

**Not-For-Profit**  
**Books and Records**



1. Bylaws
2. Conflict of Interest Policy & Disclosure Statement
3. Whistleblower Policy (if applicable)
4. IRS Tax-Exemption confirmation & tax returns
5. NYS Charities Registration
6. Grant Agreement(s)
7. Meeting minutes
8. Annual budget & financial records

**Not-For-Profit**  
**Annual Review**

1. Election of Directors and Officers
2. Bylaws – Legal / preferred changes
3. Evaluate program achievements, struggles, goals
4. Review financials, operational performance, budget
5. Set operational and financial goals for upcoming year
6. Fundraising strategies
7. Committees
8. Marketing / community outreach goals, activities
9. Event planning