



ACCREDITATION OVERVIEW

January 2019 - FULL REVIEW CYCLE

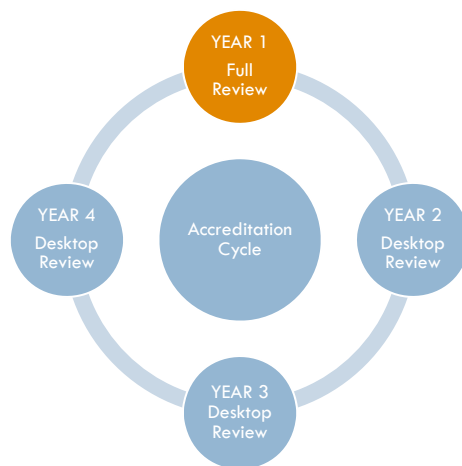
Purpose of Orientation

2

1. Provide information and clarification on the overall Accreditation process
2. Demonstrate the Pathways to Excellence (P2E) web-based portal

Accreditation Cycle

3



Staff and Volunteers

4



Kayla Morton
*Accreditation Project
Coordinator*



Adriene Tynes
*Director of
Accreditation*



Todd L'Herrou
*Accreditation Project
Leader*

- Fiscal Consultants
- Executive Volunteer Corps Members
- Accreditation Review Council members
- Standards Committee members

Stages of Accreditation

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1. Execution of the Agency Accreditation Agreement and remittance of payment
2. Agency designation of a Primary Agency Accreditation Contact
3. Completion of the User Authorization Form
4. Completion of the Pathway to Excellence (P2E) online self-assessment
5. Consultation with Project Leader prior to submission (optional)
6. Online Submission of the P2E
7. Consultation with Project Leader (prior to Onsite Review)
8. Onsite Review
9. Completion of the Verification Process
10. Final Determination of Accreditation Status

6

Paperwork though DocuSign

Paperwork through DocuSign

7

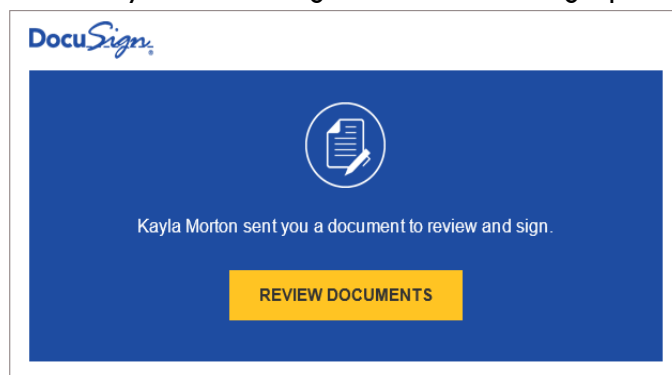
Questions or Technical Issues?

Kayla Morton
kmorton@nonprofitsfirst.org
561-910-3892

Paperwork through DocuSign

8

All CEOs will receive an email
from Kayla via DocuSign that includes this graphic.



CEO Signs the Agency Agreement

9

DocuSign Envelope ID: 924D15F6-056B-4E95-8A4E-3F43C4336A06

17. Acceptance

AGENCY NAME: Required FYE:

AGENCY ADDRESS:

Board President/Chairperson
Signature: _____
Print Name: _____
Date: _____

Executive Director/CEO
Signature: _____
Print Name: Adriene Tynes
Date: 1/14/2018

For Nonprofits First internal use only

Nonprofits First President and CEO	Date: _____	Nonprofits First Director of Accreditation	Date: _____
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NEXT

CEO Completes User Authorization Form

10

DocuSign Envelope ID: 924D15F6-056B-4E95-8A4E-3F43C4336A06

User Authorization Form (UAF)

NonprofitsFirst

Please use this form to provide us with the names, titles, and email addresses of the agency representative(s) you would like to take part in completing the P2E/self assessment tool. The users you list will each be given a unique password to access the P2E.

In addition to your Primary Accreditation Contact, you may want to include the staff members responsible for Financial Management, Human Resources, Volunteer Coordination, and Fund Development.

I hereby authorize the following individual(s) to participate in completing the P2E/self assessment tool on behalf of Required

Organization Business Name:

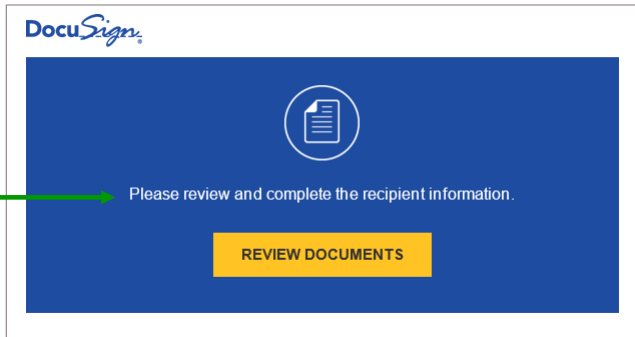
1. **Executive Director/Chief Executive Officer**
Name: Adriene Tynes
Title:
Email Address:
Signature: _____

2. **Primary Contact** (If same as above, leave blank)
Name:

NEXT

CEO sends Agreement to Board Chair

11



DocuSign

Please review and complete the recipient information.

REVIEW DOCUMENTS

A green arrow points from the left towards the text "Please review and complete the recipient information."

CEO sends Agreement to Board Chair

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You have been asked to review and add recipient information.
Please enter the email address and name for the associated role and select 'Complete and Send'.

Role	Email	Name	
Board President/Chairperson	<input type="text"/>	<input type="text"/>	Edit Private Message

COMPLETE AND SEND [Show Document](#)

New This Year

The Standards Committee reviewed all questions asked at Sound and Excellence level.

- # of questions asked at Sound level: 
- # of questions asked at Excellence level: 
- Questions reworded for clarity or removed entirely

[Summary of Changes document available in Handouts](#)

New This Year

15

- Required Financial Statements presented to the Board now include Statement of Cash Flows
 - Reminders:
 - Requesting most recent monthly or quarterly financial statements *as presented to your Board*
 - Standards require a comparison to budget
 - Explanation of major variances from budget is helpful

New This Year

16

- Separate sections for Volunteer Management and Intern Management
 - Volunteers and interns are inherently different and policies and procedures related to them should also be different
 - Eliminate confusion for organizations that use volunteers but not interns, and vice versa

Not Quite New This Year

17



Please encourage CEOs to
approve
Funder Access
to Current and Past Forms

Not Quite New this Year

18

Question #11. Did the Operating Agency file a Form 990
for the most recently ended fiscal year?

Select **NO** if you have received an IRS extension and the
extension deadline hasn't passed yet

11. Did the organization file a Form 990 for the most recently ended fiscal year?

Yes No

11.a. If a 990 was not filed, please explain:

If applicable, please upload extension request(s) (IRS Form 8868) and/or extension approval(s) (IRS CP211A Notice) :

No file chosen

IRS CP211A Notice

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Department of Treasury
Internal Revenue Service
Ogden UT 84201

Notice CP211A
Tax period [redacted]
Notice date [redacted]
Employer ID number [redacted]
To contact us [redacted]

Page 1 of 1

026121

Important information about your [redacted] Form 990

We approved your Form 8868, Application for Extension of Time To File an Exempt Organization Return

We approved the Form 8868 for your [redacted] Form 990.
Your new due date is [redacted]

What you need to do

File your [redacted] Form 990 by [redacted]. We encourage you to use electronic filing—the fastest and easiest way to file. Visit www.irs.gov/charities to learn about approved e-File providers, what types of returns can be filed electronically, and whether you are required to file electronically.

Not Quite New this Year

20

Only enter dates for the Summary of Financial Data section

Self Assessment

7% Complete

AGENCY: TEST AGENCY TEST

Input No Review Printable (blank) Form

SUMMARY OF FINANCIAL DATA

Prior Year Audit	Most Recent Audit	Current Internal Financial Statements (FS)
09/30/2017	09/30/2018	03/31/2019

Mark this Section Completed

< Back Save & Continue Later Next > Finish

- Organization Info
- Accreditation Renewal
- Documentation & Reporting - G
- Board Governance
- Risk Management & Safety
- Fundraising and Development
- Human Resources - General
- Volunteer Management
- Intern Management
- Finance
- Summary of Financial Data
- Independent Contractors/Consu
- Credit Card Policies and Transac
- Debit Card Policies and Transac

New Year, New Look

21

The screenshot shows a web form with a navigation bar at the top containing 'Input', 'No', 'Review', and 'Printable (blank) Form'. The main content area is titled 'DOCUMENTATION & REPORTING - GOVERNING DOCS'. It contains two questions:

- Question 1: '1. Does the organization have a public review?' with a 'Yes' radio button selected.
- Question 1.a: '1.a. IRS Determination Letter verifying 501(c)(3) status:'. It includes a 'Choose File' button, two 'Delete File | Test 1.docx' and 'Delete File | Test 2.docx' buttons, and a 'Choose File' button with icons for file upload, screenshot, and video recording.
- Question 1.b: '1.b. Evidence of Incorporation in State of Florida as a Nonprofit Corporation (Certificate Status)'. It includes a 'Choose File' button.

At the bottom, there is a navigation bar with buttons: '< Back', 'Save & Continue Later', 'Next >', and 'Finish'. A green arrow icon is also present.

Annotations in green boxes highlight the following features:

- 'Download multiple files on any upload field' points to the 'Delete File' buttons.
- 'New ways to take screenshots or video' points to the icons next to the 'Choose File' button in 1.a.
- 'Navigation buttons always visible' points to the bottom navigation bar.

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Pathway to Excellence (P2E)

P2E: Nonprofits First's Online Self-Assessment Tool

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1. Agency Info
2. Documentation & Reporting – Governing Docs
3. Board Governance
4. Risk Management & Safety
5. Fundraising & Development
6. Human Resources – General
7. Volunteer Management
8. Intern Management
9. Finance
10. Summary of Financial Data/Ratios
11. Independent Contractors/Consultants
12. Credit & Debit Card Policies & Transactions

P2E: Nonprofits First's Online Self-Assessment Tool

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HOW TO:

1. Sign In
2. View Forms from Previous Years
3. Grant Funder Access
4. Enter Responses
5. Access Resources
6. Navigate the P2E/Self-Assessment
7. Review P2E & Reports
8. Submit

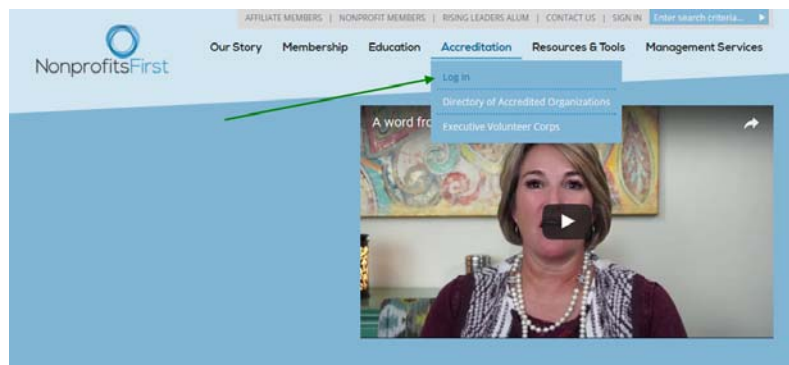
Log on at npf.webauthor.com

25

The screenshot shows the login interface for Nonprofits First. At the top, the text "Nonprofits First" is displayed. Below it, the heading "Login to get started" is centered. There are two input fields: "Login ID" with an envelope icon and "Password" with a magnifying glass icon. Below these fields are two links: "Remember Me" with a checkbox and "Forgot your password?". A blue "Sign In" button is positioned below the links. At the bottom of the login area, there is a link: "Having trouble? Contact Support". Below the entire login area, there is a separate box with the text "Not yet registered? Register Now".

Access P2E through nonprofitsfirst.org

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Log on screen

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Nonprofits First

Login to get started

Remember Me [Forgot your password?](#)

Sign In

[Having trouble? Contact Support](#)

Not yet registered? [Register Now](#)

Intro Page

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NonprofitsFirst TEST EXCELLENCE

Self Assessment Home / Self Assessment / Dashboard

Self Assessment Manage Funder Access

Welcome to the Accreditation Self-Assessment form.
To begin or continue filling out your Self-Assessment form, click on the "Complete Assessment" button below. If you have already submitted your information, you will be able to review your submission.

Here are some important things to remember:

- Click the "Save & Continue Later" button at the bottom of each page to save your work.
- The  icon means that a standard has been identified as an "Issue".
- The  icon means that the standard is not required for organizations pursuing Accreditation at the Standard level.
- Text in blue is either a hyperlink to more information or to a policy template.
- To add, edit or delete account users, contact accreditation@nonprofitsfirst.org or call 563-214-7435.

Complete Assessment

Completed Assessments - 1 Item

Form	Status	Last Activity
Accreditation Assessment Form 2017 2018	Submitted	01/13/17

Intro Page – Manage Funder Access (new)

29

The screenshot shows the NonprofitsFirst Self Assessment dashboard. At the top right, there is a notification bell and a 'TEST EXCELLENCE' button. Below the navigation bar, the 'Self Assessment' section is active. A central message box contains instructions for completing the assessment. A blue button labeled 'Complete Assessment' is visible. Below this, a table lists 'Completed Assessments - 3 Item'.

Form	Status	Last Activity
Accreditation Assessment Form 2017 2018	Submitted	05/13/17

Intro Page – Manage Funder Access (new)

30

The screenshot shows the 'Manage Funder Access' section. It features a table with 'Available Funders - 3 Items'. The table has two columns: 'Funder' and 'Has Access?'. The first funder, 'Children's Services Council of Palm Beach County', has a green 'Yes' button circled in green. The other two funders, 'Palm Beach County FAA - Funder Review' and 'United Way of Palm Beach County - Funder Review', have red 'No' buttons.

Funder	Has Access?
Children's Services Council of Palm Beach County	Yes
Palm Beach County FAA - Funder Review	No
United Way of Palm Beach County - Funder Review	No

Intro Page – Manage Funder Access (new)

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Self Assessment | MANAGE FUNDER ACCESS

Children's Services Council of Palm Beach County

Funder Company	Has Access
AGENCY ACCESS	
Does this funder have access to my Agency's assessments?	
Has Access?	<input type="radio"/> Yes
	<input checked="" type="radio"/> No

Intro Page – Manage Funder Access (new)

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Self Assessment | MANAGE FUNDER ACCESS

Available Funders - 3 Items

Funder	Has Access?
Children's Services Council of Palm Beach County	<input checked="" type="radio"/>
Palm Beach County FAA - Funder Review	<input type="radio"/>
United Way of Palm Beach County - Funder Review	<input type="radio"/>

Intro Page – Manage Funder Access (new)

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Funder	Has Access?
Children's Services Council of Palm Beach County	Yes
Palm Beach County FAA - Funder Review	No
United Way of Palm Beach County - Funder Review	No

Intro Page

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Welcome to the Accreditation Self-Assessment form.

To begin or continue filling out your Self-Assessment form, click on the "Complete Assessment" button below. If you have already submitted your information, you will be able to review your submission.

Here are some important things to remember:

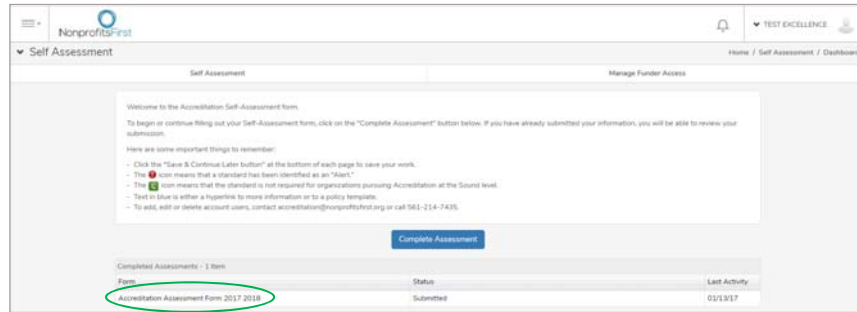
- Click the "Save & Continue Later" button at the bottom of each page to save your work.
- The **!** icon means that a standard has been identified as an "Alert."
- The **?** icon means that the standard is not required for organizations pursuing Accreditation at the Sound level.
- Text in blue is either a hyperlink to more information or to a policy template.
- To add, edit or delete account users, contact accreditation@nonprofitsfirst.org or call 561-214-7435.

[Complete Assessment](#)

Form	Status	Last Activity
Accreditation Assessment Form 2017-2018	Submitted	01/13/17

Intro Page – View Previous Years

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Welcome to the Accreditation Self-Assessment form.

To begin or continue filling out your Self-Assessment form, click on the "Complete Assessment" button below. If you have already submitted your information, you will be able to review your submission.

Here are some important things to remember:

- Click the "Save & Continue Later" button at the bottom of each page to save your work.
- The **A** icon means that a standard has been identified as an "Alert."
- The **S** icon means that the standard is not required for organizations pursuing Accreditation at the Severe level.
- See a link is either a hyperlink to more information or to a policy template.
- To add, edit or delete account users, contact accreditation@nonprofitsfirst.org or call 561-214-7435.

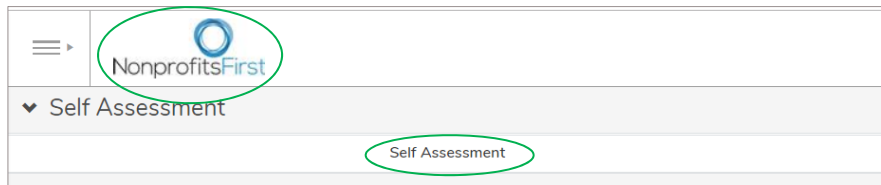
[Complete Assessment](#)

Completed Assessments - 1 Item

Form	Status	Last Activity
Accreditation Assessment Form 2017-2018	Submitted	02/19/17

Intro Page – View Previous Years (new)

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NonprofitsFirst

Self Assessment

Self Assessment

Intro Page – Click to Get Started

37

Welcome to the Accreditation Self-Assessment form.
To begin or continue filling out your Self-Assessment form, click on the "Complete Assessment" button below. If you have already submitted your information, you will be able to review your submission.

Here are some important things to remember:

- Click the "Save & Continue Later" button at the bottom of each page to save your work.
- The **A** icon means that a standard has been identified as an "Alert."
- The **Q** icon means that the standard is not required for organizations pursuing Accreditation at the Silver level.
- Text in blue is either a hyperlink to more information or to a public template.
- To add, edit or delete account users, contact accreditation@nonprofitsfirst.org or call 561-214-7435.

Completed Assessments - 1 Item

Form	Status	Last Activity
Accreditation Assessment Form 2017-2018	Submitted	02/19/17

Organization Info section

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AGENCY TEST AGENCY TEST

7%
 79 Criteria

Organization Info

- Documentation & Reporting – Governing Docs X
- Board Governance X
- Risk Management & Safety X
- Fundraising and Development X
- Human Resources - General X
- Volunteer Management X
- Intern Management X
- Finance X
- Summary of Financial Data X
- Independent Contractors/Consultants X
- Credit Card Policies and Transactions X
- Debit Card Policies and Transactions X
- Submit X

Organization Details:

Organization Name: Text

Address 1: Text, Address 2: Text

City: Text, State: Florida, Zip: 12345

Email Address: test@nonprofitsfirst.org, Website: nonprofitsfirst.org

Phone Number xxx-xxx-xxxx: 123-456-7890, Fax xxx-xxx-xxxx: 123-456-7890

Accreditation Contact: Name of Accreditation Contact, Email: test@nonprofitsfirst.org

Executive Director/Chief Executive Officer: Name, Email: test@nonprofitsfirst.org

Board Chairperson: First Last, Email: test@nonprofitsfirst.org

Financial Management: First Last, Email: test@nonprofitsfirst.org

Navigation: < Back, Save & Continue Later, Next >, Finish

Organization Info section

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The screenshot shows a form for the 'Organization Info' section. At the top, there are two columns of checkboxes for various categories: Community Improvement, Employment, Food, Nutrition, Agriculture, Housing, Shelter, Mental Health/Substance Abuse, Philanthropy, Volunteerism, Public Protection, Legal Aid, Recreation, Sports, Leisure, Science, Technology, Social Services, Volunteer Driven, Other, Education, Environment, Beautification, Historic Preservation, International, Foreign Affairs, Medical Research, Public/Social Benefit, Public Safety, Disaster Relief, Religious, Senior Issues, Tourism Development, Youth Development, and Children and Families. Below this is a 'Funders' table with columns for Name, Program, and Amount. One entry is visible: 'UW' with 'X' in the Program column and '100' in the Amount column, with a 'Delete' button to its right. Below the table is a question: 'Is your nonprofit organization certified/accredited by other organization(s)?' with an 'Add More' button. At the bottom of the form is a green bar with a checked checkbox labeled 'Mark this Section Completed'. Below the green bar are navigation buttons: '< Back', 'Save & Continue Later', 'Next >', and 'Finish'. Three green arrows point to the 'Add More' button, the 'Mark this Section Completed' checkbox, and the 'Save & Continue Later' button.

Navigation buttons

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
This is a close-up of the navigation buttons from the previous screenshot. The buttons are '< Back', 'Save & Continue Later', 'Next >', and 'Finish'. The '< Back' and 'Next >' buttons are circled in green. The 'Save & Continue Later' button is highlighted in blue. The 'Finish' button is a simple text button.




Icons

41

4. Did the organization have unrelated business income tax?

Yes No

4.a. If the organization has unrelated business income, indicate date IRS Form 990T was filed:  Please attach Form 990T:

08/13/2018   

Information Shared with Funders

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- Non-compliance with Funder Alerts
- Quarterly Reports
 - On-time P2E submission
 - Onsite Review Scheduled or Completed
 - Number of Unmet Standards after 1st onsite
 - Accreditation Complete
 - Accreditation Suspension/Revocation
 - At Risk of not being Accredited


Icons – Excellence Only


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Strategic Planning


15. Does the agency engage in organizational/strategic planning? (additional info)

Yes No In Progress

16. Does the organization have a comprehensive and clearly defined written Strategic Plan that includes items a.- g.? 

Please attach most recent Strategic Plan: 

16.a. Statement of mission and goals 

Yes No In Progress

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)


Blue text


44




Strategic Planning


15. Does the agency engage in organizational/strategic planning? (additional info)

Yes No In Progress

16. Does the organization have a comprehensive and clearly defined written Strategic Plan that includes items a.- g.? 

Please attach most recent Strategic Plan: 

16.a. Statement of mission and goals 

Yes No In Progress

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

Hints

45

Agency should have a policy/protocol addressing this even if there are not currently any pending or threatened lawsuits, claims, or assessments.

se upload the Document Retention and Destruction Policy.

se File

4. Does the organization have a written policy/protocol to acknowledge and disclose any pending or threatened lawsuits, claims, or assessments which may have an impact on the organization's finances and/or operating effectiveness, to the Board of Directors and Independent Auditor?

Yes No

Source documentation

46

1.a. Written roles and responsibilities (including fiduciary) of board members

Yes No

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

1.b. Nepotism Policy (including recusal of voting and disclosure of relationship to the full board and Independent Auditor) (sample)

Yes No

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

N/A Responses with required source documentation

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Selecting the Yes button

6. If the organization conducts charitable gambling as a fundraiser (e.g. raffles, Bingo, casino nights, etc.), does it comply with all Federal and State income tax laws and regulations regarding charitable gambling? (F.S. 849.0935) (IRS Notice 1340) (IRS Pub 1771)

Yes No N/A

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

Selecting the N/A button

6. If the organization conducts charitable gambling as a fundraiser (e.g. raffles, Bingo, casino nights, etc.), does it comply with all Federal and State income tax laws and regulations regarding charitable gambling? (F.S. 849.0935) (IRS Notice 1340) (IRS Pub 1771)

Yes No N/A

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

N/A

N/A Responses with associated upload or date fields

48

Selecting the Yes button

If the bylaws have not been amended, select N/A. No Yes N/A

Choose File

1.f. Amendments to bylaws

Yes No N/A

Date of last amendment:

Selecting the N/A button

1.f. Amendments to bylaws

Yes No N/A

1.g. Articles of Incorporation (F.S. 617.0202)

Yes No

Please upload Articles of Incorporation.

Choose File

Other Responses with associated upload or date fields

49

Selecting the Yes button

10. Was the agency subject to Federal, State or County "Single Audit" requirements?

Yes No

If yes, please upload:

10.a. Does the most recent single audit report include the following: A "clean", qualified or disclaimer of opinion as to whether the financial statement(s) are presented fairly in conformity with generally accepted governmental accounting standards?

Yes No

Please reference the source used to verify your response, including page numbers (if applicable).

Selecting the No button

10. Was the agency subject to Federal, State or County "Single Audit" requirements?

Yes No

11. Did the organization file a Form 990 for the most recently ended fiscal year?

Yes No

Side bar

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AGENCY: TEST AGENCY TEST

7% ■ 7% Complete

Input No Review Printable (blank) Form

RISK MANAGEMENT & SAFETY

Insurance Policies

1. Are the following insurance policies in place: !

1.a. General Liability

Yes No

1.a. Name of Provider: 1.a. Expiration Date: 1.a. Amt of Deductible: 1.a. Coverage:

1.b. Property (only if capital equipment exists)

Yes No N/A

1.b. Coverage: 1.b. Name of Provider: 1.b. Expiration Date: 1.b. Amt of Deductible:

- Organization Info ✓
- Documentation & Reporting - Governing Docs ✗
- Board Governance ✗
- Risk Management & Safety !
- Fundraising and Development ✗
- Human Resources - General ✗
- Volunteer Management ✗
- Intern Management ✗
- Finance ✗
- Summary of Financial Data ✗
- Independent Contractors/Consultants ✗
- Credit Card Policies and Transactions ✗
- Debit Card Policies and Transactions ✗
- Submit ✗

Sidebar Details

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7%	7% Complete
Organization Info	✓
Documentation & Reporting – Governing Docs	✗
Board Governance	✗
Risk Management & Safety	✳
Fundraising and Development	✗
Human Resources - General	✗
Volunteer Management	✗
Intern Management	✗
Finance	✗
Summary of Financial Data	✗
Independent Contractors/Consultants	✗
Credit Card Policies and Transactions	✗
Debit Card Policies and Transactions	✗
Submit	✗

PROGRESS BAR

MODULE COMPLETE

CURRENTLY IN PROGRESS

MODULE INCOMPLETE

52

Completing a Section

Click *Mark this Section Completed*

53

Is your nonprofit organization certified/accredited by other organization(s)?	Accrediting Body: + Add More	Effective/Expiration Date
<input checked="" type="checkbox"/> Mark this Section Completed		
< Back	Save & Continue Later	Next > Finish

Click *Save & Continue Later*

54

Is your nonprofit organization certified/accredited by other organization(s)?	Accrediting Body: + Add More	Effective/Expiration Date
<input checked="" type="checkbox"/> Mark this Section Completed		
< Back	Save & Continue Later	Next > Finish

If the Section is Incomplete...

55

16.f. Resources identified as needed to achieve goals and objectives

Yes No In Progress

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

16.g. Periodic updates and minimum annual review

Yes No In Progress

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

17. Has the organization considered if programs and services are congruent with the organization's mission and strategic plan?

Yes No In Progress

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. (If this is not in place, please explain.)

Mark this Section Completed

We found some items that need addressing

Incomplete Details

56

Mark this Section Completed

We didn't correctly capture your response to the following item(s).

1. Question is required
2. Question is required
3. Question is required
4. Question is required
5. Question is required
6. Question is required
7. Question is required
8. Question is required

Incomplete Highlighted cells

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BOARD GOVERNANCE

1. Does the organization provide board members with the following? [\(more info\)](#)

Please attach Board Manual:

Change File Question is required

1.a. Written roles and responsibilities (including fiduciary) of board members

Yes No Question is required

Please reference the source used to verify that this is in place, including page numbers for documents/manuals. *(If this is not in place, please explain.)*

De-select *Mark this Section Completed*

58

Mark this Section Completed

We didn't correctly capture your response to the following item(s).

1. Question is required
2. Question is required
3. Question is required
4. Question is required
5. Question is required
6. Question is required
7. Question is required

Return when ready

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Self Assessment

You can return to this form at anytime to continue entering your information.

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Reviewing your Progress

Click Review

61

AGENCY: TEST AGENCY TEST

Input: No **Review** Printable (blank) Form

DOCUMENTATION & REPORTING - GOVERNING DOCS

1. Does the organization have the following items available for public review?

7% 7% Complete

- Organization Info ✓
- Documentation & Reporting - Governing Docs ✘
- Board Governance ✘
- Risk Management & Safety ✘
- Fundraising and Development ✘
- Human Resources - General ✘

Review report

62

AGENCY: TEST AGENCY TEST

Detail Agency Response: No ✘ Unmet Standards: History ✘ New Activity

Submitted: First Name Last Name (test@testagencytest.com)
Status: Submitted / Started 1/9/19 12:24 PM
Completed: ~ submission_4806 - 1081

— ORGANIZATION INFO

ORGANIZATION DETAILS:

Organization Name

Test

Address 1: Test Address 2: Test

City: Test State: Florida Zip: 12345

Email Address: test@nonprofitsfirst.org Website: nonprofitsfirst.org

Phone Number xxx-xxx-xxxx: 123-456-7890 Fax xxx-xxx-xxxx: 123-456-7890

MILESTONES

FILES

- Test.Docx
- Test2.Docx

KEY CONTACTS

7% 7% Complete

- Organization Info ✘
- Documentation & Reporting - Governing Docs ✘

Files

63

The screenshot shows the 'AGENCY: TEST AGENCY TEST' interface. At the top, there are tabs for 'Detail', 'Agency Response: No', 'Unmet Standards', 'History', and 'New Activity'. The 'Agency Response: No' tab is selected. Below the tabs, there is a summary section with 'Submitted' (First Name Last Name (test@testagencytest.com)), 'Status' (Submitted / Started 1/9/19 12:24 PM), and 'Completed' (- submission_4806 - 1081). The main content area is divided into 'ORGANIZATION INFO' and 'ORGANIZATION DETAILS'. The 'ORGANIZATION DETAILS' section contains fields for Organization Name, Address 1, Address 2, City, State, Zip, Email Address, Website, Phone Number, and Fax. The 'FILES' tab is highlighted with a green circle. Below the 'FILES' tab, there are two file entries: 'Test.Docx' and 'Test2.Docx'. To the right of the 'FILES' tab, there is a 'KEY CONTACTS' section and a progress indicator showing '7%' completion. Below the progress indicator, there are two items: 'Organization Info' and 'Documentation & Reporting - Governing Docs'.

Click Agency Response: No

64

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Responses Report

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Submitted First Name Last Name (test@testagencytest.com)

Status Started / Started 1/9/19 12:24 PM

Completed - submission_4806 - 1081

7% ●

7/9 Complete

DOCUMENTATION & REPORTING - GOVERNING DOCS

1.d. Fictitious Name or D/B/A Registration with the Florida Department of State, Division of Corporations (F.S. 865.09)

No

1.a. Current bylaws

No

1.g. Articles of Incorporation (F.S. 617.0202)

No

FINANCE

Organization Info ★

Documentation & Reporting - Governing Docs ✗

Board Governance ✗

Risk Management & Safety ✗

Fundraising and Development ✗

Human Resources - General ✗

Volunteer Management ✗

Intern Management ✗

Finance ✗

Summary of Financial Data ✗

Independent Contractors/Consultants ✗

Credit Card Policies and Transactions ✗

Debit Card Policies and Transactions ✗

Submit ✗

Unmet standards report

66

AGENCY: TEST AGENCY TEST

Detail 🔍 Agency Response: No ✗ **Unmet Standards** 📄 History 📄 New Activity

Submitted First Name Last Name (test@testagencytest.com)

Status Started / Started 1/9/19 12:24 PM

Completed - submission_4806 - 1081

7% ●

7/9 Complete

ORGANIZATION INFO

ORGANIZATION DETAILS:

Organization Name 🔗

Test

Address 1 Address 2

Test Test

City State Zip

Test Florida 12345

Email Address Website

test@nonprofitsfirst.org nonprofitsfirst.org

Phone Number xxx-xxx-xxxx Fax xxx-xxx-xxxx

123-456-7890 123-456-7890

MILESTONES

FILES

Test.Docx

Test2.Docx

KEY CONTACTS

7% ●

7/9 Complete

★ Organization Info

✗ Documentation & Reporting - Governing Docs

Ready to Submit

Final Page

AGENCY TEST AGENCY TEST

Input No Review Printable (Blank) Form

SUBMIT

Audit Standards Checklist Audit Standards Checklist

Nonprofits First will verify compliance by analyzing any control deficiencies that are communicated to the organization by its auditor and/or result in anything but an unqualified ("Clear") opinion on your financial statements. Existence of deficiencies or material weaknesses may eliminate or delay your Accreditation status until the deficiencies have been corrected, verified, and fully documented.

Acknowledgement

I have read and understand that our organization must be in compliance with these Audit standards in order to achieve and maintain Accreditation.

Attestation

As the ED/CEO, I attest that all of the information submitted on the Accreditation Assessment Tool is true and correct; and if an on-site review is warranted, we will produce the documentation included in the "verification source" section of the Accreditation Assessment Tool at the time of the scheduled on-site review.

Executive Director/CEO

Mark this Section Completed

Click Finish

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AGENCY TEST AGENCY TEST

Input: No Review Printable (Blank) Form

SUBMIT

Audit Standards Checklist Audit Standards Checklist

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Executive Director/CEO

Test Name

Mark this Section Completed

[Back](#) [Save & Continue Later](#) [Next](#) [Finish](#)

Click Submit Assessment and you're done!

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Self Assessment

[Submit Assessment](#)

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Getting Ready for the Onsite

Consultation Prior to Onsite Review

72

- Review P2E Submission
 - Examine responses and documentation
 - Troubleshoot Funder Alerts
 - Establish timeline for completion of documentation

Consultation

73

- Schedule Onsite Review
 - Agency identifies 3 dates for possible onsite review
 - Dates allow for participation of agency CEO, key staff, and Board representative
 - Final date determined based on availability of Executive Volunteer Corps members
(Administration and Board Governance, Human Resources, and Finance)

Documents to Review

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- Corporate Book
- Board of Director's Manual
- Board Meeting Minutes
- Quarterly Financial Packet for Board
- Administrative/Operational Policy & Procedures Manual
- Strategic Plan
- Insurance Policies
- Disaster Preparedness Plan
- HR Policy & Procedures Manual and/or Employee Handbook
- Volunteer/Intern Handbook
- Financial Manual/Accounting Policy & Procedure Manual
- Independent Contractor/Consultant Agreement

Onsite Review

75

- In the past, generally 9 am – 4:30 pm
 - New uploads = Reduced Time Onsite
- 15-minute opening session to pair reviewers and agency staff and identify information on the table
- Dialogue and live verification of standards ongoing through the day
- Exit conference to summarize findings and next steps

Completion of Verification Process

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- Follow-up
 - Unmet Standards Report
 - Timeline for completion
 - Email submission of documentation
 - Return onsite, as needed
- Presentation to Accreditation Review Council
 - Follow-up, as needed

Final Determination

77

- Formal notification of accomplishment
- Presentations to Agency Board/staff, as requested

Milestones and Deadlines

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	May 31	June 30	August 31	September 30	December 31
Payment Remitted					
Initial Paperwork Complete including: - Completed User Authorization Form - Signed Agency Agreement	February 15, 2019	February 15, 2019	February 15, 2019	February 15, 2019	February 15, 2019
Online Submission of Full P2E	March 29	March 29	April 26	May 31	August 30
Consultation with Accreditation Coordinator to prepare for Onsite Review	April 26	April 26	June 28	July 31	September 13
Completion of the Onsite Review	May 31	May 31	July 31	August 30	October 11
Completion of the Verification Process	July 31	July 31	September 27	October 31	December 13
Final Accreditation Status Determined	December 27, 2019	December 27, 2019	December 27, 2019	December 27, 2019	December 27, 2019

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Questions?

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Thank You!

Aдриене Tynes
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561-214-7438