



Self-Assessment Process Checklist

2025 Annual Self-Assessment Opens on January 6, 2026

Resources

- **Self-Assessment URL** - <https://firstpic.my.site.com/bbbs>
- **2023 Standards of Practice: [Independent](#) & [Sponsored](#)**
- **[Affiliation Fee Form Guide](#)**

All the following items of the Annual Self-Assessment must be finalized in the First Pic Portal no later than 2/28/2026

- Mark In/Out of compliance for all Standards according to the **2023** Standards of Practice. Refer to links below to confirm your policies, procedures and practices include the minimum requirements of each Standard. Must be logged into BBBS Connect to access links below.
 - **[Standards of Practice for Independent Agencies](#)**
 - **[Standards of Practice for Sponsored Agencies](#)**
- Upload Board Development Plan/Advisory Council Development Plan (For Sponsored Agencies)
- Upload Strategic and Annual Plan
- Upload Program Manual
- Record Insurance Information
- **Upload** Affiliation Fee Form & Supporting Documentation
- **Upload** Income Statement
- **Print** Technology Licenses Form, **Select** Payment Option & **Upload** to your Assessment
- **Upload** Verification Letter

- **Complete** Growth Goals and Other Key Indicators survey links in the Self-Assessment at the bottom of the Additional Requirements tab and **Upload** the confirmation of completion

Step-by-Step Instructions

1. Your CEO/ED/Program Director (with Sponsored Organizations) will use the same login information received in previous years to login to the site. If you do not remember your login, please go to <https://firstpic.my.site.com/bbbs> and click on 'Forgot Your Password' to reset your password. Additional agency staff may receive a login if requested by your agency CEO/ED/Program Director (with Sponsored Organizations). Requests must be sent to support@firstpic.org.

If you are a **NEW** CEO/ED/Program Director (with Sponsored Organizations) and have never received a login, please email your login request to support@firstpic.org. Please include **your agency** and **your title** with your request.

2. Log in to the site and click on the "Organization Info" tab at the top.
3. You **do not** need to enter your EIN, D.U.N.S number, address, phone number, or website info at the top of the page.
4. Under "Associated Contacts" – Please verify/update all information entered for the required 6 staff **ROLES:**

CEO	Finance Lead
Board Chair	Fund Development Lead
Program Lead	Marketing/Recruitment Lead

The site will **not** allow you to move forward until this information is updated and verified. Please review the list of contacts/**ROLES** for accuracy and make edits where applicable.

If one person at your agency fills more than one of these roles, enter that person's name for each role. The site will not allow the same email address to be entered under multiple roles, so as a workaround, please enter their email address under their primary role, and fake emails for the additional roles, using **your organization's actual domain** so that it is a unique email.

Example entry below reflects how to enter email addresses into the portal for someone that has more than one role using the same agency domain.

First Name	Last Name	Role	Email
John	Doe	CEO	johndoe@bbbsofABCcounty.org
John	Doe	Finance Lead	sample1@bbbsofABCcounty.org
John	Doe	Fund Development Lead	sample2@bbbsofABCcounty.org

5. Under "Users" – Please verify all active users listed and deactivate any old user accounts for your agency. (This task can only be performed by your CEO/ED/Program Director with Sponsored Organizations).

6. Click on the edit button for the 2025 Current Self-Assessment. You should see the 'Edit' button to the far right. If you do not see the 'Edit' button, please review your list of **Associated Contacts** to confirm you have all 6 listed and no duplicate email addresses are entered.

*You will **NOT** see the **EDIT** button if six names under Associated Contacts are not listed for each required Role or if duplicate email addresses are entered.

7. **By February 28** - Login to your Self-Assessment via the FirstPic portal and complete the following.
 - I. **ASSESSMENT;** Answer each line of the Standards of Practice requirements as "In" or "Out" of compliance. To ensure you are assessing and recording each Standard correctly, please refer to the complete version of your Standards of Practice below which includes all minimum requirements for our 22 Standards.

[Standards of Practice for Independent Agencies](#)

[Standards of Practice for Sponsored Agencies](#)

Be sure to save your progress before leaving the portal.

1. For any items marked "Out" of compliance, the site will require that you enter an explanation in the text box on the right-hand side of the page. Your text should explain:
 - i. Why your agency is not currently in compliance with the Standard.
 - ii. The date of when the Standard will be in compliance. The completion date must be within 60 days of the Self-Assessment due date, February 28, 2025.
 - **After completing the necessary steps to achieve compliance, please notify your Agency Services Director (ASD) with an update**

2. Three Standards require an uploaded document. You will see an option to upload for each of these Standards as you go through the Assessment. Click on Upload button, click Choose File to locate PDF document, click Upload and then click Close. These include your updated:
 - i. **Board Development Plan (Standard 2.5)**

- ii. **Strategic and Annual Plan (Standard 3)**
- iii. **Program Manual (Standard 8.1)**

II. **PROOF OF INSURANCE;** Located on the Additional Requirements tab.

1. If your agency is insured through John Kirby (Great American) we only need your expiration date. You do not need to upload proof of insurance.
2. If your agency is insured through another company, enter, or edit the company name (the insurance carrier; not the broker or the agent), enter the expiration date, and upload a PDF copy of your declaration page showing coverage limits and expiration date by clicking on Upload Proof of Insurance, click Upload Proof of Insurance, click Choose File to locate PDF document, Upload and then Close.

III. **UPLOAD 2025 AUDIT;** Located on the Additional Requirements tab.

1. Enter your agency's fiscal year end date that occurred during 2025.
 - i. Please Note: Your audit must be uploaded to the site within 9 months from the fiscal year end date.
2. If your audit is already complete – click on Upload 2025 Audit, click Choose File to locate PDF document, Upload and then Close.

IV. **AFFILIATION FEE FORM;** Located on the Additional Requirements tab. Click on Affiliation Fee Form Template, located under the Templates section at the bottom of the Additional Requirements tab.

[**Affiliation Fee Form Guide**](#)

Your latest audited fiscal year financial statements or unaudited calendar year financial statements can be used to complete the Affiliation Fee Form.

1. Open in Excel.
2. Complete the form on your computer and select a payment option at the bottom. (Payments must be postmarked by 2/28 to take advantage of the 5% discount.)
3. See Instructions tab of the template for explanations for definitions of required expenditures
4. Save the form to your computer as a PDF.

5. Click on the edit pencil icon for Affiliation Fee Form.
6. Click on Choose File to locate PDF document.
7. Click on Upload and then click Close.

V. **TECHNOLOGY LICENSES FORM;** Located on the Additional Requirements tab. The fee has already been calculated for each agency based on the number of Matchforce Licenses committed to for 2026 and the Technology Licenses Form is in your Self-Assessment for you to **PRINT AND COMPLETE THE STEPS BELOW.**

1. Open the Technology Licenses Form document in PDF located under the Attachments section.
2. Print the form.
3. Select a payment option via pen/pencil, scan completed form, and save as a PDF
4. Click on the edit pencil icon for Technology Licenses Form.
5. Click on Choose File to locate edited PDF document.
6. Click on Upload and then click Close.

****IF NO SELCTION IS MADE YOU WILL BE BILLED MONTHLY.**

VI. **INCOME STATEMENT;** Located on the Additional Requirements tab.

The Income statement will be found in your audited financial statement packet. This is also referred to as the Profit & Loss Statement or the P&L Statement.

1. Click on the edit pencil icon for Income Statement.
2. Click on Choose File to locate PDF document.
3. Click on Upload and then click Close.

VII. **SUPPORTING DOCUMENTATION FOR AFFILIATION FEE FORM;** Located on the Additional Requirements tab. See further explanations on the Instructions tab of the Affiliation Fee Form Template for documentation requirements.

Supporting documentation refers to any schedules, statements, or reports that tie to the amounts you provide. Statement of expenditures, schedule of expenditures, and depreciation scheduled are all examples of supporting documentation and can be found in your audited financial packet.

1. Click on the edit pencil icon for Supporting Documentation for Affiliation Fee Form.
2. Click on Choose File to locate PDF document (*if submitting documents for more than one line, scan documents together to create one PDF file*).
3. Click on Upload and then click Close.

ORGANIZATIONAL CHART; Located on the Additional Requirements tab.

1. Click on the edit pencil icon for Organizational Chart.
2. Click on Choose File to locate PDF document.
3. Click on Upload and then click Close.

VIII. **GROWTH GOALS, Key Indicators and Organizational Design Project questions;**

Located on the Additional Requirements tab.

1. Open the Growth Goals and other Key Indicators template
2. **Use worksheet to assist with recording your data before clicking on survey link**
3. Submit data via the link provided in the template
4. After data is submitted, click Done, to receive your Confirmation of Completion
5. Print Confirmation of Completion, sign document, scan and save as a PDF
6. Click on the edit pencil icon for Growth Goals & other Key Indicators
7. Click on Choose File to locate PDF document.
8. Click on Upload and then click Close.

IX. **VERIFICATION LETTER;** Located on the Additional Requirements tab.

The Verification Letter, signed by the Agency Leader and the Agency Board Chair, confirms that the **Board of Directors** affirms the Agency's compliance with the BBBSA Membership Affiliation Agreement (MAA) and the BBBS Standards of Practice. Additionally, all CEO/Executive Directors and Board Chairs must submit an Annual Self-Assessment by February 28, 2026, as outlined in Section 7.4.2 of the MAA. Failure to meet this deadline will place the agency out of compliance with the MAA.

Agencies are encouraged to allocate sufficient time to review and verify the certification items outlined in the Verification Letter to ensure accuracy and compliance.

1. Click on Verification Letter Template, located under the Templates section at the bottom of the page

2. Complete the Letter and Print. Letter must be signed by CEO/ED and Board Chair. This needs to be uploaded with both signatures by February 28th. Be sure to make the necessary arrangements to obtain Board Chair's signature prior to the deadline.
3. Scan letter and save to your computer as a PDF.
4. Click on the edit pencil icon for Verification Letter.
5. Click on Choose File to locate PDF document.
6. Click on Upload and then click Close.

If you accidentally upload the wrong document for any of the attachments, you can delete it by clicking on the X in the circle next to the attachment.

Once all the above required items and steps have been completed, click "Submit and Exit" on the Summary tab to submit your Assessment. You will see on the Organization Info tab that your Assessment has been Submitted.

WHO TO CONTACT?

If you have questions about the FirstPic website, login issues, or other technical concerns, please contact FirstPic Support at support@firstpic.org.

If you have questions about the Self-Assessment process or requirements, please contact Agency Support at affiliatesupport@bbbsa.org.

If you have questions specific to the *Affiliation Fee Form, Technology Licenses Form, Income Statement* or *Supporting Documentation for Affiliation Fee Form*, please contact Accounting at agencydues@bbbsa.org.