

General Information

- Contact First Name and Contact Last Name (since your organization's information is shared with Guidestar, having a primary contact name is important for potential donors or funders that might reach out to your organization)

Statements and Search Criteria

- Check that Impact Statement is relevant (list accomplishments from last year and goals for this year)
- Check that Needs Statement is relevant
- Check that key words include words that appear in your mission and program descriptions
- Please indicate whether independent research has been conducted on your organization's theory of change or effectiveness.

Impact Section

- Complete or update this section as necessary. The Impact Section makes it easier for you to describe the value of the services your organization provides to donors, investors, and grant makers.

Programs Section

- Check that program descriptions and budgets are up to date
- Check that all program information is complete (Long and Short Term Success Measures, Program Success Monitors, and Examples of Program Success).

Management Section

- Current CEO/ED; Start Date; CEO/ED Experience
- Current CEO Salary (this is NOT publicly viewable)
- Staff and Volunteer Numbers and Retention Rate for Previous Year
- Current State [Charitable Solicitations Permit](#)
- Renewed [State Registration](#)
- Current Fundraising Plan, if you have one
- Current Strategic Plan, if you have one
- Current Directors & Officers Liability policy, if you have one
- Update Plans and Policies marked as Under Development to 'yes' or 'no.' If yes, upload document **with board approval date**

CENTRAL FLORIDA FOUNDATION

Governance Section

- Current Board Member List (include Board Chair)
- Current Board Chair/Co-chair
- Current Advisory Board Members
- Updated Board Attendance Spreadsheet with board meetings from last fiscal year ([download here](#)).
- Update Plans and Policies marked as Under Development to 'yes' or 'no.' If yes, upload document **with board approval date**

Financial Section

- Current Fiscal Year start and end dates
- Current Fiscal Year income and expense projections
- Most recent 990, **signed by preparer and organization's officer**
- Most recent financial audit / review/ compilation
- Capital Campaign details, if applicable

Any other changes to status of plans or policies, programs, etc.

Did You Remember to:

- Upload **signed** copies of your 990
 - Add **board approval dates** to any plans or policies uploaded
 - **Save** your work
 - **Submit** your portrait for review
 - To submit click the blue Send to Community Foundation button in the Review Changes section
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Questions? Contact Mary Meghan via email at mflanagan@cffound.org or call 407-872-3050 x16.