ConnectVA Nonprofit Directory User Guide for Current GiveRichmond Managers

Getting Started

Signing in for the First Time

If you DO already have a ConnectVA Account:

1. Go to ConnectVA.org homepage and click "Register/Login" and enter your email address and current password to login.
2. Expand your dashboard (green button on the left).
3. Update your personal profile by clicking "GO TO YOUR PROFILE" and click "Edit".
    - You may now add/edit your Name, Phone Number, Primary Organization, Organization Role, Alternative/Social Media Sites (these are your personal sites, i.e. LinkedIn, up to three), Street, City, Zip Code, and State (work address) and Demographic information.
    - You may also add a Profile Photo by clicking on Change Profile Photo.
    - *If you choose for certain fields to remain private and unsearchable, please scroll to the bottom of the page to set your privacy preferences/profile visibility options.*
4. Expand your dashboard (green button on the left) and click "MANAGE ORGANIZATION" to update key data fields in your Nonprofit Directory listing. To submit your changes, click "Save Changes" at the bottom of the page. You will see your pending changes at the top of the page in a green text box if the field requires approval. >>Go to "Updating and Editing Your Profile" in this guide for help<<

If you DO NOT already have a ConnectVA Account:

1. Go to ConnectVA.org homepage and click "Register/Login".
2. Click "Forget Password".
3. Enter the email address that is associated with your GiveRichmond account and click "Get New Password" to have a password reset link sent to this email address.
4. Check your inbox (check junk/spam too) and reset your password by clicking the link within the email.
5. Enter a new password (you can choose the "strong password" that is already entered for you or your own unique password) and click "Reset Password" and click the link to "Log in".

6. Enter your email address and new password to log in to the site.
7. Expand your dashboard (green button on the left).
8. Update your personal profile by clicking “GO TO YOUR PROFILE” and click “Edit”.
    - You may now add/edit your Name, Phone Number, Primary Organization, Organization Role, Alternative/Social Media Sites (these are your personal sites, ie LinkedIn, up to three), Street, City, Zip Code, and State (work address) and Demographic information.
    - You may also add a Profile Photo by clicking on Change Profile Photo.
    - *If you choose for certain fields to remain private and unsearchable, please scroll to the bottom of the page to set your privacy preferences/profile visibility options.*

9) Expand your dashboard (green button on the left) and click “MANAGE ORGANIZATION” to update key data fields in your Nonprofit Directory listing. To submit your changes, click “Save Changes” at the bottom of the page. You will see your pending changes at the top of the page in a green text box if the field requires approval. >>Go to “Updating and Editing Your Profile” in this guide for help<<

Removing Admins on Your Profile

- **Have a conversation internally** about who is an appropriate admin for ConnectVA.
    - Consider who will be the best person(s) to update the Nonprofit Directory listing, post jobs/RFPs, add events to the event calendar, post items needed etc.
- **MULTIPLE** admins are encouraged.
    - Each admin should be **registered separately** on ConnectVA.
    - **DO NOT use an outdated email address** to sign in.
    - **DO NOT** sign in with another person’s email address.
- **You can view current admins on the “Admins” button.**
    - If you see an outdated or inappropriate admin, email us with the email address and name of the person you want removed and we will remove it manually for you.
        - Click into the profile of the admin to view the email address.
        - In the email, let us know if the person is no longer with the organization or with the organization and should not be an admin.

Adding Admins to Your Profile

To add another admin to your organization profile you can either 1) email ConnectVA@CFrichmond.org with your request OR 2) send the person wanting admin access the following instructions:

1. Click on your organization’s profile in the Nonprofit Directory.
2. Click on “Request Membership” and add any comments to send with your request.

3. Click “Send Request” and an email will be sent to the current admins of your organization for approval.

Required Documents

Electronic Files for Upload to Nonprofit Directory

- IRS 501(c)(3) Determination Letter.
- Financial Statements for past three Fiscal Years. This could be an audit, review, year-end treasurer’s report or profit & loss statement with a balance sheet.
- Signed public-disclosure Form 990 Statements for past three fiscal years. DO NOT include Schedule B.
- State Charitable Solicitations Permit (or the letter stating organization’s exemption) that was received from the Virginia Department of Agriculture and Consumer Affairs.

The documents listed below do not need to be uploaded; however, you may need to refer to them to provide REQUIRED information.

- Current Board roster with names and company affiliations.
- Mission Statement
- Most recent annual report or program summary

When you have completed all the required items and uploaded the required documents, click Save to submit the changes for publication.

If you do not Save we will not be notified of your completion of the profile. Foundation staff will enter the Fiscal Period Financial information (3 consecutive years) from your Form 990s and audits, review the profile and contact you if there are areas that require further attention.

**It should take less than an hour to create a minimal profile with all fields.

Formatting Tips

- Draft all statements in Notepad (recommended) or Word and then copy/paste the text into your profile.
- Wait to add special characters (bullets, numbering, etc.) until after you have pasted text into your profile to avoid formatting issues.
- Keep statements brief and concise as the Nonprofit Directory fields may have character limits.

Updating and Editing Your ConnectVA Profile

Most of the data from GiveRichmond portraits have been transferred to three new tabs in the ConnectVA profile – Financials, Leadership and Programs – as well as the existing Overview tab. There are a few new and different data fields that will need to be updated.

Editing Tips

How do I edit a pending change that I already submitted?

If you've submitted a change or edit, you will see that pending change for most fields in the green box above your profile. If you submitted an edit and you want to re-edit the field, you can 1) wait for the submission to be approved and then go back and edit again or 2) re-edit/update that field, but you will see both changes pending in the green box. Once the administrator goes in to approve these edits, you will see the most recent edit in the profile.

Overview

Includes 23 possible data fields

- Organization Name – if you need to change your organization name, please email ConnectVA@CFRichmond.org.
- Legal Name – Enter the name as it appears on the determination letter from the IRS.
- DBA (Doing Business As) Name – Enter this field if your organization operates under a different name than the legal name.
- Mission Statement
- Description – This is an opportunity to expand on your mission statement and include additional background or programmatic information about the organization.
- EIN – For organizations transferred from GiveRichmond, the EIN is already in place. if you need to change your EIN, please email ConnectVA@CFRichmond.org.
- Organization Email – This usually refers to the info mailbox for the organization. If someone knew nothing about your organization and wanted to learn more, who should they email?
- Embed Video – Videos from YouTube and Vimeo can be embedded on the profile. Vimeo: click "Share" copy the entire embed code and paste it in the video field. YouTube: click "Share" and then click "Embed" to bring up the embed code. Copy the entire code and paste it in the video field.
- Primary Address – This is the physical location of the organization.
- Mailing Address – This is where the Community Foundation would mail checks. Some organizations have a separate mailing address from physical address (such as a P.O. Box)

- Primary Contact Info – The primary contact for people who want to learn more about you.
- Website – Do not put http:// or https:// before the web address, only enter www. before your web address
- Facebook – Enter only the characters after www.facebook.com/
- Twitter – Enter only the characters after www.twitter.com/
- HandsOn – Enter the entire URL address of your organization profile in order to link to your volunteer opportunities. While the link will not be viewable, it will be embedded under a "Volunteer" button in your profile.
- Online Giving – NEW! – Enter the URL for the donation page of your organization. The link will not be viewable but will be embedded under a "Donate" button.
- IRS Ruling Year
- Keywords – Enter words that might help the organization show up in a search. You can enter multiple words or combination of words, separated by a comma (example: Kids, Youth Development, Reading).
- Organization Types – Choose the best match for your services from the dropdown. Only primary type is required, but you can enter up to three organization types and subtypes.
- Primary Pillar – NEW! – If applicable, choose the Capital Region Collaborative pillar that most aligns with the organization's work (Learn more at https://www.capitalregioncollaborative.com/)
- Areas Served – NEW! – Click on the box and a dropdown will pop up and allow you to select your areas served, by county, city, region etc. Please select all that apply by clicking back into the box after each selection.
- Former name – If your organization was previously known by another name, add the name and the last year the name was used here.
- Logo & Media – Upload your organization's logo, if not already featured at the top of the profile. Choose up to 3 picture files to upload from your computer under 2MB. Enter a file name (title of picture) and a caption (what's happening in the picture), if you wish.

Financials

Includes 6 possible data fields

- Fiscal Year – Enter the start and end of the current fiscal year
- Income/Expense Projections – Enter projections for the current fiscal year. These figures should be taken from the board-approved budget for the organization.
- Financial documents – Use the drop-down menu to select the type of document you are uploading, then choose the file from your computer or network to upload it.
    - New Financial Document year – This is the end year of the document (Form 990 running from July 1, 2017 – June 30, 2018 would be the Form 990 for 2018)
- Solicitations Permit – This is the letter from the Virginia Department of Agricultural and Consumer Services. If the permit application is in process, a copy of the application can serve as a placeholder.

- You could also search for the organization here, http://cos.va-vdacs.com/cgi-bin/char_search.cgi. If the VDACS site shows the organization as registered, you can take a screenshot of the website, save it as a pdf and upload it as the permit.

Leadership

Includes approximately 35 possible data fields

- Executive Director/CEO – Include name, email and start date. If there is no CEO, leave blank.
- Board Members – Add or update the names and board roles of your current board here. Please also include email addresses for the board chair and board treasurer, which will not be visible to the public. (You can use a staff email if you, or the volunteer, have concerns about publishing the volunteer's email address.)
- Board Demographics – Enter the demographics of the board. These are individual counts, not a percentage. Ensure that the numbers add up correctly.
- Board Contributions – Please enter the percentage of board members contributing annually to the organization.
- Staff – Enter the staff and volunteer numbers in each category.
- Awards and Recognitions – Enter the award, awarding organization (if applicable) and year for any awards you would like to display
- Collaborations – Enter key organizations with whom you collaborate
- Accreditations – Enter name and year of accreditations received by the organization.
- Government licenses – Add Government Licenses, if applicable.

Programs

Includes approximately 7 possible data fields per program

- Programs – NEW! Enter your key programs by name. Please also enter a brief description for each, the address of the program, classification, locality as well as the population served by each and examples of success.
    - While the Programs that were migrated from GiveRichmond are displaying correctly on the public side, the admin side may show some html code in the field. We suggest taking some time to view the Programs on the admin side and cleaning up the field by deleting out the html code, if necessary.
    - The programs that you enter will feed into the searchable Program Directory, found within the Nonprofit Directory.