

FDP Foundations and Public Charities Task Force

(A Joint Task Force between FDP and NCURA)

September 19, 2002 Meeting Minutes

Activity Since May FDP Meeting:

Investigated COGR Website and Foundation Matrix –

It was being reconfigured a few months back and we were to be notified when it was available on line. - additional follow-up is needed.

Formed an alliance based on similar goals of the National Center for Charitable Statistics of the Center on Nonprofits and Philanthropy – The Urban Institute, Washington DC. Introduced via Rick Schoff – The Foundation Center, New York Office to Wilson C. (Bill) Levis.

Bill is co-author of “Unified Financial Reporting System for Not-for-Profit Organizations – A Comprehensive Guide to Unifying GAAP, IRS Form 990, and Other Financial Reports Using a Unified Chart of Accounts. His efforts directly impacting the Electronic Reporting Standards for the form 990. He was also a main (if not the main) coalition builder that successfully produced the test model: Accounting and Financial Reporting for Not-For-Profit Recipients of Grant Funds in Tennessee. Standardization and implementation of electronic reporting at the State level, a model that is being implemented in many states.

Jay Walton is also representing our Task Force – on the “Quality Reporting Task Force” – Uniform Grant Budgeting and Financial Reporting Standards formed by Bill.

Bill Levis is also meeting with and arranging for a meeting for the Co-Chairs with Dave Tator of National Health Council/National Assembly CFO Group and Mary Ann Hollikan GEO ...Effective Organizations.

Foundation Center reports – avoid polling membership.

Standardized technology – xml etc.

Common grant application and review home page structure

Standardized collection of Demographical Data

** Standardized format for Administrative Review and Approval of the Grantee Institution for all application submissions..