

Steps to Accreditation and Standards Basics Approval Charting a Plan of Action

Estimating the Time It Will Take and Directions for Submission

Pre-Accreditation Process:

- A. Organizations that have not already attended a Standards for Excellence Training need to access this training. See [Standards for Excellence Training Description](#). This ensures appropriate understanding of the content of the criteria and the procedures used in the Accreditation or Basics process. Organizations can attend the Standards for Excellence Implementation Workshop if offered in your region (pricing is specific to regions based on funder support). Attendees should include key staff and a board member if possible. The second training option is to attend the Standards for Excellence Guiding Principle Webinar series offered annually. If neither option is being offered in a timely manner for your organization, it is possible to purchase a set of the pre-recorded Guiding Principle Webinar Series training. Contact tish@pano.org to do that.
- B. Appoint a board member, staff member, volunteer or outside individual to lead your Standards for Excellence effort. This person will head up a “Steering Committee” consisting of staff and board (at least one board member is needed). Experience shows that organizations that appoint a single individual and committee to coordinate the Standards for Excellence process are often in a better position to complete the process in a targeted period of time.
- C. We have created a free webinar entitled “Steps to Accreditation” that will provide expanded details and content on the section below.

Starting the Accreditation Process:

Step 1: Thoroughly review the [Standards for Excellence Ethics and Accountability Code](#).

Step 2 (optional): Complete the [Self-Assessment Checklist](#) with key board and staff members to help identify areas of strength and areas that may need improvement. If you prefer to do this electronically go to <https://sfei.fluidreview.com> and open an account to complete the assessment. See [Online application instructions](#). Pay special attention to policies or procedures that may be in place informally but may require formal board approval. You can also download a hard copy at [Self Assessment Checklist](#)

Step 3: Using the [Project Management Chart](#), make a preliminary list of areas where adjustments are necessary to implement the Standards for Excellence. The Accreditation program requires adherence to *all* of the Standards except where organizations can

demonstrate clearly that a specific Standard does not apply to their situation.

Step 3: Taking your organizational work plan, existing commitments and meeting schedules (board, staff and committees) into consideration, develop a manageable work plan (again see sample [Project Management Chart](#) provided by PANO) to address those areas you have targeted for improvement. Each of these factors as well as the number and complexity of the Standards-related items to address, contribute to the time it will take your organization to implement the Standards and achieve Accreditation.

Note: For some organizations, implementing the Standards for Excellence may take several months; for others, the process may span a few years. The program is designed to strengthen infrastructure, provide better risk management, create more efficiency of operations and of course, ensure a culture of ethics and accountability with the organization. Take the time that is needed to let the program work for your organization.

Step 4: The appointed Standards for Excellence coordinator or committee may delegate responsibility for achieving targeted Standards improvements to appropriate committees, staff, task forces and/or working groups.

Examples: The personnel committee of the board might be charged with reviewing the personnel policies before recommending full board approval or the program committee may gather all the evaluation information and develop and recommend new components where needed to meet the Standards approval.

Step 5: Begin to collect and assemble your application information and accompanying materials, remembering the required documents will be uploaded electronically and attached to the application. *For instances in which you need to upload multiple documents, e.g., board minutes, please create one pdf document that contains all documents. Fluid Review does not accept uploading multiple documents for a single criterion.*

Note: The Standards for Excellence includes an immense resource of sample forms, policies, content, etc. in the Educational Resource Packets. These are free to PANO members. PDF versions are downloadable from PANO's secure member website. Please email PANO staff if you need the word version. PANO members are encouraged to contact Standards staff if you need assistance: 717-236-8584 or email tish@pano.org.

If a particular Standard is not applicable to your organization, please explain why the Standard is not applicable and include an explanation.

If you have any questions regarding your Accreditation Application, contact Tish Mogan at tish@pano.org or 717-236-8584.



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