Nonprofit Portal Guide

October 2016

YourCause

Nonprofit Portal Overview

- YourCause has created this guide to help NPOs effectively manage their engagement with corporate clients.
    - The NPO guide covers the following:
        1. New admin registration on the YourCause NPO portal
        2. Accessing Donation History
        3. ACH registration and account setup
        4. Creating and managing volunteer events
        5. Eligible NPOs to receive funds and next steps for new additions

- If at any time you need help or have a question, charities can reach the YourCause team at charity@yourcause.com or 469-607-1084

Nonprofit Portal Overview

YourCause

- YourCause is a free portal for nonprofits to administer their charity pages and engage with our corporate clients and their employee network of over 2.5M individuals worldwide. The portal provides administrator tools that empower charities to take their digital and workplace giving strategies to the next level.
- In 2013 alone, over 42,000 charities received a donations from YourCause's generous corporate clients and their employees. YourCause hopes to continue increasing the impact with powerful online tools that build strong partnerships between charities and corporate programs.
- Administrator Tools Include:

  - Pending Donations
  - Donation History
  - Match Verification
  - Add Volunteer Opportunity
  - View All Volunteer Opportunities
  - Edit Contact Information
  - Edit Website Information
  - Locations Served
  - Edit Logo Image
  - Edit Description/ Mission
  - Add Goal
  - Add Photos
  - Add/Edit Needs

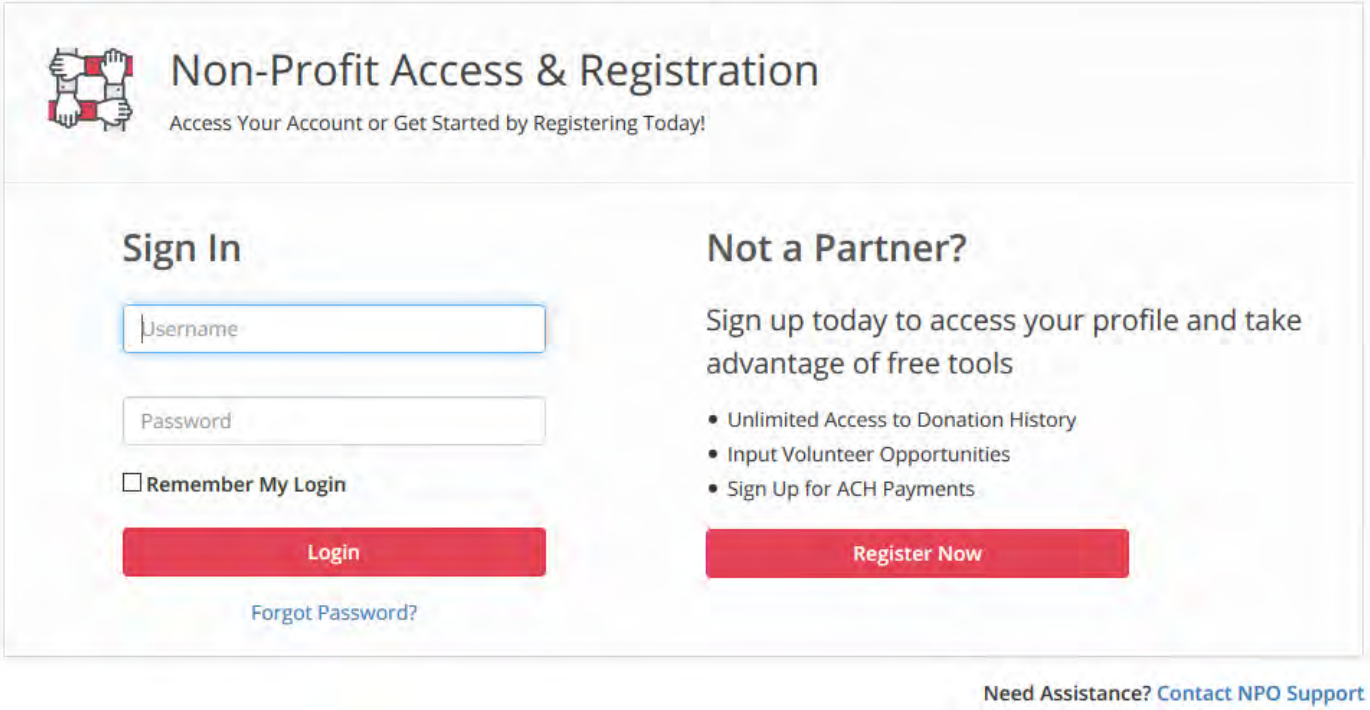
charity@yourcause.com | 469-607-1084

Admin Registration

YourCause NPO Portal

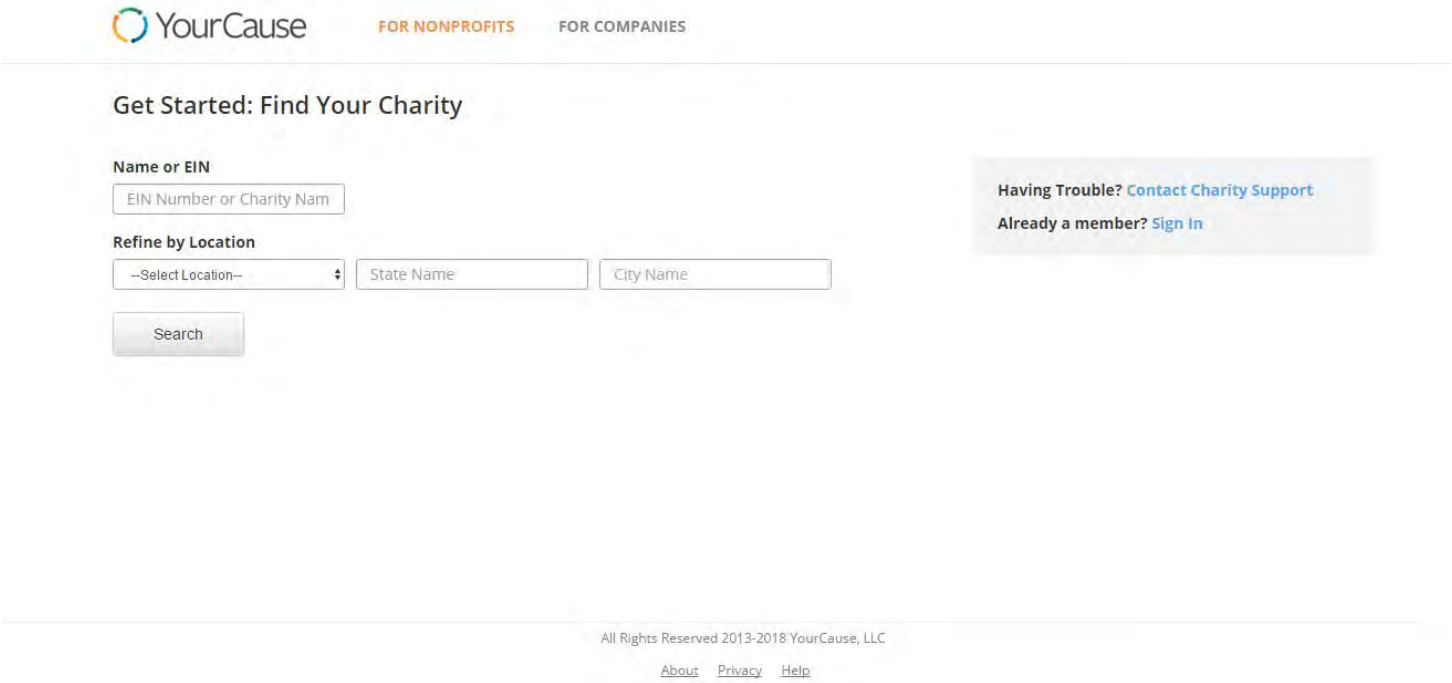
How to Register

- Go to https://npo.yourcause.com and select “Register Now”



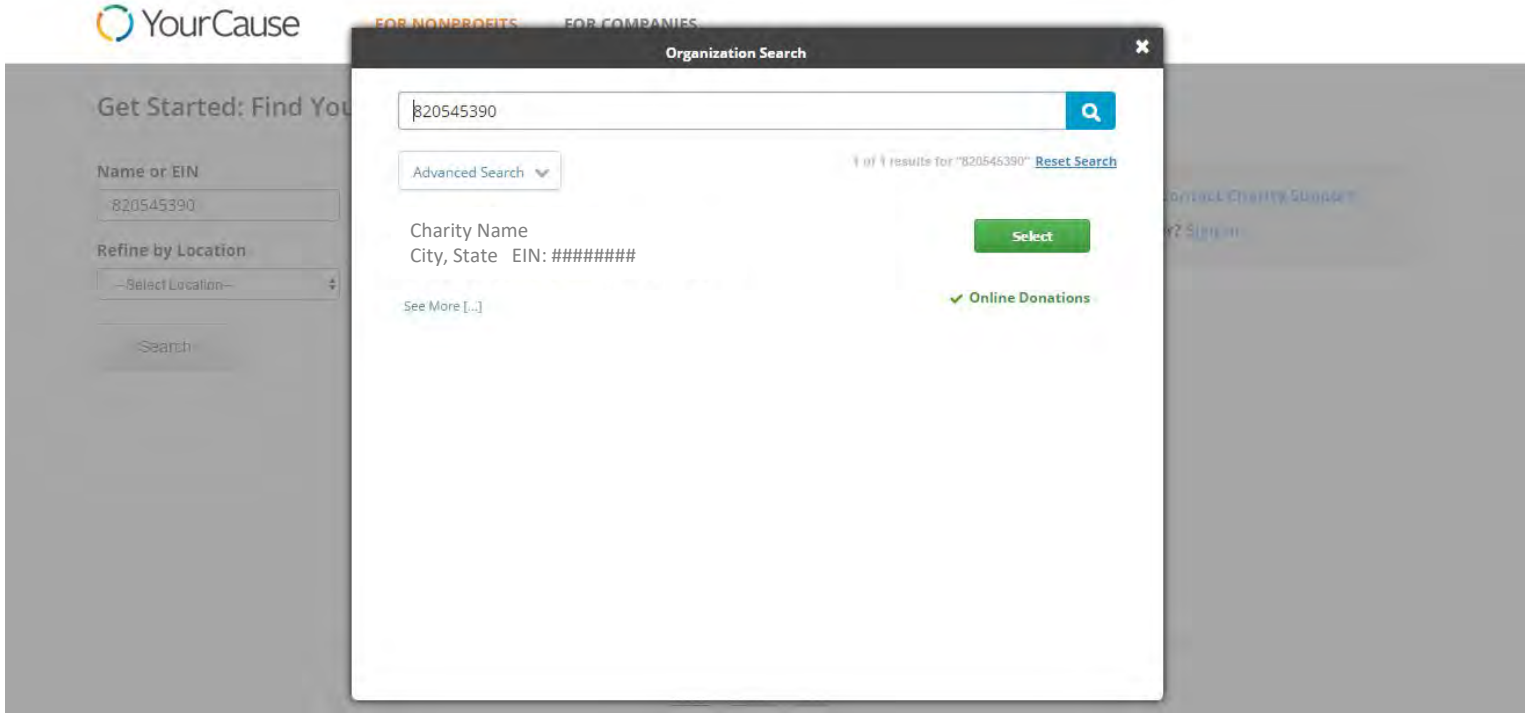
How to Register

- Search for your organization by name and location or EIN, then click “Search”



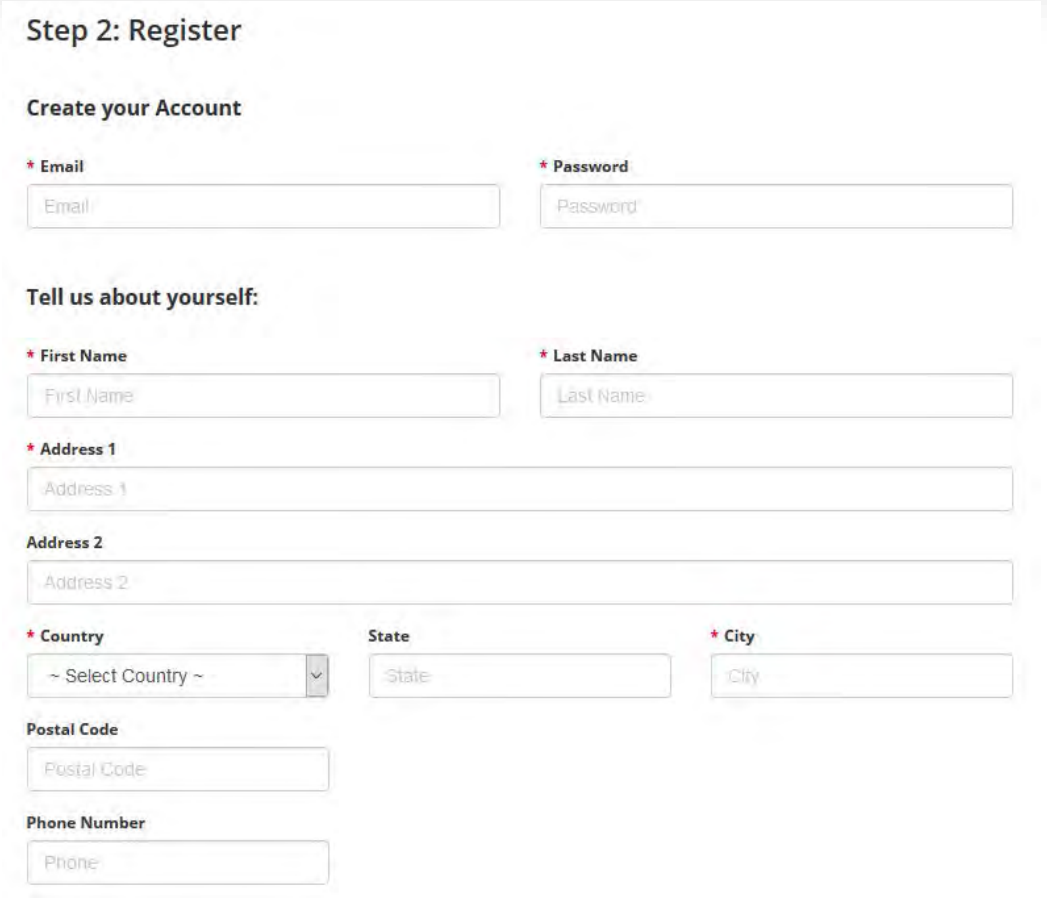
How to Register

- Find your organization and click “Select” within the returned search results



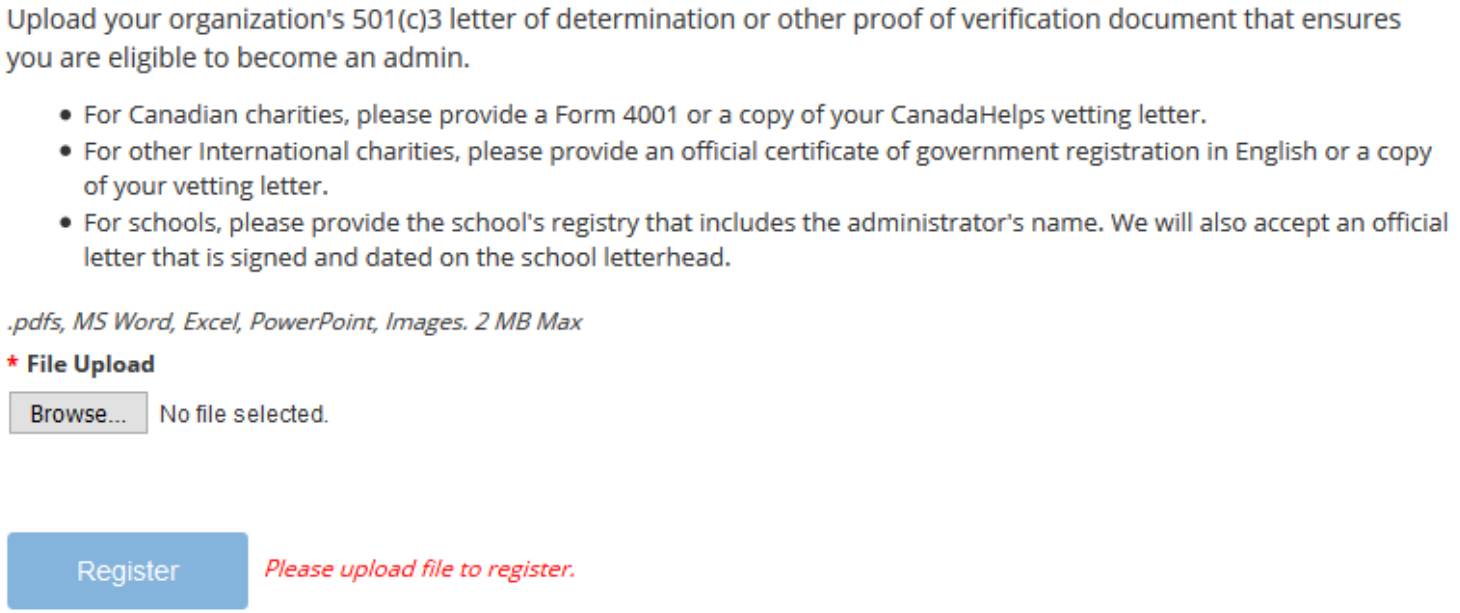
How to Register

- Complete registration details.



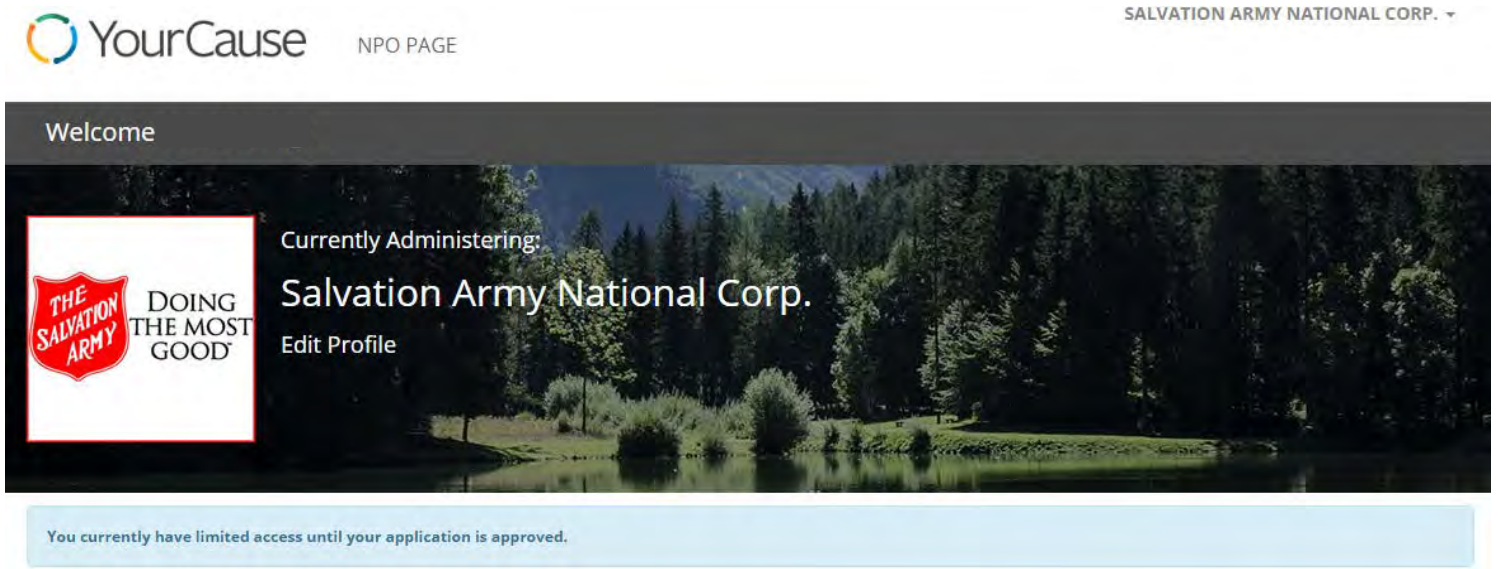
How to Register

- Upload your organization’s letter of determination or other verification document and click “Register”

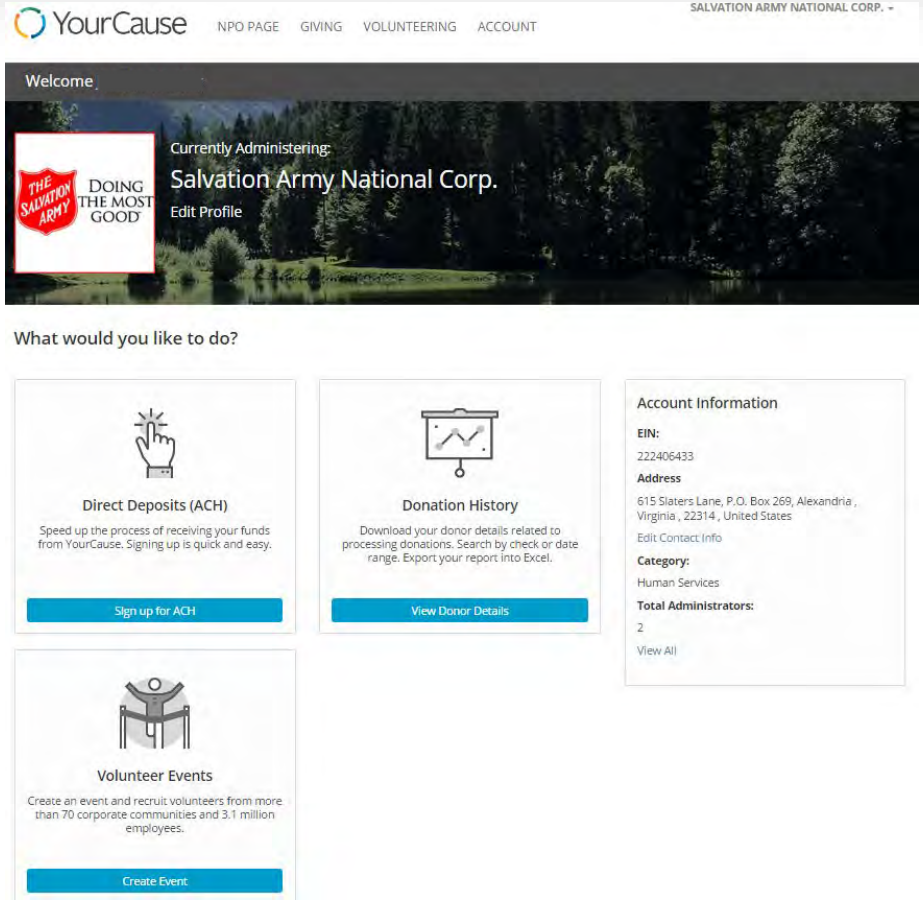


How to Register

- You now have temporary access to your charity page. By navigating to NPO PAGE, you will be able to edit your organization's profile.
- YourCause administrators will review your registration request and grant full access within two business days.



How to Register

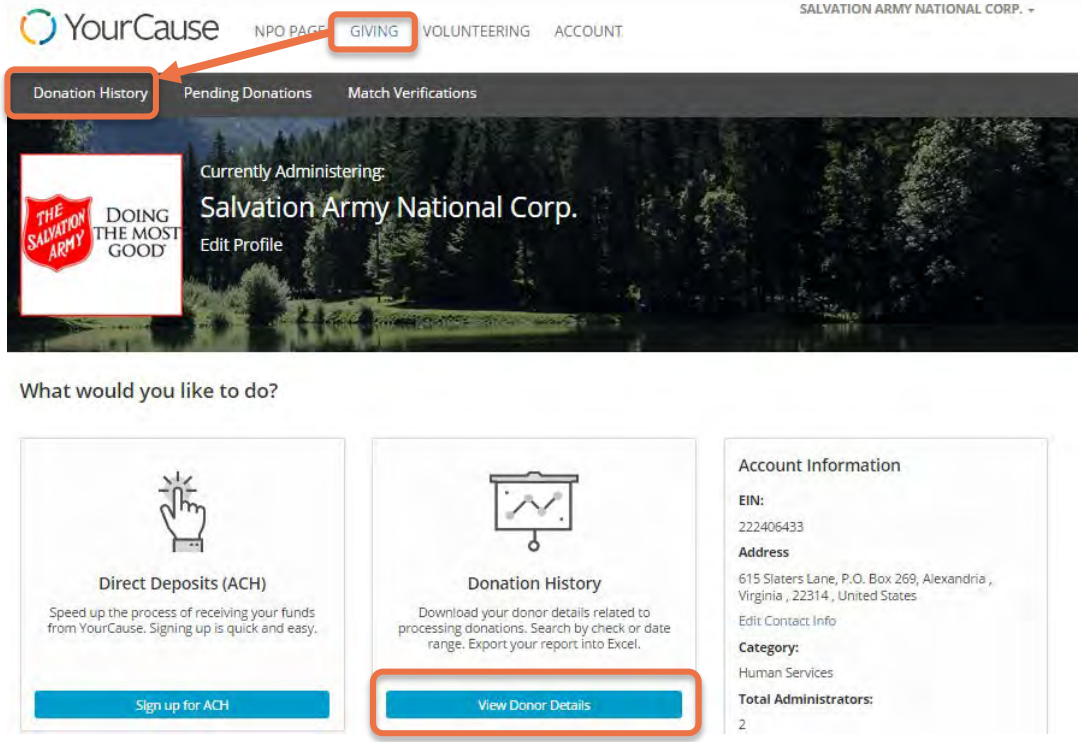


- When you receive an email that you are approved, you will be able to log in at https://npo.yourcause.com and utilize the various tools in the portal.
- From this landing page, you can use the tiles to navigate to your Donation History, Volunteer Events and start ACH registration
- You may also use the navigation tabs across the top of the screen

Donation History

YourCause NPO Portal

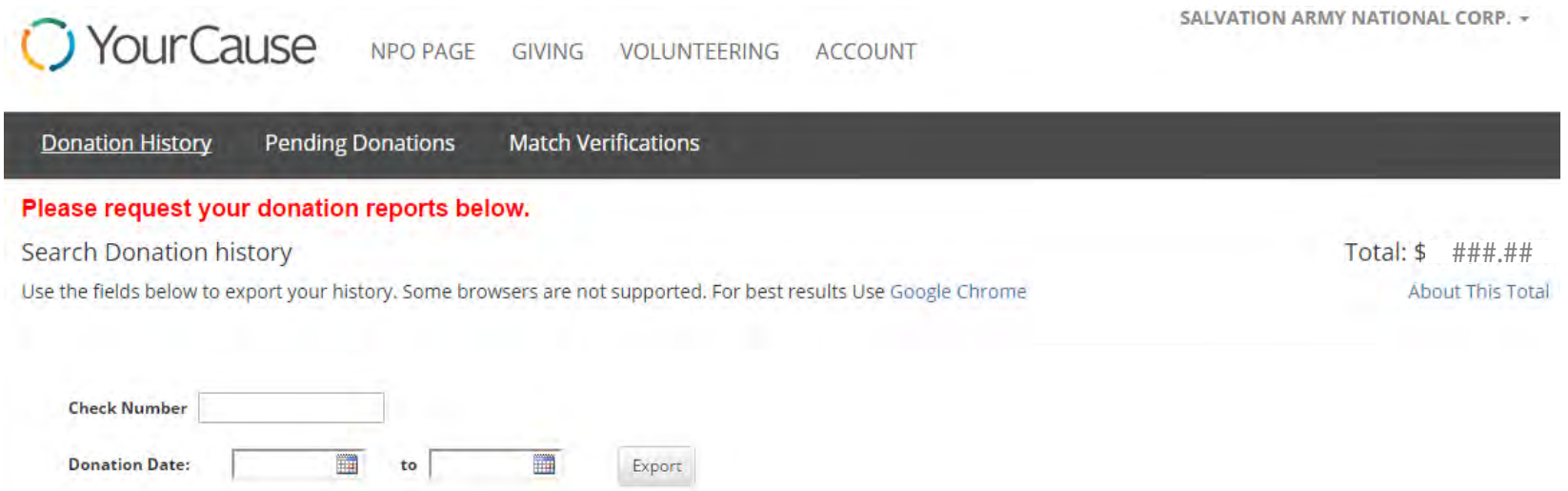
Donation History



- Navigate to GIVING > Donation History or select “View Donor Details”

Donation History

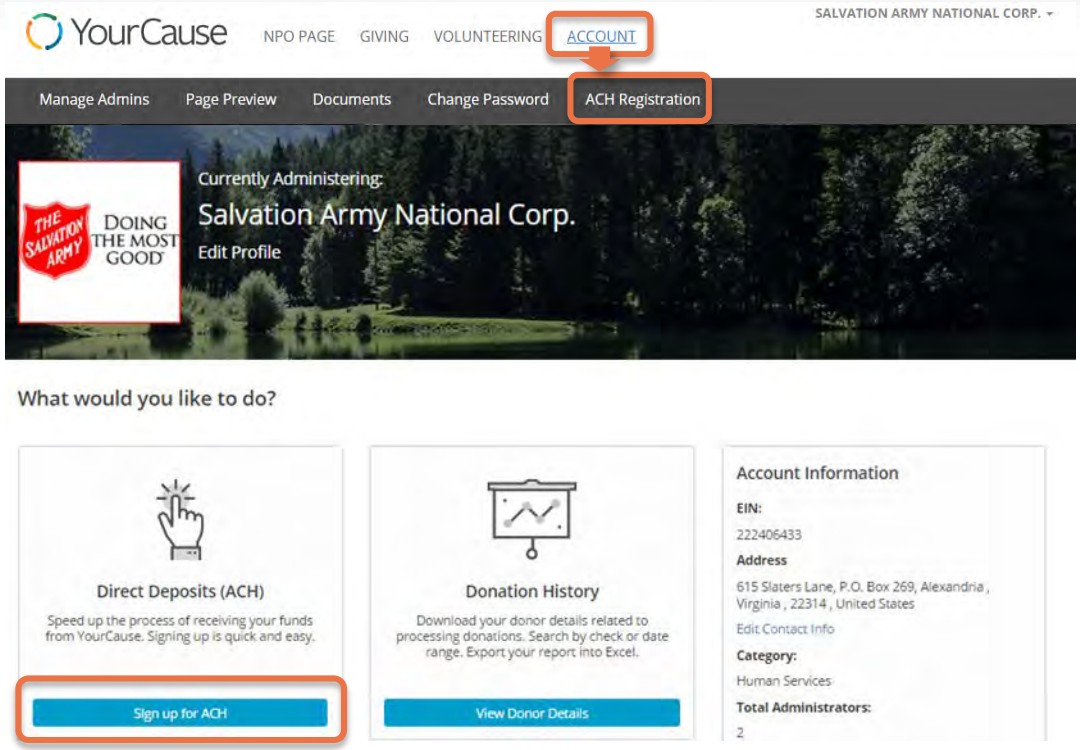
- Search by check number OR date range. Then click “Export”, this should pull a report that will open as a CSV file.



ACH Registration

YourCause NPO Portal

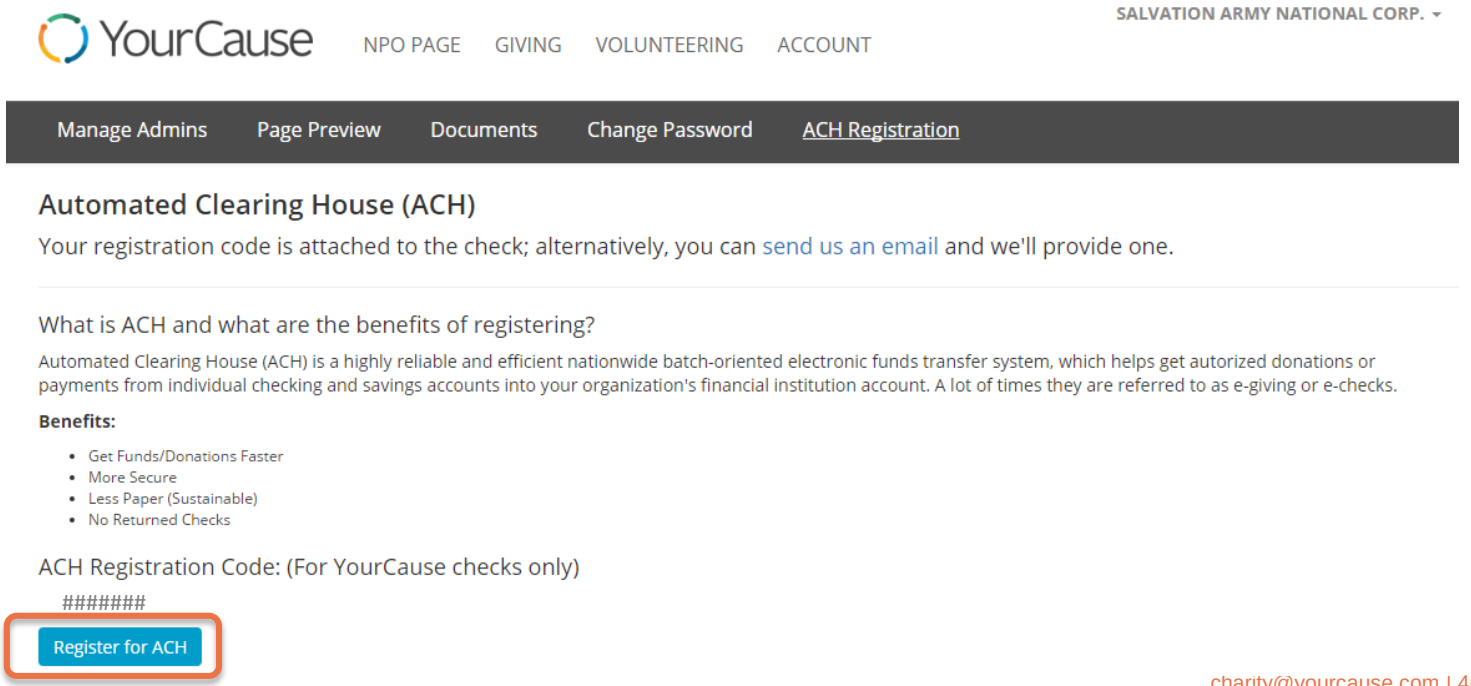
ACH Registration



- Navigate to ACCOUNT > ACH Registration or select “ACH”

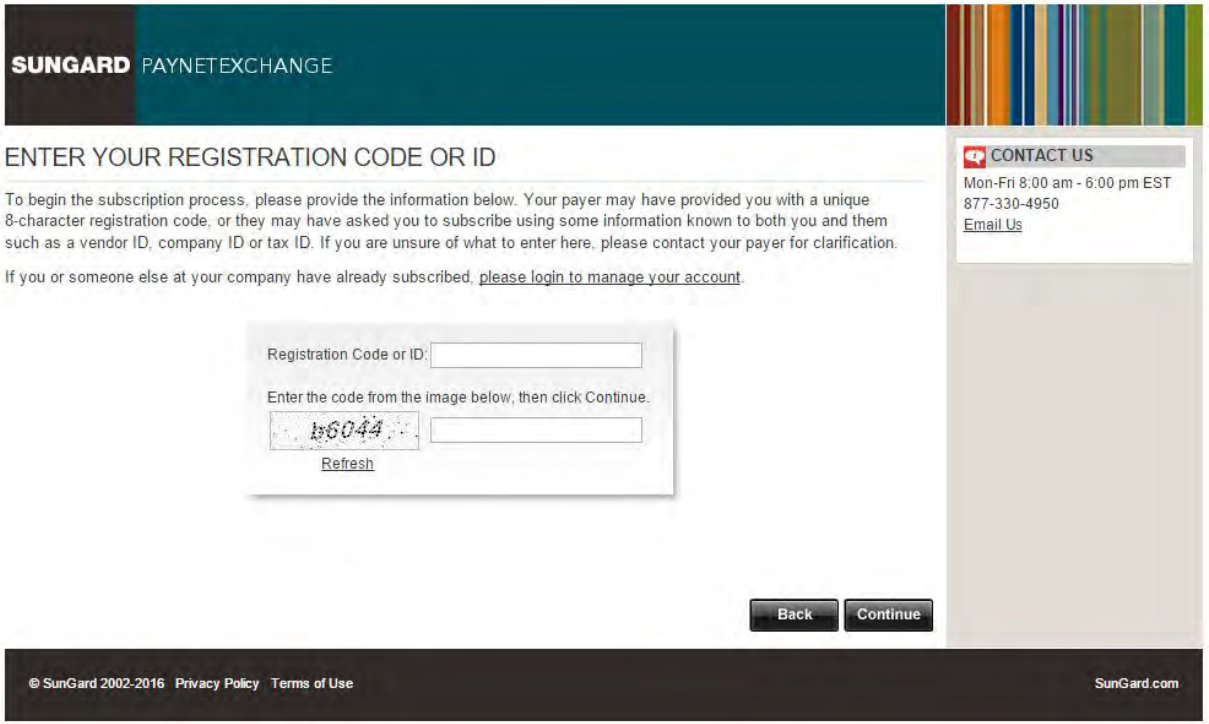
ACH Registration

- Your organization's ACH Code should be available. If not, please use the option to "Request Code". When your registration code is available, copy the code and then select "Register for ACH".



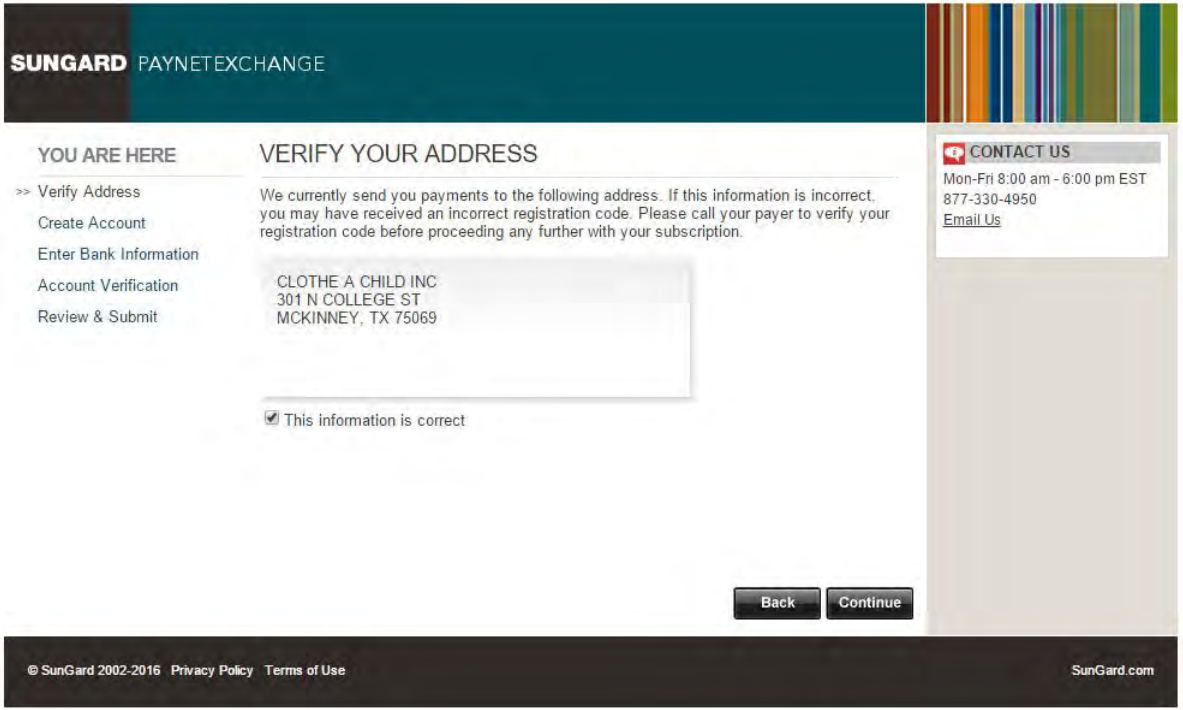
ACH Registration

- You will be directed to our partner's site to complete registration. First, enter your organization's ACH code.



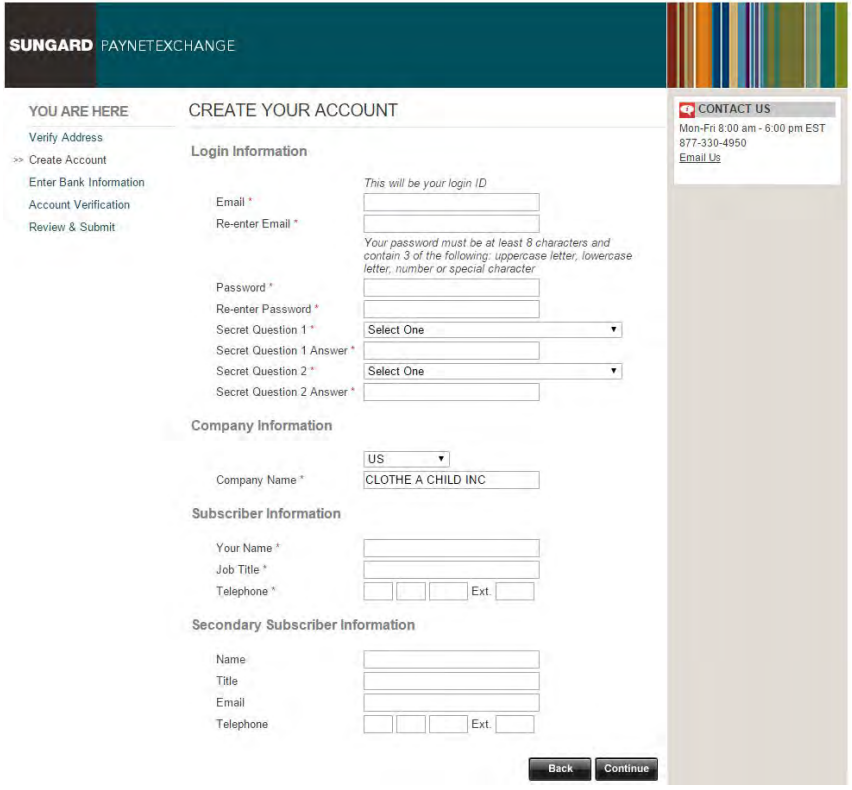
ACH Registration

- Confirm your organization's address. If the address is incorrect, please contact the YourCause NPO Support team at charity@yourcause.com



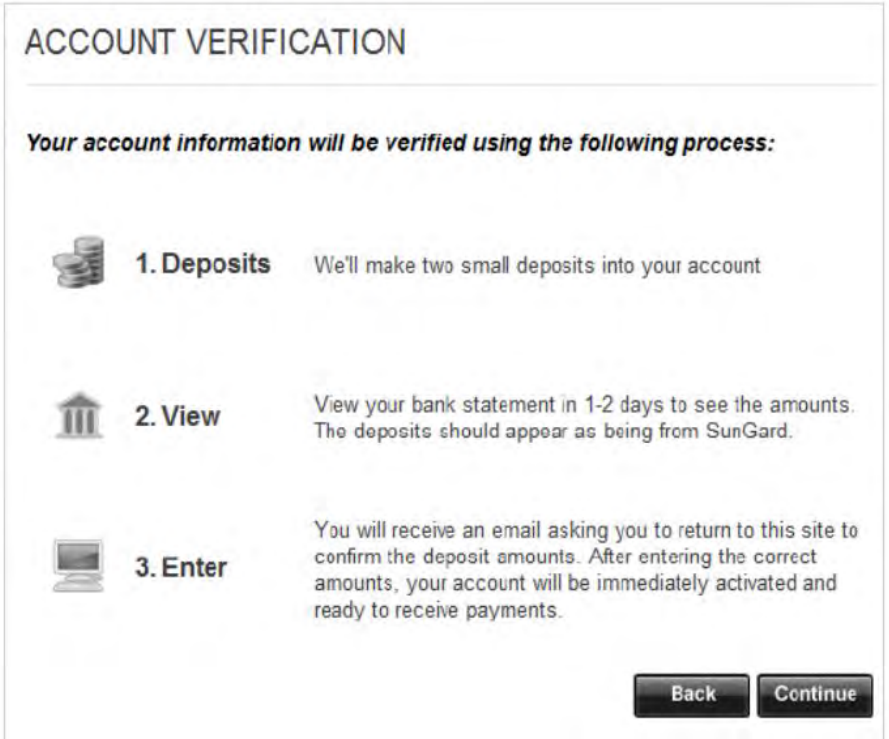
ACH Registration

- Create your account and click “Continue”.



ACH Registration

- The next step will be to enter your bank information.
- Sungard will then provide details for verifying your account by making two small deposits.



ACH Registration

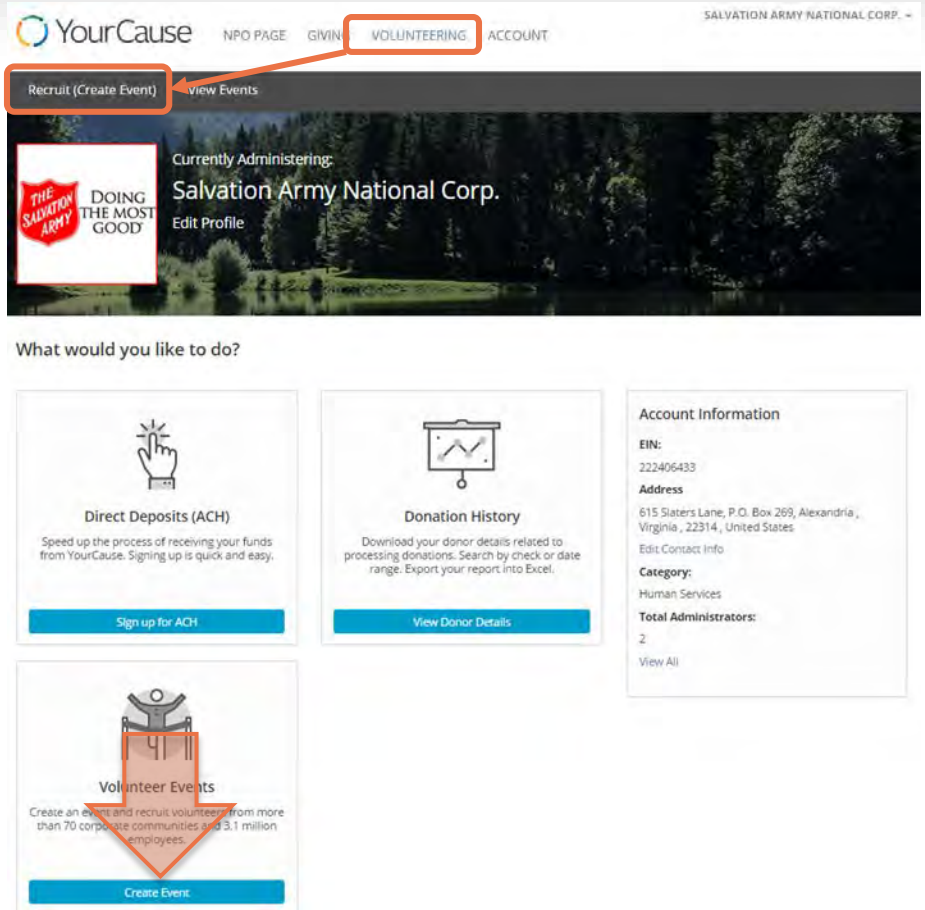
- The next step will be to “Verify Your Information”
- Once you have submitted all your information, Sungard will proceed with the test deposits.
- You will need to review your bank statement in 1-2 days to see the amounts. The deposits should appear as being from Sungard.
- Sungard will send an email reminding you to return to the site to verify the deposit amounts.
- After you enter the correct amounts, your account will be immediately activated and ready to receive payments.

If you have any questions regarding the registration process on Sungard, please contact them at 877-330-4950

Volunteering

YourCause NPO Portal

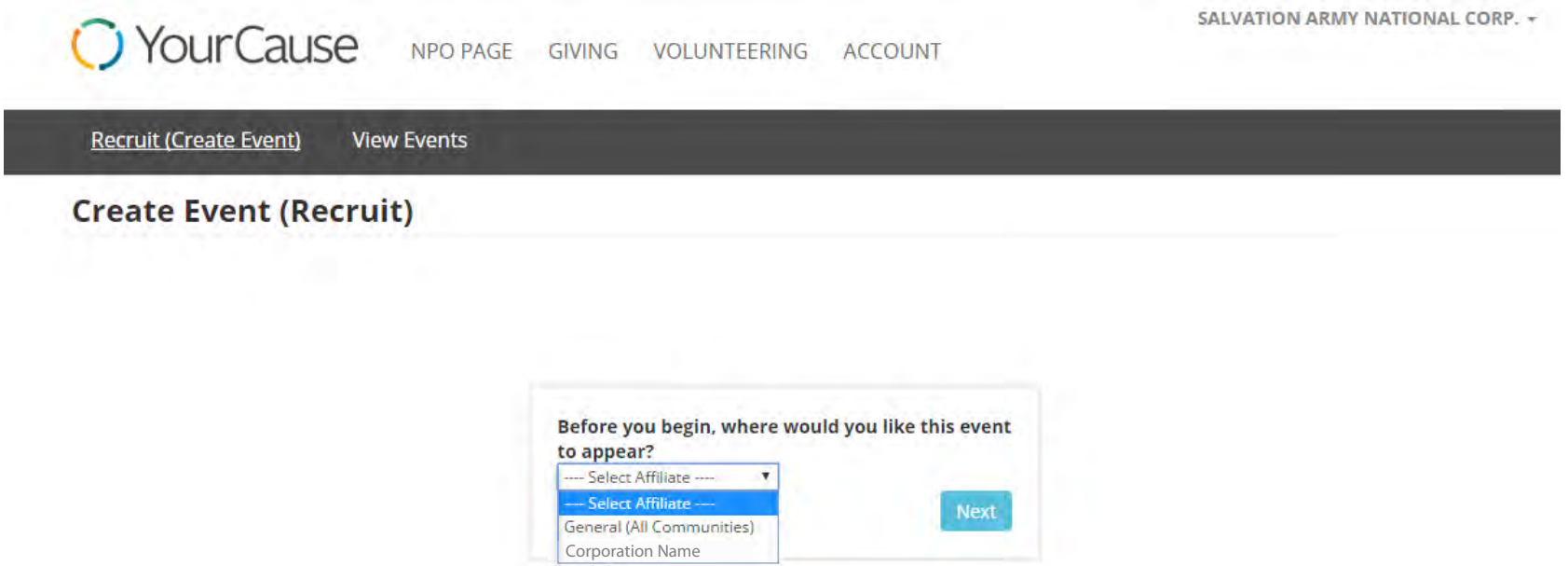
Volunteering



- Navigate to VOLUNTEERING > Recruit (Create Event) or select Create Event from the Volunteer Events tile

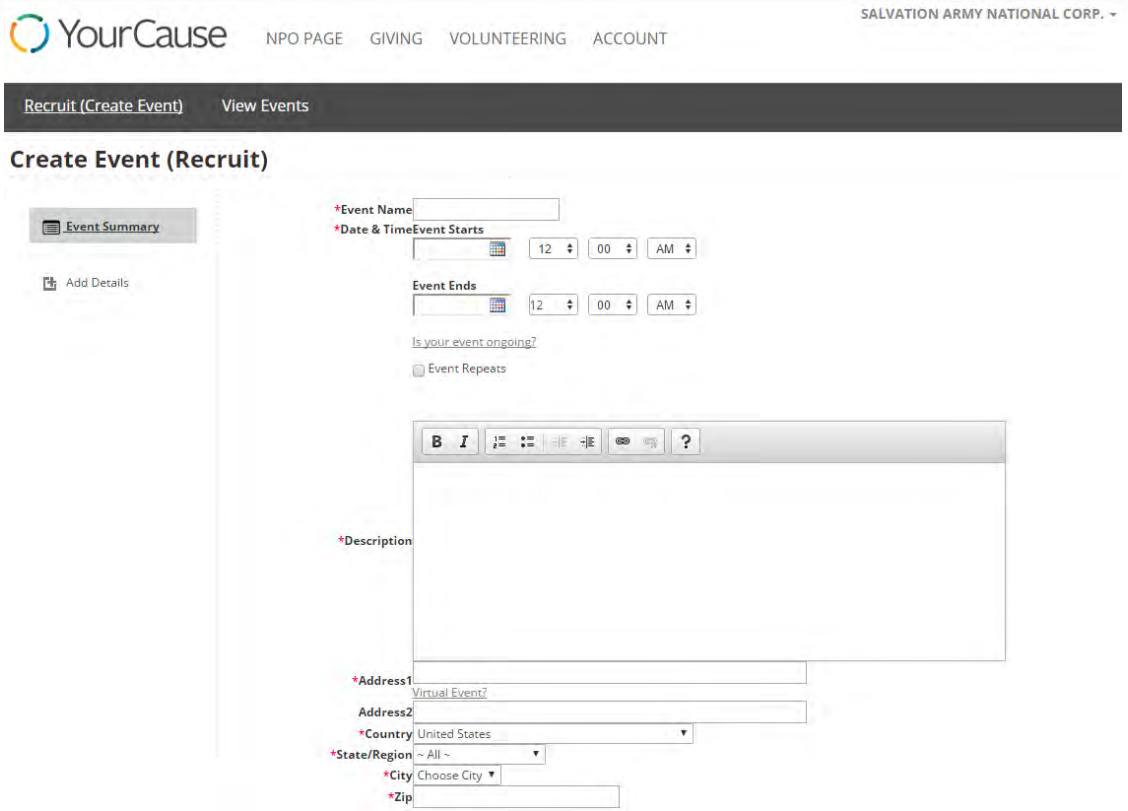
Volunteering

- Select the affiliate you would like the event to appear for.



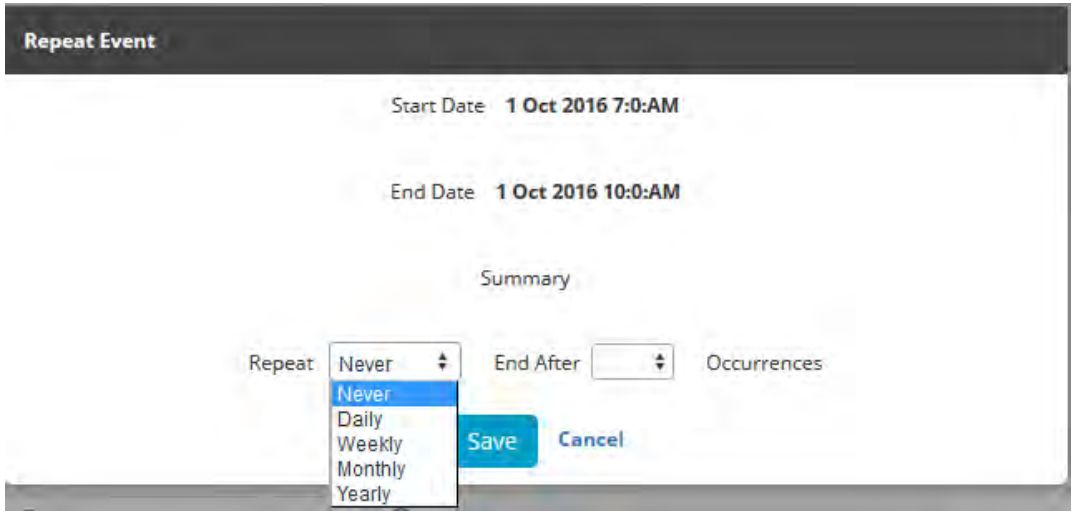
Volunteering

- Fill in your event details
- All details on this page are required, please be sure to use the address where the event will occur if different from the address of your organization
- Note the options to set your event to repeat, be ongoing or as a virtual event



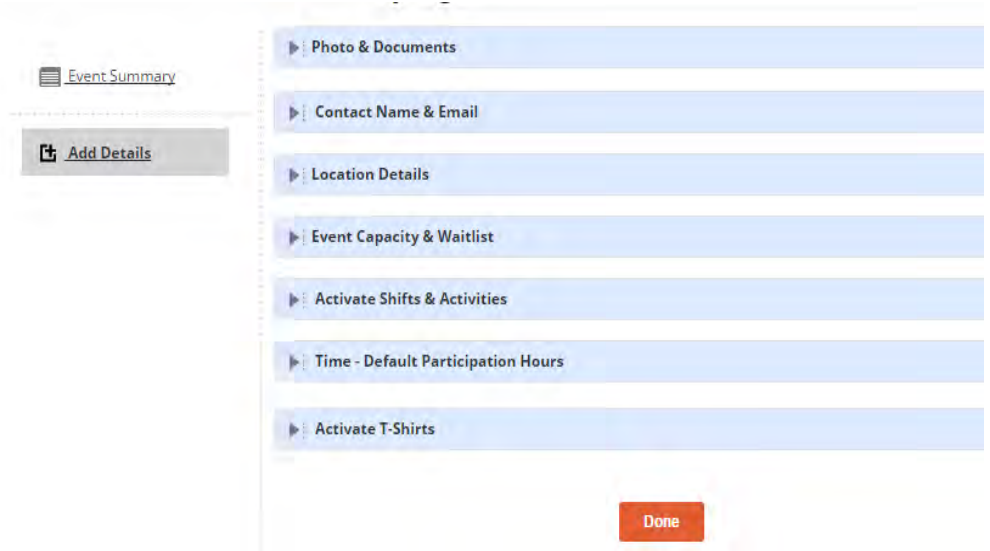
Volunteering

- If your event repeats, select the start and end time of the first day, then check the ‘Event Repeats’ option
- A pop up will appear and you will be able to set when it repeats, it will automatically recreate the event for the set amount of occurrences.
- Once you complete the event creation, you can view all occurrences under View Events
- If your event is ongoing, an end date will not be necessary.



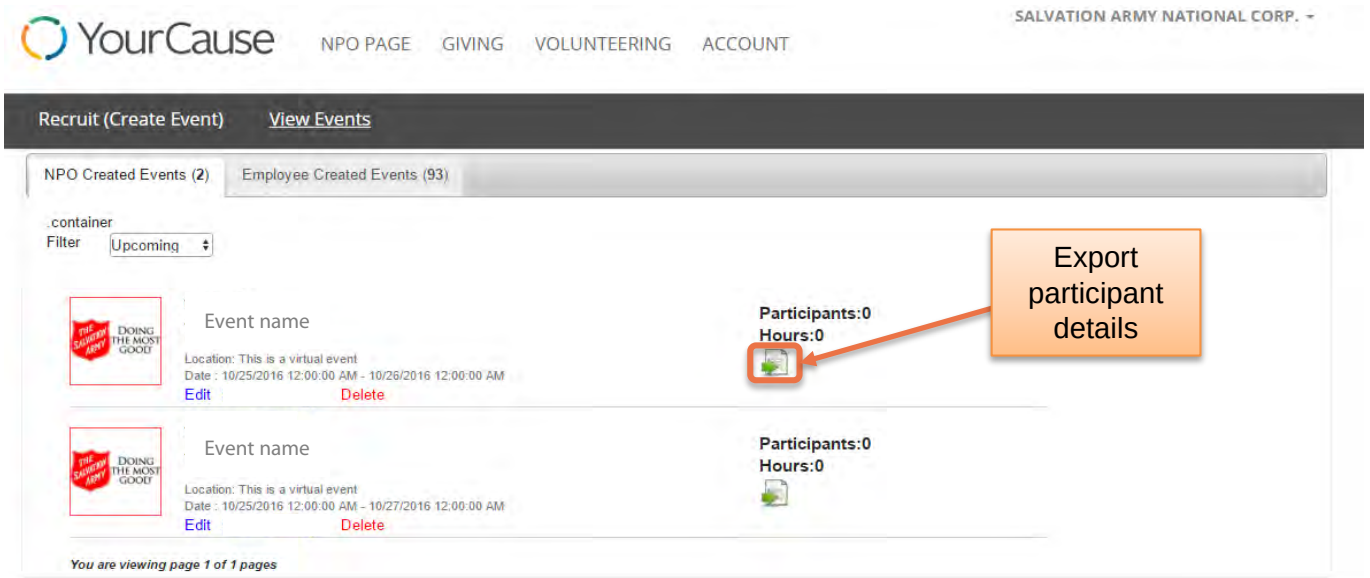
Volunteering

- Once you have populated all required fields for your event, select “Add More Details”. This section allows you to add additional information, please note important details to add below:
- Contact Name & Email: Add contact info for the person in charge of the event
- Event Capacity and Waitlist: Please add the maximum number of participants for your event
- After you have added all necessary details, select Done



Volunteering

- You will be able to view the newly created event under VOLUNTEERING > View Events
- From the View Events page, you have the ability to:
  - Edit & Delete each event
  - Export the list of participants by selecting the paper icon to the right of the event and below the number of participants and hours.



Eligible NPOs and Additions

YourCause NPO Portal

Eligible NPOs and Additions

- Eligible Organization to Receive Funds
  - YourCause partners with Silicon Valley Community Foundation (SVCF), a 501(c)(3) public charity, for back office services including organizational vetting and payment processing services. As a charitable organization, SVCF must take reasonable steps to ensure that all of its assets (including money granted to other organizations) are used to further its own Section 501(c)(3) charitable purposes. It must also comply with special limits on the use of donor advised funds.
  - **501(c)(3) organizations** that are in good standing with the IRS and Pub 78 verified or listed on the BMF.
  - **509(a)(1)** Publicly supported charities including schools, hospitals and religious organizations that receive their public support primarily from gifts, grants and contribution form a broad group of donors.
  - **509(a)(2)** Exempt purpose activity-supported charities (i.e. zoos and museums which charge admission fees and also receive gifts, grants and contributions from a broad group of donors).
  - **509(a)(3) Type I and Type II** These organizations carry out their exempt purpose by specifically supporting another charitable organization, usually another public charity. Depending on the relationship between the supported organization and the supporting organization, these organizations are classified as a specific “Type.” SVCF will grant to 509(a)(3) Type I and Type II. Note: Type III organizations are not eligible to receive grants from SVCF through this program.
  - **501(c)(3) Private Operating Foundations** is any private foundation that spends at least 85% of its adjusted net income or its minimum investment return, whichever is less, directly for the active conduct of its exempt activities. The foundation must also meet either the assets test, the endowment test or the support test.
  - **170(c)(1) Government Agencies**
  - **Accredited public schools** as identified by the U.S. Department of Education
  - **A supplemental list** of organizations that have been vetted as a result of previous SVCF grant making or at the request of a client.

Eligible NPOs and Additions

- Next Steps for Current Ineligible Organizations
  - If you think you meet the eligibility criteria and are currently not eligible to receive donations within the YourCause platform, then read below for additional information.
  - **501(c)(3) Organizations** must meet the above criteria to be eligible to automatically qualify to receive donations from SVCF. The most typical reason a 501(c)(3) organization is ineligible is because it is a 509(a)(3) Type III or a private non-operating foundation. SVCF cannot support grants to these types of organizations through this program. If you do meet the above criteria, then it may be that your "type" is listed as "unknown" within the IRS databases. To determine your type as classified by the IRS, please look at your IRS determination letter. If your determination letter does not state a supporting organization type, you may request a determination from the IRS using Form 8940 – Request for Miscellaneous Determination. Check the IRS website for additional information.
  - **Public Schools** must be on the U.S. Department of Education NCES listing, which can be found at http://nces.ed.gov/ccd/schoolsearch/. If your public accredited school is not on this list, then please contact them by accessing the current contact information located at http://nces.ed.gov/help/webmail/ and ask to be added to the list.
  - **Private Schools** must meet the above eligibility criteria to be automatically eligible to receive donations directly from SVCF. Even if a private school is accredited and listed on the NCES listing of accredited private schools, then it must still meet the above eligibility criteria. Many private schools are aligned with fundraising or other organizations that are eligible to receive donations on its behalf. If this is the case for your private school, then the YourCause corporate client employee can give their donation to the eligible organization and list the private school in the designation field. For the private school to be included in the database independently, the corporate client employee must contact YourCause through standard processes and request that the private school be added to the database as a "child" of the eligible organization. The employee must provide as much information on both organizations as possible. YourCause will then verify the relationship and eligibility of the parent organization and add the private school to the database if approved. All funds will be directed to the eligible organizations. YourCause's corporate client can also pay SVCF a vetting fee to have the educational organization vetted and added to a SVCF supplemental list of eligible organizations if approved.

Eligible NPOs and Additions

- Next Steps for Current Ineligible Organizations
  - If you think you meet the eligibility criteria and are currently not eligible to receive donations within the YourCause platform, then read below for additional information.
  - **501(c)(3) Churches/Religious Organizations** For IRS specific information for churches and religious organizations, visit http://www.irs.gov/Charities-&-Non-Profts/Churches-&-Religious-Organizations. Churches and religious organizations must meet the requirements listed above to be automatically eligible to receive grants from SVCF. If a religious organization has elected not to file for recognition by the IRS, a YourCause corporate client must request to have the religious organization vetted and added to the SVCF supplemental list of eligible organizations if approved.
  - **170(c)(1) Organizations / Government Agencies** For IRS specific information relating to tax information for federal, state and local government, visit http://www.irs.gov/Government-Entities/Federal,-State-&-Local-Governments. Government agencies must meet the eligibility requirements listed above to be automatically eligible for grants from SVCF. If a government entity has not received a governmental information letter from the IRS, then a YourCause corporate client must request to have the government entity vetted and added to the SVCF supplemental list of eligible organizations if approved.

How are we different?

Real. Passionate. Dedicated