

ANNUAL UPDATE & FINANCIAL REVIEW

Complete the Nonprofit Search update and provide the financial review information to maintain Reviewed status. If you have any questions, please contact us at nonprofitsearch@growyourgiving.org or 816.842.0388.

Nonprofit Search Update

Please note character limits are listed above each text box. A character counter is provided below each text box.

General Information Tab:

- Nonprofit's Primary Contact Person – name and email

Statement and Search Criteria Tab:

- Impact Statement – describe 3-5 accomplishments from last year and 3-5 goals for the current year
- Check your NTEE codes – these codes allow donors and Community Foundation staff find your organization using search functions

Program Tab:

- Update information for programs listed
- Examples of Program Success fields should list current program outcome information
- Check your NTEE codes for programs – these codes allow donors and Community Foundation staff to find your programs using search functions

Governance Tab:

- Current board chair and term start/end dates
- List of all current board members including company affiliations
- Board demographic figures

Management Tab:

- CEO Information
- Management Information

Financial Tab:

- Update current fiscal year start/end dates
- Projected income and expenses for current fiscal year
- Upload recently completed IRS Form 990 or 990EZ and/or audited financial statements. **The Community Foundation will review documents and enter financial information. Schedule B of the 990 may contain confidential donor information. Please omit Schedule B or remove confidential data on the form. If your agency files a 990N, please upload a document that includes your Statement of Income listing sources of revenue, a Statement of Expenses that allocates expenses by function (program, fundraising and administration) and a Balance Sheet indicating assets (current and fixed) and liabilities (short and long-term).**
- Current endowment value, if applicable
- Capital campaign information, if applicable

Please review the rest of your profile and update any information relevant to prospective donors. Choose "SEND TO COMMUNITY FOUNDATION" when your update is complete.

Finance Review Information

Please email the following information to nonprofitsearch@growyourgiving.org.

- Top Three Funding Sources with Amounts from the fiscal year for which you uploaded a 990: (i.e., "ABC Foundation \$1,000," "XYZ Government Agency \$25,000," "Individual \$30,000"); if source is an individual, we will enter "Individual Donor" rather than a name