

Preparing for your Accountability Wizard® Guided Review

Estimated Time Required: 2 hours of prep work & 2 hours for your one-on-one session.

Prior to your One-on-One Session

1) *Create Account – 5 minutes*

Go to <http://bit.ly/SetupNewReview> to create your new account. When creating your account, identify a Primary User for your organization and enter their contact information in the account creation form.

2) *Submit Enrollment Fee & Guided Review Fee– 10 minutes*

The enrollment fee is .02% of your annual operating expenses. You can find this amount on your organization's most recent IRS Form 990, Part I, Line 18, current year column. Prior to our meeting, submit your enrollment fee and the guided review fee (\$250) add-on at <https://smartgivers.org/invoice-payment/>.

TIP: You can calculate your enrollment fee here: <http://bit.ly/CalculateFee>

3) *Upload Documents & Answer Questions – 1 hour 45 minutes*

Once your account is created and payment is received, a Council team member will send you login information. Log in to the Accountability Wizard® and upload the documents you have and answer the questions to the best of your ability.

TIP: Work at your own pace! You can save your work and come back to it as many times as you'd like. Also, don't spend more than 5 minutes on any question. We'll go through all of the questions in more detail during our meeting.

4) *Schedule One-on-One Session*

If you haven't already, schedule your 2-hour, one-on-one session with a Nonprofit Services Team member. Email info@smartgivers.org to schedule.

During your One-on-One Session

5) *Complete One-on-One Session – 2 hours*

During your one-on-one session, we'll go through the Accountability Wizard® review process, question by question. You'll leave the meeting with a detailed list of next steps, or action items as we like to call them, to take back to your organization. Once the action items are complete and approved by the Council's Nonprofit Services Team, you'll be added to [our list](#) of strong and trustworthy Meets Standards® Nonprofits.