



Annual Update Checklist

Last Revised July 2024

Profile Set up Tab

- Update your tagline & causes and ensure logo is sized correctly for the GiveGab platform
- Make sure your cover photo represents your organization
- Complete the "Tell Your Story" Section
- Update your video if necessary
- If not set up yet, get verified to collect donations
- If not set up yet, add a personalized "Thank you" Message for donations

Overview Tab

- Update Impact Statement for relevance (list new accomplishments and goals)
- Update Needs Statement for current needs and details
- Review Geographic Areas Served
- Update Top Three Populations Served
Please select at least one population served, but do not select more than three.
- Update CEO and/or Board Chair Statement (or add a statement)

Programs Tab

- Review all program information (including program budgets) and update if necessary.
Please keep in mind that you must input at least 1 program and are limited to inputting a maximum of 5.

Management Tab

- Update CEO information
- Update CEO demographics
- Update Staff information (staff size, volunteers etc.)
- Update Staff demographics
- Update Awards

Governance Tab

- Update Board Members and Board Chair, including board chair term dates
- Update Demographics (ethnicity & gender)
Ensure Ethnicity and Gender Demographic totals match number of board members listed.
- Update Board stats

Financials Tab

- Update Current Fiscal Year start and end dates
- Update Current Fiscal Year income and expense projections
- Upload your most recent 990 (without Schedule B). *Note: Your profile should show last 3 year's 990 tax forms.*
If you complete a 990N, are fiscally sponsored, are a local chapter of a national organization, or are not required to file a 990, you will need to fill out the OCCF financial input template showing your financial history for the last three years (email ocnonprofitcentral@oc-cf.org to request one). If you are exempt from filing a 990, upload a document for each year on your letterhead stating that you are not required to file a 990 and include the reason for the exemption (church, school, etc.).
- Update or answer Endowment and Capital Campaign questions (if applicable)

More Details Tab

- Year of Incorporation
- EIN
- California State Exemption Number
- Organization Type of Tax-Exempt Status
- Status of IRS Required Filings, Including 990s
- Status of CA Required Filings, Including Form RRF-1
- Date Form RRF-1 was Filed

****Be sure to submit your changes to OCCF by clicking on the "Submit Profile for Review" button.**