

Required Profile Fields

Last Revised March 2026

Overview

- ☐ Mission Statement
- ☐ Background Statement
- ☐ Impact Statement
- ☐ Needs Statement
- ☐ Top Three Populations Served [select at least 1 and no more than 3]

Programs

Please keep in mind that you must input at least 1 program, and are limited to a maximum of 5 programs.

- ☐ Program Name
- ☐ Program Budget
- ☐ Program Description
- ☐ Program Outcomes

Management

- ☐ CEO/Executive Director Name
- ☐ CEO/Executive Director Demographics
- ☐ Number of staff (0 is a valid value)
 - o Full-time
 - o Part-time
 - o Volunteers
 - o Contract

Governance

- ☐ Board Chair Name
- ☐ Board Member Names
- ☐ Board Demographics - Ethnicity and Gender
 - o Ensure Ethnicity and Gender Demographic totals match number of board members listed.

Financials

- ☐ Current Fiscal Year Start and End Dates (Month, Day and Year) Status of IRS required filings including 990s
- ☐ Current Year Income Projection
- ☐ Current Year Expense Projection
- ☐ IRS Tax Form for last three year's financial history (990 without Schedule B), 990EZ or 990N. 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.).
- ☐ Does your organization file an IRS Form 990, 990EZ or 990N?

More Details

- ☐ Year of Incorporation
- ☐ EIN
- ☐ California State Exemption Number
- ☐ Organization's 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