

ANNUAL UPDATE CHECKLIST ON NONPROFIT SEARCH

Below are instructions on how to make sure your profile stays up to date annually on the NEW nonprofit search platform.

When you see this * symbol, that means you MUST complete that item in order to be able to SUBMIT your profile to the Foundation for review.

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.

Programs

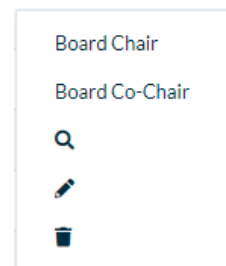
- Make sure you have at least one program listed *
- **Profile refresh tips:**
 - Make sure to fill in each section within your program. This helps the community and funders understand your program completely.

Governance

- Update current Board Member List (include Board Chair) *
- Update current Board Chair/Co-chair, if necessary
- To set your Board Chair and Co-Board Chair, go to Governance Details and you will see a list of your board members. First find the Board Chair and then click the three dots on the right.

It looks like this  . Then a small window will pop up and let you choose your Board Chair or Co-Board Chair.

Once you have set the Board Chair, you will have to verify that member's information. Make sure to fill in all fields.



Click Submit and then refresh your page. You then will see a blue button to set the Board Co-Chair that looks like this

Board Co-Chair

- 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
- Upload current Directors & Officers Liability policy, if you have one – this just needs to be the declaration page that shows what is covered and current policy period *

Management

- Update CEO Salary
- Upload current Fundraising Plan, *if you have one*
- Upload current Strategic Plan, *if you have one*
- 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 to be a list of who you collaborate with. The 'WHY' behind the relationship is what we are looking for here
- **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' *
- Upload current State [Charitable Solicitations Permit](https://fdacs.gov) (fdacs.gov) – This letter comes from the Department of Agriculture. **This is not your Tax Exemption Certificate.** *
- Update expiration date for [State Registration](https://sunbiz.org) - (SunBiz.org)
- Most recent financial audit / review/ compilation
- Capital Campaign details, if applicable

Did You Remember to:

- Satisfy all the required fields above with the *
- Upload **signed** copies of your 990
- Add **board approval dates** to any plans or policies uploaded
- **Save** your work in each section

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

Questions? Contact Alissa Mahadeo at amahadeo@cffound.org or call 407-872-3050.