GIVING MATTERS

Training Guide
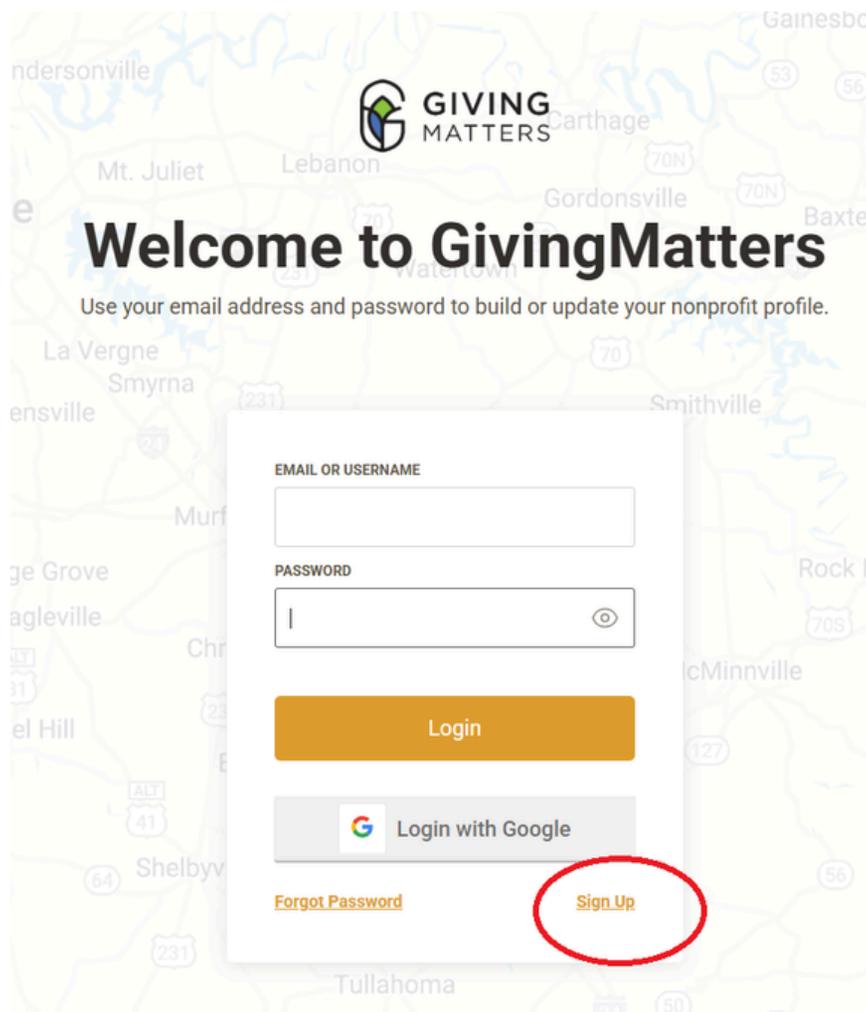
TABLE OF CONTENTS

Create or **Claim** your profile at GivingMatters.com
Click **Login**

If you are creating or claiming a profile from the old platform, you will need to create a new user login. **Old logins will not transfer.**

Click **Sign Up**.

Enter an email address & password. Click **Sign Up.**

Tell us about yourself

FIRST NAME *

John

LAST NAME *

Smith

TITLE *

Your title

ORGANIZATION NAME *

Organization name (as it appears on Form 990)

EIN ⓘ

If possible, please provide your EIN if your organization has been assigned one. Make sure that your EIN is correct. We may auto-populate information into your profile from sources such as 990 filings based on this EIN.

EIN

EMAIL *

hayleysulfridge@gmail.com

Submit

You will be directed to a second form where you will provide your organization information.

Once complete, click Submit. The pop-up means your request is pending review.

Thank you!

We are verifying your information — please check your email for account verification within a few minutes.

You will be redirected in 10 seconds

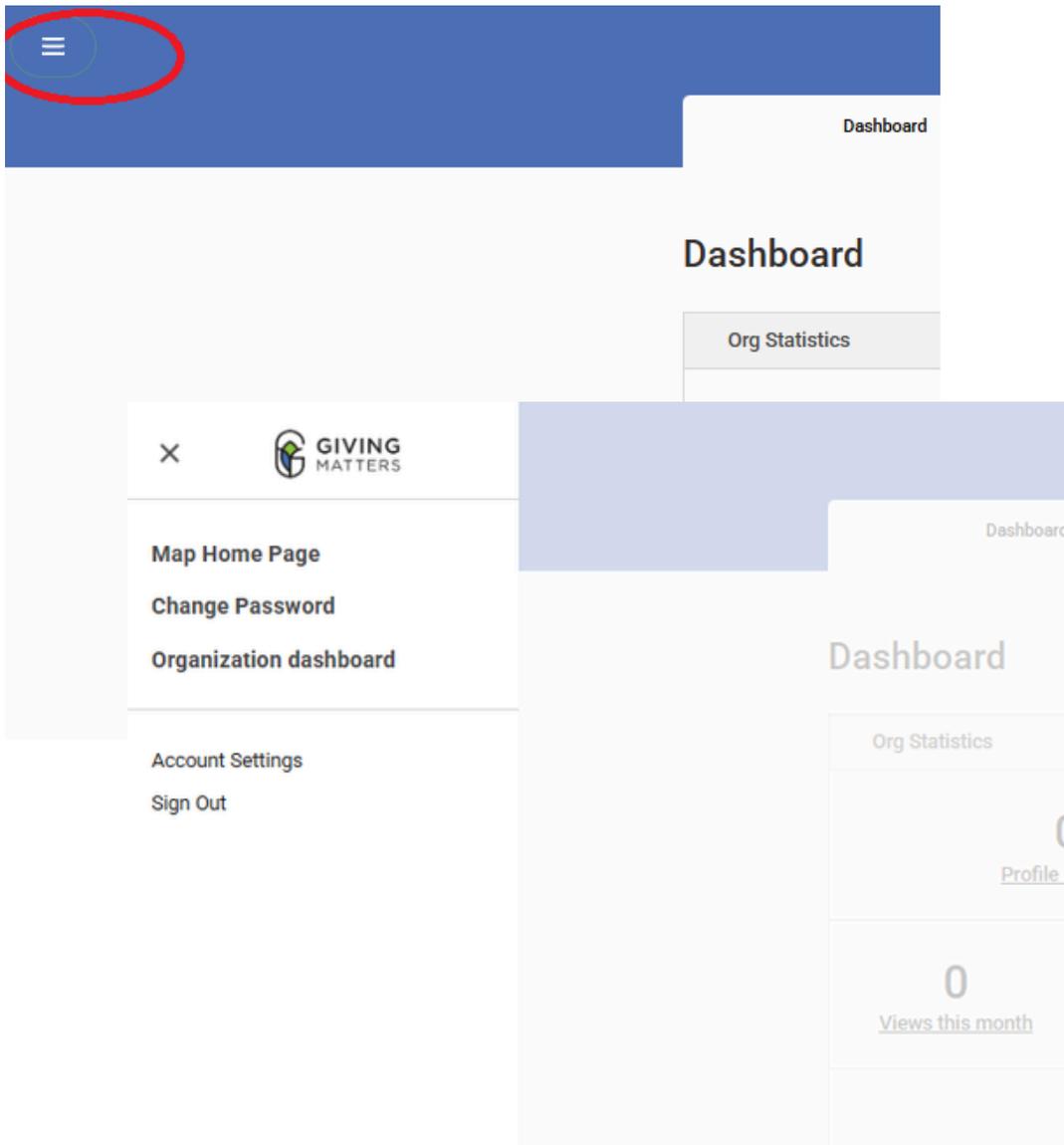Once approved you will receive an email directing you to log in.

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This is your GivingMatters **Dashboard**. Let's take a tour together.

3 horizontal lines at top left opens the navigation window to customize account settings and access the **interactive map**.
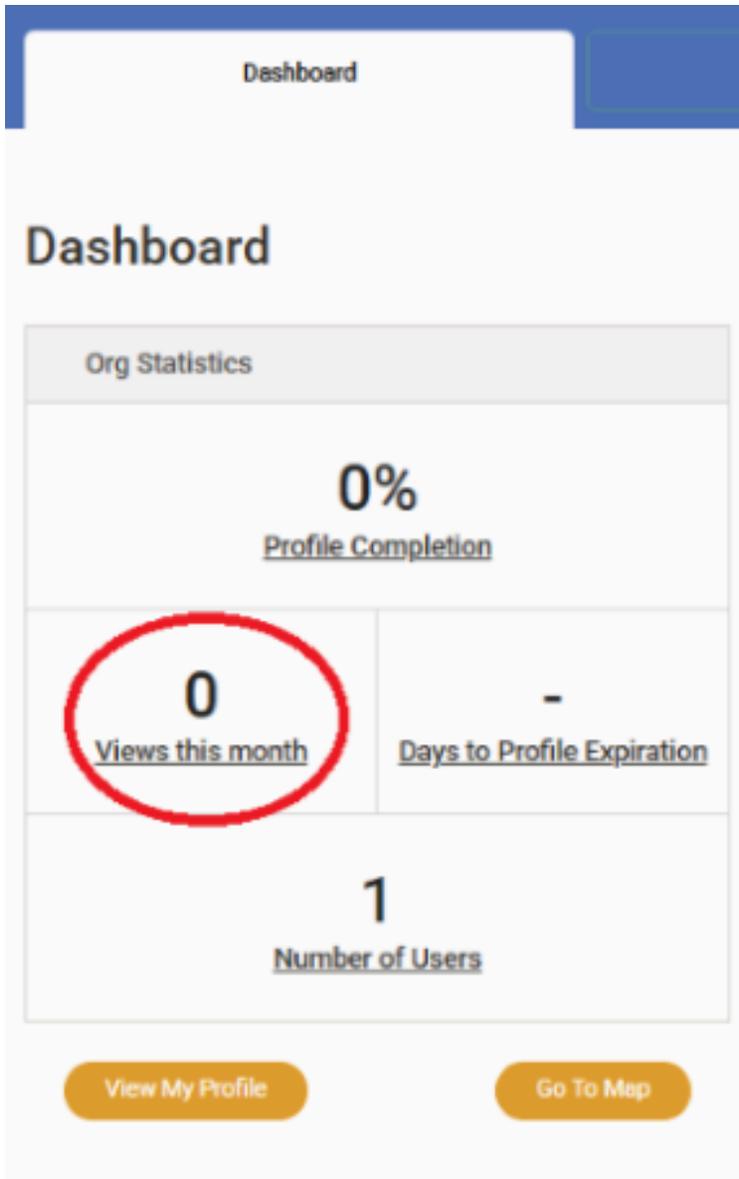
Org Statistics tracks:
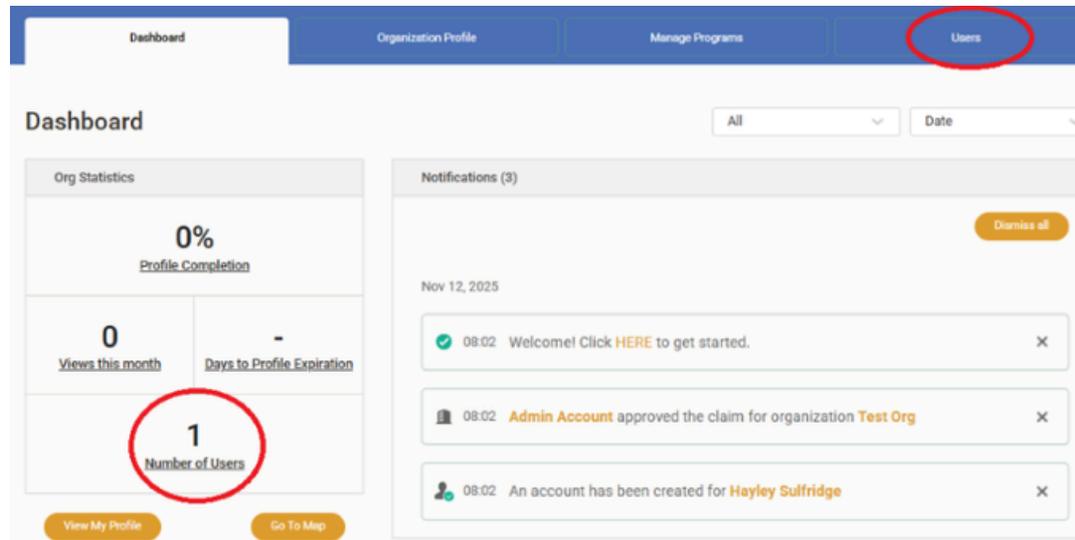
Profile completion % (submitted & approved)

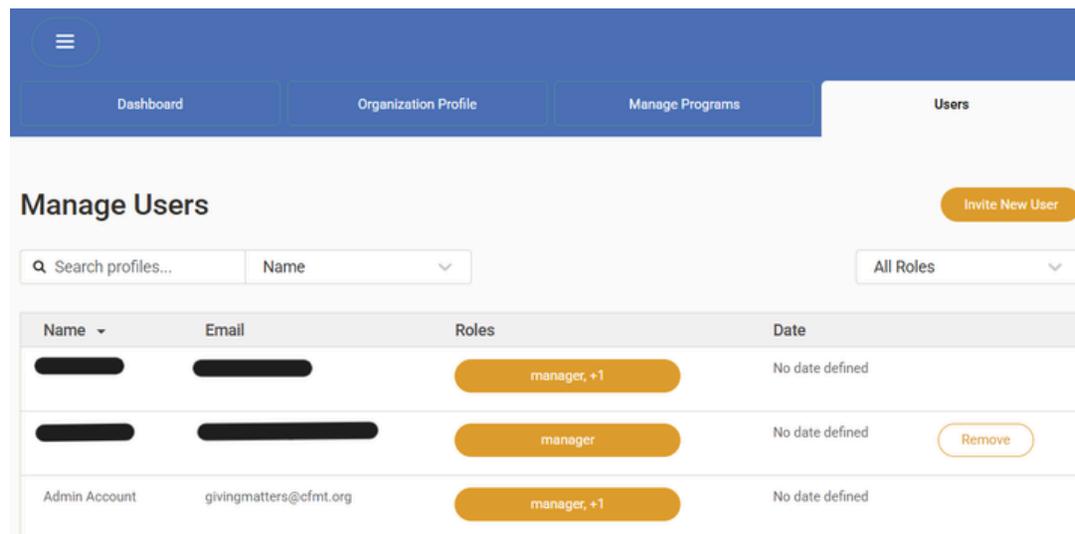Profile views for the current month

Days until profile renewal

Your profile expires **90 days** after your **Charitable Solicitations Permit**.

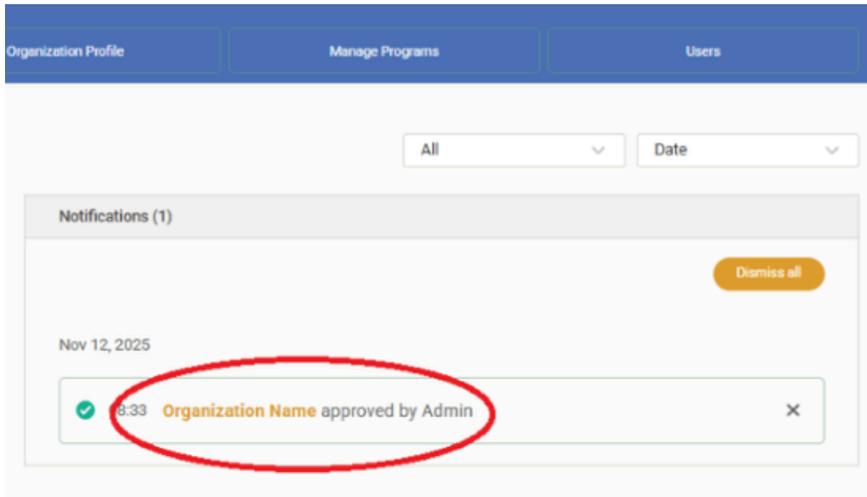We will remind you to submit the required annual updates.

Number of Users tracks the logins with admin access to your profile.

Click the **Users tab** to view and edit your admin access list.

The status of submitted fields will appear as notifications on your dashboard.

Green notifies you of admin approval.

Red directs you to edit & re-submit.
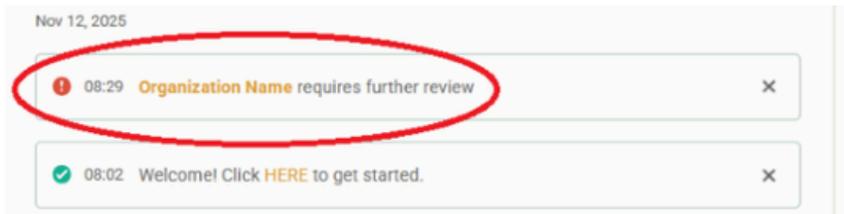
Don't worry, rejected fields always include admin comments.
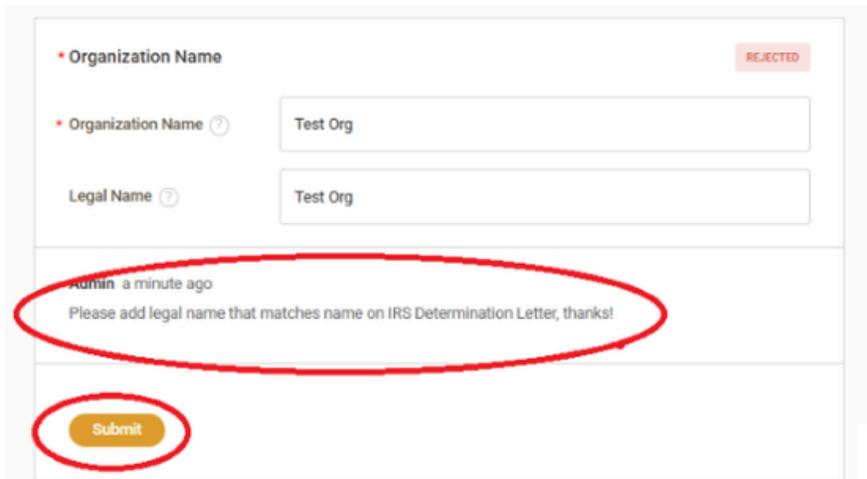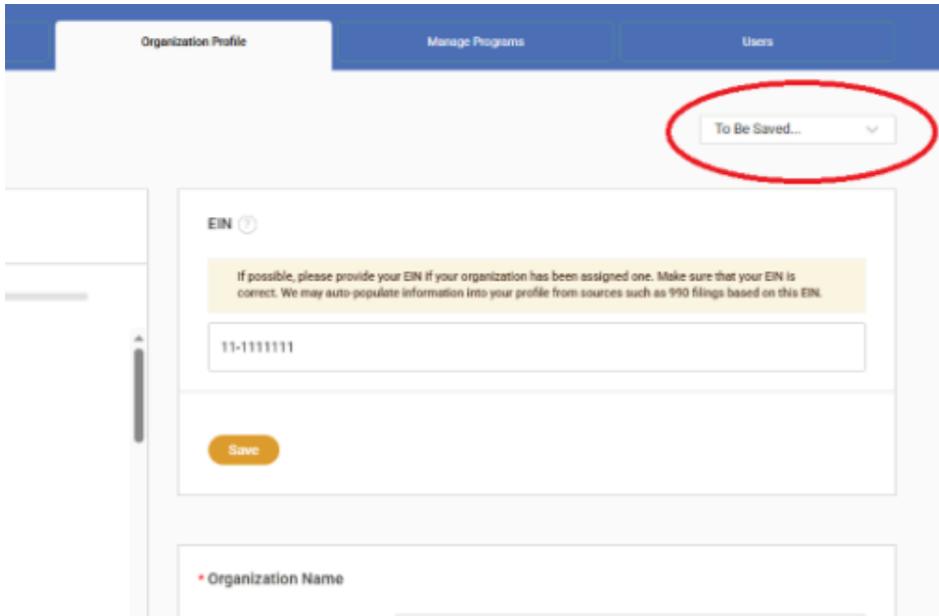
Start building out your profile by clicking **Organization Profile**

Upper right drop-down menu filters profile information by the following categories:

To Be Saved... (blank)
All Fields
Saved (not yet submitted)
Pending (submitted)
Approved
Rejected

Save your answers without submitting for admin review.

Submit your answers for review.

Submit All answers for the current tab at the bottom of the page.

After you click submit, notice the green confirmation bar at the top of your screen.

Each field you submit will now be marked **PENDING** during admin review.
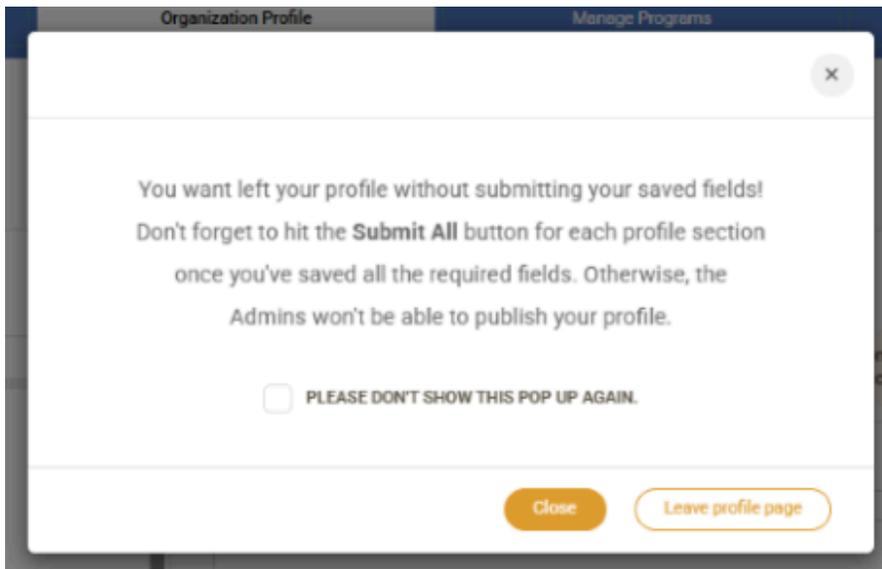
The system will warn you about saved fields that are not submitted for review.

Best to avoid this info limbo as it can delay publishing your profile.
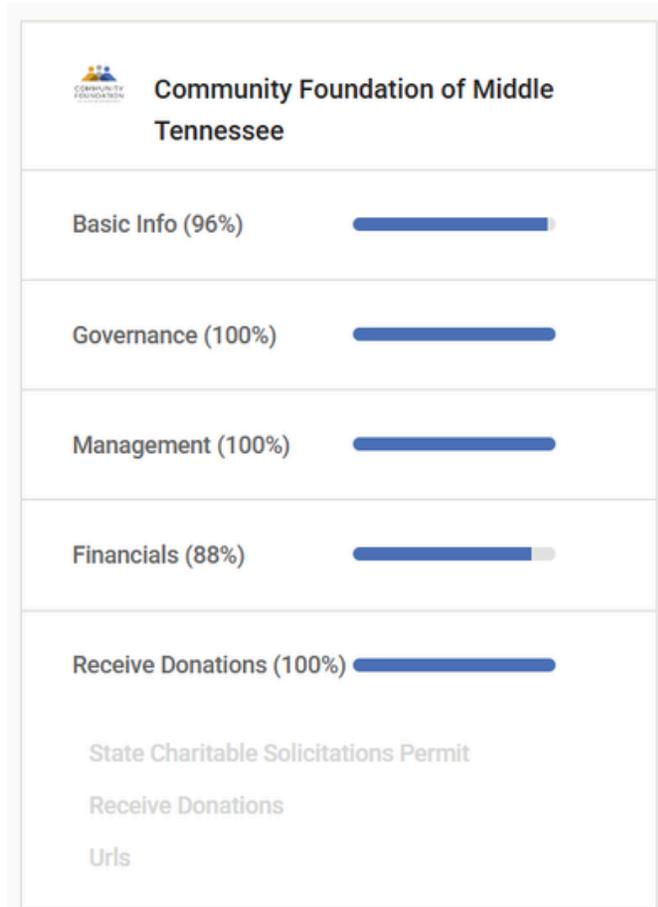
There are 5 subsection tabs:
Basic Info
Governance
Management
Financials
Receive Donations

REQUIRED FIELDS are marked with a red asterisk*
These fields must be complete to be published.

1: Basic Info

___ Organization Name
___ Contact Info (Name, Email, Phone)
___ Year of Incorporation
___ Physical Address
___ Mission Statement
___ NTEE Codes
___ Primary Areas of Impact
___ Populations Served
___ Service Areas
___ County Location
___ Search Keywords & Tags
___ IRS Letter of Determination of Tax-Exempt Status **(PDF Upload)**

2: Governance

___ List Board Members
___ Board Demographics
___ Board Chair Information
___ Board Information
___ Familial Relationship (Y/N)

3: Management

___ CEO/Executive Director Information
___ Staff & Volunteers
___ Staff Demographics
___ Staff Gender Demographics
___ Does Management Report to Board? (Y/N)

4: Financials

___ Form 990s **(PDF Upload - 3 Most Recent Years)**
___ Audits or Financial Documents **(PDF Upload - 3 Most Recent Years)**
___ Projected Budget Document for Current Fiscal Year **(PDF Upload)**
___ Capital Campaign
___ Current Fiscal Year
___ Endowment

5: Receive Donations

___ State Charitable Solicitations Permit **(PDF Upload)**
___ *You are required to connect a stripe account or alternate donation link.*

6: Manage Programs

While not marked with an asterisk, we do require you publish at least one program.
Please refer to the manage programs tab.

REQUIRED FIELDS CHECKLIST

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Let's start with **Basic Info** and outline helpful hints to speed up the process and reduce tech rage.

Please note:
Physical Address info is public facing and orgs serving at risk populations should email their profile coach for next steps.

NTEE Codes are mysterious. One helpful database resource is the IRS 990 Business Master File.
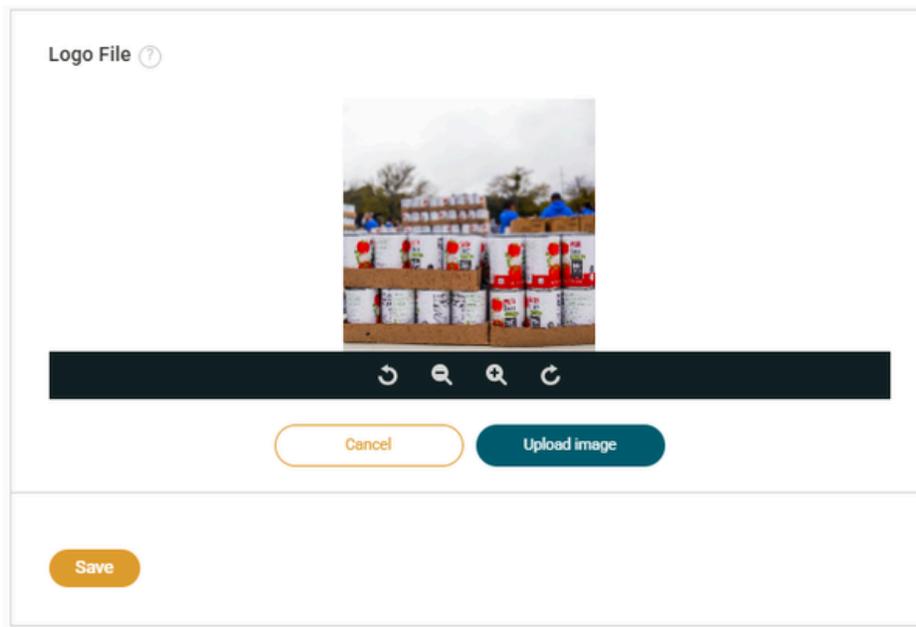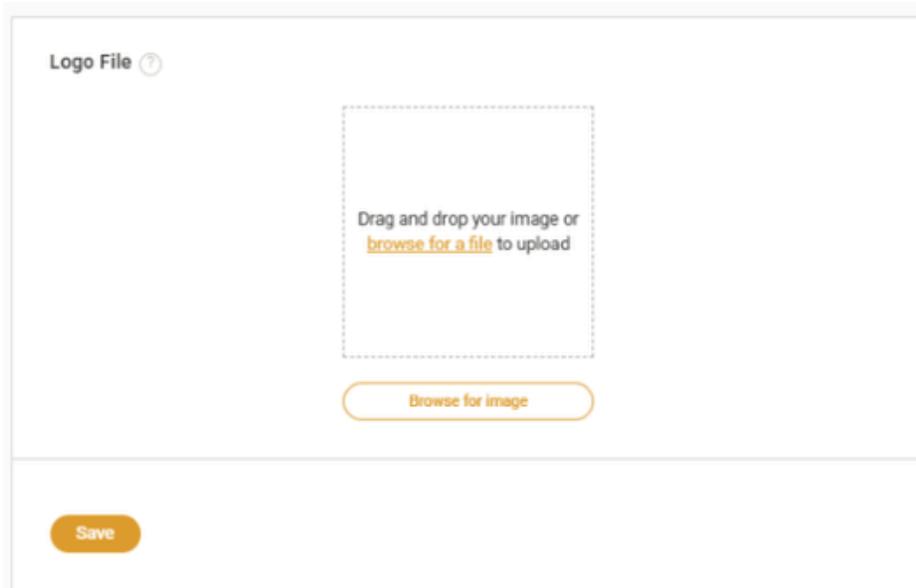
Logo File that you upload must be **.JPEG** or **.PNG** format.

Once uploaded, use **black taskbar** to zoom out **(-)**, zoom in **(+)**, and **rotate** image as necessary.

Find the sweet spot & save!

This ensures the full logo is visible on your profile.

Service Area tags link your organization to the platform's county search feature.

To save time, type <u>county</u> in the search bar and select all that apply.

Search Keywords and Tags
Brainstorm the words that describe your organization.

Now imagine someone is searching for resources and your organization has what they need.

What words are they typing in the search bar?

Enter those words here.

IRS Letter of Determination of Tax Exempt Status should look something like this with small variations depending on the year.

Key elements to confirm:
Letter date
501(c)(3) status
Public (Not Private) status

Enter the **YEAR** and upload the file as a **.PDF**

Click **Save**
& don't forget to **SUBMIT!**
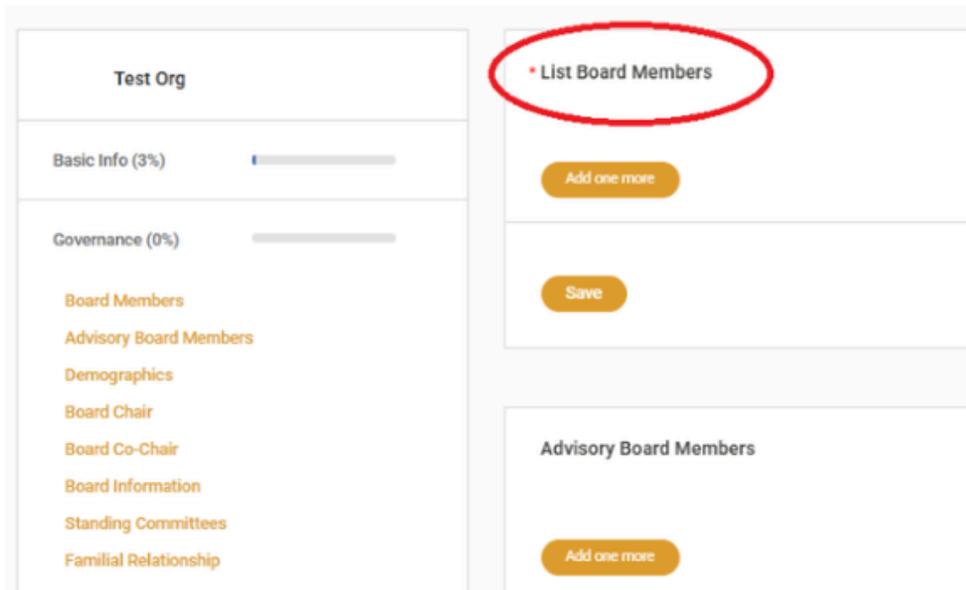
Governance & **Management** tabs focus on internal systems including demographics, active policies, and relationship between staff and board.

Set aside 10 minutes each quarter to review & update team member info.

Please note:

Publishing the demographic (race, ethnicity, gender, orientation) data of your staff & board is not required if you believe doing so risks community safety.

Financials: The key is to slow down & read the fine print. Let's break it down.

Form 990s: 3 most recent years are required.

Document type is located in the top left corner of the 990.

Year is either **calendar year** or **tax year END**.

The 990 files you upload must be complete, signed, and formatted as .PDF

Add-One-More expands the field so you can keep it moving!

2021-2022 Aventura Planning Year Budget Summary	
	Budget
Total Revenue	$665,832.88
Total Expenses	$624,280.00
Surplus/ Defecit	$41,552.88

Planning Year Revenue	
NAME	Budget
TN DOE Charter School Program grant	$265,832.88
Committed Foundation Grants	$100,000.00
ACS Board Fundraising + Additional Grants to be Secured	$300,000.00
TOTAL REVENUE	$665,832.88

Planning Year Expenses	
NAME	Budget
Personnel Costs	
Executive Director salary	$80,000.00
Lower School Co-Director salary	$75,000.00
Family Engagement Director salary	$65,000.00
Personnel taxes and benefits	$70,400.00
Curriculum development stipends	$10,000.00
Pilot program hourly wages	$3,000.00
Personnel Total	$303,400.00
Facilities Costs	
Phase 1 lease	$12,000.00
LI prior to Phase 2	$100,000.00
Phase 2 lease	$54,280.00
Student furniture	$45,000.00
Staff furniture	$10,000.00
Signage	$5,000.00
Facilities Total	$226,280.00
Professional Fees	

The following **Audits or Financial Documents** are required:

Revenue under $1M:
Projected Budget
(current fiscal year)

Revenue over $1M:
3 years of complete audits **&** Projected Budget
(current fiscal year)

Use this projected budget example: revenue **& expense** breakdowns

Enter the total amount as your answer for **Current Fiscal Year.**

Tennessee Secretary of State
Tre Hargett

Division of Business and Charitable Organizations
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243-1102

February 12, 2025

██████████████

RE: Registration to Solicit Funds for Charitable Purposes
   Organization Name: ████████████
   CO Number: ██████
   Renewal Date: ██████

Dear ████████████:

Pursuant to the Tennessee Charitable Solicitations Act, T.C.A. § 48-101-501,*et seq.* the Tennessee Secretary of State has reviewed your application and is pleased to announce your organization's registration to solicit contributions has been **approved**.

The organization must maintain statutory compliance by submitting a renewal application and required fees on an annual basis. At that time you may be required to submit tax filings, financial statements, proof of IRS status, and other documents related to your organization and its fundraising activities. You can find additional information and submit additional filings online at https://sos.tn.gov/charities. The "CO" Number listed above will serve as your organization's charitable registration number and should be used when submitting any charitable filings or correspondence.

Please also be advised that if the organization's application or other provided information includes false, misleading or deceptive statements, appropriate action will be taken. Pursuant to the Tennessee Charitable Solicitations Act, a civil penalty of up to five thousand dollars ($5,000.00) may be assessed for any violation.

Thank you for registering your organization and please do not hesitate to contact us with any questions.

Sincerely,

Tre Hargett
Secretary of State

Receive Donations:
(The best part!)

TN State Charitable Solicitations Permit:
Charitable organizations must register with the Secretary of State before soliciting contributions.

This permit must be renewed annually.

State Charitable Solicitations Permit

State Charitable Solicitations Permit #1

* Expiration   MM/YYYY   ✕

☐ IF YOU ARE UPLOADING AN EXEMPTION FORM INSTEAD, PLEASE CHECK THIS BOX.

☐ IF YOU ARE NOT UPLOADING A SOLICITATIONS PERMIT DUE TO STATUTE, CHECK THIS BOX.

Upload file

Save/Submit

Locate and upload your permit **.PDF**

Find the **renewal date** on your permit, record month & year **(mm/yyyy)**.

Tracking Number

Extension Request
Division of Business and Charitable Organizations
Department of State
State of Tennessee
312 Rosa L. Parks Avenue, 6th Floor
Nashville, Tennessee 37243
Phone: 615-741-2286
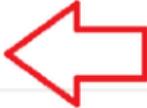sos.tn.gov/charities

Tre Hargett
Secretary of State

Extension Information

Organization Name: █████ ██ ██ ████ ████
CO Number: █████
Renewal Date: █ █ █
Extended Renewal Date: █ █ █

This is the second extension request which extends the renewal date by 60 days. No further extensions will be granted.

If your organization has filed for a renewal extension, upload the extension request.

Replace with active permit once renewal is approved.

If you **Receive Donations** via **Stripe**, connect your account by clicking blue $

Stripe is optional.
Use what works for you!

Urls provide space to customize how you link GivingMatters to your other engagement tools.

Alternate donation links payment platforms like PayPal or your website donation page.

Your **FUND THIS ORGANIZATION** link defaults to Stripe if you include both options. Alternate link is still viewable under Organization Details - About
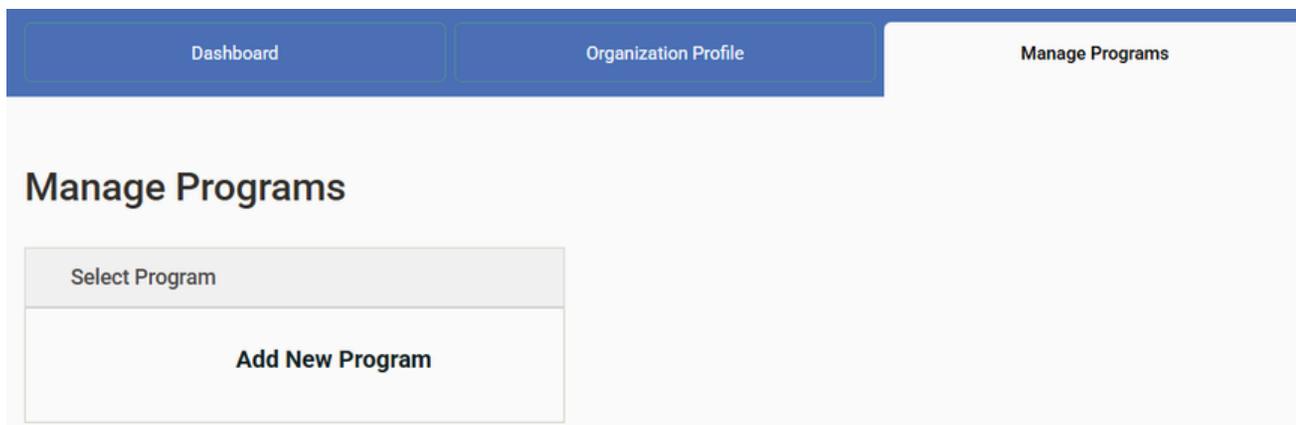
Manage Programs tab provides space to document specific initiatives.

GivingMatters requires your profile to include **at least 1 program.**
This ensures the platform **amplifies your mission** to the best of our ability.
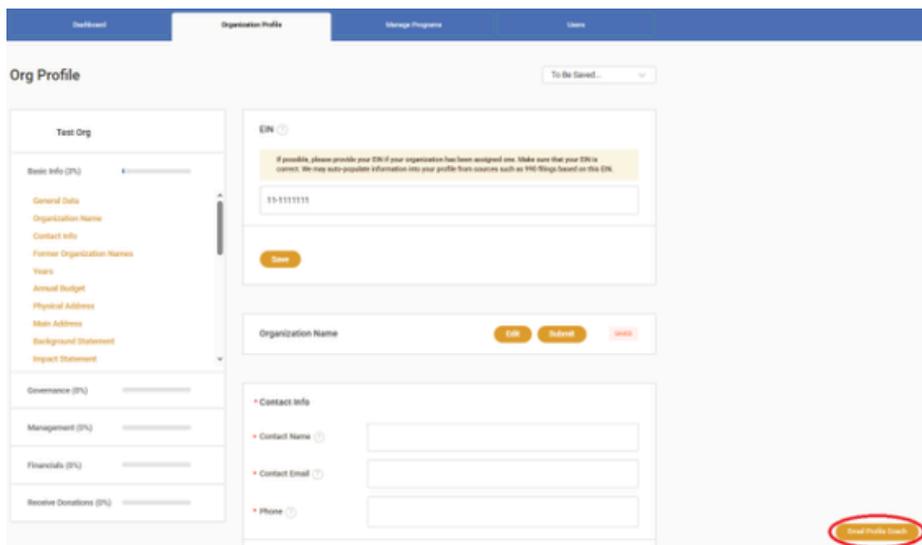
We hope this training guide is a helpful resource for you.

For additional support **email your profile coach** using the link located in the bottom right on the **Organization Profile** tab.

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