

Annual Update Checklist

Last Revised March 2026

Profile Set Up

- ☐ 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

- ☐ 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

- ☐ 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

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

Governance

- ☐ 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

- ☐ 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

- ☐ 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