

Standards Needing Attention/Approval

1.3 The Organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board. **This standard has been met/submitted and is awaiting approval by Ben.**

4.3 The Organization's Community Action Plan and Strategic Plan document the continuous use of the full ROMA cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the Organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation. **We have submitted documents which show work we have done on the Strategic Plan with certified ROMA trainer but still need formation of actual Community Action Plan and Strategic Plan.**

4.4 The governing board receives an annual update on the success of the specific strategies included in the Community Action plan. **We need to form a Community Action Plan in order to meet this standard.**

4.5 The organization has a written succession plan in place for the CEO/ED, approved by the governing board, which contains procedures for covering an emergency/unplanned, short-term absence of 3 months or less, as well as outlines the process for filling a permanent vacancy. **This standard has been met/submitted and is awaiting approval by Ben.**

4.6 An organization-wide risk assessment has been completed within the past 2 years and reported to the governing board. **An organization-wide risk assessment must be completed. Previously, the risk assessment (dated 5/19/2014) was compiled through services offered on website: <http://www.riskassessment.org>.**

6.1 The Organization has an agency-wide Strategic Plan in place that has been approved by the governing board within the past 5 years. **Formation of Strategic Plan is needed.**

6.2 The approved Strategic Plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient. **Formation of Strategic Plan is needed.**

6.3 The approved Strategic Plan contains Family, Agency, and/or Community goals. **Formation of Strategic Plan is needed.**

6.4 Customer satisfaction data and customer input, collected as part of the Community Assessment, is included in the strategic planning process. **Formation of Strategic Plan is needed.**

6.5 The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months. **Formation of Strategic Plan is needed.**

7.1 The Organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years. This standard has been met/submitted and is awaiting approval by Ben.

7.2 The Organization makes available the Employee Handbook (or personnel policies in cases without a Handbook) to all staff and notifies staff of any changes. This standard has been met/submitted and is awaiting approval by Ben.

7.8 All staff participate in a new employee orientation within 60 days of hire. This standard has been met/submitted and is awaiting approval by Ben.

8.2 All findings from the prior year's annual audit have been assessed by the Organization and addressed where the governing board has deemed it appropriate. This standard has been met/submitted and is awaiting approval by Ben.

8.3 The Organization's auditor presents the audit to the governing board. This standard has been met/submitted and is awaiting approval by Ben.

8.4 The governing board formally receives and accepts the audit. This standard has been met/submitted and is awaiting approval by Ben.

8.9 The governing board annually approves an organization-wide budget. Formation of organization-wide budget must take place.

8.10 The Fiscal Policies have been reviewed by staff within the past 2 years, updated as necessary, with changes approved by the governing board. The first 22 pages were approved at the last closed board meeting. Remainder of policies need to be board approved to meet this standard.

9.3 The organization has presented to the governing board for review or action, at least within the past 12 months, an analysis of the agency's outcomes and any operational or strategic program adjustments and improvements identified as necessary. This standard has been met/submitted and is awaiting approval by Ben.

9.4 The organization submits its annual CSBG Information Survey data report and it reflects client demographics and organization-wide outcomes. This standard has been met/submitted and is awaiting approval by Ben.