



Annual Update Checklist

To complete your annual GivingMatters.com update, please review your profile to ensure that information is accurate and up-to-date. Pay particular attention to the following fields, and to the time-sensitive items in **bold**, to maintain your *Reviewed* status.

General Information:

- Review organizational contact information (address, phone, email) for accuracy. Ensure that the “Grant Address” listed is your organization’s current mailing address.

Statements and Search Criteria:

- Impact Statement – List top accomplishments for previous year, as well as goals for the coming year.

Programs:

- Update information for programs listed. In particular, Program Budget numbers should be current, and Examples of Program Success fields should list current program outcome information.

Management:

- Review staffing information for accuracy.

Governance:

- Update board list and board demographic information.
- Ensure that current **board chair name and term dates** are accurate.

Financials:

- Update **Current Fiscal Year Dates**, if needed.
- Ensure that **Projected Revenues and Expenses** for current fiscal year are accurate.
- Update Endowment value, if applicable.
- Update Capital Campaign information, if applicable.
- Update **expiration date of current Charitable Solicitations Permit or Exemption Letter** and upload **current Permit or Letter** if available.
- **Upload most recent Form 990** and/or **Audited financial statements**. Documents must be pdf files.
- Upload a pdf copy of current **Organizational Budget**.

Click the “Review and Submit Changes” button on the left. Then click “Send to Community Foundation” at the top right. You will receive email confirmation from GivingMatters.com when your changes have been approved and published to the site.