

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 _____
