

**STRATEGIC PLANNING**

Annual Planning Sessions Y\_\_N\_\_

Strategic Plan Y\_\_N\_\_

a. Mission Y\_\_N\_\_

b. Vision Y\_\_N\_\_

c. Reviewed yearly Y\_\_N\_\_

**JOINT PROJECTS**

Civic Organizations Y\_\_N\_\_

Charity Organizations Y\_\_N\_\_

Others \_\_\_\_\_

Maintain and recruit members

Special Programs Y\_\_N\_\_

Types of programs \_\_\_\_\_

**SERVICE AWARDS**

Local awards Y\_\_N\_\_

Special achievement Y\_\_N\_\_

Such as \_\_\_\_\_

Hall of Fame Y\_\_N\_\_

Scholarships Y\_\_N\_\_

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**NON-PROFIT ORGANIZATION PROFILE**

Organization Name

Date

Contact Person

Title

Phone

Fax

Email

Website

# Training People and Organizations

## ADMINISTRATIVE

Amended By-Laws Yes\_\_\_ No\_\_\_

Last Update \_\_\_\_\_

Operations Manual Yes\_\_\_ No\_\_\_

Last Update \_\_\_\_\_

Risk Management Policy Yes\_\_\_ No\_\_\_

Code of Ethics Yes\_\_\_ No\_\_\_

### Active Committees

Audit Y\_\_N\_\_

Legislative Y\_\_N\_\_

Nominating Y\_\_N\_\_

Youth Y\_\_N\_\_

Budget/Finance Y\_\_N\_\_

Others \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Incorporation – Yearly update Y\_\_N\_\_

### Meetings

a. Committees-How often\_\_\_

b. Board - How often \_\_\_\_\_

c. Open/Annual – When

## Liability Insurance

a. General Y\_\_N\_\_

b. Professional Y\_\_N\_\_

## COMMUNICATION

Assoc. E-mail address Y\_\_N\_\_

Assoc. Web Site Y\_\_N\_\_

Group e-mail for Board Y\_\_N\_\_

Member e-mail group Y\_\_N\_\_

Publicity Committee Y\_\_N\_\_

## FINANCIAL

**Dues:** Local \_\_\_\_\_

National \_\_\_\_\_

State \_\_\_\_\_

### Accounts

a. Two signatures Y\_\_N\_\_

b. Audits Y\_\_N\_\_

How often \_\_\_\_\_

c. Timely Deposits Y\_\_N\_\_

d. Additional Bonding Y\_\_N\_\_

e. Operating Reserves (3 years max)

## Taxes

990 (990EZ) Y\_\_N\_\_

990T Y\_\_N\_\_

1099 Misc. Y\_\_N\_\_

941/944 Y\_\_N\_\_

## TRAINING/EDUCATION

Conduct training sessions for board  
Y\_\_N\_\_

List: \_\_\_\_\_

\_\_\_\_\_

Conduct Training for Volunteers  
Y\_\_N\_\_

List: \_\_\_\_\_

\_\_\_\_\_

Conduct Training for Members  
Y\_\_N\_\_

List: \_\_\_\_\_

\_\_\_\_\_

Conduct Training for Committees  
Y\_\_N\_\_

List \_\_\_\_\_

\_\_\_\_\_