



## ACCREDITATION OVERVIEW

January 2019

RENEWAL 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

# Staff and Volunteers

3



**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

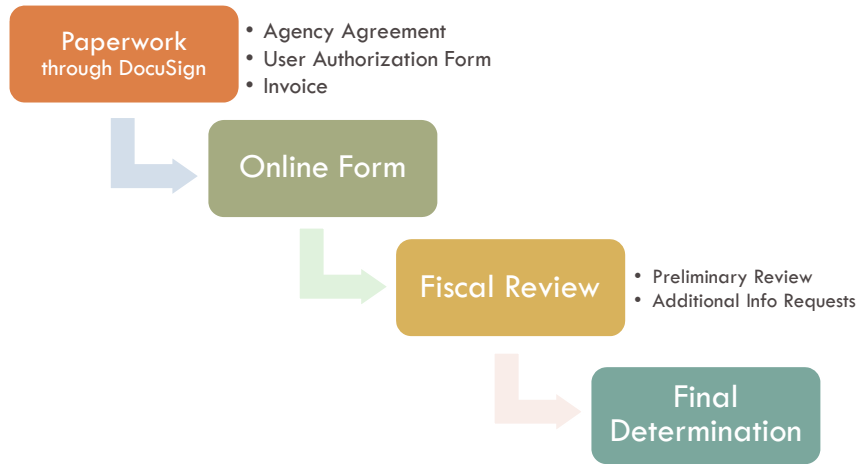
# Accreditation Cycle

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# Stages of Renewal Accreditation

5



6

## Paperwork

## Paperwork through DocuSign

7

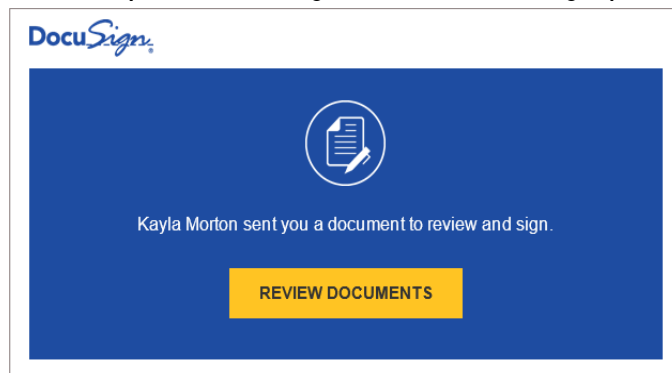
Questions or Technical Issues?

Kayla Morton  
[kmorton@nonprofitsfirst.org](mailto:kmorton@nonprofitsfirst.org)  
561-910-3892

## Paperwork through DocuSign

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



## CEO Signs the Agency Agreement

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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<br>President and CEO | Date: _____ | Nonprofits First<br>Director of Accreditation | Date: _____ |
|---------------------------------------|-------------|---|-------------|

**NEXT**

## CEO Completes User Authorization Form

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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

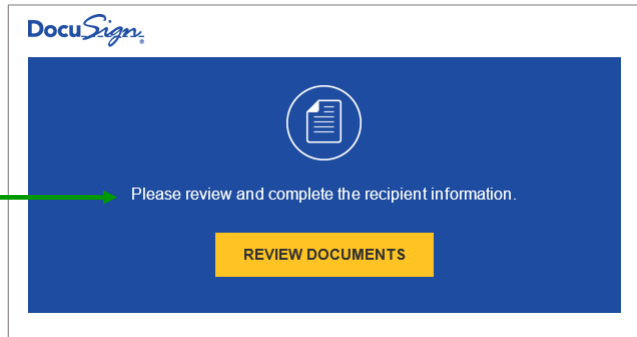
Organization Business Name:

- Executive Director/Chief Executive Officer**  
Name: Adriene Tynes  
Title:   
Email Address:   
Signature:
- Primary Contact** (If same as above, leave blank)  
Name:

**NEXT**

## CEO sends Agreement to Board Chair

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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"/> | <a href="#">Edit Private Message</a> |

**COMPLETE AND SEND** [Show Document](#)

13

## Updates and Reminders

## New Year, New Look

14

The screenshot displays the NonprofitsFirst accreditation renewal form. The form includes a header with the logo and navigation options like 'Input', 'No', 'Review', and 'Printable (Blank) Form'. The main content area contains several questions and file upload fields. Callouts highlight specific features: 'Upload multiple files on any upload field' points to a 'Choose File' button; 'New ways to take screenshots or video' points to a set of icons (camera, video, and a refresh/clear icon); and 'Navigation buttons always visible' points to a row of buttons at the bottom: '< Back', 'Save & Continue Later', 'Next >', and 'Finish'.

Upload multiple files on any upload field



New ways to take screenshots or video

Navigation buttons always visible

## New This Year

15

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

16

- 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



## Not Quite New This Year

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

## New This Year

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### Question #12

“Please upload any organizational documents that have been changed since the last full review (manuals, bylaws, etc).”

## Not Quite New this Year

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Question #3. 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

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

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

Choose File

## IRS CP211A Notice

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Department of Treasury  
Internal Revenue Service  
Ogden UT 84201

Notice CP211A  
Tax period  
Notice date  
Employer ID number  
To contact us  
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](http://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

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Only enter dates for the Summary of Financial Data section

The screenshot shows a web interface for a 'Self Assessment' form. The main title is 'AGENCY: TEST RENEWAL 2016 V2'. Below this are buttons for 'Input', 'Review', and 'Printable (blank) Form'. The 'Review' button has a red 'X' icon. The 'Summary of Financial Data' section contains a table with three columns: 'Prior Year Audit', 'Most Recent Audit', and 'Current Internal Financial Statements (FS)'. The dates entered are 09/30/2017, 09/30/2018, and 03/31/2019. A green oval highlights these three date entries. To the right of the form is a 'Manage Funder Access' sidebar with a progress bar at 25% and a list of sections: 'Agency Info', 'Accreditation Renewal', 'Summary of Financial Data', and 'Submit', each with a status icon.

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

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## Pathway to Excellence (P2E) Online Form

## P2E: Nonprofits First's Online Self-Assessment Tool

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1. Agency Info
2. Accreditation Renewal Information
  - a) Audited Financial Statements
  - b) Single Audit (if applicable)
  - c) Management Letter
  - d) IRS Form 990
  - e) IRS Form 990T (if applicable)
  - f) Internal Financial Statements
  - g) Cash Flow Projection
  - h) Funder Audit Report (if applicable)
  - i) Anticipated Changes
  - j) Organizational Chart
  - k) Changes to other organizational documents
3. Summary of Financial Data

## 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

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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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Nonprofits First

TEST EXCELLENCE

Self Assessment

Self Assessment | Manage Funder Access

Home / Self Assessment / Dashboard

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 **Alert** 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.
- Test in Use 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 | 01/13/17      |

## Intro Page – Manage Funder Access (CEO only)

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The screenshot shows the NonprofitsFirst Self Assessment dashboard. At the top right, there is a 'TEST EXCELLENCE' button. Below the header, the page is titled 'Self Assessment' and 'Self Assessment'. A 'Manage Funder Access' link is circled in green. Below this, there is a welcome message and a 'Complete Assessment' button. At the bottom, there is a table of 'Completed Assessments - 1 Item'.

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

## Manage Funder Access (CEO only)

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| Self Assessment                                  | Manage Funder Access |
|--|----------------------|
| Available Funders - 3 Items                      |                      |
| 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                   |

# Manage Funder Access (CEO only)

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Self Assessment MANAGE FUNDER ACCESS

Children's Services Council of Palm Beach County No

| 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 |

# Manage Funder Access (CEO only)

30

Self Assessment

Available Funders - 3 Items

| Funder   | Has Access?                          |
|--|--------------------------------------|
| Children's Services Council of Palm Beach County | <input checked="" type="radio"/> Yes |
| Palm Beach County FAA - Funder Review            | <input type="radio"/> No             |
| United Way of Palm Beach County - Funder Review  | <input type="radio"/> No             |

# Manage Funder Access (CEO only)

31

| 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 filing 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.
- Test is live to either a hyperlink to more information or to a policy template.
- To add, edit or delete account users, contact accreditation@nonprofitsfirst.org or call 561-234-7435.

[Complete Assessment](#)

| Form                                    | Status    | Last Activity |
|---|-----------|---------------|
| Accreditation Assessment Form 2017 2018 | Submitted | 02/3/17       |



# 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 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](mailto:accreditation@nonprofitsfirst.org) or call 561-214-7435.

[Complete Assessment](#)

Completed Assessments - 1 Item

| Form                                    | Status    | Last Activity |
|---|-----------|---------------|
| Accreditation Assessment Form 2017-2018 | Submitted | 02/13/17      |

# Intro Page – Click to Get Started

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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 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](mailto:accreditation@nonprofitsfirst.org) or call 561-214-7435.

[Complete Assessment](#)

Completed Assessments - 1 Item

| Form                                    | Status    | Last Activity |
|---|-----------|---------------|
| Accreditation Assessment Form 2017-2018 | Submitted | 02/13/17      |

# Organization Info section

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AGENCY TEST EXCELLENCE 2016 V2

72% (76/105)

Organization Info

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

# Organization Info section

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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

Children and Families

| Funders | Name | Program | Amount |
|---------|------|---------|--------|
|         | UJW  | X       | 100    |

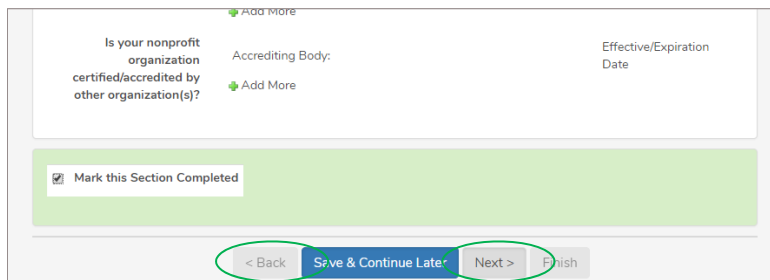
Is your nonprofit organization certified/accredited by other organization(s)?

Mark this Section Completed

Save & Continue Later

# Navigation buttons

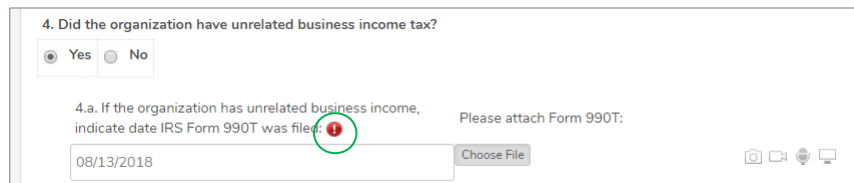
37



A screenshot of a web form interface. At the top, there is a blue header bar with the number '37' on the left. Below the header, the form contains several sections. The first section has a title 'Is your nonprofit organization certified/accrued by other organization(s)?' and a sub-label 'Accrediting Body:'. To the right of this section is a label 'Effective/Expiration Date'. There are two green 'Add More' buttons with downward arrows. Below this section is a green bar with a checkbox labeled 'Mark this Section Completed'. At the bottom of the form, there are four navigation buttons: '< Back', 'Save & Continue Later', 'Next >', and 'Finish'. The 'Save & Continue Later' and 'Next >' buttons are circled in green.

# Icons

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A screenshot of a web form interface. The form contains a question: '4. Did the organization have unrelated business income tax?' with radio buttons for 'Yes' and 'No'. Below this is a sub-question: '4.a. If the organization has unrelated business income, indicate date IRS Form 990T was filed:'. To the right of this sub-question is the text 'Please attach Form 990T:'. There is a text input field containing '08/13/2018' and a 'Choose File' button. A red error icon (a red circle with an exclamation mark) is positioned above the date input field. To the right of the 'Choose File' button are three small icons: a camera, a microphone, and a screen.


## Information Shared with Funders

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- Non-compliance with Funder Alerts
- Quarterly Reports
  - On-time P2E submission
  - Accreditation Complete
  - Accreditation Suspension/Revocation
  - At Risk of not being Accredited





## Blue text

40

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


Yes  No

3.a. Please [attach the organization's most recent Form 990\\*](#):  
([more info on filing requirements](#))

# Hints

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

To expedite the review process, please ensure the copy attached is signed and dated.



3.a. Please attach the organization's most recent Form 990\*:  
(more info on filing requirements)

Choose File



# Source documentation

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8. Was the organization subject to Federal, State or County "Single Audit" requirements?

Yes  No

If yes, please attach:

Choose File



8.a. If yes, 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).

# Side bar

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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) |
|------------------|-------------------|--|
| 12/24/2018       | 01/13/2019        | 01/21/2019                                 |

Mark this Section Completed

< Back Save & Continue Later Next > Finish

25% Complete

- Organization Info ✓
- Accreditation Renewal ✗
- Summary of Financial Data ✨
- Submit ✗

# \*Sidebar Details

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25% Complete

- Organization Info ✓
- Accreditation Renewal ✗
- Summary of Financial Data ✨
- Submit ✗

PROGRESS BAR

MODULE COMPLETE

MODULE INCOMPLETE

CURRENTLY IN PROGRESS

45

## Completing a Section

## Click *Mark this Section Completed*

46

The screenshot shows a form with the following elements:

- Top right: [Add More](#)
- Text: "Is your nonprofit organization certified/accredited by other organization(s)?"
- Text: "Accrediting Body:"
- Text: "Effective/Expiration Date"
- Text: [Add More](#)
- Form area:  Mark this Section Completed (highlighted with a green oval)
- Bottom navigation: [< Back](#), [Save & Continue Later](#), [Next >](#), [Finish](#)

## Click Save & Continue Later

47

The screenshot shows a form with the following elements:

- Header: **Is your nonprofit organization certified/accredited by other organization(s)?**
- Buttons: **Add More** (green), **Accrediting Body:** **Add More** (green), **Effective/Expiration Date**
- Form Field:  **Mark this Section Completed** (green background)
- Navigation: **< Back**, **Save & Continue Later** (circled in blue), **Next >**, **Finish**

## If the Section is Incomplete...

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The screenshot shows a form titled **ACCREDITATION RENEWAL** with the following elements:

- Header: **ACCREDITATION RENEWAL**
- Message: **Question is required** (red box)
- Question: **1. What is the organization's most recently ended fiscal year end?**
- Form Field:
- Message: **We found some items that need addressing** (red box with warning icon and close button)



## Incomplete Details

49

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

Please complete or correct the form and submit again.

## Incomplete Cells Highlighted

50

ACCREDITATION RENEWAL

Question is required

1. What is the organization's most recently ended fiscal year end?

## De-select *Mark this Section Completed*

51

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

Please complete or correct the form and submit again.

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

## Return when ready

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Self Assessment

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

## Reviewing your Progress

### Click *Review*

AGENCY: TEST EXCELLENCE 2016 V2

Input No **30** **Review** Printable (blank) Form

ACCREDITATION RENEWAL

1. What is the organization's most recently ended fiscal year end?

Please attach most recent audit:

Choose File

# Review report

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The screenshot shows a web interface for a review report. At the top, it says 'AGENCY: TEST EXCELLENCE 2016 V2'. Below this are several tabs: 'Detail' (selected), 'Agency Response: No [red icon]', 'Unmet Standards', 'History [red icon]', and 'New Activity'. The main content area is divided into two columns. The left column contains submission details: 'Submitted: Test Excellence (testexcellence@nonprofitsfirst.org)', 'Status: Started / Started 1/2/19 12:22 PM', and 'Completed: - submission\_4698 - 1079'. The right column has sections for 'MILESTONES' and 'FILES'. Under 'FILES', there is a file named 'Test.Docx'. Below the submission details is a section for 'ORGANIZATION INFO' with 'ORGANIZATION DETAILS' showing 'Organization Name: Test Organization'.

# Files

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This screenshot is identical to the one above, showing the same review report interface. The only difference is that the 'FILES' section in the right-hand column is circled in red, highlighting the file 'Test.Docx'.

## Ready to Submit

## Final Page

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 ("Clean") 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

Nongprofits 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 ("Clean") 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.

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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

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 Manage Funder Access

[Submit Assessment](#)

100% 100% Complete

Organization Info

Accreditation Renewal

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## Verification Process

## Fiscal Review

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- Nonprofits First will review P2E Submission
  - Examine responses and documentation
  - Troubleshoot Funder Alerts
  - Establish timeline for completion of documentation, as needed
  
- Presentation to Accreditation Review Council
  - Follow-up, as needed
    - If 990 completed after form submission, approval will be held until copy received

## Final Determination

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

## Milestones and Deadlines

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| Milestone   | If your Fiscal Year End is:    |                      |                      |                      |                      |
|---|--------------------------------|----------------------|----------------------|----------------------|----------------------|
|   | May 31                         | June 30              | August 31            | September 30         | December 31          |
|   | the deadline is no later than: |                      |                      |                      |                      |
| Payment Remitted  |                                |                      |                      |                      |                      |
| Initial Paperwork Complete including:<br>Completed User Authorization Form<br>Signed Agency Agreement | February 15,<br>2019           | February 15,<br>2019 | February 15,<br>2019 | February 15,<br>2019 | February 15,<br>2019 |
| Online Submission of P2E  | March 29                       | March 29             | April 26             | May 31               | August 30            |
| Completion of the Verification Process  | July 31                        | July 31              | August 30            | September 27         | November 30          |
| Final Accreditation Status Determined   | December 13,<br>2019           | December 13,<br>2019 | December 13,<br>2019 | December 13,<br>2019 | December 13,<br>2019 |



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## Questions?

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## Thank You!

Aдриене Tynes  
atynes@nonprofitsfirst.org  
561-214-7438