

NONPROFIT CHECKLIST

The Giving Partner Platform Migration

Welcome to the new Giving Partner! Our updated platform has brought about many upgrades and a few changes. Use this checklist to review your profile and see what's new.

PROFILE SETUP

WHAT'S NEW

- ADD A TAGLINE
- TELL YOUR STORY
- ADD A COVER PHOTO
- LINK A VIDEO

FOR REVIEW

- CHECK YOUR WEBSITE
- CHECK CAUSE CATEGORIES
- REVIEW YOUR LOGO
- REVIEW SITE ADMINISTRATORS

OVERVIEW

WHAT'S NEW

- NEEDS
- GOALS
- ACCOMPLISHMENTS

FOR REVIEW

- MISSION STATEMENT
- AREAS SERVED

**LEGAL, PLANNING
& POLICIES**

WHAT'S NEW

- START AND END YEARS FOR PLANS & POLICIES

FOR REVIEW

- PLANS AND POLICIES UP TO DATE?
- REVIEW AWARDS, AFFILIATIONS, AND ACCREDITATIONS

FINANCIALS

FOR REVIEW

- FISCAL YEAR CURRENT?
- CURRENT FINANCIALS INCLUDING 990
- HISTORICAL FINANCIALS

GOVERNANCE

WHAT'S NEW

- ARE YOU CURRENTLY SEEKING BOARD MEMBERS?

FOR REVIEW

- BOARD CHAIR
- BOARD LIST & DEMOGRAPHICS

MANAGEMENT & VOLUNTEERS

FOR REVIEW

- CEO/EXECUTIVE DIRECTOR CONTACT INFORMATION
- STAFF STATISTICS
- STAFF EVALUATION POLICIES

PROGRAMS

WHAT'S NEW

- PROGRAM START YEAR
- PROGRAM AREAS SERVED
- POPULATION SERVED DESCRIPTION
- PROJECTED/ACTUAL NUMBER SERVED
- OUTCOME QUESTIONS (3)