GrantCentral – Organization Profile

Overview
Important information about your organization is stored in your Organization Profile, including contact information, communities served by your organization, mission and history, board and staff information, financials, and key contacts. The Organization Profile is separate from grant applications, and can be reviewed and updated at any time.

Use this document as a guide for completing your Organization Profile. Reach out to your program contact for questions about the content of your Organization Profile, and email grants@cct.org or call (312) 800-8914 for technical questions about using GrantCentral.

Please Note:
• In order to submit an application, you must have certified that your Organization Profile is complete and up-to-date. LOIs and applications cannot be submitted until your Organization Profile is complete and certified. We encourage you to review your Organization Profile regularly and keep contact details up-to-date, leaving fewer steps to complete before an application deadline.

• You may complete the sections of the Organization Profile in any order. You can save your progress by clicking on the “Save” button. Be sure to save your work frequently.

• The Organization Profile uses pop-up boxes to collect some information. Be sure to enable pop-ups in your web browser to ensure you are able to access all sections of the online form.

• When you have completed every section and question in the Organization Profile, click the “Check for Errors/Certify” button. If complete, this action will save and certify your Organization Profile. If any information is missing or incomplete, the system will tell you what needs to be corrected/completed.

• Please use whole numbers. The system does not accept decimals, symbols, special characters (including dollar signs) and blank spaces before or after a number. Character limits are indicated for any question/field that has them.
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Organization Information

1. Is your organization a 501c3 tax-exempt entity?
   Select Yes/No. Once you have made a selection, click the “Save” button and then click the “Update Organization Registration” button.

2. If yes, are you interested in applying for a grant, serving only as a fiscal sponsor, or both?
   Select Grant/Fiscal Sponsor/Both

3. If no, enter the name of your Fiscal Sponsor.
   If you are a non-501c3 organization that uses a fiscal sponsor to receive grants, you must enter the name of your fiscal sponsor organization in the search bar for this question. If your fiscal sponsor has a GrantCentral profile, its name will populate as you enter it in the search bar. If your fiscal sponsor does not have a profile in GrantCentral, they must create one in order for you to submit a grant application and receive grant funding. Contact your fiscal sponsor to ask them to create a profile in GrantCentral as soon as possible.

4. Legal Name

5. Organization Doing Business As (DBA) Name

6. EIN

7. Primary Address

8. If you provided in-person, onsite services at a location(s) other than your headquarters in the last year, please list the addresses (street, city, state, zip). Separate multiple addresses with commas.

9. Year Established

10. If you are a non 501c3 and use a fiscal sponsor, and the fiscal sponsor has a profile in GrantCentral, the following information will populate from the fiscal sponsor’s Organization Profile:
    - Fiscal Agent EIN
    - Fiscal Agent Signatory Full Name
    - Fiscal Agent Signatory Title
    - Fiscal Agent Signatory Email
    - Fiscal Agent Mailing Address

11. If you are a non 501c3 and use a fiscal sponsor, please upload your Fiscal Agent Letter of Agreement

12. Select NTEE code
    The National Taxonomy of Exempt Entities (NTEE) system is used by the IRS, the National Center for Charitable Statistics and GuideStar to classify nonprofit organizations and the work that they do. To find the code(s) that classify your organization, visit https://learn.guidestar.org/help/ntee-codes. Once you have determined the right code(s) for your organization, begin typing the name of your code into the search bar and select the correct code from the options that populate.
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13. Website
14. Facebook
15. Twitter
16. YouTube
17. Logo

Community Served

1. Does your organization primarily: (select all that apply)
   - Provide direct services?
     If yes, In your most recent fiscal year, how many individuals did your organization serve?
   - Conduct policy and advocacy efforts?
     If yes, in what areas? Check all that apply:
     - Consumer Financial Services
     - Criminal Justice
     - Economic Development
     - Education
     - Entrepreneurship
     - Health
     - Housing
     - Human Services
     - Immigration
     - Income Security
     - State/Local Budget
     - Tax
     - Transportation
     - Workforce Development
     - Other
   - If yes, at what level of government are you advocating? Check all that apply:
     - City
     - County
     - State
     - Federal
   - If yes, in your most recent fiscal year, how many individuals were impacted by your policy and advocacy efforts?

2. Community Demographics
   Click “Open” to complete the table, which collects demographic data on the community served by your organization, including race and ethnicity, gender, age, income level, sexual orientation, disability, and
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veteran status. If you do not collect this data, you may enter X in the table for each category that you do not collect data. If you do not have complete or up-to-date data, there are text fields for you to describe your beneficiary population and explain how you collect demographic data.

3. Broad Location Served

Select the location of the beneficiaries that your organization serves or impacts. For policy organizations, select locations that are relevant to your efforts. Choose all that apply. You will be asked to select the specific neighborhoods or townships that your organization works in if you select City of Chicago or Cook, DuPage, Kane, Kendall, Lake, McHenry or Will Counties.

- City of Chicago
- Cook County
- Will County
- Lake County
- DuPage County
- McHenry County
- Kane County
- Kendall County
- Illinois
- Midwest
- Nationwide
- International

4. Who are the populations of focus for your organization?

Select the primary beneficiaries or populations that your organization serves. Select all that apply. If you select “Other,” a text field will appear for you to describe your populations of focus.

Note: Population categories will be updated and refined based on your feedback. Email learning@cct.org with recommendations or suggestions to include in future versions.

If you select “People who identify with a particular race(s)” above, additional fields will appear for you to provide more detail on your populations of focus:

- American Indian or Alaska Native: e.g., American Indian, Alaska Native, Central or South American Indian
- Hispanic or LatinX: e.g., Mexican or Mexican American, Salvadorian, Puerto Rican, Dominican, Cuban, Colombian
- White: e.g., German, Irish, English, Italian, Polish, French
- Asian: e.g., Chinese, Vietnamese, Filipino, Korean, Asian Indian, Japanese
- Black or African American: e.g., African American, Nigerian, Jamaican, Ethiopian, Haitian, Somali
- Native Hawaiian or Other Pacific Islander: e.g., Native Hawaiian, Tongan, Samoan, Fijian, Chamorro, Marshallese
- Middle Eastern: e.g., Lebanese, Syrian, Iranian, Moroccan, Egyptian, Algerian
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Organization History and Strategic Fit

1. Provide your organization mission and vision statement. (1,000 characters)

2. The Trust's vision is a thriving, equitable and connected Chicago region where people of all races, places and identities have the opportunity to reach their potential. Please describe how your organization's mission, activities, and outcomes contribute to that vision. (1,500 characters)

3. Provide a brief summary of your organization's history (3,000 characters)

4. Briefly describe your organization's current programs and activities. (1,000 characters)

5. Describe your organization's recent significant accomplishments or milestones (within last five years). (1,500 characters)

6. Describe any internal and external efforts your organization is currently undertaking or plans to undertake to incorporate diversity, equity, and/or inclusion (DEI) into its policies, practices, and programs. (1,500 characters)

7. Describe how the demographics of the community and/or individuals that your organization serves are reflected in the composition of your staff and Board. (1,500 characters)

8. Describe how your organization incorporates the perspective and lived experience of the community and/or individuals that you serve. (1,500 characters)

9. For organizations serving as a fiscal sponsor only: Briefly describe your organization's fiscal sponsorship practices to ensure good stewardship of funds.

10. For organizations serving as a fiscal sponsor only: Is this your first time serving as a fiscal sponsor? (select Yes/No)

11. For organizations serving as a fiscal sponsor only: If no, how many organizations are you currently serving as a fiscal sponsor?

Board, Leadership and Staff

1. Executive Director/President/CEO Name

2. Provide a bio for your organization’s Executive Director/President/CEO

3. Brief Bios of the Leadership Team
   Complete the Leadership Team chart by inputting the full name, title, and a short bio (approx. 4-5 sentences) for each member of your organization’s leadership team. Click “Open” to complete the chart.

4. Board Members
   Complete the Board Member chart by inputting the full name, role, professional affiliation and residence for each member of your organization’s board. Click “Open” to complete the chart.
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5. Staff and Board Demographics
   
   Click “Open” to complete the table, which collects demographic data on your staff and board, including race and ethnicity, gender, sexual orientation, disability, veteran status and age. Demographic categories will be updated and refined based on your feedback. Organizational demographic data will inform us about the diverse, representative and inclusive staffing practices of our potential and current grantees. We recognize that you may not collect all of this data. If you do not currently collect the data, please mark that box with a 0 (zero). We do not expect you to develop new data collection practices to complete the table; however, we are happy to provide technical assistance to organizations interested in expanding their data collection practices. Please email learning@cct.org with recommendations or suggestions to include in future versions.

6. Total number of full-time staff

7. Total number of part-time staff

8. Total number of volunteers

9. Total Number of senior staff

10. Total number of board members

11. Describe your Board and the role it plays in planning, fundraising, and financial oversight. How are decisions made?

12. For organizations serving as a fiscal sponsor only: Describe your Board's role in financial oversight of fiscally sponsored organizations.

Financials

1. Upload your current year’s Operating Budget to include both projected expenses and revenues

2. Upload your organization's year-to-date Statement of Financial Position (Balance Sheet)

3. Upload your organization's year-to-date Statement of Activities (Income Statement)

4. Organization Fiscal Year Start

5. Organization Fiscal Year End

6. Upload your organization’s three most recent Audited Financial Statements. Upload the final financial statement for the year just completed if not audited.

7. Upload your most current IRS Form 990
8. Organizational Budget

*Please input into the budget chart the numbers from your most recent audit or 990. Please do not enter decimals, commas or dollar signs. The three years should be consecutive. List your revenues, expenses (categorized as program, general, administrative, and fundraising), surplus, deficit, and net assets.*

9. What is the percentage of administration costs for your organization’s budget?

10. If there is a deficit or other major changes over the past three years, please explain why. (1,000 characters)

11. Funding Sources

*For the previous year, please provide the names and dollar amounts of the top five sources of funding for your organization, including government contracts, foundations, corporations, Individual donors and earned income.*

12. Does your organization use a financial management system?

13. If yes, select the appropriate financial management system from the dropdown menu.

14. If no, Please describe your system for management of finances.

15. Has your organization had any instances of fraud, malfeasance, or financial mismanagement within the last five years? If yes, describe how it was managed.

**Contacts**

*Select contacts from the dropdown menu of contacts associated with your organization in GrantCentral. Scroll down on the “Contacts” tab to the “Manage Users” section to add or remove contacts associated with your organization.*

1. Staff Contact Name

2. Signatory

*This individual should be the most senior executive for your organization and must be able to sign grant contracts. A grant cannot be made without an up-to-date signatory.*

3. Staff Contact for Development

4. Staff Contact for Marketing

5. Staff Contact for Finance/Accounting