



**GIVING**  
MATTERS

Training Guide

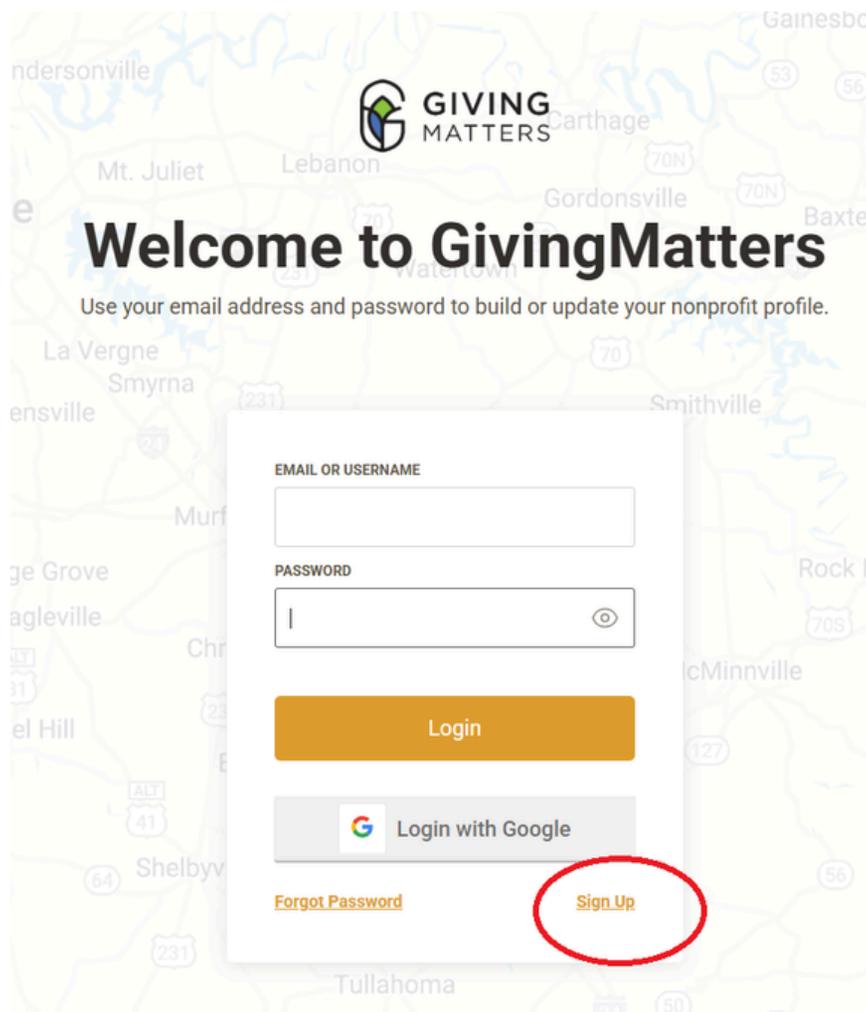
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**Create** or **Claim** your profile at GivingMatters.com  
Click **Login**

Tools Guides [Login](#) CFMT.org





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 page

Mt. Juliet Lebanon 70N

**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.

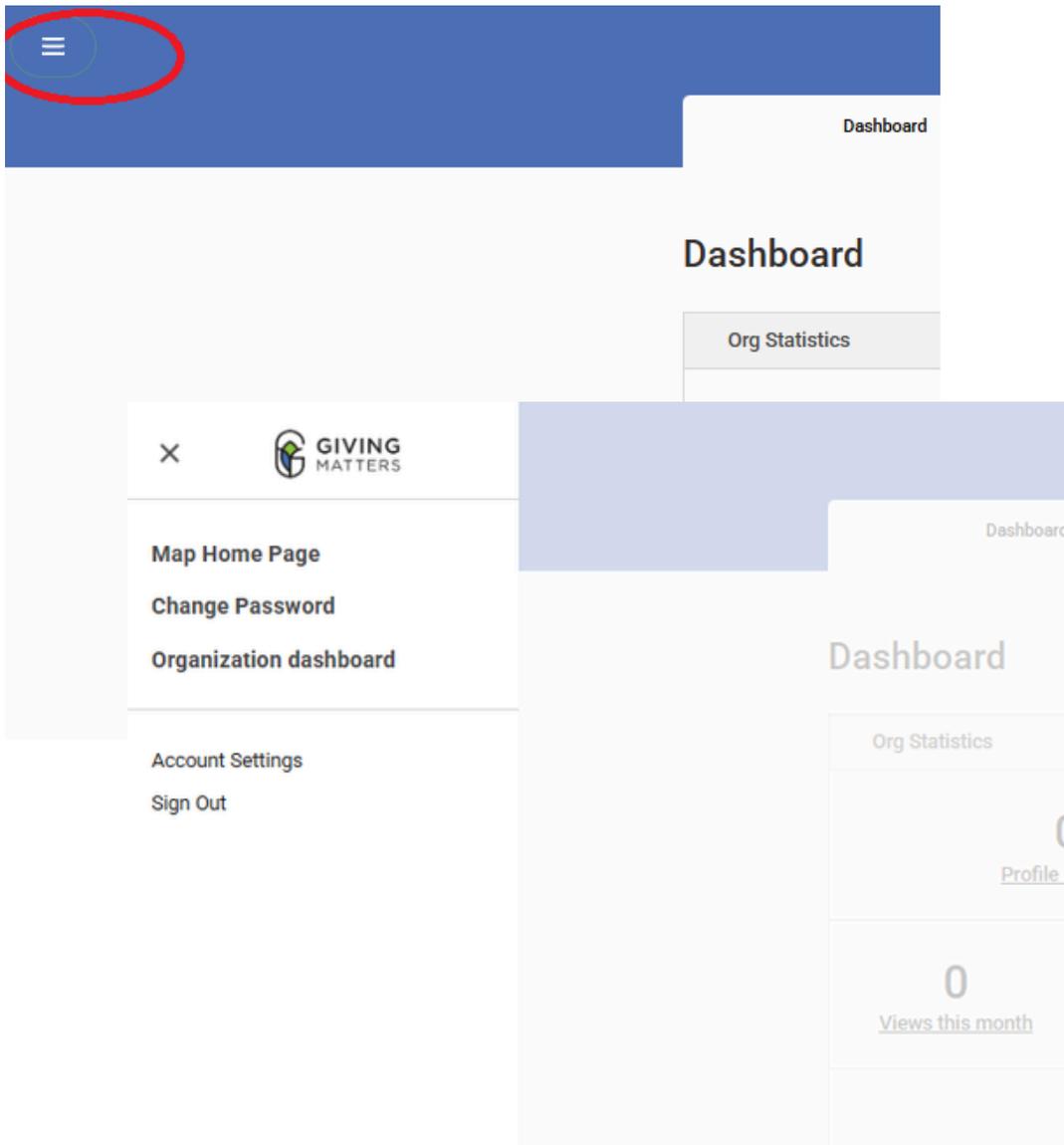
This is your GivingMatters **Dashboard**. Let's take a tour together.

The screenshot displays the GivingMatters Dashboard interface. At the top, there is a blue navigation bar with four tabs: "Dashboard" (active), "Organization Profile", "Manage Programs", and "Users". Below the navigation bar, the main content area is titled "Dashboard" and includes two dropdown menus for filtering: "All" and "Date".

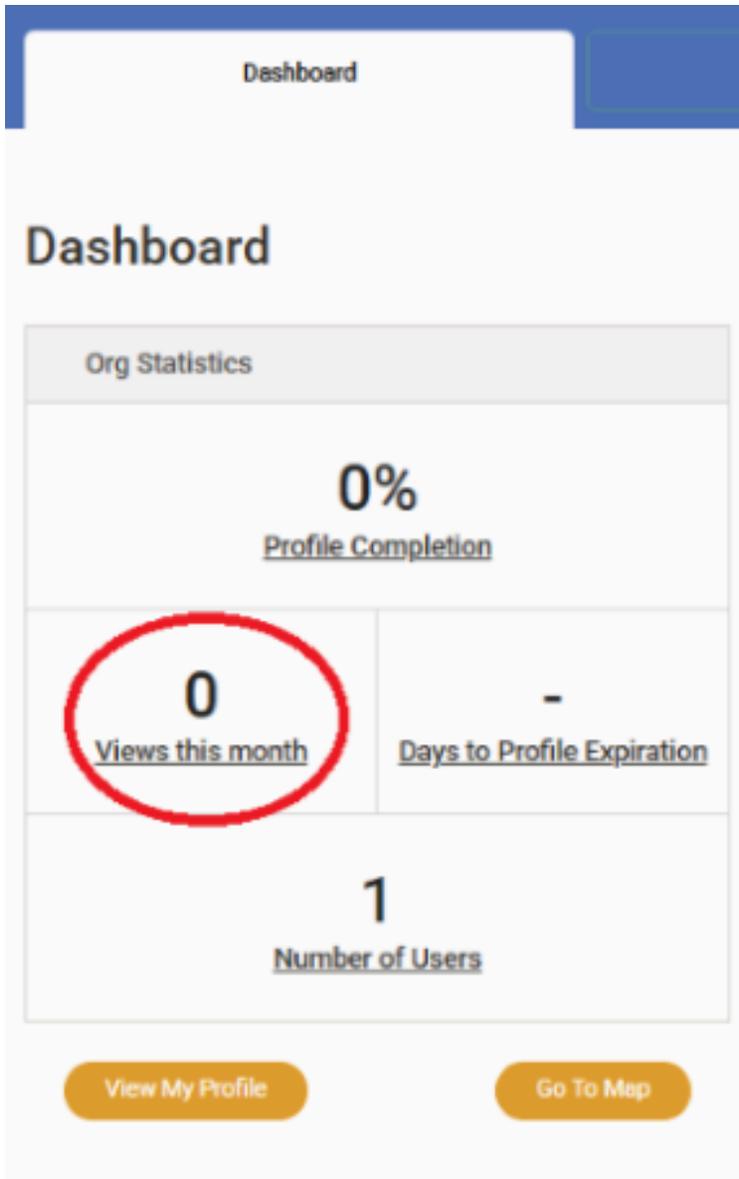
The dashboard is divided into two main sections:

- Org Statistics:** This section contains three key metrics:
  - 0% Profile Completion:** A large percentage indicating the current status of profile completion.
  - 0 Views this month:** A metric showing the number of views for the current month.
  - Days to Profile Expiration:** A metric showing the number of days until the profile expires.
  - 1 Number of Users:** A metric showing the total number of users.
- Notifications (3):** A list of three notifications, each with a timestamp of 08:02 and a "Dismiss all" button at the top right:
  - 08:02: Welcome! Click [HERE](#) to get started.
  - 08:02: **Admin Account** approved the claim for organization **Test Org**.
  - 08:02: An account has been created for **Hayley Sulfridge**.

At the bottom of the dashboard, there are two buttons: "View My Profile" and "Go To Map".



**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)

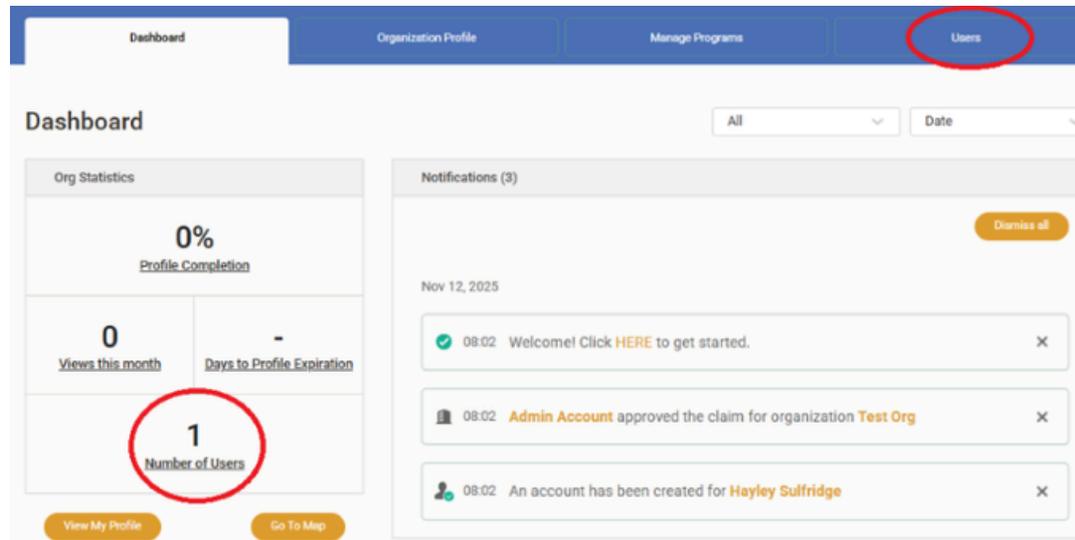
Profile views for the current month

Days until profile renewal

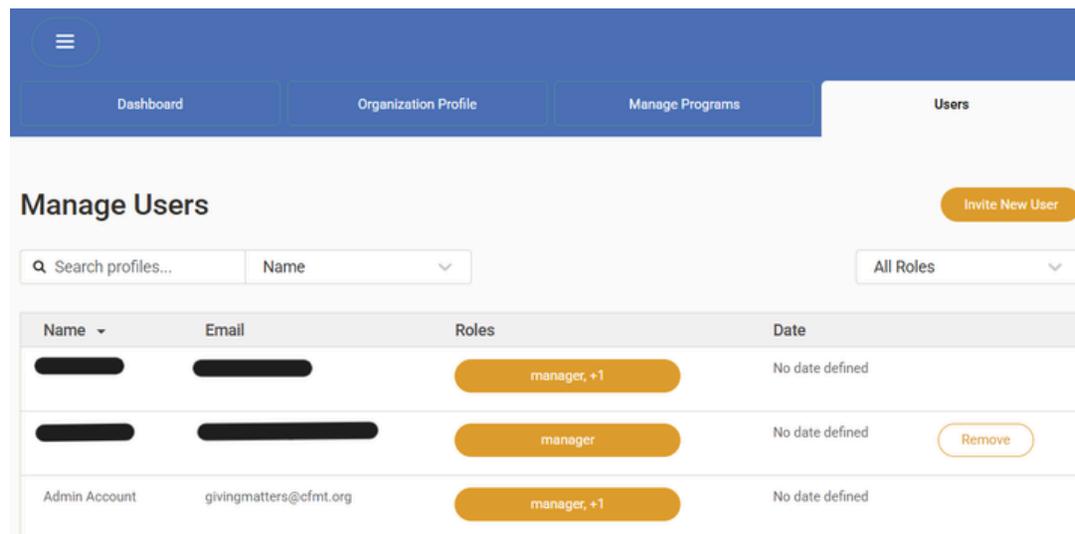
Your profile expires **90 days** after your **Charitable Solicitations Permit**.

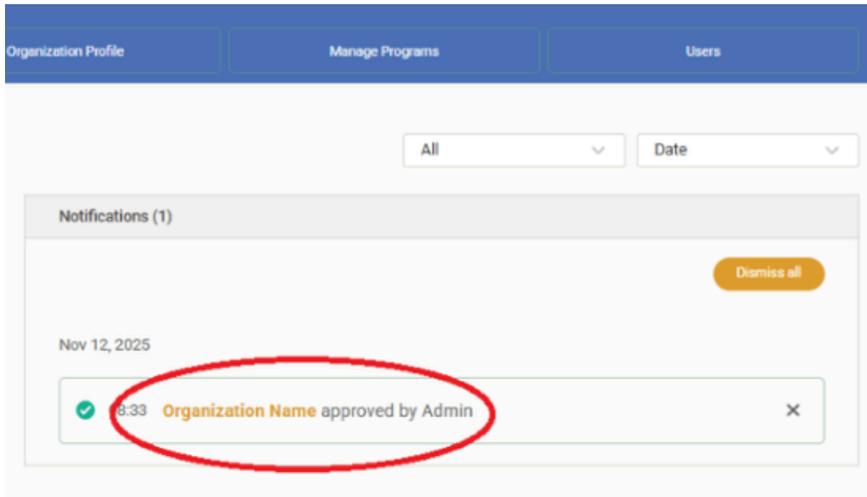
We will remind you to submit the required annual updates.

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



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

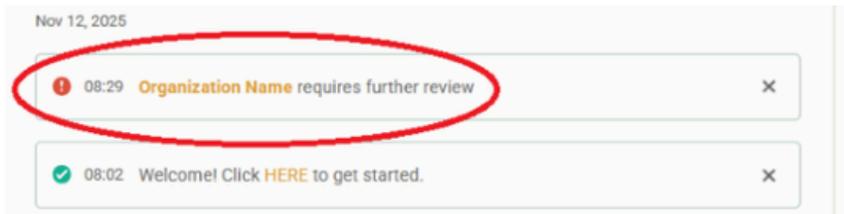




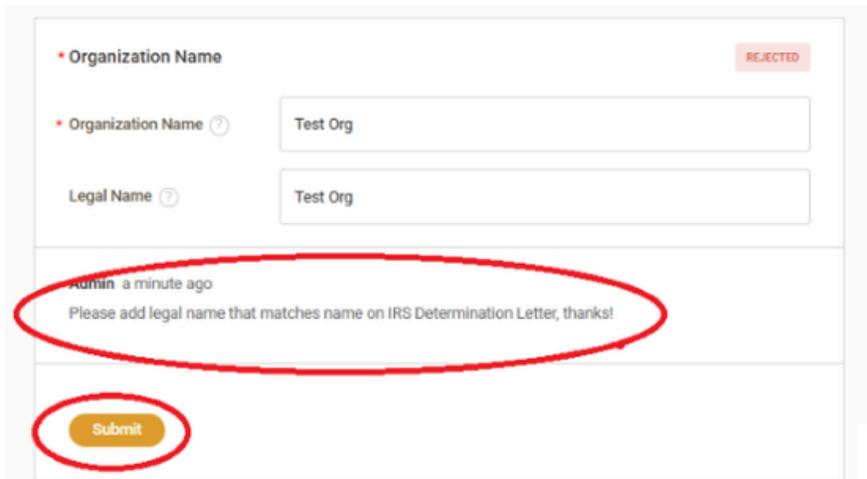
The status of submitted fields will appear as notifications on your dashboard.

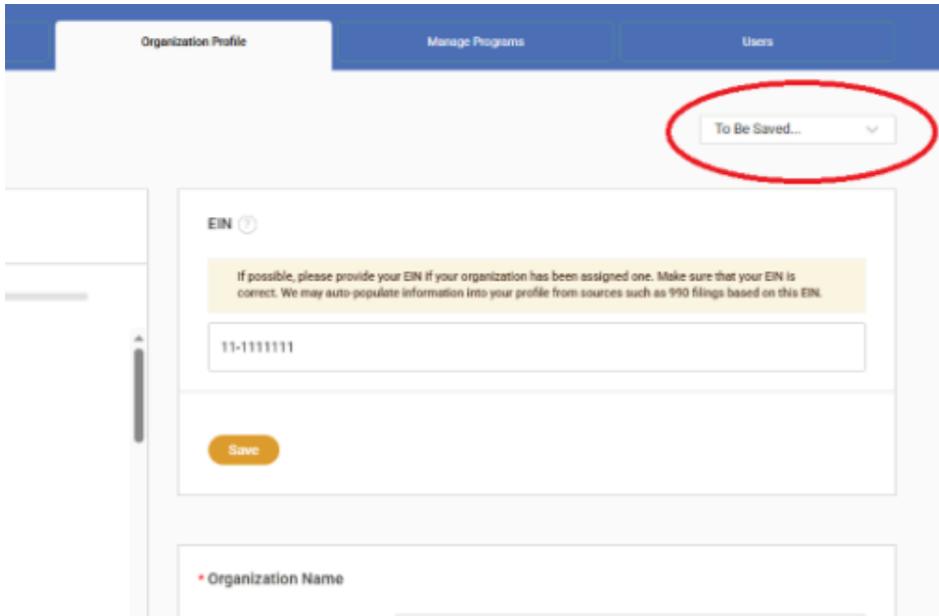
**Green** notifies you of admin approval.

**Red** directs you to edit & re-submit.



Don't worry, rejected fields always include admin comments.

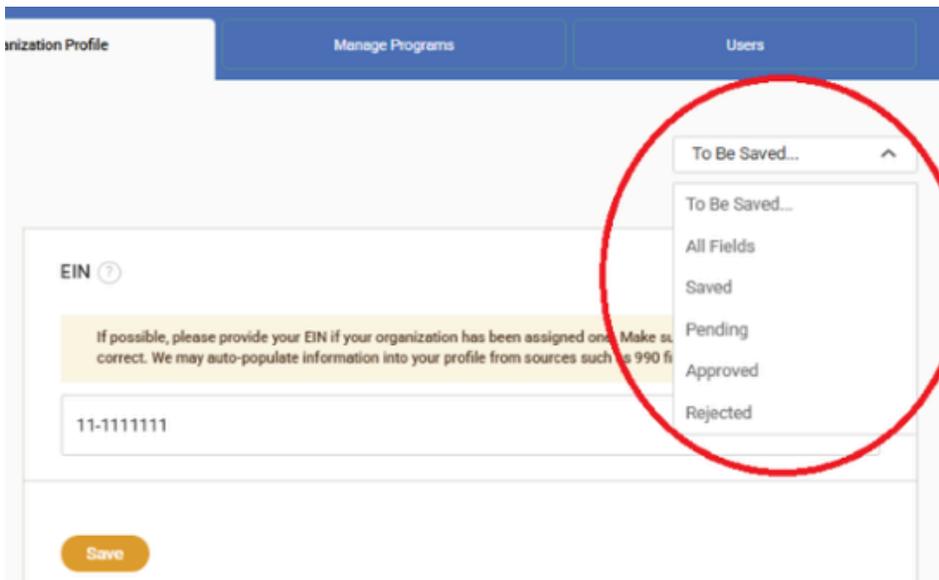




Start building out your profile by clicking **Organization Profile**

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**



• Organization Name

• Organization Name ⓘ

Legal Name ⓘ

**Save**

**Save** your answers without submitting for admin review.

Organization Name

**Edit** **Submit** **SAVED**

**Submit** your answers for review.

**Add one more**

**Save**

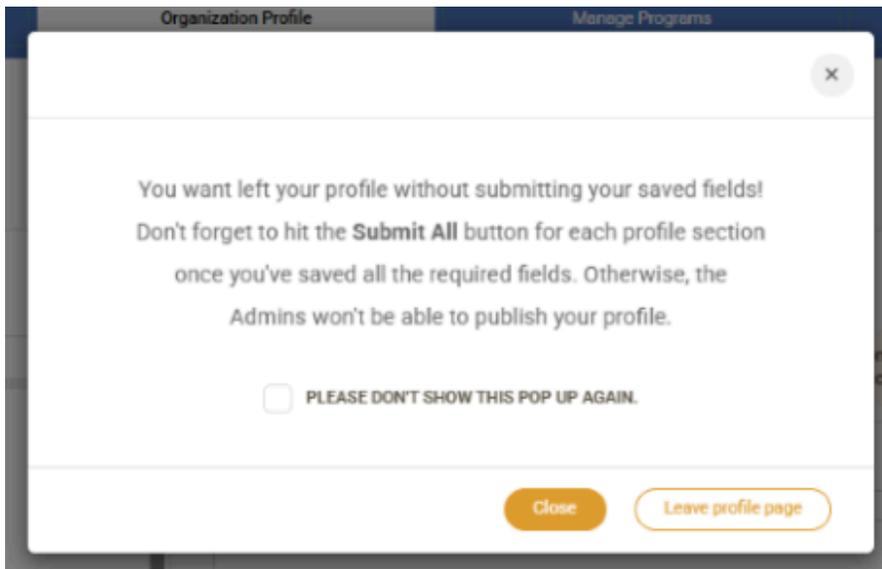
**Submit all**

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

This screenshot shows the "EIN" field in the "Organization Profile" form. The field is labeled "EIN" with a help icon. Below the label is a yellow instruction box: "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." The input field contains the text "11-1111111". Below the input field is a "Save" button. At the bottom of the form, the "Organization Name" field is visible, with an "Edit" button and a "PENDING" status label circled in red.

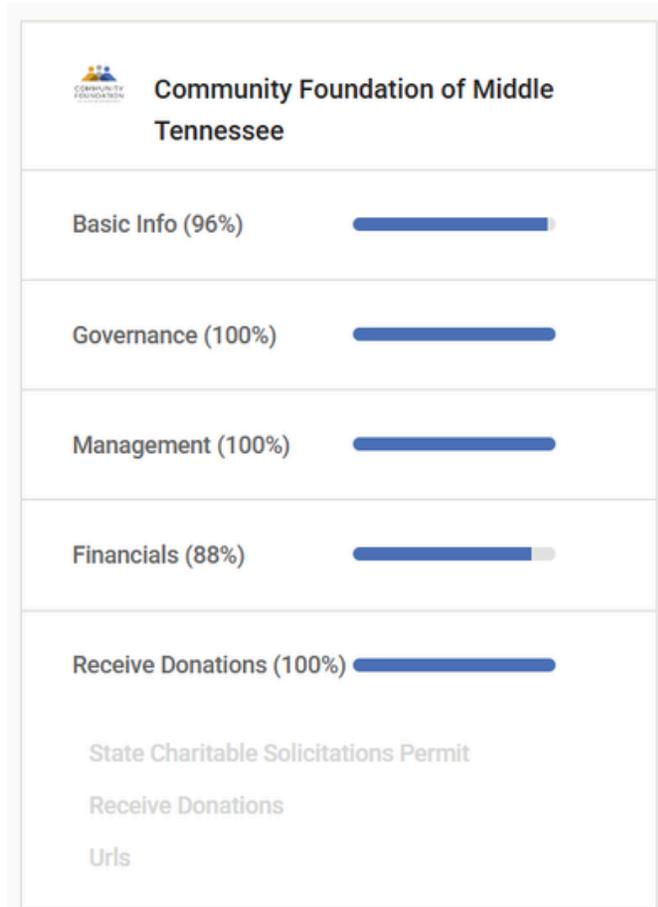
After you click submit, notice the green confirmation bar at the top of your screen.

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**

**\* Organization Name** APPROVED

\* Organization Name ?

Legal Name ?

**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**

Test Org

Basic Info (3%) ▬

General Data

Organization Name

Contact Info

Former Organization Names

Years

Annual Budget

Physical Address

Main Address

Background Statement

Impact Statement

Governance (0%) ▬

Management (0%) ▬

Financials (0%) ▬

Receive Donations (0%) ▬

• Physical Address

•

Address ⓘ

1234 Bridgestone Parkway, La Vergne, TN, USA

123 Threet Industrial Road, Smyrna, TN, USA

1230 Heil Quaker Boulevard, La Vergne, TN, USA

12308 Arborbend Dr, Smyrna, TN, USA

123 Centennial Drive, La Vergne, TN, USA

• City

• State

• Zip Code

Save

Main Address

Address

Save

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.

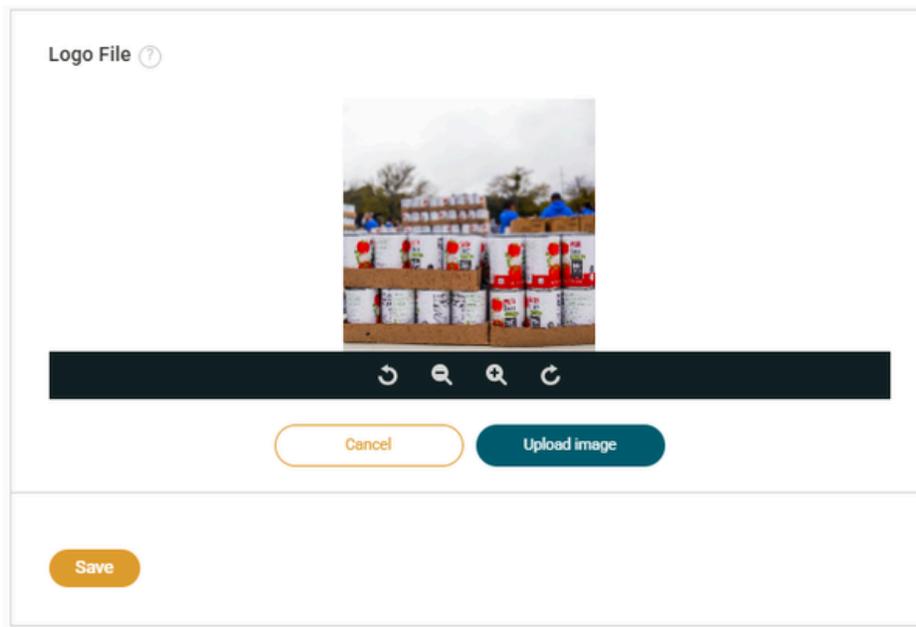
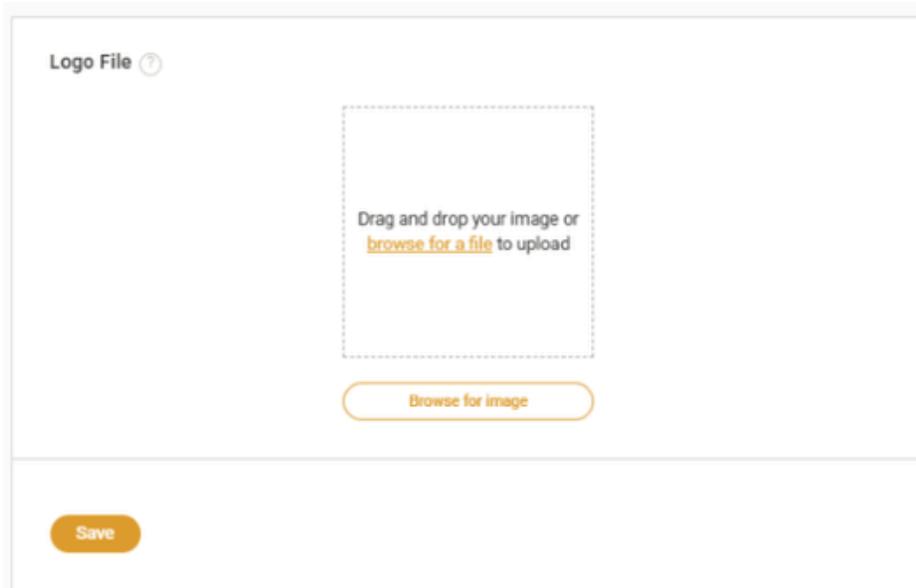
• NTEE Codes

• NTEE Code - Primary Type

• NTEE Codes - Primary Subtype

NTEE Codes - Secondary Type

**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.

**Test Org**

Basic Info (3%)

- General Data
- Organization Name
- Contact Info
- Former Organization Names
- Years
- Annual Budget
- Physical Address
- Main Address
- Background Statement
- Impact Statement

**Service Areas**

county

City

- Lynchburg, Moore County
- Hartsville/Trousdale County

County

- Rutherford County
- Smith County
- Sumner County
- White County
- Trousdale County
- Bedford County
- DeKalb County

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

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

**Search Keywords and Tags**

Please be sure to add Middle TN counties you serve.

Search tags... No options

Save

**Search Keywords and Tags**

Please be sure to add Middle TN counties you serve.

nonprofit Nonprofit nonprofit

**Search Keywords and Tags**

Please be sure to add Middle TN counties you serve.

new tag + Create: "new tag"

Save

## 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.

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
401 W. PEACHTREE ST., NW  
ATLANTA, GA 30365-0000

DEPARTMENT OF THE TREASURY

Date:

NASHVILLE AREA COMMUNITY FOUNDATION  
INC

NASHVILLE, TN 37203

Employer Identification Number:

Case Number:

Contact Person:

Contact Telephone Number:  
(410) 962-6058

Our Letter Dated:  
February 25, 1992

Addendum Applies:  
Yes

Dear Applicant:

-- This modifies our letter of the above date in which we stated that you should be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she has in part responsibility for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

• IRS Letter of Determination of Tax Exempt Status

IRS Letter of Determination of Tax Exempt Status #1

• Year

**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**

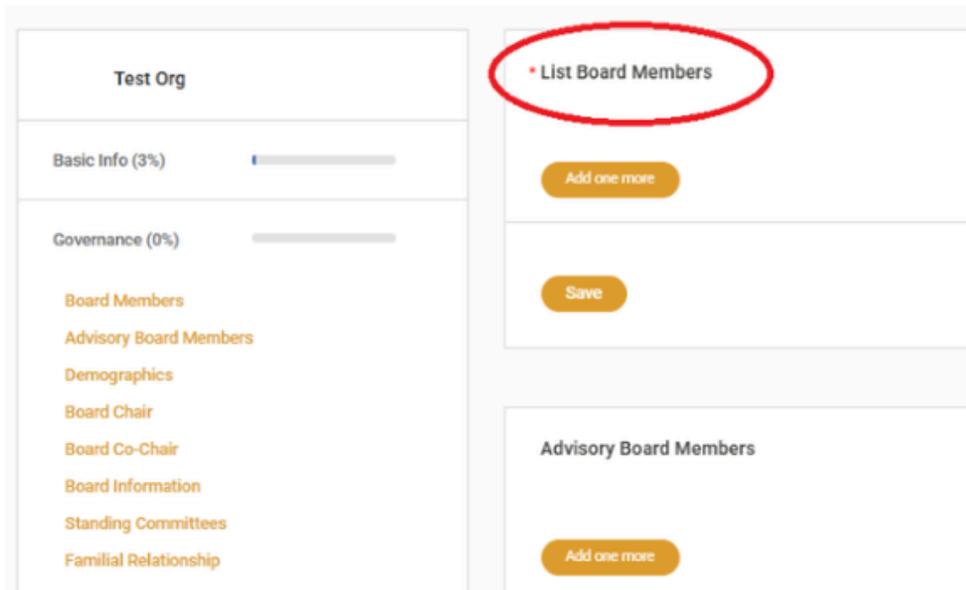
**501(c)(3) status**

**Public (Not Private) status**

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

Click **Save**

& don't forget to **SUBMIT!**



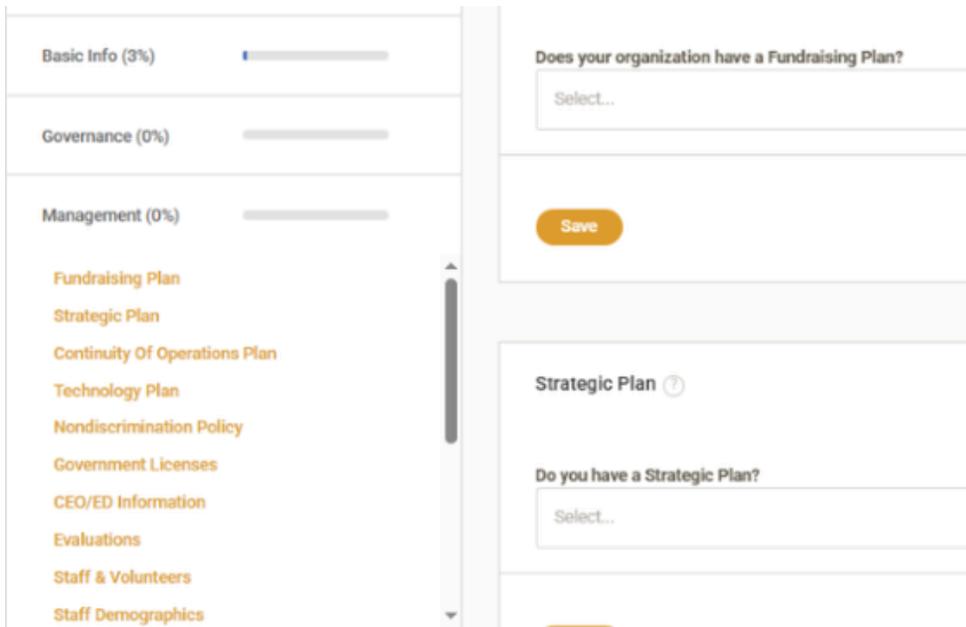
## Governance & Management

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.**



\* Form 990s ?

*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.*

Form 990s #1 ✕ Remove

\* Document Type ? Select...

\* Year ←

\* Upload file ←

Does your Form 990  
\* represent a region beyond  
Middle Tennessee? Select...

Add one more ←

Save

**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
<b>TOTAL REVENUE</b>	<b>\$665,832.88</b>

Planning Year Expenses	
NAME	Budget
<b>Personnel Costs</b>	
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
<b>Personnel Total</b>	<b>\$303,400.00</b>
<b>Facilities Costs</b>	
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
<b>Facilities Total</b>	<b>\$226,280.00</b>
<b>Professional Fees</b>	

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

[Redacted]

**RE:** Registration to Solicit Funds for Charitable Purposes

Organization Name: [Redacted]

CO Number: [Redacted]

Renewal Date: [Redacted]

Dear [Redacted]:

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 X

- 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

██████████



Tre Hargett  
Secretary of State

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

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

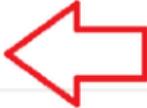
Extension Information

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

**Replace with active permit once renewal is approved.**

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

Receive Donations

Add your donation link here [S Connect with Stripe](#) 

[Save](#) **Connect Stripe**  
**OR**  
**Link your own donor portal**

Urls

Link to Volunteer Opportunities:

Alternate Donation Link:  

Receive Donations

Add your donation link here acct\_1R9WP0CXL9K5AjvU APPROVED [x Disconnect](#) 

 [Save/Submit](#) [Reject](#)

Urls

Link to Volunteer Opportunities:

 Alternate Donation Link:

Link to Donation Registry:

 [Save/Submit](#)

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

**Community Foundation of Middle Tennessee**

http://www.cfmt.org  
givingback@cfmt.org  
(615) 321-4939

48 # OF EMPLOYEES	1991 YEAR FOUNDED	\$7,301,847 ANNUAL BUDGET
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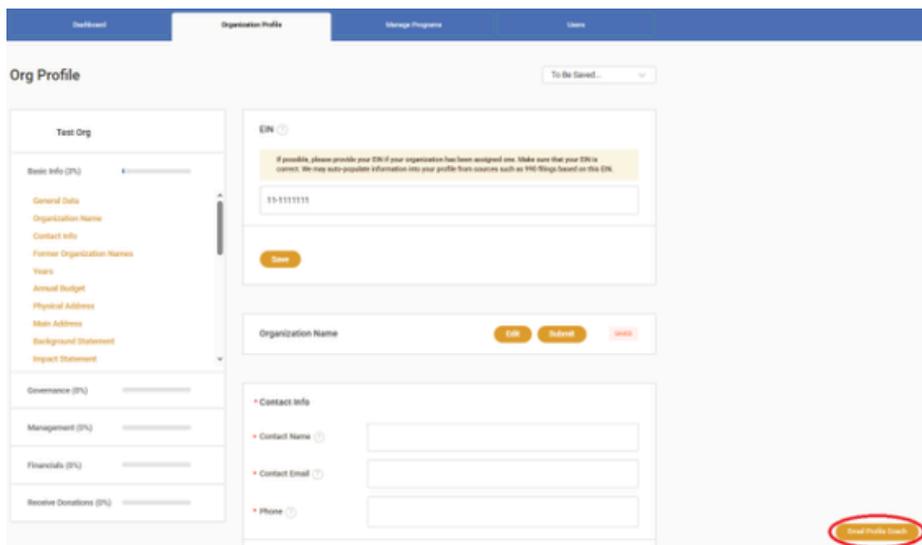
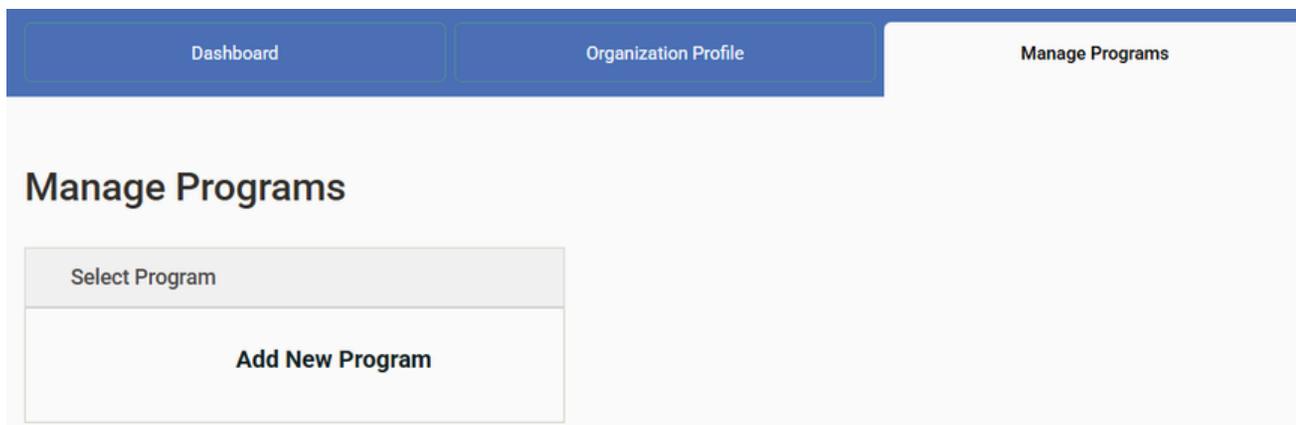
**Fund This Organization**

Contact Info

Our Mission

**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.