

# DSAIA Accreditation Checklist

Organization Information	Where to find resources	Accreditation Level		
		Basic	Silver	Gold
501c3 Determination Letter	General Operations & Administration	✓		
Mission Statement (you'll be asked to submit your mission statement)	Bylaws, Policies & Procedures	✓		
Bylaws (copy for upload)	Bylaws, Policies & Procedures	✓		
conform to state statutes	Bylaws, Policies & Procedures	✓		
selection and tenure of governing board	Bylaws, Policies & Procedures	✓		
board requirements for quorum	Bylaws, Policies & Procedures	✓		
consecutive terms and term limits	Bylaws, Policies & Procedures	✓		
at least 5 board members	Bylaws, Policies & Procedures	✓		
process for handling urgent business between meetings	Bylaws, Policies & Procedures	✓		
board meeting frequency	Bylaws, Policies & Procedures	✓		
<i>Refer to this list of webinars for additional resources:</i>	<i>Board Development 101</i>			

Committees	Where to find resources	Accreditation Level		
		Basic	Silver	Gold
Committee structure	Board Development & Resources	✓		
Committee goals and objectives	Board Development & Resources		✓	
Committee charters	Board Development & Resources			✓
<i>Refer to this list of webinars for additional resources:</i>	<i>Board Development 101</i>			
	<i>Shared Responsibility &amp; Accountability</i>			

Organization Minutes	Where to find resources	Accreditation Level		
		Basic	Silver	Gold
Approval of mission statement annually	Board Development & Resources	✓		
Approval of budget	General Operations & Administration	✓		
Review of bylaws annually	Bylaws, Policies & Procedures	✓		
Written agenda and materials sent out in advance of meeting	Board Development & Resources	✓		
Review of need for general liability coverage upon renewal of policy		✓		
Review need for Board of Directors liability coverage upon renewal of		✓		
Programs and activities reviewed at least every 3 years		✓		
Approval of 990			✓	
Programs and activities reviewed at least every 2 years			✓	
Review of ED's performance annually	Employee Materials		✓	
Review overall compensation structure of organization at least every 3 years	Employee Materials		✓	
Review website annually to continuously update			✓	
Programs and activities reviewed annually				✓
Review of financial plan	General Operations & Administration			✓
<i>Refer to this list of webinars for additional resources:</i>	<i>Shared Responsibility &amp; Accountability</i>			
	<i>Are You Covered (Part 1 &amp; 2)</i>			
	<i>Building a More Productive Board</i>			
	<i>Budgeting</i>			
Please be prepared to upload a copy of one meeting's minutes.				

Policies/Procedures/Practices	Where to find resources	Basic	Silver	Gold
-------------------------------	-------------------------	-------	--------	------

<b>Board Policies/Procedures</b>				
Board member attendance & noncompliance policy	Board Development & Resources		✓	
Board periodic evaluations	Board Development & Resources			✓
Formal nomination & approval process	Board Development & Resources			✓
Board skills gap analysis	Board Development & Resources			✓
Board training program	Board Development & Resources			✓
Organized board development program/process	Board Development & Resources			✓
Board self-assessment annually	Board Development & Resources			✓
Conflict of Interest Policy	Bylaws, Policies & Procedures		✓	
Confidentiality Policy	Bylaws, Policies & Procedures		✓	
Disclosure Policy signed annually by board members	Bylaws, Policies & Procedures		✓	
Anti-harassment Policy	Bylaws, Policies & Procedures			✓
Grievance Policy	Bylaws, Policies & Procedures			✓
Whistleblower Policy	Bylaws, Policies & Procedures			✓
Document Retention Policy	Bylaws, Policies & Procedures			✓
Non-Discrimination Policy	Bylaws, Policies & Procedures			✓
Technology Plan/Policy (electronic data backup and storage system in place)	Bylaws, Policies & Procedures			✓
Acceptance of Gifts Policy	Bylaws, Policies & Procedures			✓
Includes limits on individuals or entities from which the organization will accept gifts	Board Development & Resources			✓
Includes the purpose for which donations will be accepted	Board Development & Resources			✓
Includes whether to accept unusual or unexpected gifts	Board Development & Resources			✓
Includes disclosure statement	Board Development & Resources			✓
<b>Public Affairs Practices</b>				
<i>The accreditation program does not include a formal policy in writing</i>				
Assure positions of organization are nonpartisan			✓	
Education info provided to media or distributed is accurate			✓	
Provide public education and policy advocacy in community				✓
Assign a point person for public policy related questions/issues				✓
Takes a position on specific issues				✓
<i>Refer to this list of webinars for additional resources:</i>				
	<i>Board Development Series (6 webinars total)</i>			
	<i>Building a More Productive Board</i>			
	<i>How To Lose a Board Member</i>			
	<i>How To Read Financial Reports (bd member training)</i>			
	<i>Growing Grassroots Advocacy at the State Level</i>			
	<i>How You Can Help Pass a DS Prenatal Testing Info Law In Your State</i>			
<b>Financial Statements &amp; Policies</b>	<b>Where to find resources</b>		<b>Basic</b>	<b>Silver</b> <b>Gold</b>
990 Filing (does your org file a version of the 990?)			✓	
<b>Financial Policies</b>				
Internal Control Procedures	Bylaws, Policies & Procedures			✓
Investment Policy	Bylaws, Policies & Procedures			✓
Purchasing Practices	Bylaws, Policies & Procedures			✓
Unrestricted current net assets	Bylaws, Policies & Procedures			✓
Reserve Fund Policy	Bylaws, Policies & Procedures			✓
<b>Financial Statements</b>				

End of year financial statement (budget v. actual)		✓	
At least 60% of resources spent on programs			✓
Financial statements prepared at least quarterly (budget v. actual)			✓
Financial statements include Profit & Loss for each program and complete balance sheet			✓
Savings reserve of 3-6 months	Bylaws, Policies & Procedures		✓
Savings reserve of at least one year	Bylaws, Policies & Procedures		✓
At least 75% of resources spent on programs			✓
Cash flow projections			✓
<i>Refer to this list of webinars for additional resources:</i>			
	<i>How To Read Financial Reports</i>		
	<i>Internal Controls</i>		

<b>Evaluation of Programs/Activities</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
Includes qualitative & quantitative methods		✓		
Evaluations used to strengthen organization/make programmatic changes		✓		
Employ a measurement tool for participation satisfaction	Evaluation Tools & Surveys	✓		
Evaluations include input from program participants	Evaluation Tools & Surveys		✓	
Programs/activities are evaluated in relation to mission			✓	
Evaluations address program efficiency and effectiveness				✓
Procedures are cost-effective				✓

<b>Marketing, Communication &amp; Internet Presence</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
Has a Facebook page/group		✓		
Has a marketing brochure (upload a digital copy of brochure)	Awareness & Marketing	✓		
Produces a newsletter (print/online)	Communications	✓		
Contact info is readily available on all marketing materials		✓		
Accurate and truthful solicitation		✓		
Has a website			✓	
Contact info included prominently on website			✓	
Noted online what info is being collected upon sign up			✓	
Noted online how info will be used			✓	
Information online on how to contact the organization to review info			✓	
Noted online what security is in place to protect submitted information			✓	
Noted online how charity benefits from sale of products or donations (actual/estimate of purchase price that will benefit charity, dates of campaign, max or guaranteed)			✓	
<b>Data Management</b>				
Have a database/list of membership	Communications	✓		

Have a segregated database (not a listing) of membership/volunteers/donors	Communications	✓
Have a segregated database (not a listing) of community stakeholders	Communications	✓
<i>Refer to this list of webinars for additional resources:</i>		
	<i>Copy, Cut &amp; Paste</i>	
	<i>E-Newsletters</i>	
	<i>Facebook Content Strategy</i>	
	<i>Facebook Q&amp;A</i>	
	<i>Marketing Your Walk with Social Media</i>	
	<i>Social Media 101</i>	
	<i>Online Fundraising Best Practices</i>	
	<i>How To Captivate &amp; Engage Your Constituents with Your Website</i>	
	<i>The Like-Able Organization</i>	
	<i>Technology Series - Databases</i>	

<b>Organizational Structure</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
Has an "organizational chart" which shows the hierarchy of authority within the organization	General Operations & Administration	✓		
Has clearly defined roles and responsibilities of board/staff/volunteer structure	General Operations & Administration	✓		
Has clearly defined authority of board/staff/volunteers	General Operations & Administration		✓	
Has job descriptions for all board/staff/volunteers	General Operations & Administration		✓	
<b>Organizational Assessment</b>				
Assesses at least every two years - the organization's performance and effectiveness and of determining future actions required to achieve its mission				✓
Evaluation systems are in place to measure progress in achieving results (includes outcome evaluation, documenting how the organization is making a difference, plus formative evaluation, identifying ways the organization				✓
<i>Refer to this list of webinars for additional resources:</i>				
	<i>Board Development 101</i>			
	<i>The Role of Your Board</i>			
	<i>Shared Responsibility &amp; Accountability</i>			
	<i>Volunteer Manager's Toolkit</i>			

<b>Staff</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
Perform annual performance evaluations	Employee Materials	✓		
Include staff self-assessment	Employee Materials	✓		
Procedure in place on the hiring	Employee Materials	✓		
Procedure in place on how to set compensation	Employee Materials		✓	
Procedure in place on how to evaluate the ED	Employee Materials		✓	
<i>Refer to this list of webinars for additional resources:</i>				
	<i>Adding Top Level Staff</i>			
	<i>How To Lose an Executive Director</i>			
This section is only for groups who have staff and is optional.				

<b>Strategic Planning</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
Has developed a strategic plan	Board Development & Resources		✓	
Strategic Plan includes both short term and long term planning for the organization	Board Development & Resources		✓	
Strategic Plan defines specific goals and objectives related to the mission	Board Development & Resources		✓	
Strategic Plan includes tools/procedures to evaluate the organization's programs/initiatives included in the plan aimed toward achieving the mission	Board Development & Resources		✓	
<i>Refer to this list of webinars for additional resources:</i>	<i>Shared Responsibility &amp; Accountability</i>			
	<i>Strategic Planning with Your Board</i>			
	<i>Creating &amp; Living Into Your Strategic Plan</i>			

<b>Fund Development</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
Have at least one source of fundraising/development in place	Events & Fundraising	✓		
Have a dependable funding plan in place	Events & Fundraising		✓	
Funding plan includes a diverse funding base	Events & Fundraising			✓
If receiving grant funding, has a grant tracking/reporting plan in place	Grantwriting			✓
<i>Refer to this list of webinars for additional resources:</i>	<i>Fundraising with Your Board</i>			
	<i>Creating Fundraising</i>			
	<i>Donor Development Series (3 webinars)</i>			
	<i>Setting Your Fundraising Goals</i>			
	<i>Grantwriting Boot Camp Series (6 webinars)</i>			
	<i>Improving Your Fundraiser</i>			
	<i>Online Fundraising Best Practices</i>			
	<i>What Your Sponsors Really Want</i>			
	<i>Increasing Your Silent Auction Revenue</i>			
	<i>Run For Money: Organizing a 5K</i>			
	<i>Build a Better Golf Tournament</i>			

<b>Annual Report</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
Mission statement	Communications		✓	
Program activities	Communications		✓	
Summary of statement of financial position	Communications		✓	
Names of Board of Directors	Communications		✓	
Names of management staff	Communications		✓	
Recognition of donors	Communications		✓	
<i>Refer to this list of webinars for additional resources:</i>	<i>How To Write an Annual Report</i>			

<b>Programs</b>	<b>Where to find resources</b>	<b>Basic</b>	<b>Silver</b>	<b>Gold</b>
<i>Note the amt of pgms for each level, as well as the 3 programs needed for Basic Accreditation</i>		4	8	12
New Parent Outreach, Support & Information	New & Expectant Parent Outreach	✓		
Down syndrome information resources	Awareness & Marketing	✓		
Prenatal Outreach & Support	New & Expectant Parent Outreach	✓		
Parent Education Program	Parent & Family Support Materials			
Organized support program for mothers	Programs			
Organized support program for fathers	Programs			

Organized group for teens/adults	Teen & Adult Materials
Medical Outreach Program	Medical Outreach
Scholarship Program (i.e., for conferences, conventions or	Conferences & Workshops
Parent/Professional Workshops (one speaker or 1/2 day events)	Conferences & Workshops
Parent/Professional Conference (minimum of full day of workshops/programming)	Conferences & Workshops
School-related inclusion & awareness programming (peer presentations, etc.)	Education & School Resources
Sibling support & information	Parent & Family Support Materials
Direct services (therapy)	Programs
Direct services (education programs)	Education & School Resources
Other - there will be an opportunity to offer add'l programs that might not fit under the above categories	
<i>Refer to this list of webinars for additional resources:</i>	<i>A Healthier Life: Wellness &amp; Fitness Program</i>
	<i>Back to School Workshop</i>
	<i>Creating Successful Support Programs for Grandparents</i>
	<i>Developing a Successful Annual Conference</i>
	<i>Diversity Outreach</i>
	<i>Heartstrings</i>
	<i>iCan Bike</i>
	<i>Medical Outreach Program</i>
	<i>New Family Support</i>
	<i>Next Chapter Book Club</i>
	<i>Parents First Call Program</i>
	<i>Peer Presentations</i>
	<i>Sibshops</i>
	<i>Six in Sixty Series</i>
	<i>The Learning Program</i>
	<i>Why D.A.D.S.</i>