

# Nonprofit Document Organization Checklist

## CHARTER DOCUMENTS

Charter documents relate to the formation of the nonprofit organization and descriptions of the organization's history and mission.

DOCUMENT	STATUS			NEXT STEPS	
	Version date	Complete	Requires update		Missing
Articles of Incorporation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
IRS 501(c) letter of determination		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other tax exemption documents		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Licenses and permits		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Registration for solicitation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Organization history		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Mission statement		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## BOARD POLICIES

Board policies are the guidelines established by the board to protect the organization and help it reach its long-term goals.

DOCUMENT	STATUS				NEXT STEPS
	Version date	Complete	Requires update	Missing	
Bylaws		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board operating policies		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Financial policies		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Gift acceptance policy		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Conflict of interest policy		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Whistleblower policy		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document retention & destruction policy		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Employee policies		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Volunteer policies		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Child protection policy		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## BOARD MEMBERSHIP DOCUMENTS

Board membership documents relate to the selection and maintenance of board members.

DOCUMENT	STATUS			NEXT STEPS	
	Version date	Complete	Requires update		Missing
Board roster		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
New board member commitment form		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Annual conflict of interest disclosure form		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board nomination form		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board application form		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
New member evaluation & interview guide		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
New board member onboarding checklist		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
New board member welcome letter		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board liability insurance policy information		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

# BOARD BUSINESS DOCUMENTS

Ongoing business of the board is documented with these templates.

DOCUMENT	STATUS			NEXT STEPS	
	Version date	Complete	Requires update		Missing
Board calendar		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board meeting minutes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board resolutions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Board meeting agendas		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Committee charters		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Committee meeting minutes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Committee meeting agendas		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## BOARD PLANNING & MONITORING DOCUMENTS

These documents help board members plan and monitor organization accomplishments.

DOCUMENT	STATUS			NEXT STEPS	
	Version date	Complete	Requires update		Missing
Strategic plan		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Current annual plan		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Budget		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Program summaries		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monitoring data		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Past audit reports		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	