



# Internal Audit Template for Nonprofit Organizations

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Use this tool to evaluate your nonprofit's operational health, ensure compliance, and strengthen organizational capacity.

## 1. Governance & Leadership

Audit Item	Status ( <input checked="" type="checkbox"/> / <input type="checkbox"/> )	Notes/Action Needed
The Board of Directors is active and meets regularly		
The board has diverse skills and reflects the community served		
Bylaws are up to date and followed		
Conflict of interest policy in place and enforced		
Board roles and responsibilities are documented		

## 2. Legal & Regulatory Compliance

Audit Item	Status ( <input checked="" type="checkbox"/> / <input type="checkbox"/> )	Notes/Action Needed
IRS 501(c)(3) determination letter is on file		
State charitable registration is current		
Annual IRS Form 990 filed on time		
Nonprofit is in good standing with state authorities		
Insurance policies are up to date (liability, D&O, etc.)		

## 3. Financial Management

Audit Item	Status ( <input checked="" type="checkbox"/> / <input type="checkbox"/> )	Notes/Action Needed
Bookkeeping is accurate and up to date		
Annual budget is board-		



approved and monitored		
Financial reports are reviewed regularly by leadership		
Internal controls are in place for handling funds		
Audit or financial review conducted annually (if applicable)		

#### 4. Program Management

Audit Item	Status ( <input checked="" type="checkbox"/> / <input type="checkbox"/> )	Notes/Action Needed
Programs align with mission and strategic plan		
Program goals and outcomes are tracked and evaluated		
Client or participant feedback is collected and used		
Partnerships and collaborations are documented		
Success stories and impact data are updated regularly		

#### 5. Fundraising & Development

Audit Item	Status ( <input checked="" type="checkbox"/> / <input type="checkbox"/> )	Notes/Action Needed
Fundraising plan in place with diversified funding streams		
Donor database is secure and current		
Grant tracking system in place		
Acknowledgement letters sent within 48 hours		
Compliance with fundraising laws and ethics		

#### 6. Human Resources

Audit Item	Status ( <input checked="" type="checkbox"/> / <input type="checkbox"/> )	Notes/Action Needed
Employee and volunteer files are complete		
Job descriptions and		



performance evaluations are current		
HR policies and procedures manual exists		
Staff and volunteers receive regular training		
Workplace culture supports equity and inclusion		

## 7. Marketing & Communications

Audit Item	Status ( <input checked="" type="checkbox"/> / <input checked="" type="checkbox"/> )	Notes/Action Needed
Clear and compelling messaging about mission and programs		
Website is updated and accessible		
Social media presence is consistent with branding		
Media contacts and press materials are ready		
Annual report or impact summary available		

## Next Steps Summary

Top 3 Areas to Improve:

- 1.
- 2.
- 3.

Action Plan Deadline: \_\_\_\_\_

Next Internal Audit Date: \_\_\_\_\_