



**STEP-BY-STEP**  
**C.Q.<sup>®</sup> INSTRUCTIONS FOR**  
**ADMINISTRATORS**

Unity Foundation  
Unity, ME 04988  
207-948-6489  
info@unityfdn.org  
www.unityfdn.org

1. Access the **C.Q.<sup>®</sup> Registration** page from the Unity Foundation home page or directly at <http://www.unityfdn.org/cq.html>.
2. Complete the **C.Q.<sup>®</sup> Registration** form.

### Register New Organization:

**Registration Type**  C.Q.<sup>®</sup> Instrument Application  
 Programmatic Grant Application

**Organization Prefix:** Enter an abbreviation that will be used to identify your organization. It should be 4 upper-case alphabetic characters.

**Example:** For the Smith Foundation, a good choice might be SMTH. This prefix will become the first part of your Organization ID, which will be provided to you later in the registration process.

Organization Prefix

Organization Name

**Group ID:** If you have been provided with a group ID to use for registration, please enter it below. Otherwise, leave this field blank.

Group ID

Street

City

State

Zip

County

Tel. No.

Fax No.

Email Address  
(Registration information from the  
Unity Foundation will be sent to this  
address.)

Website URL

Subsector

Geographic Service Area

Tax ID

Current Oper. Budget

e.g., 2,000,000

Last Oper. Budget

e.g., 1,000,000

Year Incorp.

FS Audit

 Y  N

CEO Name

Contact Name

501(c)(3) corp.

 Y  N

Organizational Password

No. of Full-Time Employees

No. of Part-Time Employees

No. of Volunteers

No. of Offices/Locations

Previous C.Q.® Date

(if applicable)

(mm/dd/yyyy)

Mission

Complete Registration

3. Once your organization is **registered**, you will receive an email that looks like this:

From: Lori Roming  
Sent: Monday, April 25, 2005 4:12 PM  
To: nonprofit@nonprofitorganization.org  
Subject: Unity Foundation Registration (Org. ID XXXX000)

Dear Participant:

Thank you for registering.

Your Organization ID is XXXX000. Please include it on all correspondence sent (via USPS or electronically) to Unity Foundation.

Once your registration is approved, you will be contacted via email with the information you need in order to log in to our system to enter email addresses for your organization's Board and Executive staff.

Regards,  
The Unity Foundation

4. Once your organization is **approved**, you will receive an email that looks like this:

From: Lori Roming  
Sent: Tuesday, April 26, 2007 8:43 AM  
To: nonprofit@nonprofitorganization.org  
Subject: Unity Foundation Registration Approval (Org. ID XXXX000)

Dear Applicant:

Thank you for your interest in the Unity Foundation's **C.Q.**<sup>®</sup> instrument and capacity-building program. Your application has been approved.

In order to log in to our system to enter email addresses for your organization's Board and Executive Staff, you will need the following information:

User ID: XXXX000-ADM  
Password: XXXX0000

To continue the process, please follow this link to access our Data Maintenance page:

[http://unityfdn.org/cgi-bin/data\\_maint/unity\\_login.cgi](http://unityfdn.org/cgi-bin/data_maint/unity_login.cgi)

Complete instructions are provided.

Please note that once you have entered the names and email addresses of Board members and Executive Staff, confidential user names and passwords will be sent to each participant within 48 hours ("start date"). Participants will then have 14 days ("end date") to complete the **C.Q.**<sup>®</sup> Instrument.

If you wish to change the start/end dates or have any questions, please contact Lori Roming at 207-948-6489 or lroming@unityfdn.org.

Regards,  
The Unity Foundation

The Data Maintenance page can also be accessed through the **C.Q.**<sup>®</sup> **Administration** link on the Unity Foundation website.

5. From the **C.Q.**<sup>®</sup> Administration page, access the User Maintenance Utility (the first link). The first time you access this page, it will look like this:

Users in "Nonprofit Organization" (ID XXXX000) <span style="float: right;">Add New User</span>						
User IDs with administrative permissions are displayed in red elow.						
ID (Click to Edit)	Name	Email	Title	Position (O/S)	Type	Status
XXXX000-ADM	Administrator	nonprofit@nonprofit.org	Executive Director		Full-Time	Active

6. Click on the box marked "Add New User".

**Add New User: Organization "XXXX000"**

User ID   
 (The User ID should consist of the first 4 characters of your organization ID, plus the user's initials.)

Name

Email Address

Title

Position (Other Staff Only)

User Type  Full-Time  Part-Time

User Status  Active  Deleted

Password   
 (Optional. Leave blank to use organization-level password.)

Authorization Level  User Permissions  Org. Admin. Permissions  
 (Can be set only by Unity Administrator.)

7. Enter the names, titles and email addresses of each participant. There is no need to enter separate passwords. **Please be sure to specify the Board Chair/President and Executive Director.**

After each entry, a confirmation screen will appear. You will then be asked to enter another participant or complete the listings:

**Add New User:** Organization “XXXX000”

**Record for user “XXXX-XX” was successfully added.**

[Add Another User in Organization “XXXX000”](#)

If you have completed entering ALL users in this organization, please click on the link below:

[User Entry Complete](#)

**IMPORTANT:**  
**For initial C.Q.<sup>®</sup> registrations, the automated registration process will not proceed until you have indicated completion of user entry by clicking on the above link. Once this is done, instructions and passwords will be mailed to all users within 48 hours.**

After entering the last participant, it is **VERY IMPORTANT** to click on “**User Entry Complete**”. It is the only way that Unity Foundation is notified that all the names have been added.

8. Once Unity Foundation receives notification that all participants have been added, it will issue instructions. Each participant will receive an email that looks like this:

From: info@unityfdn.org  
Sent: Wednesday, April 27, 2007 11:34 AM  
To: Participant  
Subject: **C.Q.**<sup>®</sup> Questionnaire Instructions

Dear **C.Q.**<sup>®</sup> Participant:

You will be able to access the questionnaire as of (DATE). **The deadline for completing the questionnaire is (DATE).**

This form must be filled out online and can be found at the following address:

[www.unityfdn.org/cq.html](http://www.unityfdn.org/cq.html)

Click on the link that reads "**INSTRUMENT**". You will be prompted to enter your Organization ID, your Organization Password, and your individual Client ID. Here is the information you will need:

<b>Organization ID:</b>	<b>XXXX000</b>
<b>Password:</b>	<b>xxxxxxx</b>
<b>Client ID:</b>	<b>XXXX000-XX</b>

Please type in all information exactly as shown above. The ID's and password are "case sensitive".

The form will take approximately 35-45 minutes to complete and **must be completed in one session**. Please answer all questions to the best of your ability. You will be given the opportunity to go back to change your answers as you complete each section. However, once all of the questions have been answered and the form submitted, the database will be locked.

A Benchmarks Report will be issued to your organization.

Thank you again for participating in our program. If you have any questions, please contact **Administrator** at email address **noprofit@organization.org**.

9. The Administrator may check who has completed the **C.Q.**<sup>®</sup> instrument by accessing the Data Maintenance page and following the **C.Q.**<sup>®</sup> User Activity Report link.

Display CQ<sup>®</sup> Questionnaire completion status by User ID: [CQ<sup>®</sup> User Activity Report](#)

This shows who has completed the instrument and who has attempted to complete it (but has not finished). If a participant ID does not appear on this list, the person hasn't attempted to complete the instrument.

10. Once all participants have completed the **C.Q.**<sup>®</sup> instrument, a **C.Q.**<sup>®</sup> **Benchmarks Report** and **Benchmarks Analysis** will be sent to the Executive Director and Board Chair/President of the organization. These two are then responsible for distributing the report(s) to the rest of the Board and Staff.

## Frequently Asked Questions

Q. Who are "Executive Staff"?

A. They are the Executive Director or Chief Executive Officer; Chief Development Officer; Chief Financial Officer/Chief Operating Officer.

Q. What if one of my Board members doesn't have -- or doesn't know how to use -- a computer?

A. Designate someone to receive the instructions and then assist the member with accessing and completing the instrument.

Q. What if two participants have the same initials?

A. Add their middle initials or a number to the ID.

Q. Does the Administrator have access to individual responses?

A. No. The Administrator can only determine who has/has not completed the **C.Q.**<sup>®</sup> instrument.

Q. What if someone needs to have instructions sent again?

A. The Administrator should contact **Lori Roming** at [lroming@unityfdn.org](mailto:lroming@unityfdn.org) or **207-948-6489**.