CROSSTRIBE ADVISORY
LET'S PROSPER TOGETHER

Form 990 Marketing Checklist (for Comms/Marketing)

Use this checklist to align your Form 990 with your brand narrative and donor-facing messaging. Check items you complete; share with Finance & your ED for a smooth review.

A) Ownership & Timing

☐ I'm on the 990 review route early (2–3 weeks before filing).

☐ I know which sections are public-facing narrative (Part I, Part III, Schedule O).

☐ I have last year's 990, annual report, website copy, and grant boilerplate for consistency checks.

B) Brand & Message Alignment

☐ Mission statement (Part I, Line 1) matches website/annual report; ≤25 words and clear.

☐ Audience and geography are explicit and consistent across materials.

☐ Voice/tone is plain-language, donor-friendly, and jargon-light.

C) Program Accomplishments (Part III + Schedule O)

☐ Top 3 programs listed in priority order that matches public materials.

☐ Each program paragraph includes outcome metrics (e.g., 'served 1,250 clients; 87%…'), not just activities.

☐ Include year-over-year deltas or brief context if numbers changed.

☐ New or ended programs are clearly explained.

D) Proof Points & Data Hygiene

☐ I've pulled 3–5 headline stats to reuse in comms (newsletter, grants, deck).

☐ Sensitive areas (deficits, unusual ratios, one-time items) have plain-English explanations in Schedule O.

☐ Restricted funds / major grants align with the public narrative.

E) Governance, Policies, and Trust Signals

☐ Conflicts, whistleblower, and document-retention policies are accurately indicated; website reflects them.

☐ Executive comp has board-oversight context prepared for FAQs.

☐ Related-party or affiliate disclosures have a clear 'what/why/controls' narrative.

F) Fundraising & Events (Schedule G + Part I)

☐ Event and fundraising disclosures align with public recaps (no surprises).

☐ If fundraising costs rose, Schedule O notes the investment story (new channel/market, long-term ROI).

G) Digital/SEO Deployment (Post-Filing)

☐ Latest 990 PDF posted on Transparency/Financials page with a short explanation of what a 990 is.

☐ Page includes a 'Highlights' list (3–5 bullets); internal links from About → Transparency.

☐ Candid/GuideStar profile updated (mission, programs, impact metrics, 990 attached).

☐ Charity Navigator/BBB profiles reviewed and refreshed.

H) Communications Plan

☐ Board brief: 1 page of highlights + talking points.

☐ Staff brief: changes, where to find the file, FAQs.

☐ Donor email: link to highlights + one strong stat.

☐ Social posts (2–3 variants) framing 990 as transparency + impact.

☐ Media note (if relevant): short paragraph + link to highlights/990.

I) Collateral & Reuse

☐ One-page '990 Highlights' PDF/slide: 3 stats, 3 program bullets, mission line.

☐ Add highlights to grant boilerplate and pitch decks.

☐ Include in board-orientation packet.

J) Red-Flag Scan (Prep Talking Points)

☐ Major swing in admin/fundraising ratio explained.

☐ Deficit or cash crunch contextualized (timing, capital project, multi-year grant).

☐ New debt, litigation, or affiliate transactions narrated plainly.

☐ Any UBI (unrelated business income) activity explained simply.

K) Final QA Before Filing

☐ Names, URLs, locations, and program titles match public materials exactly.

☐ Acronyms expanded at first mention; jargon removed.

☐ Program blurbs meet IRS guidance (specific, measurable, non-promotional) and still read human.

☐ Schedule O mirrors and supports the story (no contradictions).

☐ Internal sign-offs: Finance → Marketing/Comms → ED → Board designee.

We're here to help! Contact us by
email, info@crosstribeadvisory.com,
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or visit our website at: https://www.crosstribeadvisory.com/