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.

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/)