



## Consortium of Florida Education Foundations Foundations for Excellence Quality Standards Suggested Timeline of Activity Completion



Consider the below timeline to complete activities suggested by our Foundations for Excellence Quality Standards process. Quarters are based on a fiscal year start date of July 1.

FIRST QUARTER			
ACTIVITY	RESPONSIBILITY	NOTES	STANDARD(S) REFERENCED
New board member orientation	Board Chair and ED	Within month of being accepted to board	11
Board/Board Member Assessment	Board	Annually, formal assessment or informal discussion	9
Meetings w/ community about education issues	Board and ED		20
Update Board Manual (include Bylaws, member and staff roles and responsibilities, committee descriptions, acknowledgement of expectations and receipt of board manual, policies)	Board and Staff	Prior to new member orientation	7, 11, 13, 15, 16, 23, 28, 29
Update board member, volunteer and staff roles and responsibilities (include advocacy roles and role to review government regulation compliance)	Board and ED	As needed, but at least annually	7, 11, 23, 25, 26, 29
Develop/Update Leadership Succession Plan	Board and ED	Review annually	28
Update employee manual (if appropriate)	ED	Review annually	29

**This quarter, did you:**

- ✓ **Register for next Consortium quarterly membership meeting?**
- ✓ **Complete annual review of appropriate employees?**
- ✓ **Update donor records (including endowments and pledged gifts)?**
- ✓ **Disburse appropriate foundation-specific communications (using foundation letterhead and email signature)?**
- ✓ **Participate in Consortium Legislative Committee calls?**
- ✓ **Engage local legislative delegation through events, program tours, delegation meetings, etc.?**
- ✓ **Review budget with board?**



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SECOND QUARTER			
ACTIVITY	RESPONSIBILITY	NOTES	STANDARD(S) REFERENCED
Review of compliance with federal and state regulations	Board and ED	Timed with annual audit completion	11, 25, 27
Complete financial audit or review	Board and ED	Annually	25, 27
File IRS Form 990, 990-EZ or 990-N	Staff or Board	Annually by 15 <sup>th</sup> day of 5 <sup>th</sup> month following FY end	25
Develop/Update Advocacy Policy	Board and ED	Review annually	11, 23
Update insurance needs/coverage	Board and ED	Review annually	13, 26
Develop/Update financial policies	Board and ED	Review annually	27, 30

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THIRD QUARTER			
ACTIVITY	RESPONSIBILITY	NOTES	STANDARD(S) REFERENCED
Develop/Update planned giving and endowment policies	Board and ED	Review annually	11, 18
Review board recruitment needs and strategy	Board and ED	At least annually	7, 13
Update Stewardship and/or Fundraising Plan (includes revenue diversification plan, multi-year gift plan)	Staff and/or Board Committee	Review annually	14, 15, 17, 18, 20
Develop/Update Communications Plan	Staff and/or Board Committee	Review annually	15
Review of foundation brand	Staff and/or Board Committee	Every few years	21
Update Marketing Plan (includes multi-channel communication, mission-aligned, consistent messaging)	Staff and/or Board Committee	Review annually	22

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FOURTH QUARTER			
ACTIVITY	RESPONSIBILITY	NOTES	STANDARD(S) REFERENCED
Strategic Planning	Board and Staff	Part of or prior to board annual meeting; should be at least reviewed annually	1, 2, 3, 5, 12, 13, 19
Review program outcomes/ impact/ return on investment	Staff and/or Board Committee	At least annually, but recommend mid-year, as well.	4, 5, 6, 14, 16
ED/Board Chair review	ED, Board Chair and/or Superintendent	Annually	10
Annual budgeting (includes line item for board and staff PD, insurance coverage)	Board and ED		13, 26, 30
Meetings w/ Superintendent and/or District Staff on program priorities and alignment	ED	At least once per year prior to planning	3, 19, 24
File annual report with FL Dept of State	Staff or Board	Due by May 1	25

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