Charity Research Worksheet

Check a charity in about ten minutes. One page per charity.

AGreaterCause.com

Charity name _____

EIN _____ **City / state** _____

Website _____

1. IRS Tax Exempt Organization Search (apps.irs.gov/app/eos)

- ☐ Listed as eligible to receive tax-deductible gifts
- ☐ Not on the auto-revocation list
- ☐ Recent Form 990 / 990-EZ / 990-N found (year: _____)

2. Form 990 (Candid, ProPublica Nonprofit Explorer or the IRS)

- ☐ Revenue is steady or growing over 3 years
- ☐ Part III describes specific results, not just activities
- ☐ Majority of board is independent (Part VI)
- ☐ Leadership pay looks reasonable for its size (Part VII)
- ☐ No troubling insider transactions (Schedule L)

3. State and watchdogs

- ☐ Registered with my state's charity office, if required (nasconet.org)
- ☐ No complaints or actions posted by my state
- ☐ Reviewed by BBB Wise Giving Alliance / Charity Navigator, no serious concerns (or not rated)

4. The ask

- ☐ No pressure to give immediately
- ☐ Accepts checks or cards made out to the charity
- ☐ Provides receipts and written acknowledgments ($250+)

Numbers from the latest Form 990

Total revenue _____ **Total expenses** _____ **Net assets (end of year)** _____

Program expenses _____ **Management & general** _____ **Fundraising** _____

Notes and questions to ask

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Compare up to three charities

Fill in after you've researched each one.

AGreaterCause.com

	Charity A	Charity B	Charity C
Charity name			
What it does (one line)			
Where it works			
IRS status confirmed?			
Latest 990 year			
Revenue trend			
Program spending share			
Independent board?			
State registration?			
Watchdog review			
Results I could verify			
My gut feeling			
Gift I'm considering			

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