### **NONPROFIT CHECKLIST**

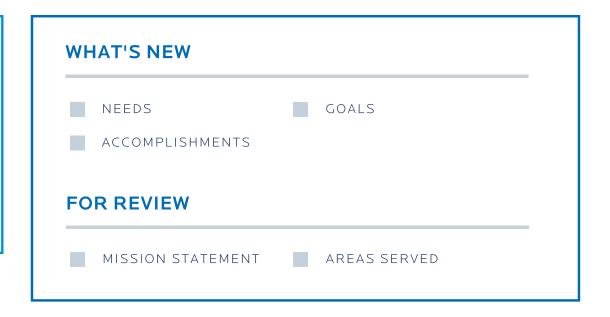
### The Giving Partner Platform Migration

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 SETUR

# 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



# 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

### INANCIALS

### **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)