



National Standards Teleconference

November 18, 2014

Participant list attached

Community foundation accreditation compliance dates attached

Topic	Discussion
Lara Kalwinski open teleconference 9:00 am	
What are National Standards?	National Standards is an accreditation program for community foundations that promotes operational effectiveness to foster excellence in community philanthropy. Provides confidence in your operation, so that necessary risk can be taken to solve complex social problems.
Who runs National Standards?	The Community Foundation National Standards Board (CFNSB) carries out and advances the National Standards for U.S. Community Foundations™ accreditation process by ensuring the integrity of the process and building the value of confirmation of compliance for the community foundation field and greater community.
Do you have to be a COF member to be National Standards accreditation	No. You can be National Standards accredited without being a Council on Foundations member.
History of National Standards	Slide 5 of PowerPoint Presentation
Why is the program valuable?	<p>Preparing and completing the submission provides a roadmap for establishing and implementing legal, ethical, and effective practices that withstand the scrutiny of donors, government and media.</p> <ul style="list-style-type: none"> • IRS Audit • Opinion to the Editor • Legislative and Regulatory Scrutiny

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Accreditations benefits	<ul style="list-style-type: none"> • Training for your staff and board through National Standards guidance on the website and ongoing webinars and trainings • Legal guidance from attorneys including sample policies and answers to your foundation’s legal questions related to accreditation. • Communications toolkit for highlighting the value of accreditation to your community. • Displaying the National Standards logo that symbolizes organizational excellence on your communications materials and on Guidestar.
Recognition from policymakers & regulators	<ul style="list-style-type: none"> • Legislators and regulators at the local, state, and federal level recognize National Standards as a way to evaluate community foundations. • Iowa, Kentucky, and Maryland, already recognize National Standards with tax credit legislation connected to donations to community foundations with accreditation. Several other states are also working on passing legislation. • California law permits accredited community foundations to be eligible managers of land trust endowments. <p>Accredited community foundations receive bonus points when applying for the HUD Secretary’s Award for Public-Private Partnerships</p>
Revised National Standards	<ul style="list-style-type: none"> • From 41 downsized to 26 National Standards • Easy Updates <ul style="list-style-type: none"> ○ Online ○ Annual ○ Only update what’s changed ○ Respond to changes in law <p>The new process considers three types of users:</p> <ol style="list-style-type: none"> 1. Applicants: Those completing the Certification Application 2. Reviewers: Those reviewing the submitted Certification Applications 3. Administrators: Those monitoring application submission, payment, review and status
What does the new application consist of?	<ol style="list-style-type: none"> 1. Signup/Login Page – you can sign up and save a draft and return to continue completing your application 2. Instructions 3. Accreditation Registration

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	<ol style="list-style-type: none"> 4. Legal required upload fields 5. National Standards – one page per standard 6. Data Collection 7. Review 8. Submit 9. Request for Payment is issued by email
What reviews are performed?	<p>Review Cycle</p> <ol style="list-style-type: none"> 1. Legal Review 2. Peer Review 3. Director Review 4. Applicant review of Final Comments 5. Applicant Response <p>This cycle can occur 3 times. If the applicant goes through the 3rd cycle with some comments still outstanding, the National Standards director will confer with the applicant in order to clarify what is still outstanding.</p>
Once approved, what happens?	<ol style="list-style-type: none"> 1. Applicant receives email confirmation that their application is approved 2. Applicant receives link to License Agreement 3. Application is moved to Reconfirmation 4. Applicant prepared what has changed in the last year 5. Applicant submits what has changed no later than 90 days prior to their accreditation end date
Mark your Calendars	January 2015 new online application process will go live. www.cfstandards.org
www.cfstandards.org	<p>There will only be one log-in per community foundation to ensure that are not duplicate changes being made at the same time. Only one set of changes would be saved.</p> <p>All information will be stored online. Annually changes and updates will need to be submitted. Application can be saved during process. Can be saved as a PDF. Application is editable until final “submit” button is pressed.</p>
Cost of National Standards	<p>Initial application will cost \$1250.00</p> <p>After initial payment price, each annual cost will be \$1000.00</p>

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	Payment is due when application is “submitted” Currently you can still pay by check. Online payments like Paypal or authorize.net are being looked into.
Q&A	Lara will schedule supportive teleconferences to answer future questions regarding online submission or legal questions.
When should CF’s begin reaccreditation application?	If community foundation accreditation expires in 2016, CF should attempt to complete submission by January 2016. Recommended to begin six months before accreditation expiration.
Will there be any online training for the new accreditation system?	All foundations up for re-accreditation in the beta year will get a temporary extension period. At this time, December 1, 2014 3pm is the first training call planned.
Will all previous accreditation information be online?	No. When you log in for the first time, you will have to upload all your information. But from that point forward you will only have to complete updates.
Will National Standards be issuing a timeline that CF’s can use as a guideline?	Lara will be sending out emails reminders through the networking team. Once you have an online profile you will also get automated emails.
Is it okay to begin uploading information as soon as possible - ahead of reaccreditation period?	Absolutely! You can begin uploading information as soon as the website goes live in January 2015. You would save this information as “draft”.
If we have subsidiary organization organized as supporting organizations, are there activities consolidated within this new version of National Standards, or do they have to go through the process of applying for National Standards on their own?	“Right now, supporting organizations cannot get accreditation through their community foundation, nor can they apply for accreditation as independents. Because of the nature of the supporting and supported organization relationship, we would have to do a combined application. The issue that we have with the combined application when there are multiple supporting organizations is that it would require a kind of review that would probably need a peer and legal review onsite to safeguard the integrity of the program. Those are the hurdles we are facing and are the hurdles we are aggressively trying to overcome.”
Lara Kalwinski Contact information	Direct Phone Number: (703)879-0672 Email: submissions@cfstandards.org
Adjourned 10:30am	

Minutes prepared by Sirena Waldman, Executive Assistant
The League of California Community Foundations

National Standards Recertification Dates

Community Foundation	Current Compliance Start date	Date of next Submission	Recommended Date to begin Process
California Community Foundation	10/12/2012	10/11/2017	4/11/2017
East Bay Community Foundation	9/30/2011	9/29/2016	3/29/2016
Fresno Regional Foundation	7/27/2012	7/26/2017	1/26/2017
Humboldt Area Foundation	1/16/2009	1/15/2014	In Process
Kern Community Foundation	7/27/2012	7/26/2017	1/26/2017
The Community Foundation of Mendocino	3/11/2011	3/10/2016	9/10/2015
Community Foundation for Monterey County	3/9/2011	3/8/2016	9/8/2015
Napa Valley Community Foundation	11/4/2011	11/3/2016	5/3/2016
Orange County Community Foundation	4/29/2011	4/28/2016	10/28/2015
Pasadena Community Foundation	2/18/2011	2/17/2016	8/17/2015
Placer Community Foundation	3/11/2014	3/10/2019	9/10/2018
The Community Foundation Serving the Counties of Riverside and San Bernardino	5/16/2011	5/15/2016	11/15/2015
Sacramento Region Community Foundation	8/12/2011	8/11/2016	2/11/2016
Community Foundation for San Benito County	5/1/2012	4/30/2017	11/30/2016
The San Diego Foundation	2/16/2012	2/15/2017	8/15/2016
The San Francisco Foundation	2/11/2011	2/10/2016	8/10/2015
The Community Foundation San Luis Obispo County	7/15/2011	7/14/2016	1/14/2016
Santa Barbara Foundation	12/27/2011	12/26/2016	6/26/2016

Community Foundation	Current Compliance Start date	Date of next Submission	Recommended Date to begin Process
Community Foundation Santa Cruz County	12/6/2011	12/5/2016	6/5/2016
Shasta Regional Community Foundation	5/26/2011	5/25/2016	11/25/2015
Silicon Valley Community Foundation	4/12/2011	4/11/2016	10/11/2015
Solano Community Foundation	8/13/2012	8/12/2017	2/12/2017
Community Foundation Sonoma County	12/21/2011	12/20/2016	6/20/2016
Stanislaus Community Foundation	10/16/2014	10/15/2014	4/15/2019
Tahoe Truckee Community Foundation	6/1/2011	5/31/2016	1/1/2016
Ventura County Community Foundation	12/21/2011	12/20/2016	6/20/2016
Community Foundation of the Verdugos	1/24/2013	1/23/2018	7/23/2017

November 18, 2014 National Standards Teleconference Participants

Participant	Community Foundation	Title
Megan Barber Allende	The Community Foundation of Mendocino County	Director of Grants & Programs
Jennifer DeVoll	Pasadena Community Foundation	CEO
Patricia Holley	The Community Foundation San Luis Obispo County	Donor Services & Communications Associate
Linda Cutler	Sacramento Regional Community Foundation	CEO
Amanda Hutchings Jennifer Powell	Shasta Regional Community Foundation	Program Officer Development & Program Officer
Marian Kaanon	Stanislaus Community Foundation	CEO
Jeff Pickering	Kern Community Foundation	CEO
Danette M. Rinehart	Kern Community Foundation	Manager of Finance and Administration
Joanne Udell	Orange County Community Foundation	HR & Operations Manager
Lara Kalwinski	Council on Foundations	Policy Associate and Director of National Standards
Will Heaton	Council on Foundations	Vice President of Network
Patricia Jones	The League of California Community Foundations	Lead Consultant
Sirena Waldman	The League of California Community Foundations	Executive Assistant