features

Take a look at the features of the nonprofit home page. The purple tabs in the navigation bar also appear to donors when they log in, except for the NPO home tab. A "dashboard" of graphs provides you with an overview of your portrait and portrait activity on the middle-right side of the page.

The "**# of Fields Complete**" graph provides a snapshot of the progress that you have made in completing your organization's portrait, and the sections remaining to complete your organization's portrait. *Please note that while the " # of fields complete" graph may indicate that all of the required fields in your portrait are finished, there will be additional information that the Community Foundation of Central Florida Staff requires from your organization to earn the Reviewed seal.*

The "**# of Portrait Views**" graph tracks how many times someone has viewed your portrait, and the number of credit card donations your organization has received.

The "**Credit Card Donations**" graph tracks the number of donations processed through Network for Good.

The **blank graph** allows us to customize a graph based on your organization's reporting needs.

Accessing Your Organization's Portrait

Go to the "Edit" button next to "My Portraits" to access your organization's portrait, section by section. "Portraits" is plural, for users who may work for more than one nonprofit. The "My Request for Portraits" feature is not active at this time.

Nonprofit Resource Links

Use these links to access additional guidance documents, frequently asked questions, and other resources.

Credit Card Donations

The Community Foundation of Central Florida is partnering with Network for Good (NFG) so that your organization can receive credit card donations. We will send you more information about this process once we have finalized our agreement with NFG.

"SAVE" your work as you go

For security reasons, after 30 minutes of inactivity the DonorEdge® system automatically logs you off resulting in the **loss of any unsaved work**. The system's definition of "activity" is toggling between sections in your portrait. Entering data into fields is not considered "activity". Please click the "Save for Later" button at the top of the page frequently to prevent the loss of any unsaved work. Use the "Save and Continue" button at the bottom

of the page one you complete the section. The “Save and Continue” button automatically directs you to the next section of your portrait, and alerts you (red text) of any missing information in the current section.

DonorEdge® Portrait Sections

General Information

Please note: The Community Foundation of Central Florida requires you to complete of **ALL** of the fields in this section of your portrait.

Below are the areas in which we thought extra guidance would be helpful as you complete your portrait. Also, refer to the appendix for guidance as directed throughout the user guide.

The Community Foundation of Central Florida Staff will complete the fields below on your behalf:

- Organization Name
- EIN #
- Legacy ID #
- Year of Incorporation

(If any of the information contained in these fields is incorrect, please use the “Notes” in the General Information” section below the menu on the left side, mid-way down the page to request a change.)

Statements and Search Criteria

Please note: The Community Foundation of Central Florida requires you to complete of **ALL** of the fields in this section of your portrait. Below are the areas in which we thought extra guidance would be helpful as you complete your portrait. Also, refer to the appendix for guidance as directed throughout the user guide.

Please draft all statements in Word or Notepad then copy and paste the information into DonorEdge®. Do not draft statements in DonorEdge® **Do not use bullets, numbers or any special formatting. The system will time out after 30 minutes and will discard the information you have entered unless you save it.**

If you get the message that you have exceeded the text amount after you paste into DonorEdge®. Use the Notepad to help to reduce the hidden text and codes that may be in your Word file.

Impact Statement (2,000 character limit with spaces): The impact statement should tell donors the practical purpose of your organization and should map back to your mission statement. In particular, the impact objective should answer the questions, “What immediate effects will the organization make on the community/individual?” and “What community needs will the organization meet?”

Needs Statement (500 character limit with spaces): Communicating organizational needs to donors is essential for sustaining your organization. The Needs Statement will allow you to communicate your needs clearly and concisely. Complete this statement by listing the five most pressing needs of your organization. Each organization has the discretion to list small and/or large needs, and to determine their order of priority.

Statement from the CEO/Executive Director (2,000 character limit with spaces): Take this opportunity to give an insider’s perspective about your organization’s uniqueness. You can add or emphasize information about your organization that is important and distinctive. When developing the Executive Director’s Statement, think about:

- How can you best sell your organization to donors visiting DonorEdge®?
- If you were sitting with a donor, what are the key issues you would want to communicate to them about your organization?
- What about your organization is unique, distinctive, strong, and defines its importance?
- Communicate your passion about the work that you do.
- Put the best face on your organization.

- Some organizations might want to provide a short vignette or human interest story showing donors how your organization benefits individuals and the community.

Remember to use the “SAVE FOR LATER” button at top of the page periodically to avoid timing out!

Organizational Category(ies) – NTEE:

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. For more information about the drop down NTEE (National Taxonomy of Exempt Entities) code choices; visit their website at <http://nccs.urban.org/classification/NTEE.cfm>

Geographic Area Served: Check all that apply. If you select “Florida”, you must serve the entire state

- International – Organization serves foreign countries in addition to the United States
- National – Organization serves states in addition to Florida
- FL – Organization serves counties listed on the portrait. There are 7 Central Florida counties to choose from. You may serve more than one county.

This organization has received a Community Foundation discretionary/competitive grant in the past five years?

This field will be completed by the Community Foundation of Central Florida staff.

Former Name/ Former Name Year: If your organization has operated under any other names, enter the previous name and the last year that name was used.

Keywords: Searchable Key Words (150 character limits with spaces)

These words are words you might use if you were doing a Google search for your agency, including former names. Enter each word separated only by one space. Do not use commas or semi-colons.

At this point, use the “SAVE AND CONTINUE” button to go to the next section automatically.

Programs

Please note: The Community Foundation of Central Florida requires you to complete of ALL of the fields in this section of your portrait. Below are the areas in which we thought extra guidance would be helpful as you complete your portrait. Also, refer to the appendix for guidance as directed throughout the User Guide.

Programs: You may only add five programs to this section and they will appear in the order entered. Please draft all programs in a word processing program or Notepad then copy and paste them into DonorEdge®. **Do not draft statements in DonorEdge®.** The system will time out after 30 minutes and will discard the information you have entered unless you saved it. If you get the message that you have exceeded the text amount after you paste into DonorEdge®. Use the Notepad to help to reduce the hidden text and codes that may be in your Word file.

Program Description (1,000 character limit with spaces): Following are some ideas for crafting a program description. These are not requirements but will help you think about options for an effective program description. **Please also see the information on program articulation in the Appendix of this guide.**

- Write a succinct narrative on each program or program area.
- Articulate your program goals and/or outcomes. What are you trying to accomplish? How do you measure success?
- Address service capacity (number of shelter beds, number of performances annually, number of participants, and number of rescued animals or spayed/neutered animals, number of housing units developed/renovated).
- Mention previous year actuals (In 2004, your organization provided outpatient substance abuse treatment to 100 adolescents. Of those 65 completed treatment, 48 remained clean and sober for six weeks following treatment.)
- Add a more detailed description of service population if “Target Beneficiary Codes” do not accurately reflect who you serve.
- If you have more than five programs, find five unifying themes to consolidate them into five “categories” or “program areas.” Use the description to name the programs within the categories.
- Give evidence of the need that your program meets in the community including information from quoting studies or statistics.

Remember to use the “SAVE FOR LATER” button at top of the page periodically to avoid timing out!

Program Budget: Do NOT enter symbols (\$ or .) only the number. If your organization has unified budgeting and does not budget by program, please approximate the budget numbers by dividing total operating expenses by the percent of organizational resources (staff, volunteers, funding) going to this program area. Since we will not reconcile these figures to the Audit or 990, figures can be approximations.

Target Population Served: Select up to three target beneficiary groups for each program. To add a beneficiary, select the appropriate group in the drop-down list and click the Add button. The group will appear in the box below. If you need to remove a beneficiary, select the beneficiary in the box and click the Remove button.

Program comments:

CEO/Board Comments: Discuss successes and challenges facing the organization in regards to programs and outcomes. Foundation Staff Comments: Completed by Foundation staff, if applicable

Remember to use the “SAVE AND CONTINUE” to automatically go to the next section.

Governance

Please note: The Community Foundation of Central Florida requires you to complete of ALL of the fields in this section of your portrait. Below are the areas in which we thought extra guidance would be helpful as you complete your portrait. Also, refer to the appendix for guidance as directed throughout the user guide.

Primary Board: Boards can be categorized by type (governing, advisory, youth, constituent, other) and by board members' geographic representation (local, national, regional, international). You may enter more than one board. However, you are required to choose one as your primary board. If you do not indicate which board is your primary board, the system will automatically default to the first board listed. You will also be asked to provide statistical information for your primary board members including: board attendance rate, racial/ethnic demographics, etc.

Names and Affiliations:

Legacy ID: This field will be completed by the Community Foundation of Central Florida staff.

Company Affiliation: If not the board member is not affiliated with a company, list "Retired" or "Community Volunteer."

Board Demographics (Gender): Not Specified: This field is used if board member does not want to disclose gender.

Remember to use the "SAVE FOR LATER" button at top of the page periodically to avoid timing out!

Board Attendance Spreadsheet Upload: Access the link on the DonorEdge® NPO Home page to download the template. *Note: documents for uploading should not be larger than 10MB.*

Written Board Selection Criteria Document: *See Appendix for guidance on minimum criteria.*

Written Board Selection Criteria Document upload: If you select "Yes" for written board selection criteria, you are required to upload a copy of the document with date of board approval. *Note: documents for uploading should not be larger than 10MB.*

Written Conflict of Interest Policy Document: *See Appendix for guidance on minimum criteria.*

Written Conflict of Interest Policy Document upload: Please Indicate whether your organization has a written conflict of interest policy that is reviewed on a regular basis. If you select "Yes" for written conflict of interest policy, you are required to upload a copy of the document with date of board approval. *Note: documents for uploading should not be larger than 10MB.*

Constituency Includes Client Representation: Does a board member represent your target population served? This answer will not be viewable by the public but you are required to complete this field by the Community Foundation of Central Florida.

Remember to use the "SAVE AND CONTINUE" to automatically go to the next section.

Management

Please note: The Community Foundation of Central Florida requires you to complete of *ALL* of the fields in this section of your portrait. Below are the areas in which we thought extra guidance would be helpful as you complete your portrait. Also, refer to the appendix for guidance as directed throughout the user guide.

Remember to use the "SAVE FOR LATER" button periodically to avoid timing out!

Note: ALL Legacy ID #'s fields are completed by the Community Foundation of Central Florida staff.

CEO Total Compensation for Last Year: This field is completed by the Community Foundation of Central Florida staff as reported on your 990.

Fundraising Plan: See Appendix for guidance on minimum criteria.

Fundraising Plan Document Upload: If you select "Yes" for fundraising plan, you are required to upload a copy of the document with date of board approval. Note: documents for uploading should not be larger than 10MB. If you indicate "under development," please provide details regarding anticipated completion date in the Comments section.

Strategic Plan: See Appendix for guidance on minimum criteria.

Strategic Plan Document Upload: If you select "Yes" for strategic plan, you are required to upload a copy of the document with date of board approval. Note: documents for uploading should not be larger than 10MB. If you indicate "under development," please provide details regarding anticipated completion date in the Comments section.

State Charitable Solicitations Permit: (check if Exempt, enter Expiration Date)

State Charitable Solicitations Permit Upload: If you select "Yes" for State Charitable Solicitations Permit, you are required to upload a copy of the document into the Other Documents section. Note: documents for uploading should not be larger than 10MB. **You are not required to send us a hard copy of this permit, as indicated by Portrait instructions.**

Management Succession/Training Plan: See Appendix for guidance on minimum criteria.

Management Succession/Training Plan Document Upload: If you select "Yes" for management succession plan, you are required to upload a copy of the document with date of board approval. Note: documents for uploading should not be larger than 10MB. If you indicate "under development," please provide details regarding anticipated completion date in the Comments section.

Remember to use the "SAVE FOR LATER" button periodically to avoid timing out!

Organization Policy and Procedures: See Appendix for guidance on minimum criteria.

Organization Policy and Procedures Plan Document Upload: If you select "Yes" for the policies and procedures plan, you are required to upload a copy of the document with date of board approval.

Whistle blower policy: The Sarbanes-Oxley Act provides certain protections for “whistle-blowers” and criminal penalties for actions taken in retaliation against whistle-blowers. The Act protects persons who risk their careers by reporting suspected illegal activities in the organization. It is illegal for a corporate entity, for-profit or non-profit to punish the whistle-blower in any manner.

Whistle blower policy upload: If this policy is not included as part of your Organizations Policies and Procedures Document, upload it separately with date of board approval in the “Other Documents” section in “Other 1” or “Other 2”. Please note that documents uploaded in “Other 1” or “Other 2” are **only** viewable by the Community Foundation of Central Florida. Documents uploaded in “Other 1” and “Other 2” are **not** viewable by the public. Note: To protect the integrity of your document, we recommend that you save it in PDF format.

Document Destruction policy: The Sarbanes-Oxley Act addresses the destruction of business records and documents and turns intentional document destruction into a process that must be carefully monitored.

Document Destruction policy upload: If this policy is not included as part of your Organizations Policies and Procedures Document, upload it separately with date of board approval in the “Other Documents” section in “Other 1” or “Other 2”. Please note that documents uploaded in “Other 1” or “Other 2” are **only** viewable by the Community Foundation of Central Florida. Documents uploaded in “Other 1” and “Other 2” are **not** viewable by the public. Note: To protect the integrity of your document, we recommend that you save it in PDF format.

CEO/Executive Director Formal Evaluation: 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.

Affiliations: If you do not see the name of the organization with which you are affiliated in the drop down list, please use the “CEO/Board Comments” field to request that we add the organization. You can also submit the request to add an affiliation by using “Notes” in the Management section.

Directors & Officers Insurance Policy Upload: If you select “Yes” for directors and officers insurance policy, you are required to upload a copy of the document.

Nondiscrimination Policy Upload: Upload: If you select “Yes” for the Nondiscrimination Policy, you are required to upload a copy of the document with date of board approval.

Management Comments: The Comments section is an opportunity for you to describe something that was not captured, highlighted, or explained for 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 your organization is facing and solutions you are considering or opportunities that you currently exploring. You should also use this section to provide details regarding anticipated completion dates of documents you indicated were “in development.” Don’t forget to select the name of the individual providing the comments from the drop down list and indicate the month/year in which the comments were provided.

Foundation Staff Comments: For use by the Community Foundation of Central Florida staff, if applicable

Remember to use the “SAVE AND CONTINUE” to automatically go to the next section.

Financials

Please note: The Community Foundation of Central Florida requires you to complete of ALL of the fields in this section of your portrait. Below are the areas in which we thought extra guidance would be helpful as you complete your portrait. Also, refer to the appendix for guidance as directed throughout the User Guide.

The Community Foundation of Central Florida Staff will complete the fields below on your behalf:

- **Endowment** – Yes/No (if you have endowment with Community Foundation of Central Florida)
- **Endowment Value and Spending Policy Section**
- **Previous Fiscal Period Financial Information** – Completed using the prior years' financial information documentation that you provide to the Community Foundation of Central Florida.

(If any of the information contained in these fields is incorrect, please use the "Notes" in the General Information" section below the menu on the left side, mid-way down the page to request a change.)

Current Fiscal Year Projections: Enter only the number. Do NOT use symbols (\$ or ,).

IRS Letter of Determination of Tax Exempt Status

Note: *documents for uploading should not be larger than 10MB.*

Remember to use the "SAVE FOR LATER" button at top of the page periodically to avoid timing out!

Form 990s:

Note: *documents for uploading should not be larger than 10MB.*

- Upload the signed, public inspection version of your IRS Form 990s for the past 3 years.
- Also upload in a separate document the Schedule B for each year, if available.

Remember to use the "SAVE FOR LATER" button at top of the page periodically to avoid timing out!

Audit Documents:

Note: *documents for uploading should not be larger than 10MB.*

- Upload the audited financial statement documents containing the signed independent auditors' report on the audit firm's letterhead for the past 3 years.

Remember to use the "SAVE FOR LATER" button at top of the page periodically to avoid timing out!

Other Documents

This section is for documents that you did upload in the other sections of your portrait. Note: To protect the integrity of your document, we recommend that you save it in PDF format. Following are examples of documents that you may want to upload.

Solicitations Permit: Upload the letter your organization receives from the Florida Department of Agriculture & Consumer Services which states that your organization has complied with the Solicitation of Contributions Act.

If the following documents are not included in your organization's Policies and Procedures document, Please upload them in this section with date of board approval in "Other 1" or "Other 2". Documents uploaded in "Other 1" or "Other 2" are **only** viewable by the Community Foundation of Central Florida. Note: *documents for uploading should not be larger than 10MB.*

- **Whistle Blower Policy**
- **Document Destruction**
- **Policy Nondiscrimination Policy**

Multi-Media

We encourage you to put your organization's logo as well as photos on your website to help market your organization. Logos are required to be **jpg or gif and 150 pixels wide x 150 pixels high** with no restriction on height. Pictures are required to be **jpg or gif and 320 x 240 pixels**. All logos and pictures should be optimized for the web (<100K if possible). Videos are YouTube only as defined by the YouTube "embed" tag. The Community Foundation will upload the YouTube for you. Please send us the link via email.

Review Changes

This section track and allows you to view a history of changes made to your portrait. The list shows what data field was changed, what change was made and the day and time of the change. You can also use the button at the top of the page labeled "Review Changes to Publish or Send Back" to see this information. When you are satisfied with your portrait, use the blue button labeled "Send to Community Foundation". We will review your portrait and contact you when it has been approved for publishing or if there are areas that require further attention.

Notes

Use this feature in each section to notify the Community Foundation of Central Florida staff of any changes/correction required to the information in your portrait that we entered into DonorEdge® on your behalf. You can also request additional options for drop down list answers. For example, if you don't see the "Affiliation" that you need, you can request that we add it to the drop down list. The Community Foundation will use the Notes feature to identify any areas that require further attention after completing our review.

Send to Community Foundation for Review

When you are satisfied with your portrait, click the button at the top of the page labeled "Review Changes to Publish or Send Back". A blue button labeled "Send to Community Foundation" will appear. Click this button to send us your portrait. We will review your portrait and contact you when it has been approved for publishing or if there are areas that require further attention.

APPENDIX

SUPPORTING DOCUMENTS OVERVIEW FOR DonorEdge® PORTRAITS

When completing your DonorEdge® portrait, your organization must submit documentation to the Community Foundation of Central Florida to verify the existence of certain policies, procedures, and plans. In all cases, these documents must be written and must have received approval by the organization's board of directors. For each type of document, the Foundation has established minimum criteria the organization must meet in order to qualify.

Board Selection Criteria

Minimum Criteria: When the Community Foundation validates the information you submit, you should not answer "yes" to this question if:

- . You have not uploaded a copy of your document;
- . The document has not been approved by your board of directors; and
- . The criteria simply reiterate those described in your organization's bylaws.

Conflict of Interest Policy

Minimum Criteria: When the Community Foundation validates the information you submit, you should not answer "yes" to this question if you have not uploaded a copy of your board-approved document or the document was not included or referenced among your organizational policies and procedures.

Fundraising Plan

Minimum Criteria: When the Community Foundation validates the information you should not answer "yes" to this question if you have not uploaded a copy of your document and the document has not been approved by your board of directors.

Strategic Plan

Minimum Criteria: When the Community Foundation validates the information you submit, you should not answer "yes" to this question if you have not uploaded a copy of your complete document and the document has not been approved by your board of directors. Furthermore, for DonorEdge® purposes, a strategic plan will need to include written strategies on how staff is responsible for the activity that will reach key goals and objectives as well as target dates.

Management/Leadership Succession Plan

Minimum Criteria: When the Community Foundation validates the information you submit, you should not answer "yes" to this question if you have not uploaded a copy of your document, and if the document has not been approved by your board of directors.

Organization Policies and Procedures

Minimum Criteria: When the Community Foundation validates the information you submit, you should not answer "yes" to this question if:

- . You have not submitted the document;
- . Your policies and procedures are limited to only personnel policies; and
- . Your policies and procedures have not been approved by your board of directors.

Note: If policies addressing whistle-blower protection and document destruction do not appear in your policies and procedures document, they must be uploaded separately under "Other Documents" to demonstrate compliance with the Sarbanes-Oxley Act of 2002.

DonorEdge® Board Selection Criteria Guidance

Board Selection Criteria is: A procedure by your organization strategically thinks about its board composition to ensure board members are in place to advance the organization's mission. The procedure can include on-going as well as seasonal activities around board development.

Board Selection Criteria is not:

- Paragraph in by-laws that describes composition of board
- Board job description

Possible elements of a Board Selection Criteria document:

- Nominating Committee composition, leadership, process and timeline
- Agency philosophy of board development
- Process for analyzing board's current composition (strengths and weaknesses)
- Process for strategically balancing the board so that the knowledge and skills needed by the organization are present on the board. Might include a board grid.
- Process for strategically developing a diverse board (if this is a priority for the organization)
- Board voting procedure and/or timeline
- Board Application form and board member role in identifying and recruiting new board members.
- Board member recruitment and education process (meeting, tour...)
- Board member job description
- Board member roles and responsibilities
- Board member data sheet
- Board member Conflict of Interest statement
- Board orientation procedure (possible mentoring procedure)
- Publicity of new board members to the broader community

Length: In general, the procedure can be articulated in 1-2 pages. However other elements listed above might be included as attachments.

DonorEdge® Conflict of Interest Policy Guidance

Conflict of Interest Policy definition: demonstrates an effort by your organization to prevent perceived, potential, or actual conflicts of interest in your operations.

Goals:

- To preclude self-dealing and other conflicts by board members; and
- To insulate the organization from perceptions of improper conduct.

Features:

- Considers staff as well as board, and may even encompass volunteers;
- Signed at the beginning of an individual's affiliation with the organization (e.g., board term start date, date of hire) and reviewed annually thereafter;
- Requires individuals to fully disclose potential conflicts.
- Requires board members to abstain from discussion/voting on issues with which they have a conflict.
- Complies with applicable state laws.

DonorEdge® Fundraising Plan Guidance

Fundraising Plan is: A procedure by which a nonprofit strategically thinks about its annual and long-range development plan to advance the organization's mission.

Fundraising plan is not:

- Monetary goals alone
- Page from strategic plan

Possible elements of a Fundraising Plan:

- Development Committee composition and leadership
- Agency philosophy of development
- Development Director's Job Description with measures and outcomes
- Development Goals for each activity (could include)
 - Event (or multiple events)
 - Direct Mailings/Email Solicitations
 - Individual Solicitations
 - Foundations/Corporations
 - Government
 - Membership
 - Earned Income
 - Donor recognition
 - Planned Giving
 - Capital Campaign
- Tasks associated with each goal
- Assignments of who is responsible for each task that moves toward the goal
- Percent of growth in each goal area as related to previous year
 - Board training for Development
- Board reporting format or procedure so all board members know the progress toward each goal at Board meetings
- Calendar of annual due dates for all agency development activities (Master calendar to insure flow regardless of staff/volunteer fluctuations)
- Board personal gifts to agency
- Agency plan for development staff

Length: In general, the procedure can be articulated in 3-15 pages. However, some elements listed above might be included as attachments.

DonorEdge® Strategic Plan Guidance

Strategic Plan is: A long-range plan by which a your organization strategically thinks about its vision and direction for the future. Strategic Plans help unify board, staff and volunteers around shared goals. Strategic plans can be guiding documents for organizational direction and priorities.

Strategic Plans help organizations look beyond the day-to-day management of operations to the essential vision for strengthening the organization. They also enable the leadership to focus energies on projects that fit with goals outlined in the plan.

Strategic plan is not:

- Mission statement and directions alone

Possible elements of a Strategic Plan:

- Generally strategic plans are developed with the involvement of board, staff, volunteers and key stakeholders.
- Generally, strategic plans consider objectives for a 3-5 year vision but larger organizations may consider a longer timeframe such as 10 years.
- Often consultants are used when developing a strategic plan. Consultants can facilitate the multiple conversations and prepare documents for board approval.
- Elements of a strategic plan might include:
 - Program Development
 - Staff/Board/Volunteer Development
 - Fundraising/Marketing
 - Management issues important to the organization
- Strategic plans should have clear goals or strategic directions (usually limited to 3-5 focused initiatives)
 - Tasks associated with each goal
 - Assignments of responsible person for each task that moves toward the goal (accountability structure)
 - Timelines for completion of each task leading to the goals
 - Process for annual review by the board and sometimes more frequent review by the staff.

Length: In general, a strategic plan can be articulated in 3-15 pages. However, some elements listed above might be included as attachments.

DonorEdge® Management Succession Guidance

Goals:

- To ensure a smooth organizational transition through Executive Director change, or change in essential senior staff.
- To guide the Board of Directors through an executive change.
- To guide the internal and external message through executive change with the intent of preserving the nonprofit's community reputation.

Types of leadership transition:

Anticipated

- Grooming
- Long-range resignation
- Planned organizational transitions

Unanticipated

- Fired
- Death
- Illness/Injury
- Family circumstances
- New professional opportunities or directions

Advanced work:

- Write and annually update executive job descriptions with qualifications.
- Annually evaluate executives so Board members understand the requirements and the qualifications needed for successful leadership in a nonprofit setting.
- Develop an administrative calendar with all major recurring activities throughout the year that the executive initiates or leads.
- Develop written policies and procedures for all organizational operations (nothing is too simple - from managing the database to holiday traditions).
- Executive office organization should be such that others could locate important information easily. Keys to executive offices and files should be secure but accessible by select staff member and/or board member.

Anticipated:

- Identify a transition team (likely staff, board, and consultant) to focus on the transition.
- Identify funding available for transition needs.
- Appoint a search committee to hire, orient and train a new executive. Identify in policy the composition of the search committee and chair (may include staff, board members, consultant, Executive Director from another nonprofit organization). Identify in policy the full scope of work expected from the search committee from hiring to orientation.
- Conduct an organizational analysis to identify strengths, weaknesses, opportunities and challenges.
- Update organization's strategic plan to inform the hiring process. (What type of leader is needed to take us into the future?)

Unanticipated:

- Identify a transition team (likely staff, board, and consultant) to focus on the transition.
- Identify funding available for transition needs.
- Appoint a search committee to hire, orient and train a new executive. Identify in policy the composition of the search committee and chair (may include staff, board members, consultant,

Executive Director from another nonprofit organization). Identify in policy the full scope of work expected from the search committee from hiring to orientation.

- Conduct an organizational analysis to identify strengths, weaknesses, opportunities and challenges.

Immediate management Issues:

- Identify an operations team (likely staff, board, and consultant) to function as temporary administrative decision makers.
- Identify an interim staff structure. This could include requesting an interim CEO from Center for Nonprofit Management, appointing a board member as Executive Director or appointing a staff member to have temporary decision making authority.
- Tend to security issues including signature authorizations, locks, codes, passwords, credit cards, technology.
- Identify, to the extent possible, major deadlines.
- Assess financial obligations, liabilities and contracts. Request a special audit, if indicated.

Manage the Message:

- Develop an internal and external message regarding the leadership transition.
- Inform internal organization (Board of Directors).
- Inform the staff and share the transition plan.
- Designate spokesperson to respond to inquiries.
- Reassure key stakeholders that a management and transition plan are in place.
- Notify any persons where this is a contractual obligation to advise them when leadership is changing.

Training and Orientation of New Executive:

- Search Committee should remain engaged in the training and orientation process for the first year of the new executive's work.
- Schedule at least the first two weeks of new executive's employment with transition team still managing daily operations. During the two weeks, schedule orientation meetings for new executive.
- Identify and make necessary formal introductions (funders, contract managers...).
- Provide an updated policies and procedures manual.
- Engage departing executive, as appropriate.

DonorEdge® Policies and Procedures Guidelines

Policy and Procedures Criteria is: A collection of written policies that ensure an organization's smooth operation at the program and administrative levels. Policies are written in user-friendly terms so that they are easily understood by the reader and usually include a staff/board training element, review expectations and system of accountability.

Policies and Procedures are not:

- Personnel Policy/Human Resources policy only

Possible elements of Policies and Procedures:

- Personnel Policy/Human Resources policy
- Fiscal/Financial Management policy
- Board Development and operations procedures
- Operational Procedures (phone, equipment, supply orders, database management)
- Ethics/Code of Conduct
- Conflict of Interest
- Fundraising Procedures (events, mailings, donor cultivation)
- Technology Procedure (use of internet, maintenance requests, new and departing staff procedure...)
- Title VI
- Supervision, hiring and staff exit procedures
- Sarbanes-Oxley Act policies (Whistle-blower and Document Destruction)
- Accountability system by which internal or external findings are communicated to appropriate parties
- Annual review of policy for revisions, edits, corrections, updates...
- How policies are a part of new staff/board training and annual staff recertification
- When necessary a step-by-step instruction to assist with smooth transition through staff turnover.

An organization's mission might indicate other policies that are necessary, for example:

- Clinical services organizations might have universal precautions, admission & discharge, confidentiality, release of information...
- Animal organization might have health codes, humane treatment...
- Arts organizations might have artistic freedom, copyright...

DonorEdge® Definition of Endowment

Questions:

- (1) Do you have an endowment? Yes/No. If yes, what is the value of your endowment?
- (2) What is your spending policy?

Endowment Fund:

An established fund of cash, securities, or other assets to provide income for the maintenance of a not-for-profit organization. The use of the assets of the fund may be permanently restricted, temporarily restricted, or unrestricted. For DonorEdge®™ purposes, the above questions only apply to permanently restricted endowment funds.

Endowment funds generally are established by donor-restricted gifts and bequests to provide a permanent endowment, which is to provide a permanent source of income. The principal of a permanent endowment must be maintained permanently—not used up, expended, or otherwise exhausted—and is classified as permanently restricted net assets. FASB - *Financial Statements of Not-for-Profit Organizations*. Statement #117

Four Easy Steps to Articulating Program Outcomes

This is a simple example of how to use the Programs section of the Community Foundation of Central Florida's online Nonprofit portrait to illustrate the goals, outcome measurements and results/impacts of your organization's programs

Program Name:

Healthy Beginnings Prenatal Classes

Program Description:

Healthy Beginnings is a 12-class course that provides at-risk, low-income pregnant women with the knowledge and support they need to deliver healthy, full-term babies. Participants learn about improving nutrition/exercise habits, reducing/eliminating substance use/abuse, and information on accessing regular medical care and screenings during pregnancy.

Program Long-Term Success:

Describe ultimate change(s) that will result from this program. This may be far into the future and represent an ideal state. The ultimate success may not always be within the full purview of the program or organization. Tracking should be plausible but may require use of public data in some cases.

Numerous studies confirm that healthy maternal habits during pregnancy will increase the likelihood of a healthy-weight, full-term baby. Prevention of low birth weight deliveries improves long-term health outcomes for children into adulthood. For women completing Healthy Beginnings classes, **70% of the women will deliver healthy, full-term babies.**

Program Short-Term Success:

Describe near term achievement(s) or improvement(s) that will result from this program. This may represent immediate outcomes occurring as a result of the end of a session, classes, or service intervention. It may be as short as one contact or project. Duration will vary based on type of program.

Research shows that the more knowledgeable pregnant women are, the more likely they are to seek prenatal care, maintain a healthy,

1. This is the ultimate impact of your program. The example mentions a specific goal/outcome. However, programs don't always have a long-term goal/outcome that is measurable. Your long-term outcome(s) may sometimes describe more of an ideal scenario, rather than a measurable data point.

2. These are the short-term outcome targets you set for your program for a specific time period.

nutritious diet, and abstain from using drugs, tobacco, or alcohol. These women also have a greater tendency to seek out information from health care providers about other positive aspects that they can implement during pregnancy. This type of behavior helps to decrease the risk of low birth weight deliveries. **For 2008, by the end of their 12 class sessions: 85% of participants will exhibit changed behavior that minimizes risk factors leading to low birth weight babies. 90% of women tested will be drug free.**

Program Success Measured by:

Describe how you know what is working and what is not working with the program. Report the actual tools used to measure or track success. May include surveys, counselor notes, interviews with consumer or person impacted by action, test scores.

Participants undergo **random drug screening** for drugs, alcohol, and tobacco. Women **self-report changes in diet and exercise**. Birthing scores and **baby's weight are reported** in hospital records.

3. How do you measure those goals/targets outlined in your short-term and long-term success descriptions?

Examples of Program Success:

Provide information or data that convincingly shows that the program is doing well. Provide a case scenario or examples of consumer changed behaviors or their own testimonies of impact. Statistics are helpful.

At the end of 2008, 90% of program participants improved their nutrition and exercise habits; 87% of smokers decreased or ceased smoking cigarettes over the course of the program; 92% of participants were drug-free at the end of the program; 75% of participants delivered full-term, healthy babies.

Jane, a woman who enrolled in the program at the eighth week of her pregnancy, was a pack-a-day smoker. After enrolling in Healthy Beginnings, she stopped smoking within four weeks and remained tobacco-free for the remainder of her 36-week pregnancy.

4a. What results did you ultimately achieve? Make sure the results reflect the goals/targets you set in your descriptions of long- and short-term success.

4b. It's great to include an anecdote/story to illustrate your success. If you didn't achieve all your targets, note what you're doing to address that, and how you're improving your program for the coming period.