

# Component Accreditation Portal

Visit <https://aia.secure-platform.com/a/solicitations/296/home> to start.

**Welcome Becky Magdaleno**

Note: You have already started a Submission that is not yet complete.

[Click here to review your past Entry\(s\)](#)

[Click here to begin a new Entry](#)

Start a new entry if you have not already begun.

**Welcome Becky Magdaleno**

Ann Dorrough, CAE  
anndorrough@aia.org  
(202) 626 7412

Home > My Submissions > 39104 - Becky Magdaleno

### 2022 Component Accreditation

[MANAGE COLLABORATORS](#)

Submitter Profile → Advocacy → Communications & outreach → Education → Finance & operations → Finance & operations (continued) → Governance → Governance (continued) → Membership → End of submission

**Component Type \***  
(select)

**Component Name \***  
Character count: 0 / 50

**First Name \***  
Becky

**Last Name \***  
Character count: 9 / 50  
Magdaleno

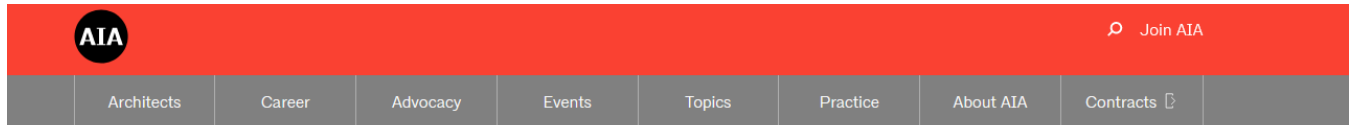
**Phone # \***  
Character count: 10 / 20  
8502227590

**Component Mailing Address \***  
Street Address  
Line 2

Select Local from dropdown.

Fill out your information.

# Component Accreditation Portal



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- My Submissions
  - All (6)
  - Needs Attention (1)
  - Incomplete (3)
  - Complete (3)
  - Expired (0)
  - Archived (6)
- My Profile
- Log Out

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## 2022 Component Accreditation

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[Submitter Profile](#) → [Advocacy](#) → [Communications & outreach](#) → [Education](#) → [Finance & operations](#) → [Finance & operations \(continued\)](#) → [Governance](#) → [Governance \(continued\)](#) → [Membership](#) → [End of submission](#)

### Engage (L) \*

Does the component engage with local government agencies, decision makers, and building officials on issues of importance to the architectural community?

- Yes
- No

### Engage (d)

Provide a PDF summary of these engagement activities, including interactions with local government officials and staff (for example, discussions about regulatory or legislative concerns, invitations to chapter events, and partnerships with local business networks.)

[Browse...](#) No file selected.

[PREV](#) [SAVE](#) [SAVE AND NEXT](#)

Engage - Answer yes. Participation in Legislative Day counts for this.

Here are items you may use to upload. You must create one PDF to upload.

<https://www.dropbox.com/scl/fo/4o4lztqan4flxy7bxiqp1/h?dl=0&rlkey=db3jx3he4mOqskvcryrss579h>

Include anything you have done locally in the PDF you create.

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### Events \*

Does the component post its upcoming events to its website?

- Yes  
 No

### POC (url)

Provide the URL for the upcoming events page on the component's website.

### POC \*

On its website, does the component provide a way that users may reach a point of contact for the component?

- Yes  
 No

### POC (url)

Provide the URL for the webpage where the point of contact information is located.

Events – Answer yes to events being on your website and provide you website address where upcoming events are posted. AIA Florida does post component events on our website at [https://aiafla.org/About-the-AIA\\_Calendar.cfm](https://aiafla.org/About-the-AIA_Calendar.cfm).

POC – Answer yes to point of contact and provide website address where your component's contact information is provided.

# Component Accreditation Portal

## Brand \*

Does the component follow AIA brand guidelines consistently across all the component's electronic and print media?

- Yes  
 No

## Brand URL

Provide the URL for the homepage of the component's website.

## Brand (mag)

If the component publishes a magazine, provide a PDF of the cover.

No file selected.

## Brand (other)

If the component produces brochures or flyers, provide a PDF of a typical item.

No file selected.

## CDocs \*

Does the component provide regular, visible promotion of AIA Contract Documents in the component's electronic and print communications?

- Yes  
 No

## Career \*

Does the component provide regular, visible promotion of the AIA Career Center in the component's electronic and print communications?

- Yes  
 No

Brand – Should be able to answer yes. Your component should be using the red circle logo and not the eagle. Brand guidelines, archetype fonts and component logos are available at <https://www.dropbox.com/scl/fo/h38zo87wjpu7paqblzn6f/h?dl=0&rlkey=hn18obz2v8p88qdh6zdOynank>.

Brand URL – Provide your website homepage to so brand compliance.

Brand (mag) – You do not need to upload anything. AIA Florida will upload our magazine with our accreditation submission.

Brand (other) – Upload any printed materials that show brand compliance. You do not upload *all* of your print material.

CDocs – There should be a link to AIA documents on your website even if your component is not a reseller. AIA ads are available at <https://www.dropbox.com/scl/fo/ra3k29dktey80a52xjjpf/h?dl=0&rlkey=d1lmyl6spaozzwiynwse5lzom>. You may link to <https://aiacontracts.com/#/>.

# Component Accreditation Portal

Career – link to the AIA career center somewhere on your website.

<https://careercenter.aia.org/jobseekers/>.

## **AIAU \***

Does the component provide regular, visible promotion of AIAU in the component's electronic and print communications?

- Yes  
 No

## **Conference \***

Does the component provide regular, visible promotion of the AIA Conference on Architecture in the component's electronic and print communications?

- Yes, year-round  
 Yes, but not year-round  
 No

## **Untitled**

If there is not a year-round link to the conference on the component's website, provide a PDF showing how the most recent conference was promoted on the site.

No file selected.

## **Member Work \***

Does the component recognize and publicize outstanding architecture projects by members?

- Yes  
 No

## **Awards (d)**

If the component offers a design awards program, provide a PDF of the most recent call for entries.

No file selected.

## **Recognition (d)**

If the component does not offer a design awards program, provide a PDF of materials publicizing other forms of recognition of members' work (such as tours, public displays or featured placement in communications).

No file selected.

AIAU – Link to AIAU on you website. <https://aiau.aia.org/>.

There are not AIAU ads from AIA National available right now.

Suggestion: take screenshots of any AIA National promotions on your website and save should this compliance be questioned. AIA Florida has an AIA National page on our website. You may wish to create something similar or link to it at

<https://www.aiafla.org/About-the-AIA-AIA-National.cfm>.

Member Work: Answer yes. You may upload your latest awards call for entries even if it wasn't in 2022. You may also upload AIA Florida's awards call for entries available at <https://www.dropbox.com/scl/fo/npock6oyj5gzfzkzafmrs7/h?dl=0&rlkey=wcx2q3m525I7wI0pyhj8mwa8b>.

# Component Accreditation Portal

## Audience \*

Does the component raise awareness about the value of design and the role of architects using messaging and programs aimed at a public audience?

Yes

No

## Audience (t)

Describe at least one key public awareness activity and the target audience.

## Audience (d) \*

Provide a PDF of a public outreach communication or press release.

No file selected.

You may upload People's Choice information and talk about how your component participated in People's Choice to meet this requirement. People's Choice materials available at

<https://www.dropbox.com/scl/fo/tl20amhqu67mo2cflxnbz/h?dl=0&rlkey=o7u392iawfk6v485luyasbhttp>.

People's Choice counts for this. Here are some items you can use. You do have to compile into one PDF.

<https://www.dropbox.com/scl/fo/tl20amhqu67mo2cflxnbz/h?dl=0&rlkey=o7u392iawfk6v485luyasbhttp>

# Component Accreditation Portal

## 18/12 \*

In 2022, did the component offer at least 18 LU course hours--of which at least 12 are health/safety/welfare (HSW)--on the component's own CES Provider account?

- Yes (AIA will verify; no documentation needed)
- We partnered with another CES Provider to do so.
- No

## Curation \*

In 2022, did the component have some direct involvement in creating, facilitating, or customizing at least 4 hours of content for its members?

- Yes (AIA will verify; no documentation needed.)
- No

## Provider \*

In 2022, did the component submit its own courses and update member transcripts for its own courses on time, in compliance with requirements in the CES Provider Manual?

- Yes (AIA will verify; no documentation needed.)
- No

## EPs \*

Does the component provide career information, mentoring opportunities, and Architect Registration Examination (ARE) preparation support for emerging professionals?

- Yes
- No

Answer as appropriate for your component. The two Advanced Florida Building Code webinars count for the four hours of component-curated content. Forms with continuing education credits provided by AIA Florida within your component are available at <https://www.dropbox.com/scl/fo/4u5vp5rjsh0wkn9o3vitz/h?dl=0&rlkey=km4sj3352hhnqga764wqlb6nc>. Please note, if AIA Florida staff is assisting with your component's accreditation upload, there is not a CE PDF for your component.

EPs - AIA Florida hosted Ask an Architect and an ARE panel. Information to upload is available at <https://www.dropbox.com/scl/fo/xm2t6ohjzli8nlitfp890/h?dl=0&rlkey=jhgevhhou6awxrc4mrxw55ufvy>.

# Component Accreditation Portal

## Tax \*

Does the component file a federal tax return annually? (US components file an IRS 990, 990EZ, or 990N return, depending on their financial status.)

Yes

No

## Tax (d)

Provide a PDF of the component's most recent IRS 990, 990EZ, or 990N return.

No file selected.

## Other tax

If applicable, list any other tax returns that the component files with its state, local, provincial, or territorial governments.

Tax – upload your latest return. If your annual income is under \$50,000, it's just the 990T.

Other tax – It is unlikely that you have any other tax obligation to upload.



# Component Accreditation Portal

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## Insurance \*

Does the component maintain both directors and officers insurance and general liability insurance policies?

- Yes  
 No

## Insurance (d)

Provide a PDF that summarizes the component's directors & officers and general liability coverage.

Documentation may include a certificate of insurance from the insurer or a declarations page (not the entire policy document).

No file selected.

## Insurance2 (d)

Additional space to upload insurance documentation, if needed.

No file selected.

## Continuity \*

Has the component prepared a business continuity plan to be used in case of a disaster or crisis?

- Yes  
 No

## Financials \*

Does the component provide financial reports to the board at least quarterly?

- Yes  
 No

## Financial management \*

Has the component adopted a financial management policy that covers which parties at the component have authority over expenditures, signing checks, payroll (if applicable), contracts, and financial records?

- Yes  
 No

Insurance – Your component should have at least two policies – general liability and directors and officers. Upload the cover sheets to your policies that show the expiration dates.

Continuity – Your component should have a policy in place. If you need to adopt one, a sample to be amended to your needs is available at

<https://www.dropbox.com/scl/fo/da3xz1uu37h2f9f79zcnf/h?dl=0&rlkey=e5h9rji0y64vj4b9hgyahzwc>. This has previously been required for accreditation so there should be one in place.

# Component Accreditation Portal

Example continuity and disaster response plan. You will have to edit to your specific needs:  
<https://www.dropbox.com/scl/fo/da3xz1uu37h2f9f79zcnf/h?dl=0&rlkey=e5h9rji0y64vj4b9hgyahzwcj>.

## Financials \*

Does the component provide financial reports to the board at least quarterly?

- Yes  
 No

## Financials (d)

Provide a PDF of the most recent board agenda or minutes that shows financial reports are being delivered to the board. (Do not send the financial reports themselves.)

No file selected.

## Financial management \*

Has the component adopted a financial management policy that covers which parties at the component have authority over expenditures, signing checks, payroll (if applicable), contracts, and financial records?

- Yes  
 No

## Financial policy

Provide a PDF of your financial management policy(ies).

No file selected.

## Reserves \*

Has the component adopted a financial reserve policy?

- Yes  
 No

## Reserves (d)

Provide a PDF of the component's financial reserve policy.

No file selected.

Financials – Your component board should be receiving financials at least quarterly.  
Upload a board agenda showing financials on the agenda. This is not a new requirement.

Financial Management – NEW

**“Adopt and adhere to a financial management policy that assigns authority to certain staff or leader positions for these financial actions and decisions: approving expenditure of funds, signing checks, approving payroll (if applicable), entering into contracts, and maintaining accurate financial records.”**

Reserves – NEW

**“Adopt and adhere to a financial reserve policy.”**

# Component Accreditation Portal

## Audit or review \*

Has the component adopted a policy on financial audits or volunteer-led financial reviews? (If CPA audits are not performed, a component needs a volunteer committee to examine its financial records annually.)

- Yes  
 No

## Audit or review (d)

Provide a PDF of your policy on audits or volunteer financial reviews, as applicable to you.

No file selected.

## Security \*

Has the component adopted policies or procedures to ensure that financial data and transactions are secure, to protect both customers and the component?

- Yes  
 No

## Security (d)

Provide a copy of the component's key policies or procedures concerning securely handling funds and member personal and financial data.

No file selected.

## Security2 (d)

Additional space to upload documents, if needed.

No file selected.

## Security3 (d)

Additional space to upload documents, if needed.

No file selected.

Audit or review – This policy should already be in place as it was required during the last accreditation. It does not require you to conduct an audit or review.

Security – A financial privacy policy has been required previously so you should have one in place. You should not be having people filing out forms with their credit card numbers and saving those.

# Component Accreditation Portal

## PCI DSS \*

If the component accepts credit card payments, does the card processor comply with the Payment Card Industry Data Security Standard (PCI DSS)?

- Yes
- Not applicable (no credit card payments taken)
- No

## Processor

Please provide the name of the organization your component uses for credit card processing.

PCI DSS – If you are accepting cards, you are likely using something like Square, Paypal, Affinipay or something similar. Those services are PCI compliant.

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## Dues \*

Did the component report the upcoming year's dues rates to AIA by the September 15 deadline?

- Yes (AIA will verify; no documentation needed.)
- No

## GR leader \*

Did the component send at least one elected leader to Grassroots at least once during the past three years?

- Yes (AIA will verify; no documentation needed.)
- No

## GR exec \*

Did the component send its executive director (who works at least 30 hours per week) to Grassroots at least once during the past three years?

- Yes (AIA will verify; no documentation needed.)
- No
- Not applicable; our executive director does not work 30 hours per week.
- Not applicable; we have no executive director.

## IRT \*

Did the component send its executive director (who works at least 30 hours per week) to attend Institute Resource Training within the first two years after hiring?

- Yes (AIA will verify; no documentation needed.)
- No
- Not applicable; our executive director does not work 30 hours per week.
- Not applicable; we have no executive director.

Dues – If AIA Florida staff reported these on your behalf, you may mark yes. I believe all components met this requirement.

## Component Accreditation Portal

GR Leader – Mark yes as long a volunteer leader has attended Grassroots in the previous three years even if it was virtual.

GR Exec – Mark as is appropriate for your component. If you don't have staff that works more than 30 hours per week, it is not required for your executive director to attend Grassroots.

IRT – This only a requirement for executive directors who work more than 30 hours per week and should be attended within their first two years of hiring.

### **CACE \***

Did the component send its executive director (who works at least 30 hours per week) to the CACE Annual Meeting at least once during the past three years?

- Yes (AIA will verify; no documentation needed.)
- No
- Not applicable; our executive director does not work 30 hours per week.
- Not applicable; we have no executive director.

CACE – Mark as is appropriate for your component.

# Component Accreditation Portal

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## Whistleblower \*

Has the component adopted a written policy on whistleblower protection?

- Yes  
 No

## Whistleblower (d)

Provide a copy of the component's policy on whistleblower protection.

No file selected.

## Conflicts \*

Has the component adopted a written policy on conflicts of interest?

- Yes  
 No

## Conflicts (d)

Provide a copy of the component's policy on conflicts of interest.

No file selected.

## Records \*

Has the component adopted a written policy on records retention and destruction?

- Yes  
 No

## Records (d)

Provide a copy of the component's policy on records retention and destruction.

No file selected.

Upload the request policies. These have all been required since the accreditation began so your component should have these in place.

# Component Accreditation Portal

## Compensation \*

If the component has an executive director, has the component adopted a written policy on review of executive director compensation and benefits?

- Yes
- No
- Not applicable; we do not have an executive director.

## Antitrust \*

Does the component comply with AIA's antitrust policy?

- Yes
- No

## Anti-trust (t)

Describe how the component complies with and educates its leadership and members about antitrust compliance.

## Anti-harassment \*

Does the component comply with AIA's anti-harassment policy?

- Yes
- No

## EDI \*

Does the component uphold the institute's Equity, Diversity, and Inclusion Statement?

- Yes
- No

Mark as appropriate for your components. All of these policies have been previously required.

# Component Accreditation Portal

## Policy access \*

Does the component give board members access to its policies?

- Yes  
 No

## Policy access (t)

Please describe how all board members are provided access to the component's policies.

## Bylaws \*

Does the component review and update bylaws at least once every 10 years using the AIA Model Component Bylaws (or bylaws addendum language) as a guide?

- Yes  
 No

## Bylaws (d)

Provide a copy of current bylaws, which includes the date they were last amended.

No file selected.

Policy Access – Your component board members should receive a policy or leadership manual at your board orientation.

Bylaws – Upload your component’s latest copy included the latest date of amendment.

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## Officers

Use the tool below to list the component’s 2023 officers as follows: 1) Click “edit” to add an officer’s contact information. 2) Click “add.” 3) Click “add another officer” for subsequent entries. (Only officers are required; entering other directors is optional.)

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Items	Action
No Items have been added. Click on Add Officer below.	

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# Component Accreditation Portal

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## Role

Use "Chair" for the President. Use "Chair-elect" for the President-elect. Use "Other" for other volunteer officers.  
Use "Staff" only for a staffer who serves as a board officer.

- Chair
- Chair-elect
- Other
- Staff

## Position Title

## Email

Enter the address associated with the officer's AIA membership.

## Term Start Date

Typically January 1 at most components; also include the year.

## Term End Date

Typically December 31 at most components; also include the year.

CANCEL

ADD

## Orientation \*

Does the component provide orientation for its board of directors annually?

- Yes
- No

Add your officers as requested. Even if you reported them to AIA Florida, they still need to be reported here.

Orientation – Board should receive an orientation annually. Ideally right before the new board takes office or at the beginning of term. AIA Florida conducted orientation for 2022 component leadership in December 2021. A copy of the orientation presentation is available at <https://www.dropbox.com/scl/fo/olhjq4izxclyq9t9zalpa/h?dl=0&rlkey=ni7964dysvx888gulssgquhsf>.

# Component Accreditation Portal

## Strategic \*

Does the component conduct strategic planning at least every five years and align it with the institute's strategic plan?

- Yes  
 No

## Strategic (d)

Provide a copy of the component's most recent strategic plan, which includes the date of adoption.

No file selected.

## Corporation \*

Is the component currently registered as a nonprofit corporation? (In the U.S., this is usually with the secretary of state. Elsewhere, it may be with a territory or host country provincial agency.)

- Yes  
 No

## Corporation (d)

Provide a PDF of the record showing the component is currently registered as a nonprofit corporation with its state, territory, or host country.

No file selected.

Strategic – Your component should be conducting strategic planning at least every five years. Upload your component's plan.

Corporation – Your component should be filing an annual report with the Florida Division of Corporations each year through [sunbiz.org](http://sunbiz.org). You may look up your corporate record on at [www.sunbiz.org](http://www.sunbiz.org) if you don't have a copy.

# Component Accreditation Portal

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## Retain \*

Does the component conduct retention and recruitment efforts annually?

- Yes  
 No

## Retain (t)

Describe the component's member recruitment and retention activities.

## Retain (d)

Provide a PDF sample of materials used to reach out to members for this purpose.

No file selected.

Include anything your component is doing to recruitment members. Membership ads to be used in advance of 2023 are available at <https://www.dropbox.com/scl/fo/hrOru2biy5noodvs09zaq/h?dl=0&rlkey=w8askzhgfbsss a98jwh8wj2qr>.

# Component Accreditation Portal

## Engage (t)

Describe the component's activities to engage members of each type found in the component's membership (Associates, Architects, International Associates, Fellows). Also describe activities to recognize and engage all new members and those who are newly licensed.

## Engage (d)

Alternatively, if you have a document describing these engagement activities, you may provide a PDF of it here instead of using the text box above.

No file selected.

Upload anything your component does to welcome new members, honor new fellows or recognize new licensees.

## Feedback (t)

Provide a summary of key insights obtained from these assessment activities. Please note when the research was conducted.

## Feedback (d)

Alternatively, you may upload a PDF of the findings from your research.

No file selected.

This is satisfied with the statewide survey. Report is available at <https://www.dropbox.com/scl/fo/9xlzed7jsz8ty7rovzu/h?dl=0&rlkey=nzheeda5lj2nmmk93qli26dl3>.