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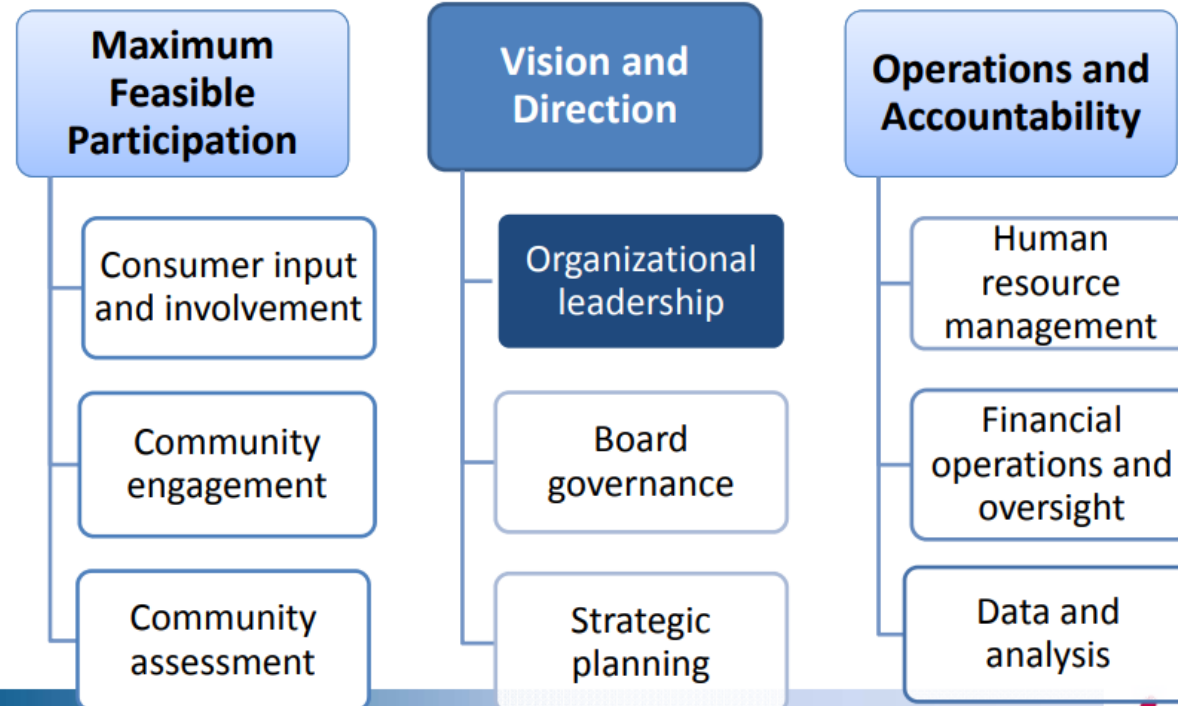
CSBG ORGANIZATIONAL STANDARDS – ZOOM TRAINING

APRIL 11, 2024 10:00 A.M. – 12:00 P.M.



CSBG Organizational Standards

Organized into three thematic groups



CSBG ORGANIZATIONAL STANDARDS

ORGANIZATIONAL LEADERSHIP

4.1 - Governing Board has reviewed the Organization's mission statement

4.2- The Organization Community Action Plan is outcome-based, anti-poverty focused, and ties directly to the Community Assessment.

4.3- Community Action Plan & Strategic Plan document the continuous use of the full ROMA Cycle...

4.4- Governing Board receives annual update on the success of specific strategies included in the Community Action Plan.

4.5- Succession plan in place for the CEO/ED approved by governing board.

4.6- Comprehensive Risk Assessment has been completed within the past 2 years and reported to governing board.

ORGANIZATIONAL STANDARDS

ORGANIZATIONAL LEADERSHIP CONTINUED

PROBLEMATIC AREA'S

Problematic areas for many agencies

4.3 – Have an agreement with a certified ROMA trainer. (Ex: Josh Summers with O.A.C.A.A.). Have trainings with a Certified ROMA Trainer and backup documentation.

4.4 – Review your Agency Strategic Plan with the Board of Trustees. In the review at the Board Meeting, ask the Board for input, document it in the Board meeting minutes. Request approval from the full Board of Trustee's. Annual update on the Strategic Plan to the Board is required.

ORGANIZATIONAL STANDARDS

BOARD GOVERNANCE

5.1 Board Structure

5.2 Organization's governing board has written procedures that document a democratic selection process for low-income board members adequate to assure that they are representative of the low-income community.

5.3 Organization's bylaws have been reviewed by an attorney within the past 5 years

5.4 Organization documents that each governing board member has received a copy of the bylaws within the past 2 years.

5.5 Organization's governing board meets in accordance with the frequency and quorum requirements and filled board vacancies as set out in bylaws.

5.6 Each governing board member has signed a conflict of interest policy within the past 2 years.

5.7 The organization has a process to provide a structured orientation for governing board members within 6 months of being seated.

5.8 Governing Board members have been provided with training on their duties and responsibilities within the past 2 years.

5.9 The organization's governing board receives programmatic updates at each regular board meeting.

ORGANIZATIONAL STANDARDS

BOARD GOVERNANCE CONTINUED

PROBLEMATIC AREA'S

Problematic areas for many agencies

5.1 Board Structure- Uploading the Board Roster and Bylaws shows your agency is being compliant. Agency Bylaws should outline the procedures of procurement for filling board seats.

5.2 Organization's governing board has written procedures that document a democratic selection process for low-income board members adequate to assure that they are representative of the low-income community. Documentation: Written Policy, Board policy/procedure manual, Bylaws, Board Meeting Minutes.

5.3 Organization's bylaws have been reviewed by an attorney within the past 5 years. Documentation: Invoice from Attorney, Letter from Attorney that review was completed, Board Minutes discussing the review.

5.4 Organization documents that each governing board member has received a copy of the bylaws within the past 2 years. Documentation: Board Minutes stating that the Bylaws was handed out to the Board of Trustee's and/or a receipt of receiving the Bylaws.

ORGANIZATIONAL STANDARDS

BOARD GOVERNANCE CONTINUED

PROBLEMATIC AREA'S CONTINUED

- 5.5 Organization's governing board meets in accordance with the frequency and quorum requirements and filled board vacancies as set out in bylaws. Documentation: Board Minutes, Board Roster and Bylaws.
- 5.6 Each governing board member has signed a conflict of interest policy within the past 2 years. Documentation: Copy of the signed Conflict of Interest.
- 5.7 The organization has a process to provide a structured orientation for governing board members within 6 months of being seated. Documentation: Board member signs off they have received the Orientation, Certificate of Orientation, Reporting out to the board that the new Board Member (s) that have sat through orientation.
- 5.8 Governing Board members have been provided with training on their duties and responsibilities within the past 2 years. Documentation: Board Meeting Minutes, Special Sessions, Conferences, Certificates of Completion, Copies of Sign In sheets, Copy of the curriculum used /training materials.

ORGANIZATIONAL STANDARDS

STRATEGIC PLANNING

6.1 Agency-Wide Strategic Plan in place that has been approved by the governing board within past 5 years.

6.2 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.

6.3 The approved Strategic Plan contains family, agency, and/or community goals.

6.4 Customer Satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.

6.5 The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.

ORGANIZATIONAL STANDARDS

STRATEGIC PLANNING

PROBLEMATIC AREAS FOR MANY AGENCIES:

6.2 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. Documentation of Approval (Board Minutes), Community Needs Assessment, Customer Survey's, participation surveys from other partners.

6.3 The approved Strategic Plan contains family, agency, and/or community goals. Documentation: Strategic Plan and Community Needs Assessment.

6.4 Customer Satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process. Documentation: Customer Survey's, Sign in sheets for Community Forums, outreach events, etc.