



ESSENTIAL DOCUMENTS

The following essential documents (boiler plate information) should be reviewed annually, kept up-to-date and located in a place where they are easily accessible at all times. The following outlines what you need to have in place to manage an efficient organization.

- Incorporation Papers
- Mission Statement
- Board List (include name, profession, member's business affiliations & current terms)
- Board of Director's by-laws
- Organizational Chart
- Strategic Plan
- Key staff and volunteer's resumes
- Job descriptions
- Last fiscal year agency Audit Report
- Form 990
- Budget
- List of current year's income sources
- List of funders (past and present)
- Federal Tax I.D. Number
- IRS Tax Exempt Status Letter
- State Tax Exempt Status Letter
- Profile of agency's history, present services, clients/participants
- Testimonials
- Media Coverage (press releases, television/news coverage, etc.)
- Brochures
- List of Partners/Agencies that you collaborate with, are a member of, or get support from
- List of Associations where you have an active membership
- "Americans with Disabilities Act" Plan
- Wish List (what does the Agency need in regards to good services, professional volunteers)

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