Philanthropy Online
Agency profile setup guide

Philanthropy Online is a database designed to provide agencies with the ability to showcase their organization to Greater Milwaukee Foundation donors. It also allows agencies to apply for grants online and track their progress. This document guides you through the process of creating your organization's profile. An agency is required to create a profile before it is able to apply for a grant.

Log in

Log in to POL by visiting the Grants section on the Foundation's home page at www.greatermilwaukeefoundation.org and click on Grant Seekers. Select "Access Philanthropy Online (POL)" and click on the button in the middle of the page.

Your name and the name of your organization will be displayed on the top of the page. Once you have logged in, you can return to your personal home page by clicking on the "Return to My Account Home" link at the top of the page.

My Account

On the left-hand side of the page, under "My Account," you will view two options: "Edit My Profile" and "Organization Profile." "Edit My Profile" contains your individual contact information. When you have completed all information, click on the green word "Save" at the bottom of the screen.

Change Username

You can change both your username and password. Both must be between four and 10 characters in length (without spaces). Click on the green word "Update" at the bottom of the page to save your changes.

Organization Profile

The information you add here is available to Foundation donors, donor advisers, professional advisers and other agencies. After completing each section, click "Save" or "Save/Continue" to proceed to the next step.

Please note: Fields marked with a red dot must be completed.

Step 1: Organization

This page also allows you to add a logo to your profile page. The logo will appear next to your address on the main profile screen. The logo or picture must be in a gif, jpg or png file type and must not be larger than 20K. The system CANNOT accept pictures or logos in Adobe Acrobat PDF file. If you have a website, please enter it in the "Web URL" field.

Step 2: Staff Contacts
This page is for authorized Foundation staff use only. Do not make any changes to this page or you will be unable to make changes to your organization's profile.

Step 3: Board Members
Enter the names of board members and their affiliations. Please also identify the board chair and officers. This information will be used by Foundation staff as part of the grant application review.

Step 4: Mission
Enter your agency's mission, programs and history. Please include your date of incorporation and fiscal year. This is important information for potential donors and our Board.

Step 5: Interest Areas
This step allows you to categorize the work your organization does and the population and area it serves. This information helps donors and advisers locate the organizations that match their areas of interest. You can choose up to 10 categories. The more detailed information you provide, the more effectively your organization will be matched to the interests of donors and other advisers. Once categories have been selected, choose the appropriate population and geographic areas served. There is no limit to the amount of boxes you can select for these sections.

Step 6: Budget
Enter multiple year budgets, if appropriate. Enter the name of the associated project or program, as well as a start date and end date. Please note the format for entering dates: YYYY-MM-DD. If there are categories in your budget not listed on this form, click on the "Add Line Item" button to add categories and amounts. Complete the income and expense portions of this page.

Step 7: Documentation
We encourage you to upload your agency's IRS letter of determination and 990 form so we can receive them electronically and make your information visible more quickly.

Step 8: Tax Info
This section contains important IRS-related information. If your organization is associated with a fiscal agent, please complete the appropriate fields.

Step 9: Non-Discrimination Policy
If your board has approved a non-discrimination policy that differs from the policy shown on this page, use the box provided to include your policy or to comment on it.

Once this page is complete, click on "I Agree" button and a message will read "Thank you for completing your profile."

Please note:

These changes will not be reflected on your profile on our website until an administrator has approved them. In two to three weeks from the date that you have completed your profile and your tax information is received, the Foundation staff will review your profile and make it visible.

Organization Projects (this section is not required)
After completing your organizational profile, you will be directed to continue to the "Organization Projects" page, where you can enter information on particular projects your organization wishes to share with donors. You are not required to complete this section.

Step 1: Project info
This section allows your organization to highlight one or more programs you wish to showcase, ranging from sustaining support to special projects. Once programs have been entered, they will be visible when your profile is visible.

Once the end date is reached, the program/project will no longer be visible to the public. You can change the end date at any time so it is displayed again. This allows you to reuse the seasonal programs from year to year. For ongoing programs, choose the date furthest into the future. You can edit or remove these programs at any time.

Step 2: Questions
Provide a brief description of the program and its importance to the agency and the community.

Step 3: Objectives
List specific goals and outcomes you hope to accomplish through the program or project.

Step 3: Interest areas
Enter the interest areas, population and geographic area served by the particular program. These values need to be specific to the program and not to the organization.