

PROFILE ANNUAL UPDATE CHECKLIST

Please review **ALL** sections of the profile to make sure your information is up to date.

Below are the specific sections with items that expire on an annual basis:

Statements

- Update Impact Statement to list previous years accomplishments and list current years goals
- **Profile refresh tips:**
 - **Update Needs Statement** to show what you need, WHY you need it and how much it costs
 - **Update keywords** to include words that appear in your mission and program descriptions. This is how people find you who do not know you or know what you do
 - **Under 'Geographic Area Served'** – make sure to include Winter Park and/or Orlando if you serve clients from these areas.
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Governance

- Update current Board Member List (include Board Chair)
- Update current Board Chair/Co-chair, if necessary
- Make sure board demographics (ethnicity and gender) match the total number of board members in your main board listing. Ex – if you have 10 board members, then the demographics should equal 10.
- Update current Board Attendance Spreadsheet with board meetings from last fiscal year ([download here](#)). Also, make sure to update the % in the field above the spreadsheet in the profile.
- Update Plans and Policies marked as Under Development to 'yes' or 'no.' If yes, upload document **with board approval date**
- Update current Advisory Board Members

Management

- Update CEO Salary
- Upload current State [Charitable Solicitations Permit](#) (freshfromflorida.com) – This letter comes from the Department of Agriculture. This is not your Tax Exemption Certificate.
- Update expiration date for [State Registration](#) - (SunBiz.org)
- Upload current Fundraising Plan, *if you have one*
- Upload current Strategic Plan, *if you have one*
- Upload current Directors & Officers Liability policy, if you have one – this just needs to be the declaration page that shows what is covered and policy period
- If Plans and Policies are marked as Under Development, change to 'yes' or 'no.' If yes, upload document **with board approval date**
- **Profile refresh tips:**
 - **Collaborations** – explain the 'what' and 'why' of those collaborations. This is not intended to be a list.
 - **Bios for senior staff** – make sure to include bios of each senior staff member.

Financials

- Update current Fiscal Year start and end dates
- Update current Fiscal Year income and expense projections (comes from budget)
- Upload most recent 990, **signed by preparer and organization's officer** – if 990 includes schedule B, please remove it from your 990 before you upload to profile. Upload the schedule B separately in 'Other Documents'
- Most recent financial audit / review/ compilation
- Capital Campaign details, if applicable

Did You Remember to:

- Upload **signed** copies of your 990
- Add **board approval dates** to any plans or policies uploaded
- **Save** your work
- **Review** in the 'preview' mode to ensure that changes got made the way you wanted
- **Send** your profile to the Central Florida Foundation for review
 - go to 'Review Changes' and then click on 'Send to Foundation' **or**
 - if you click on 'Confirm and Submit' it brings you to the same place to 'Review Changes' and **you have to hit the 'Send to Foundation'** button.

*******You will receive a confirmation email once you have submitted any changes.*******

- **Inform** me if you want to authorize additional staff to work on your profile. Send me email with name, email and phone number.



Questions?

Contact Mary Meghan via email at mflanagan@cffound.org

407-872-3050 x116.

Want additional help with profile?

Register for the monthly **Refresh your Profile** webinar on our Event Calendar (https://cffound.org/explore/event_calendar/)