

National Standards for U.S. Community Foundations

RECONFIRMATION PROCESS AT A GLANCE

Five years after your organization is confirmed in compliance with National Standards, you are required to complete the following process of reconfirmation to maintain your compliance status. To be reconfirmed in compliance with National Standards, you must verify that the evidence of compliance you supplied in support of your initial confirmation remains accurate. In addition, you must supply new information where realities at your community foundation have changed and where National Standards have evolved. Here, each step of the process is described simply to serve as an at-a-glance reference. Find the full process with links to helpful resources at www.cfstandards.org

STEPS TOWARD RECONFIRMATION

- 1. Receive your reconfirmation submission date.** The Community Foundations National Standards Board will notify you of this date based on your original confirmation.
- 2. Send your statement of agreement.** Submit the Statement of Agreement signed by your president/CEO and board chair, along with deposit.
- 3. Review your past compliance evidence.** Gather policies and paperwork you submitted for confirmation to check whether they're still valid or need to be updated and resubmitted.
- 4. Review compliance tabs.** Scan 35 tabs on the National Standards website to understand what you're required to submit. Watch for R and P symbols, which indicate new, baseline and Pension Protection Act requirements.
- 5. Print cover sheets.** Download template cover sheets and use them to describe the documentation you submit.
- 6. Prepare materials for submission.** Gather required documentation, including those that evidence any material changes to your organization since your compliance was confirmed.
- 7. Build your new reconfirmation record binder.** Create a narrative introduction. Organize materials under cover sheets describing the contents. Make three complete copies.
- 8. Approve a board resolution.** Testify to the validity of new evidence submitted and any that was submitted previously and remains valid from your initial confirmation.
- 9. Submit your reconfirmation package.** Pack carefully and send to Diane Miller, National Standards Manager, Community Foundations National Standards Board, Council on Foundations, 2121 Crystal Drive, Suite 700, Arlington, VA 22202 (703-879-0600).
- 10. Receive acknowledgement.** The National Standards board will notify you within 10 business days of the arrival of your package.
- 11. Await the pre-screening process.** The National Standards Board will pre-screen materials for completeness and verify continued Section 170(b)(1)(a)(vi) classification by the IRS.
- 12. Await the review process.** Using a consistent, rigorous framework, peer compliance reviewers will assess the policies and procedures documented in your record binder and may contact you for clarification.
- 13. Receive notice of the decision.** Upon reconfirmation, you'll receive notice in writing, including details about the benefits of compliance.
- 14. Uphold the National Standards and reconfirm again.** Your compliance is valid for five more years. During this time, keep your record binder up to date. After five years is up, begin the reconfirmation process again.