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2025 ORGANIZATIONAL STANDARDS AND RISK ASSESSMENT

MICHAEL D. CALL, PH.D.



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Executive Summary

██████████ continues to be a powerful force for good in ██████████ ██████████ Counties. Founded in 1965, the agency has demonstrated continual resilience to changing community dynamics, commitment to alleviating poverty, and passion for engaging with all stakeholders to make a difference.

This organizational standards and risk assessment, conducted by Civicus Consulting Group out of Kansas City, Missouri, concludes that ██████████ is not only meeting every organizational standard and adequately mitigating risk, but it is exceptionally well aligned. Together, these three attributes are evidence of a strong organization that is achieving its mission: developing pathways out of poverty through innovative, community-based, collaborative approaches.

The following summarizes this report's findings.

- Consumer input remains central to the planning, execution, and evaluation of all programs and initiatives.
- Community engagement is a strength, with genuine collaboration with other corporate partners, government, human service providers, faith-based organizations, and others playing preeminent position in the strategic plan and community action plan.
- The community assessment is strong. It relies on both quantitative and qualitative data and addresses all critical elements for sound strategic planning. It is utilized to assist in program adjustments, to validate assumptions, and to measure impact. It is built on stakeholder engagement, sound data, and expert input.
- Board governance is stable, and board members are fully engaged. The board is following the federal tripartite requirement. Board members understand and execute their fiduciary responsibilities with tremendous care. The board has systems in place to assure all necessary steps are taken to assure proper and adequate oversight, avoid conflicts of interest, advocate for the community and various stakeholders, and make sound decisions.
- Staff leadership continues to be exceptional in every way. Sensible and rational decisions are made through deliberate consideration of all available information. Proper reporting is accomplished at the program management, leadership team, and executive levels. Systems ensuring legitimate financial controls are followed; fiscal transparency is a core hallmark of leadership and the organization. The CEO exhibits unfaltering resilience and strength, even in the midst of uncertainty in funding streams.
- The strategic plan is reasonable and aspirational. Updated every year, it drives programming and is a standard for other community action agencies.
- Personnel policies are exemplary. Policies are clear, concise, and useful. Policies include a code of conduct, whistleblower protections and processes, written evaluations (including CEO evaluation conducted by the board), and all necessary policies for clear understanding of functional duties. Written job descriptions are available and regularly updated.

- Annual audits are clean and unqualified. Financial systems include reasonable controls; financial policies are clear and followed. Board oversight of financial transactions is sound. Procurement, payroll withholdings, and reimbursement procedures, as well as all other regular financial activities, are described in written policies that are understood by all necessary staff and board members.
- [REDACTED] tracks and reports client demographics and services and all program outcomes. Reports are provided to program managers, leadership team members, and the board. The annual report is submitted on time.
- Although staff experience some anxiety over the immediate future, moral is good, team cohesiveness is moderate to strong, and employees are generally happy. Staff and board members exhibit substantial trust in the CEO and other staff leaders.

To mitigate risk, we recommend the following actions. Both recommendations are discussed further in the Conclusions section of this report.

- Establish a business continuity plan.
- Establish a board-level risk assessment and risk mitigation policy.

This assessment also finds that [REDACTED]

- meets every Organizational Standard;
- manages and mitigates risk well; and
- is highly aligned.

Introduction

In the summer of 2025, Civicus Consulting Group of Kansas City, Missouri, conducted an organizational standards and risk assessment of ██████ in ██████ ██████. This is the sixth assessment we have conducted for ██████ since 2014. This year, the organization continues to meet all organizational standards and to take adequate measures to mitigate risk.

Our Model

Civicus Consulting Group developed its Alignment and Risk Assessment Model in the early 2010s. It aggregates the relationship and adequacy of more than 100 elements of successful nonprofits into one assessment tool to help nonprofit leaders their organizations move to higher levels of performance. In 2014, we added adherence to CSBG Organizational Standards for our work with community action agencies. In 2024, with more community action agencies engaging us to conduct these assessments, we modified our reporting to fully align with the national CSBG Organizational Standards.

Methodology

Civicus utilizes a mixed methodology to assess risk and alignment with the CSBG Organizational Standards. We conduct in-person interviews with the organization's CEO, other staff leaders, program managers, board officers, and identified front-line staff. These interviews help our consultants better understand the culture, processes, procedures, challenges, and opportunities facing the organization. We typically deploy an optional, proprietary online survey for all staff and board members are invited to participate; depending on the organization, additional stakeholders such as volunteers, donors, or clients may also be invited to participate. Finally, we review scores of corporate documents, including financial statements, tax filings, policies and procedures, promotional material, organizational charts, insurance certificates, bylaws, and other material that helps us identify potential gaps or weaknesses.

Additional Alignment Measures

In addition to assessing risk and analyzing performance against the organizational standards, this review also considers areas of alignment including employee environment, team cohesiveness, and morale. These metrics are rated through an online survey of staff and board members, supplemented by one-on-one interviews. This survey's beginnings are the Civicus Alignment and Risk Assessment, a tool used to assess organizational alignment. The results of the survey help leaders understand areas for improvement and measure progress.

Note About the Online Survey

This year's online survey of staff and board members—which has remained virtually unchanged during the time ██████ has participated in it—included 34 participants. The results of the survey are descriptive, not inferential. Because these results are applicable only to those who participated, they are not representative of all employees and board members.

Citation Convention

Rather than utilizing footnotes, this report relies on parenthetical citations at the end of sentences, bullet points, paragraphs, or sections. The citations refer to either digital documents (e.g, Board Financial Report 2025-04 April), references to interviews with staff or board members (e.g., Civicus Interviews), or references to the staff and board survey (2025 Survey).

Results

██████████ continues to meet all organizational standards and take all necessary precautions to mitigate risk. The nine Organizational Studies are categorized into three broad areas, each with three subareas:

- Maximum Feasible Participation includes consumer input and involvement; community engagement; and community assessment.
- Vision and Direction includes organizational leadership; board governance; and strategic planning.
- Operations and Accountability includes human resource management; financial operations and oversight; and data and analysis.

Each of the nine standards includes multiple elements, making a total of 58 standards to be met. In addition, appropriate measures must be taken to mitigate risk. ██████████ meets all these standards. This report provides details for ██████████ leadership and board to rely on in its ongoing efforts to meet its mission to alleviate poverty and enhance the public health and welfare in ██████████ ██████████ Counties.

Maximum Feasible Participation

The Maximum Feasible Participation category in the CSBG Organizational Standards measures the extent to which agencies actively involve individuals experiencing low incomes, other community members, and other stakeholders in program development and decision making. The voices of these individuals are essential to shape services, policies, and strategies; these individuals can also help build partnerships to address poverty effectively. By maximizing the participation of persons experiencing low incomes and other stakeholders, community action agencies can design and implement beneficial programs and services that are likely to succeed. Without these voices, services run the risk of ineffectiveness and failure.

Category One: Consumer Input and Involvement

Consumer Input and Involvement: Community action agencies must seek input and involvement with persons experiencing low incomes in order to be successful in building resilience, self-sufficiency, personal networks, and skills. Participation could include opportunities to serve on advisory boards or committees, participating in surveys or focus groups, consulting on program or the organization either formal or informal means, or other methods. This engagement helps ensure the agency's work is responsive to the current needs in the community.

Standard 1.1

The organization demonstrates low-income individuals' participation in its activities.

██████████ actively meets Standard 1.1 in multiple ways. First, its tripartite board of directors includes five members representing persons living with low incomes, five elected officials, and five community at

large; this composition allows the governing body to have equal representation from the low-income sector. Board members and board minutes indicate that all representation participates in discussions and decisions. Second, the organization proactively encourages individuals living with low incomes to participate in its services. Third, [REDACTED] has established mechanisms for individuals living with low incomes to vote for their representatives on the board, fostering a sense of ownership and involvement in the agency's governance. Additional evidence of the central role of persons with low incomes is the annual work plan and strategic plan, both of which are based on the 2023 community needs assessment, which is focused on individuals living with low incomes. ([REDACTED] BYLAWS, AMENDED RESTATED, 03.2023.pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.26.2023.pdf; 2023 Strategic Plan, FINAL, APPROVED; [REDACTED] WORK PLAN 2024-2025, Legal Size; Civicus Interviews).

Standard 1.2

The organization analyzes information collected directly from low-income individuals as part of the community assessment.

As part of its community assessment process, [REDACTED] conducts a community needs assessment, collecting data directly from persons experiencing low incomes. Following the Results Oriented Management and Accountability (ROMA) model, [REDACTED] assesses needs regularly and continuously to improve programs and services, modify initiatives based on real-time trends and feedback, and measure program success.

The community needs assessment process includes focus groups and surveys—including with persons living with low incomes. By utilizing this data, [REDACTED] develops targeted programs and services that address needs identified by individuals themselves (2023 Strategic Plan, FINAL, APPROVED.pdf; Civicus Interviews; Civicus Survey).

Standard 1.3

The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.

[REDACTED] engages in a systematic approach for collecting, analyzing, and reporting customer satisfaction data to its board of directors. Recognizing the importance of understanding client feedback to improve its services, staff and board members strive to align services and programs with the needs of low-income individuals.

The organization conducts regular assessments and evaluations of its programs, which include gathering customer both qualitative and quantitative satisfaction data from participants. The deep commitment to this process is reflected throughout organizational documents, including the strategic plan, annual work plan, and even the agency's personnel policies. ().

Moreover, [REDACTED] reports customer satisfaction data to the board through regular updates on program performance—including insights derived from client feedback—which allows for informed decision-making and strategic planning. Transparency is apparent throughout the organization, and providing honest customer feedback and program performance data without whitewashing is evidence that

evidence of that (MINUTES - ACTION INC. BOARD OF DIRECTORS MEETING 01.23.2025.pdf, et. al.; 2023 Strategic Plan, FINAL, APPROVED; ACTION INC WORK PLAN 2024-2025, Legal Size; [REDACTED] Personnel Policy Handbook - Updated 2024-03.pdf; Civicus Interviews; Civicus Survey).

Category Two: Community Engagement

Building and maintaining partnerships with community stakeholders is essential to success for any community action agency. These stakeholders include, first and foremost, individuals and families living with low incomes. They also include faith-based organizations, businesses, public agencies, educational institutions, and other nonprofits. Collaboration with these stakeholders increases the likelihood of success and builds a network to support the work of community action. It creates a climate for a holistic approach to overcoming systemic poverty issues.

Standard 2.1

The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.

Here are some relevant points extracted from the content:

Collaborative Projects. The agency is involved in multiple collaborations with an abundance of service providers and other stakeholders. For example, permanent supportive housing projects include partnerships with [REDACTED] County and the [REDACTED]; the Crisis Response System for [REDACTED] includes partnerships with [REDACTED] Health Department, community health centers, the [REDACTED] Veteran's Home, 2-1-1 call center, foundations, and multiple other entities; and the [REDACTED] City Christmas and Holiday Giving Program includes collaborative efforts with Toys-for-Tots, RSVP, [REDACTED] Emergency Food Bank, [REDACTED] Foundation and [REDACTED]. Notably, several of [REDACTED] board members are either personally involved in the [REDACTED] System or have mental health service expertise—which not only strengthen the partnerships, but also contributes to the success of the services provided through the collaboration. These are just a few of the collaborations Action in which Action leads or participates ([REDACTED] (2020, December 11). "There's still time to give to [REDACTED]" [REDACTED] [REDACTED] (2021, December 15). "[REDACTED] Christmas" helps less fortunate during holiday season. [REDACTED] Community Action Team [REDACTED] (n.d.). [https://www.\[REDACTED\]](https://www.[REDACTED]); MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.23.2025, et. al.; Civicus Interviews).

Outreach Plans. [REDACTED] is implementing multiple partnerships with various service entities, local governments, and others who have a stake in assisting persons living with low incomes in the service area. Minutes from board meetings provide updates on the status of some of these efforts. The strategic plan indicates the organization is working toward partnerships calls for "local hospitals, local governments, public health departments, law enforcement, judges, first responders, the federally qualified Community Health Center, [REDACTED] Mental Health Center, and other community partners" to provide drop-in

services at times of crises in the communities served (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 03.28.2024.pdf, et. al.; 2023 Strategic Plan, FINAL, APPROVED) .

Funding and Grants. [REDACTED] relies on collaborations and partnerships with multiple funding partners—including federal and state partners, but also private-sector foundations, companies, and individuals—to achieve its mission. Private funding includes grants or donations from [REDACTED] [REDACTED] and others ([REDACTED] (2024, February 5). <https://mthf.org/grants/search-grants-awarded>; MINUTES - [REDACTED] BUDGET, FINANCE, AUDIT COMMITTEE MEETING 06.27.2024.pdf, et. al.; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.25.2024.pdf; Civicus Interviews).

Community Needs Assessment. [REDACTED] conducts its community needs assessments every three years, and this effort requires significant collaboration with multiple entities to gather data, conduct interviews and focus groups, and identify community needs 2023 Strategic Plan, FINAL, APPROVED.pdf.

Standard 2.2

The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.

[REDACTED] is continuously gathering, monitoring, and synthesizing data to inform its decision making, modify programs, and improve service delivery. These data-gathering efforts include all sectors of the six-county service area.

Community Needs Assessment. As mentioned in 2.1 above, [REDACTED] triennial community needs assessment includes gathering input from various sectors, including community-based organizations, faith-based organizations, and public sector entities. This step of data gathering is crucial to the success of the assessment (2023 Strategic Plan, FINAL, APPROVED.pdf).

Board of Directors Involvement. Board members' personal and professional backgrounds provide invaluable insights into ongoing data gathering from the three sectors represented: persons living with low incomes, elected officials, and community at large. ([REDACTED] BOARD OF DIRECTORS ROSTER 07.2025; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.26.2023.pdf, et. al.).

Engagement with Partners. [REDACTED] ongoing engagement with multiple partners provides invaluable, continuous data and perspectives that help improve service delivery. Partnerships with education-, faith-, and civic-based groups, service providers, elected officials, and others present opportunities for increased understanding and knowledge of community needs (2023 Strategic Plan, FINAL, APPROVED.pdf; [REDACTED] WORK PLAN 2024-2025, Legal Size; Civicus Interviews; Civicus Survey.).

Standard 2.3

The organization communicates its activities and its results to the community.

Action is continuing its efforts to build awareness of its name, its work, and its results with the community. Its current efforts include the following.

Strategic Communications Plan. Action has developed and is implementing a strategic communications plan to further strengthen its standing in the community and with elected officials. This plan includes strategies to emphasizing return on investment and economic benefits of federal funding, highlighting local governance and accountability, using real-life testimonials and trusted messengers to share success stories, and framing programs as nonpartisan, cost-effective, and outcome-driven. The plan includes social media campaigns, collaboration with partners, and participation in community events, among other efforts.

Consistent Messaging. The agency is committed to delivering clear, consistent, and impactful communications that result in increased recognition of [REDACTED] and its purpose. These key messages include

- Community Action Agencies are irreplaceable.
- Prevention is cheaper than crisis.
- Programs support economic stability and workforce participation.
- Communities cannot sustain services without federal funding.
- Programs align with core values like family, community, and self-sufficiency.

Target Audience Analysis. Action is tailoring messages to specific audiences, including Montana's congressional delegation, voters, business and civic leaders, [REDACTED] clients, and local community members.

Collectively, these efforts increase awareness and highlight the critical role of [REDACTED] in strengthening communities (COMMUNICATION STRATEGY 2025.pdf; Civicus Interviews; Civicus Survey).

Standard 2.4

The organization documents the number of volunteers and hours mobilized in support of its activities.

[REDACTED] maintains a record of the number of volunteers and the hours of volunteering, while emphasizing the importance of involving persons living with low incomes not only on its own boards and committees, but on others' as well. This emphasis is part of the agency's strategy to build community capacity, provide voice for this population, and increase skills and experience of individuals with low incomes ([REDACTED] WORK PLAN 2024-2025, Legal Size).

Category Three: Community Assessment

Community assessments, or community needs assessments, are required at least every three years. Conducting thorough, comprehensive assessments assures is a key element in meeting community needs. Assessments consider demographic changes in the service area as well as emerging needs of persons experiencing poverty. As the six areas of community action are analyzed—both separately and as a whole—and as persons experiencing low income participate in the assessment, a more accurate understanding of changing community dynamics is available for program planning.

Standard 3.1

The organization conducted a community assessment and issued a report within the past 3 years.

Community Needs Assessment. action completed a community needs assessment in 2023, and is joining with all other community action agencies in the state to produce a statewide community assessment in 2025. The assessment is shared with others in the community and is the basis for future planning (2023 Strategic Plan, FINAL, APPROVED.pdf; Civicus Interviews).

Standard 3.2

As part of the community assessment, the organization collects and includes current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for their service area(s).

The community needs assessment includes a demographic breakdown of poverty statistics, including gender, age, and race or ethnicity crosstabulations. Data collected includes local statistics or populations living with low incomes in [REDACTED] this data was gathered through secondary sources as well as focus groups and surveys (2023 Strategic Plan, FINAL, APPROVED.pdf; Civicus Interviews).

Standard 3.3

The organization collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the community assessment.

The 2023 community needs assessment included public policy research, a survey of poor and low-income constituents, a review of other local needs assessments, and community-level data gathered from credible government or other sources. This approach of utilizing both qualitative and quantitative data for the six-county service area allows [REDACTED] to better understand the complex and dynamic rolls of various factors contributing to poverty. (2023 Strategic Plan, FINAL, APPROVED.pdf; Civicus Interviews).

Standard 3.4

The community assessment includes key findings on the causes and conditions of poverty and the needs of the communities assessed.

The key findings of the 2023 community needs assessment include the following.

Rising Inequality. Income inequality is increasing, with a significant proportion of the population in the six-county service area living below the federal poverty line (15 percent) or at or below 200 percent of the poverty line (36 percent). Despite an increase in high-income households, poverty persists.

Healthcare Disparities. Low-income individuals face higher risk factors for chronic illness, food and housing insecurity, and shorter life expectancy. There is a need to expand collaborative efforts in rural counties to improve health outcomes.

Behavioral Health Challenges. Depression and substance abuse are prevalent, particularly among low-income individuals in rural areas. The behavioral health system requires more robust interventions and support.

Climate Change Impacts. Economically disadvantaged people are disproportionately affected by climate change, including extreme cold, heat, smoke, and other environmental factors. Weatherization services can play a role in mitigating these impacts.

Service Gaps. [REDACTED] currently serves only 27 percent of eligible low-income individuals in its service area, highlighting the need to expand outreach and access to services.

Advocacy Needs. System-level changes are required in areas such as behavioral health, healthcare, and climate resilience to better support low-income populations. (2023 Strategic Plan, FINAL, APPROVED.pdf; Civicus Interviews).

Standard 3.5

The governing board formally accepts the completed community assessment.

[REDACTED]s board of directors approved the community assessment, which is heavily referenced in the strategic plan. On September 12, 2023, the board and key staff leaders and program managers participated in strategic plan development, including the review of the community needs assessment and accompanying data (2023 Strategic Plan, FINAL, APPROVED.pdf; Civicus Interviews).

Vision and Direction

Leadership is essential to providing vision and direction for any organization; community action agencies are no different. With proper vision and direction, agencies are able to focus resources to achieve the mission of addressing poverty. A legitimate and sound board of directors, a competent and strong executive, well-functioning staff, and dedicated volunteers can work more successfully when proper vision and organizational direction is provided. This category focuses on foundational elements; mission statement, sound bylaws, reliable governance, results-oriented management and accountability (ROMA), and other factors are considered.

Category Four: Organizational Leadership

Strong leadership in community action agencies is always an asset. Such leadership helps assure strategic orientation, proper oversight of programs and operations, adherence to mission-oriented goals and outcomes, organizational alignment with community needs, proper board governance, and fruitful partnerships with community stakeholders.

Standard 4.1

The governing board has reviewed the organization's mission statement within the past 5 years and assured that:

- 1. The mission addresses poverty; and*

2. *The organization's programs and services are in alignment with the mission.*

Mission Statement. The mission statement of [REDACTED] is clearly articulated and directly addresses poverty:

[REDACTED] is dedicated to developing pathways out of poverty through innovative, community-based, collaborative approaches.

Board Meeting Minutes and Agendas. Board meeting agendas and minutes include both the mission statement and the conflict-of-interest statement at the top, and both are read aloud at each meeting (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.25.2024.pdf, et. al.; Civicus Interviews).

Strategic Planning Documents. The strategic plan describes how [REDACTED] programs and services are intended to meet its mission. It emphasizes the commitment to addressing poverty and includes specific goals and objectives that align with the mission statement (2023 Strategic Plan, FINAL, APPROVED.pdf).

Annual Reviews. In addition to reading the mission statement aloud at each meeting, the board conducts annual reviews of the mission statement as part of its governance responsibilities. This is documented in various board meeting minutes, indicating a strong commitment to ensuring that the mission remains the focus of all the agency's activities.

Program Evaluations. The agency regularly evaluates its programs to ensure they are in alignment with the mission; program outcomes are discussed in board meetings, ensuring program alignment with the mission (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 03.27.2025.pdf, et. al.)

Online Survey. In the online survey, we asked two open-ended questions dealing with mission. First, "What does [REDACTED] seek to accomplish in the community?" Second, "What is [REDACTED] mission statement?" The purpose of the first question is to gather top-of-mind responses to assess mission understanding. Most respondents (23) indicated some type of assistance to persons experiencing low incomes. The next most common responses include the word "pathways" and reference to providing ways to emerge from poverty and into self-sufficiency.

Table 1: What does ██████ Seek to Accomplish in the Community?

What does ██████ Seek to Accomplish in the Community?			
Category	Frequency	Description	Example Phrases
Assisting those with low incomes or in poverty	23	Providing help, support, or resources to low-income, poor, or vulnerable people.	"Help low income people," "Serve the underprivileged," "Reduce poverty"
Creating pathways out of poverty	10	Developing long-term solutions or opportunities to help people exit poverty.	"Pathways out of poverty," "Developing pathways out of poverty"
Providing specific services (housing, utilities, etc.)	7	Offering targeted assistance like housing, utilities, or food support.	"Support for housing, utilities, rent, and food," "Rental and heating assistance"
Serving the community broadly	7	Supporting the community as a whole, often without specifying poverty.	"Help the community of ██████" "Serve individuals in our community"
Advocacy and guidance	4	Advocating for or guiding individuals, especially those facing challenges.	"Advocating for low-income/homeless folks," "Offering guidance, resources"
Ending poverty	3	Explicit goal of eradicating poverty entirely.	"Ending poverty to individuals and families," "The mission is to end poverty"
Improving living situations	2	Enhancing quality of life for at-risk or struggling individuals.	"Improve their living situations," "Help them live better while in poverty"
Unity	1	Promoting community unity (unique response, possibly metaphorical).	"Unity"

The question, "What is ██████ mission statement?" is not a test to determine whether respondents could recite the statement verbatim from memory. The purpose of this item was to determine whether key words or phrases are stated. Clearly, the staff and board members of ██████ know the mission statement; phrases such as "developing pathways out of poverty" and "innovative, community-based, collaborative approaches" were the most common mentioned. Only one respondent indicated he or she is uncertain.

Table 2: What is [REDACTED] Mission Statement?

What is [REDACTED] Mission Statement?			
Category	Frequency	Description	Example Phrases
Developing pathways out of poverty	27	Creating or providing opportunities to help people exit poverty.	"Developing pathways out of poverty," "Help people out of poverty"
Innovative, community-based, collaborative approaches	16	Emphasizing innovative, community-driven, and collaborative methods to address poverty.	"Innovative, community-based, collaborative approaches," "Collaboration and community-based approaches"
Helping the disadvantaged or vulnerable	5	Supporting poor, homeless, or overlooked individuals.	"Help the disadvantaged," "Help the poor and overlooked," "Ensuring no one has to face poverty and homelessness alone"
Ending poverty	3	Explicit goal of eradicating poverty entirely.	"Commitment to ending poverty," "To end poverty"
Compassion and respect	3	Delivering services with compassion, professionalism, or respect for all.	"With compassion and professionalism," "Everyone is important and should be treated as such"
Building better futures	2	Helping families or individuals improve their long-term prospects.	"Help families build better futures," "Build better futures for their families"
Unsure	1	Respondent was uncertain of the mission.	"Unsure"

When asked what values [REDACTED] embraces, most response included compassion, collaboration, and accountability—the organization’s three core values ([REDACTED] Personnel Policy Handbook - Updated 2024-03).

What Values Does [REDACTED] Embrace?			
Category	Frequency	Description	Example Phrases
Compassion/Empathy/ Care	20	Emphasizing kindness, empathy, care, or sensitivity toward clients.	"Compassion," "Empathy," "Care," "Sensitive to the needs of our clients"
Collaboration/Community	19	Valuing teamwork, community partnerships, or collaborative approaches.	"Collaboration," "Community action partner," "Community"
Accountability/ Transparency	16	Prioritizing responsibility, transparency, or integrity in operations.	"Accountability," "Transparency," "Integrity"
Dignity/Respect	6	Treating clients with respect and dignity.	"Dignity and respect," "Respect"
Equity/Fairness/Inclusion	4	Promoting fairness, inclusivity, or equity in services.	"Equity," "Fairness," "Inclusion," "Inclusive"
Empowerment/ Self-Esteem	3	Supporting clients' empowerment, self-esteem, or personal growth.	"Empowerment," "Self esteem," "Encouragement"
Innovation	2	Valuing creative or innovative approaches to problem-solving.	"Innovation"
Honesty/Integrity	2	Upholding honesty or moral integrity.	"Honesty," "Integrity"
Hope/Support	2	Inspiring hope or providing support to clients.	"Hope," "Support"
Hard Work	1	Valuing dedication and effort in work.	"Hard work"
Ideals	1	Upholding aspirational principles or ideals.	"Ideals"

Standard 4.2

The organization's Community Action plan is outcome-based, anti-poverty focused, and ties directly to the community assessment.

Outcome-Based Focus. The workplan emphasizes measurable outcomes across various programs. For example, Rapid Rehousing and Homeless Prevention Services aims to stabilize 300 homeless families and individuals in safe housing; the Early Childhood Education program ensures 125 children develop school readiness skills and obtain age-appropriate health screenings; and the Youth Services program targets employment outcomes, with 25 youth gaining job readiness skills and 13 obtaining employment

Anti-Poverty Focus. The workplan directly addresses poverty through targeted interventions. Some of these include the Heat Assistance and Weatherization programs that reduce housing cost burdens for 2,000 households annually; the Food Assistance program tackles food insecurity by serving 50,000 summer meals to children and 10,000 lunches to homeless individuals. Another example are the Permanent Affordable Housing initiatives, which provide safe housing for families experiencing low incomes, as well as seniors and veterans.

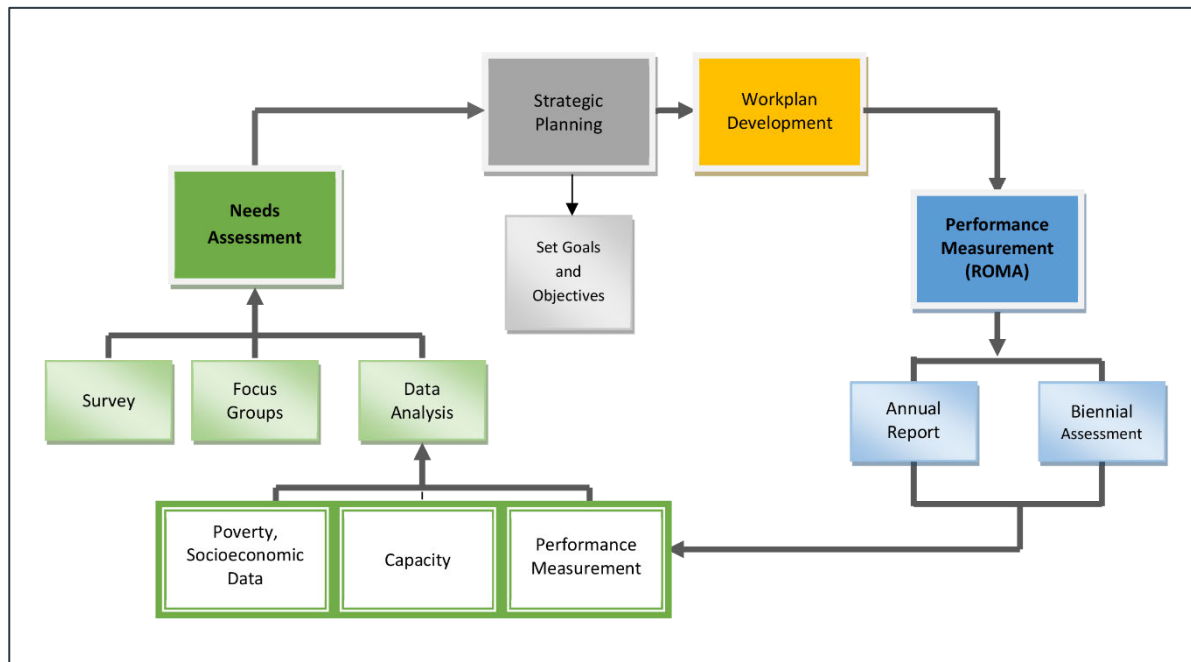
Connection to Community Assessment. The workplan is directly tied to the findings of the 2023 community needs assessment. For example, the Rapid Rehousing program addresses the identified need for housing solutions due to rising homelessness and poverty rates; the Early Childhood Education program responds to high child poverty rates and educational underachievement; the Climate Resilience initiatives align with the assessment's findings on the disproportionate impact of climate change on low-income households (██████████ WORK PLAN 2024-2025, Legal Size.pdf)

Standard 4.3

The organization's Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (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.

Use of the ROMA Cycle. The organization's strategic plan and its annual workplan are replete with references to the ROMA cycle. By continuous application of the cycle, ██████████ has improved and streamlined services. The organization conducts a needs assessment every three years to identify community needs and priorities. Based on the assessment, a strategic plan is developed and annual Community Action Plans, or work plans, are established. Specific programs and services are implemented to achieve the outcome-based impact outlined in the plans and identified in the community assessment.

Results are documented as they are achieved, and regular, ongoing evaluations provide opportunities for



customer feedback, monitoring by program managers, staff leadership, and board members. This monitoring and evaluation provides key data for refinement of service delivery (2023 Strategic Plan, FINAL, APPROVED).

Figure 1: Process Depicted in 2023 Strategic Plan

Standard 4.4

The governing board receives an annual update on the success of specific strategies included in the Community Action plan.

Annual Updates. The board receives updates at every meeting (held six times per year) regarding the progress of the Community Action plan. Board members have opportunities to inquire about program and service progress and barriers to success; the board regularly discusses ways to improve (MINUTES - BOARD OF DIRECTORS MEETING 01.25.2024.pdf, et. al.;) Civicus Interviews).

Performance Metrics. The board reviewed performance metrics related to the Community Action plan. In addition, the board’s Budget, Finance, and Audit Committee—which meets not only in off-board-meeting months, but often in months the board meets as well—reviews metrics. This comes naturally as discussions of expenditures and budget-to-actual data is reported, reviewed, and discussed (**MINUTES - BOARD OF DIRECTORS MEETING 03.28.2024.pdf, et. al.; MINUTES - BUDGET, FINANCE, AUDIT COMMITTEE MEETING 01.23.2025, et. al.).

Documentation of Success. The (**MINUTES - BOARD OF DIRECTORS MEETING 07.25.2024.pdf**) includes a summary of the annual achievements related to the Community Action plan. The board received documentation that highlighted successful strategies and their contributions to the organization’s mission.

Continuous Monitoring. The board receives updates on the annual work plan’s strategies throughout the year. For example, in the meeting held on July 25, 2025, the board learned that the Summer Meal Program was “in full swing with about 130 volunteers and 13 paid staff;” and that it is on track to match the

number of meals served in the prior year. The board also heard reports about the Homeward Bound property, indicating that the buy/sell agreement for the property was canceled due to the buyer's inability to secure funding; the earnest money of \$7,000 was refunded, and there is interest from a veteran's group, though no new offers have been submitted. Additionally, the board was informed that a grant of \$1,485,000 was awarded for four pilot units of permanent supportive housing. An architect has been chosen, and the design process has started, with a contractor to be selected soon. This level of reporting and discussion is the norm (MINUTES - ██████████ BOARD OF DIRECTORS MEETING 07.25.2024, et. al.).

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.

Written Succession Plan. ██████████ has developed a sound succession plan that covers unplanned departures of the CEO and planned departures of the CEO (including those that are six or fewer months out and those that are more than six months out). It also includes CEO transition expectations and CEO hiring policies and procedures (BUSINESS CONTINUITY, SUCCESSION PLAN.pdf).

Standard 4.6

An organization-wide, comprehensive risk assessment has been completed within the past 2 years and reported to the governing board.

██████████ conducted a risk assessment in 2023 when its last organizational standards assessment was completed. Additionally, insurance carriers and auditors assess risk during their respective annual reviews (Civicus Interviews).

██████████s bylaws state that "the corporation shall indemnify any current or former director, officer, employee, or other agent of the corporation to the fullest extent authorized under Mont. Code Ann. §§ 35-2-446 through 35-2-454, or any successor statutes, and may advance to any such person funds to pay expenses that may be incurred in defending any action or proceeding" (██████████ BYLAWS, AMENDED RESTATED, 03.2023; Article 7, §13).

Category Five: Board Governance

The board of directors of a private community action agency is critical for many reasons: proper governance is, perhaps, the most significant. The board is required to be tripartite in both form and function—all members of the board should have equal footings as directors and should make their voices known through all board and committee meetings and events. Strong governance ensures the community action agency follows proper budgets and fiscal controls, stays true to its mission, conducts business in a forthright and proper manner, and is meeting goals and outcomes that serve the community's interests.

Standard 5.1

The organization's governing board is structured in compliance with the CSBG Act:

1. At least one third democratically selected representatives of the low-income community;
2. One-third local elected officials (or their representatives); and
3. The remaining membership from major groups and interests in the community.

██████████ continues to maintain compliance with Standard 5.1. The governing board includes five democratically selected representatives of the low-income community, one-third of the total board membership. Five board members representing local elected officials serve on the board, and five members represent the community at large (██████████ BOARD OF DIRECTORS ROSTER 07.2025).

Standard 5.2

The 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.

██████████'s bylaws call for a "democratic procedure by a group or organization that is comprised of or is significantly represented by low-income residents of the communities served by the corporation. Names of candidates selected through the democratic procedure shall be submitted for official nomination and election to the Board of Directors in accordance with nomination procedures approved by the Board of Directors. Directors representing the low-income sector on the Board shall be current residents of the corporation's service area as described in Article 1 of these Bylaws" (██████████ BYLAWS, AMENDED RESTATED, 03.2023, Article 5).

Written Procedure. Section 2.1 of the Board of Directors Policies manual indicates that persons experiencing low incomes or their representatives can be elected through a paper ballot procedure. Ballots are distributed to clientele receiving services, either by mail or hand delivery, and must include biographical sketches of candidates. The candidate receiving the most votes is submitted for nomination to the board. If only one candidate is listed, an affirmative vote of at least 15 percent of returned ballots is required for nomination. This procedure can also be used to validate or reelect existing low-income representatives.

Organized Low-income Groups. Section 2.2 of the Policy manual states that candidates can be nominated through elections held by organized low-income groups, such as Parent-Teacher Organizations, neighborhood groups, or coalitions with significant representation from low-income individuals. The name of the person receiving the most votes or chosen by a majority of the group is submitted for nomination to the Board. (██████████ Board Policies and Procedures, Updated 09.2023).

Standard 5.3

The organization's bylaws have been reviewed by an attorney within the past 5 years.

██████████ bylaws were reviewed for current legal compliance in 2022, within the five-year standard (MINUTES - ██████████ BOARD OF DIRECTORS MEETING 09.28.2022).

Standard 5.4

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

Board members receive a copy of the bylaws upon joining the board. In addition, board members review bylaws, financial policies and procedures, personnel policies and other relevant documents each year; When bylaws are amended, copies of the revised document are provided. (Civicus Interviews).

Standard 5.5

The organization's governing board meets in accordance with the frequency and quorum requirements and fills board vacancies as set out in its bylaws.

Board minutes indicate that the board met as directed in the bylaws, in the months of January, March, May, July, September, and November (Article 7, §1) (██████████ BYLAWS, AMENDED RESTATED, 03.2023; MINUTES - ██████████ BOARD OF DIRECTORS MEETING 01.23.2025.pdf, et. al.).

Standard 5.6

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

██████████ provides a conflict-of-interest declaration form for board members to review, complete, sign, and submit each year. Reminders are provided during meetings to ensure compliance. (MINUTES - ██████████ BOARD OF DIRECTORS MEETING 01.25.2024.pdf, et. al.). In addition, the conflict-of-interest policy is read aloud—and sometimes discussed—at each board meeting.

Standard 5.7

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

Onboarding of new board members includes training in the organization's mission, conflict of interest policy, strategic plan, annual Community Action plan, bylaws, ROMA, and other essential topics (Civicus Interviews).

Standard 5.8

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

██████████ board members receive ongoing training throughout the year, in addition to formal training within each calendar year (██████████ WORK PLAN 2024-2025, Legal Size; 2023 Strategic Plan, FINAL, APPROVED; Civicus Interviews).

Standard 5.9

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

██████████ provides extensive program reports at each board meeting (see 4.4 above).

The minutes virtually every board meeting record that programmatic reports were made. For example, during the meeting on March 28, 2024, the CEO reported updates on key programmatic initiatives, such as the Homeward Bound Property and Head Start Policies (MINUTES - ██████████ BOARD OF DIRECTORS MEETING 03.28.2024). The minutes from the January 25, 2024, meeting state that programmatic data, including Head Start enrollment statistics and performance metrics, were

presented for review and discussion (MINUTES - ACTION INC. BOARD OF DIRECTORS MEETING 01.25.2024).

Additional Indicators of Board Governance

Over the years, the online survey Civicus has implemented asks staff and board members about the strength of board governance. In 2025, 40 percent of respondents strongly agree with the statement, “Our board of directors sets the general direction and vision for our organization.” This is down from 2023’s 53.8 percent.

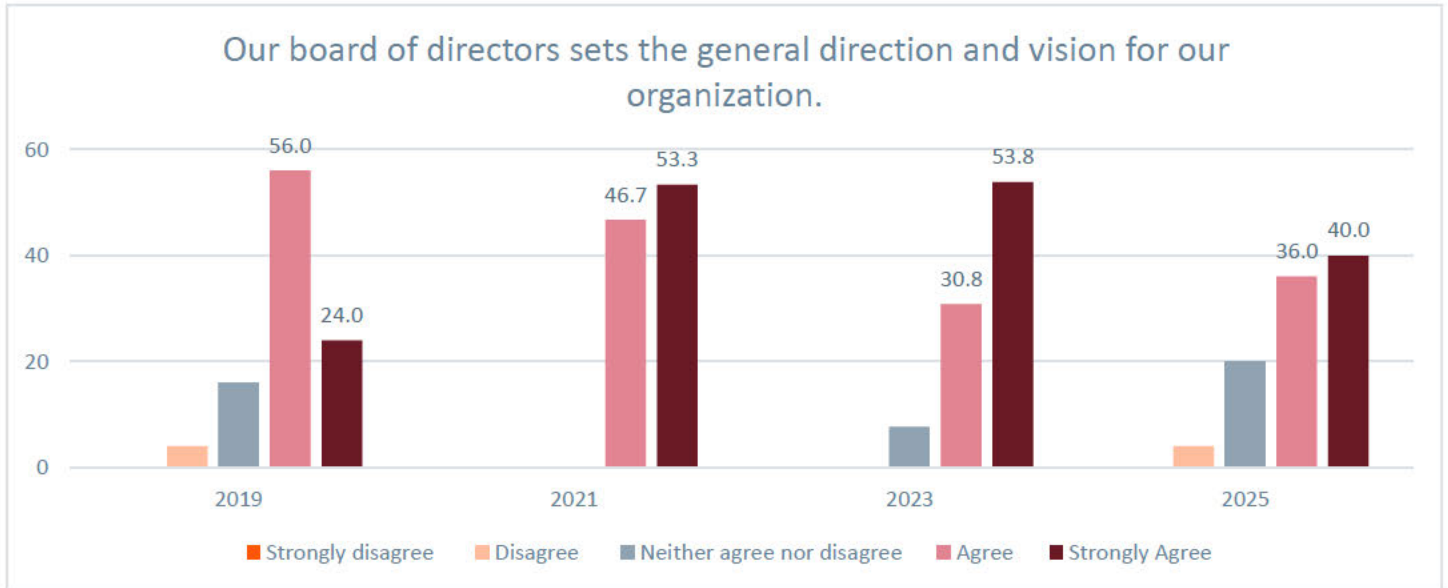


Figure 2: Our board of directors sets the general direction and vision for our organization.

The survey also asked whether the board of directors maintains appropriate oversight of the organization. About 73 percent either strongly agree or agree that it does.

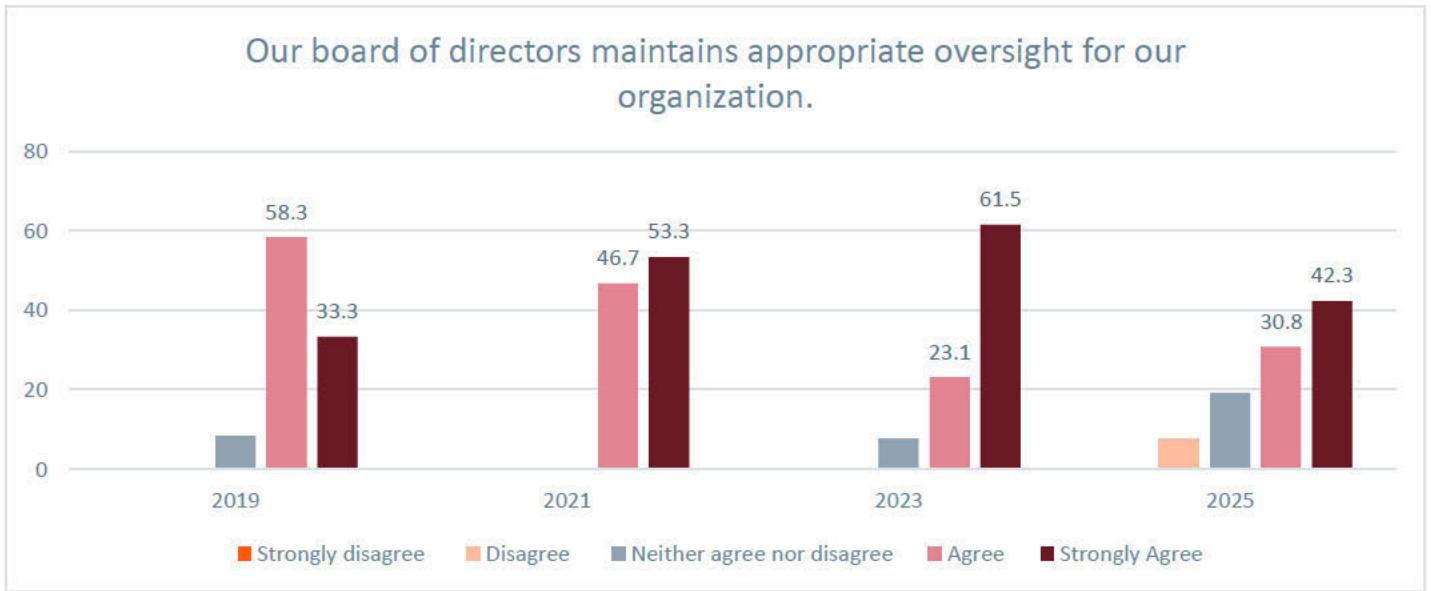


Figure 3: Our board of directors maintains appropriate oversight for our organization.

Category Six: Strategic Planning

Strategic planning helps community action agencies remain focused on the long-term work of meeting its mission instead of being engulfed in the minutia of program compliance, service delivery, meeting budgets, and so on. If properly developed and deployed, strategic plans help with organizational sustainability and impact.

Standard 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.

The current recent strategic plan was finalized and approved by Action’s board of directors on September 12, 2023. This plan, which covers 2024 through 2026, is based on a comprehensive assessment of the organization’s capacity and the triennial community assessment (2023 Strategic Plan, FINAL, APPROVED.pdf).

Standard 6.2

The approved strategic plan, or comparable planning document, addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of people with low incomes to become more self-sufficient.

Focus on Poverty Reduction. The strategic plan identifies specific goals and objectives aimed at advancing equity and providing essential services to low-income populations. For example, one of the primary goals is to "advance equity through the provision of essential services to poor and low-income people in the service area." This goal emphasizes the organization's commitment to addressing the root causes of poverty and enhancing the well-being of communities in [REDACTED]

Focus on Revitalization. The strategic plan also calls for the development of “permanent supported housing unit to support better health outcomes for people with complex behavior health challenges.” Efforts include collaborative efforts with ██████████ County and the Housing Authority of ██████ to obtain funding for these housing units.

Empowerment of People with Low Incomes. The plan identifies efforts to deliver “trauma-informed services that ease economic stress and provide opportunities for upward mobility”; “providing housing, food, heat, and social supports”; advocating for “allowing the use of green technologies within existing weatherization grants”; and providing “youth employment and training as well as supports to youth exiting the foster care system and services for homeless youth” to “keep services around disadvantaged youth and help redirect a future in poverty to a healthy, economically stable life” (2023 Strategic Plan, FINAL, APPROVED.pdf).

Standard 6.3

The approved strategic plan contains family, agency, and/or community goals.

The plan includes the following specific goals for families, the agency, and the community:

The strategic plan includes the following family goals.

- Deliver trauma-informed services to ease economic stress for low-income households and provide opportunities for upward mobility (Page 6).
- Increase access to essential services such as heat assistance, rent assistance, food assistance, and early childhood education to support family stability (Page 6-7).
- Provide services like case management, housing assistance, and food to improve health outcomes for families living in poverty (Page 8).
- Develop permanent supported housing units to address the needs of families with complex behavioral health challenges (Page 8).
- Offer programs like the Workforce Innovation and Opportunity Act (WIOA), Chafee Foster Care Independence, and Youth Homeless Demonstration grants to help disadvantaged youth transition to stable and economically secure lives (Page 6).

It includes the following agency goals.

- Improve efficiency and compliance in all departments through regular assessments, staff training, and performance measurement systems (Page 11).
- Utilize information technology systems to enhance internal communication and external outreach (Page 11).
- Develop an agency-wide outreach plan to increase awareness of services and reach more low-income individuals, particularly in rural areas (Page 7).
- Fund a public awareness/outreach position to maintain consistent connections with the public and community partners (Page 7).
- Advocate for system-level changes in behavioral health and climate resilience to better serve low-income populations (Page 9-10).

The plan includes the following community goals.

- Collaborate with local hospitals, governments, and service providers to rebuild community-based mental health systems and provide crisis response services (Page 9).
- Advocate for and implement green technologies in weatherization programs to create climate-resilient living environments for low-income households (Page 10).
- Work with community partners to provide safe shelter for the homeless during extreme climate events (Page 10).
- Build partnerships with hospitals, healthcare providers, and other stakeholders to expand services and improve outcomes for low-income individuals in rural areas (Page 8-9).
- Engage in community events, fairs, and campaigns to strengthen community-based education and outreach (Page 7, 11).

Standard 6.4

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

Community Assessment. [REDACTED]'s community needs assessment, conducted every three years, includes primary data from surveys, focus groups, interviews with clients and community stakeholders, and quantitative data from secondary sources. The insights obtained from this process are invaluable and inform staff and board members of current specific needs, trends, and faced by individuals experiencing low income.

Incorporation of Customer Input. Feedback collected from customers is analyzed and utilized to inform all aspects of the strategic planning process. For example, the work plan stresses aligning services with the expectations and unique needs of clients, helping the agency remain responsive to the community.

Customer Satisfaction Data. [REDACTED] regularly and systematically collects customer satisfaction data to evaluate the effectiveness of programs and services. It utilizes this data to make necessary adjustments that improve service quality (2023 Strategic Plan, FINAL, APPROVED.pdf; [REDACTED] Work Plan 2024-2025, Legal Size.pdf; Civicus Interviews).

Standard 6.5

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

[REDACTED] board of directors receives updates on program progress and movement toward strategic goals every two months in its board meetings. See 4.4 and 5.9 above.

Regular Updates to the Governing Board. The minutes of the January 2024 board meeting indicate the board received updates on strategic plan progress. It also received and discussed a report from the Budget/Finance/Audit Committee, which included financial performance and program outcomes related to the strategic goals (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.25.2024.pdf).

Performance Monitoring. In addition to financial reports, the board receives updates on program performance and client satisfaction metrics. For example, The May 2024 meeting included discussions about the Head Start Summary Report, which provides a good understanding of service and program effectiveness—all pointing toward the strategic objectives (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 05.23.2024.pdf).

Accountability and Strategic Alignment. The March 2024 meeting minutes document that the board discussed implementation of the strategic plan and considered possible adjustments based on the progress and challenges encountered (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 03.28.2024.pdf).

Operations and Accountability

The Operations and Accountability category of the CSBG Organizational Standards measures the effectiveness, transparency, and efficiency of a community action agency's (CAA) internal operations across three domains: Human Resource Management, Financial Operations and Oversight, and Data and Analysis. Without effective management of its workforce—from recruiting and hiring to training and retaining qualified staff—the CAA will falter. This category also considers the financial practices (such as budgeting, audits, and fiscal procedures) data (collection, tracking, and utilization of data), and compliance with contracts, regulations, and laws.

Category Seven: Human Resource Management

Without good human resource management, any nonprofit organization would fail. With a focus on proper policies and procedures, community action agencies comply with labor laws adequately, recruit and retain staff successfully, and foster skills among personnel appropriately. Standards include regular performance evaluations, professional development, and team orientation, among other items—to help ensure quality services are delivered.

Standard 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.

Written Personnel Policies. [REDACTED] personnel policies are comprehensive and thorough. They include all necessary information and policies to manage the workforce. They are regularly updated and are provided to staff upon hiring and onboarding ([REDACTED] Personnel Policy Handbook - Updated 2024-03.pdf; Civicus Interviews; Civicus Survey).

Legal Review. The personnel policies were reviewed by competent legal counsel in July 2022. Policies were reviewed for legal compliance and protection of employee and the organization's rights ([REDACTED] Personnel Policy Handbook.pdf).

Governing Board Approval. The board of directors approves each update of the personnel policies manual; the most recent update is March 2024 ([REDACTED] Personnel Policy Handbook - Updated 2024-03.pdf).

Timeliness of Review and Approval. The review and approval process for the personnel policies occurs regularly, with the most recent updates documented in March 2024. Prior reviews occurred in March 2023, July 2022, and March 2017 ([REDACTED] Personnel Policy Handbook - Updated 2024-03.pdf).

Standard 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.

Availability of the Employee Handbook. The employee personnel manual is the primary (if not the only) resource for personnel policies; it is given to all employees upon onboarding. Updated versions are provided when they are available. Employees certify they have received the latest handbook by signing and dating a certification form; this form is retained by management ([REDACTED] Personnel Policy Handbook - Updated 2024-03.pdf; Civicus Interviews).

Notification of Changes. [REDACTED] has a systematic approach for communicating any updates or changes to the employee handbook. The organization notifies staff through written communication, such as emails or memos, detailing the specific changes made to the policies (Civicus Interviews).

Training and Orientation. New employees receive training and orientation that includes a review of the employee handbook. The handbook emphasizes the critical nature of understanding and adhering by these policies ([REDACTED] Personnel Policy Handbook.pdf).

Standard 7.3

The organization has written job descriptions for all positions, which have been updated within the past 5 years.

[REDACTED] has written job descriptions for all positions. These descriptions provide critical communications on duties, responsibilities, qualifications, and expectations. They have been updated within the past five years (Associate Property Manager 03.2025.pdf, Chief Financial Officer 05.2024.pdf, et. al.; Civicus Interviews).

Standard 7.4

The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.

[REDACTED]s board of directors reviews the performance of the CEO each year (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.23.2025, et. al.; Civicus Interviews).

Standard 7.5

The governing board reviews and approves CEO/executive director compensation within every calendar year.

[REDACTED]s board of directors reviews and approves the compensation of the CEO each year (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.23.2025, et. al.; Civicus Interviews).

Standard 7.6

The organization has a policy in place for regular written evaluation of employees by their supervisors.

Written Evaluation Policy. [REDACTED] has a formal policy and process for conducting regular written evaluations of employees. This policy ensures that evaluations are—to the degree possible—systematic, fair, and consistent.

The Human Resources Manager is tasked with

- Developing and maintaining a successful and meaningful performance evaluation process.
- Providing appraisal instruments and training managers to effectively use them.
- Ensuring performance appraisals are completed in accordance with policies across agency programs and departments.
- Coaching and disciplining employees, resolving grievances, and counseling employees and supervisors to address performance-related issues.

The employee handbook indicates the following regarding performance evaluations.

Continuous Evaluation. Performance is continuously evaluated through day-to-day interactions between employees and their supervisors. This provides employees with a sense of how their performance is perceived and what is expected of them.

Periodic Formal Evaluations. In addition to regular (often daily) interactions, periodic formal performance evaluations are conducted. These evaluations may also occur in the event of a promotion or a change in duties and responsibilities.

Encouragement for Communication. Employees are encouraged to discuss expectations and performance with their supervisors, particularly if they are unsure about their supervisor's perceptions or expectations.

New Employment Probationary Period. New employees must receive a satisfactory performance appraisal to successfully complete their probationary period.

Background checks and selection procedures. Due to federal regulations and close interaction with children, Head Start maintains its own protocols for background checks and performance.

(Human Resources Manager 06.11.2025.pdf; [REDACTED] Personnel Policy Handbook - Updated 2024-03; Civicus Interviews; Civicus Survey.)

Standard 7.7

The organization has a whistleblower policy that has been approved by the governing board.

Whistleblower Policy Overview. [REDACTED] whistleblower policy is thorough. It provides a framework for employees, board members, and stakeholders (such as volunteers and customers) to report suspected fraudulent or dishonest activities without fear of retaliation. The policy's purpose is to ensure that all individuals associated with the agency understand their rights and responsibilities.

Approval by the Governing Board. The policy has been thoroughly reviewed and has received approval from the board; this demonstrates the board's commitment to fostering an ethical organizational culture.

Reporting Mechanisms. The whistleblower protection policy provides clear reporting mechanisms, including designated contacts within the organization (such as the CEO, Human Resources Manager or the board chair). These designated individuals are responsible for receiving and addressing reports, as well as ensuring appropriate actions are taken promptly.

Protection Against Retaliation. A key component of the whistleblower protection policy is that it offers protection to individuals who report concerns in good faith. The policy explicitly states that no employee, board member, or volunteer will face harassment, retaliation, or adverse employment action for reporting suspected misconduct. The aim of this protection is to encourage persons to share concerns, thereby enhancing the organization's integrity.

Training and Awareness. ██████ is committed to maintaining awareness about the whistleblower policy among its employees and stakeholders. Civicus interviews and the Civicus survey indicate a nearly ubiquitous awareness of the policy. Training is provided to all board and staff members, as well as volunteers, when onboarding and throughout their time with the organization.

Encouragement to Report. Employees, board members, consultants, vendors, volunteers, clients, and community members are encouraged to report suspected fraudulent or dishonest use or misuse of resources, property, or issues with services and programs.

Reporting Channels. Concerns can be reported to the Human Resources Manager, the CEO, or the Chairperson of the Board of Directors. Anonymous written statements are also accepted.

Investigation. All complaints are promptly reviewed, documented, and investigated. Corrective action is taken if necessary, and confidentiality is maintained to the extent possible.

No Retaliation. Individuals who report concerns in good faith are protected from harassment, retaliation, or adverse consequences. Employees who retaliate may face disciplinary action, including termination.

False Allegations. Intentional false allegations may result in disciplinary action.

(████████████████████ Personnel Policy Handbook - Updated 2024-03.pdf; Civicus Interviews; Civicus Survey).

Standard 7.8

All staff participate in a new employee orientation within 60 days of hire.

██████████'s onboarding activities include training and orientation of new employees within the week of hire (Civicus Interviews).

Standard 7.9

The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.

New employees at Action are scheduled for training during the first week of work. This training includes policies, procedures, work methods, and safety precautions. Position-specific training is provided by direct supervisors.

On-the-job and in-service training is provided throughout an employee’s career with [REDACTED]. The degree of training is dependent on the position. All employees receive ongoing, near-daily training and mentoring by direct supervisors or others; some employees are required to attend additional training conducted by funders, state organizations, regional or national conferences, and so forth.

Mental health and wellness training is provided for Head Start staff as a requirement for funding. First aid and CPR certification is provided for certain roles; employees in these positions must obtain certification prior to the end of their probationary period and must maintain it throughout their service at Action.

ROMA training is provided to board members and appropriate staff and board members. Action has a ROMA-certified implementer on staff.

[REDACTED] Personnel Policy Handbook - Updated 2024-03.pdf; Civicus Interviews.)

Additional Indicators of Human Resource Management

The online survey of staff and board members inquired about compensation—whether the system is appropriate and adequate, and whether personal compensation is appropriate. About half of those who

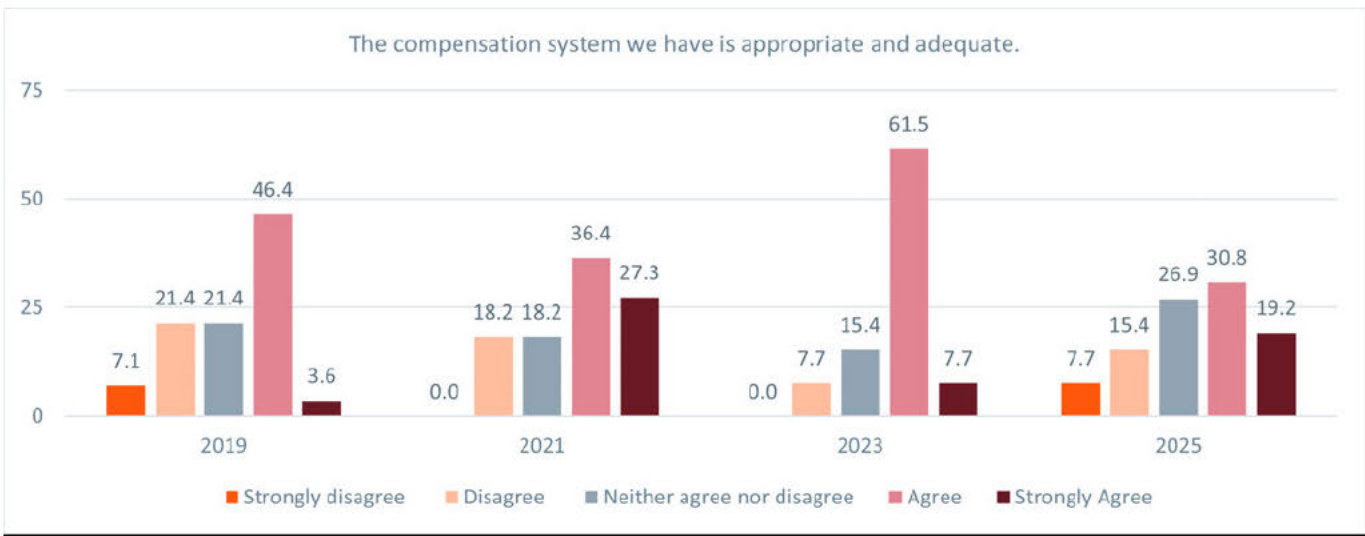


Figure 4: The compensation system we have is appropriate and adequate.

responded indicate the system itself is appropriate and adequate, while about 23 percent believe it's not. Most also agree or strongly agree their personal compensation is appropriate.

Category Eight: Financial Operations and Oversight

Finances are critical to run any organization. Proper fiscal controls, policies, and procedures must be established, maintained, and followed. Transparency and compliance are key to proper fiscal operations; necessary oversight at the executive and board level are required. Funding sources (be they public or private funds) expect sound record keeping, compliance with standard policies and procedures, and clean financial audits.

Standard 8.1

The Organization's annual audit (or audited financial statements) is completed by a Certified Public Accountant on time in accordance with Title 2 of the Code of Federal Regulations, Uniform Administration Requirements, Cost Principles, and Audit Requirement (if applicable) and/or State audit threshold requirements.

██████████'s annual audit is completed by a Certified Public Accountant (CPA) on time, in accordance with relevant regulations.

Annual Audit Process. The annual audit process at ██████████ is designed to provide an independent assessment of the organization's financial statements and compliance with federal and state regulations. The audits provided (FY 2021 and FY 2022) detail the audit procedures and findings, and confirm they were performed in accordance with generally accepted auditing standards (Audit, Final 09 30 22 FS.pdf; Audit, Final 09 30 21 FS - ██████████.pdf).

Timeliness of Completion. ██████████ ensures that the annual audit is completed on time, typically within the required timeframe following the end of the fiscal year (30 September). Audits are finalized and presented to the board of directors in a timely manner, allowing for review and approval (Audit, Final 09 30 22 FS.pdf; Audit, Final 09 30 21 FS - ██████████.pdf).

Compliance with Regulations. The audits conducted Anderson ZurMuehlen, Certified Public Accountants & Business Advisors (FY 2021) and KCoE Isom (now known as ██████████ (FY 2022). are in compliance with Title 2 of the Code of Federal Regulations. This code outlines the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for federal awards.

Engagement of Certified Public Accountant. ██████████ engages a qualified CPA firm to conduct its annual audit. The firm is responsible for evaluating the organization's financial practices and providing an independent opinion on the financial statements (██████████ 990 Draft - 2023 (FY24).pdf; Civicus Interviews).

Reporting and Follow-Up. Upon completion of the audit, ██████████ receives a detailed report that includes findings and recommendations. The audits are presented to the board of directors, with ample opportunity for questions and discussion. Audits revealed no material weaknesses or significant deficiencies; no findings were presented in the two reviewed audits. The board accepted the audits through

formal action (Audit, Final 09 30 22 FS.pdf; Audit, Final 09 30 21 FS - [REDACTED].pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 05.26.2022.pdf, et. al.).

Assessment of Prior Year Audit Findings. Following the completion of the annual audit, [REDACTED] staff and board reviews the findings and recommendations provided by the independent auditor. No findings were presented in the reviewed audits (Audit, Final 09 30 22 FS.pdf; Audit, Final 09 30 21 FS - [REDACTED].pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 05.26.2022.pdf, et. al.).

Governing Board Review. [REDACTED] board discusses the audit results and determines any appropriate actions to address identified issues (Audit, Final 09 30 22 FS.pdf; Audit, Final 09 30 21 FS - [REDACTED].pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 05.26.2022.pdf, et. al.).

Standard 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.

There were no findings and, therefore, no corrective actions required over the two years' audits provided to us.

Standard 8.3

The organization's auditor presents the audit to the governing board.

At the board meeting held on May 23, 2024, [REDACTED] from [REDACTED], the auditor, provided a detailed presentation of the audited financial statements, discussed it, and answered board member questions (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 05.23.2024).

Standard 8.4

The governing board formally receives and accepts the audit.

Following the presentation of the audited financial statements at its May 23, 2024, meeting, the board formally accepted the audit through a motion and vote (MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 05.23.2024).

Standard 8.5

The organization has solicited bids for its audit within the past 5 years.

After an open bidding process, the current auditing firm, [REDACTED] was selected in 2023 (Civics Interviews).

Standard 8.6

The IRS Form 990 is completed annually and made available to the governing board for review.

[REDACTED] adheres to Standard 8.6 by ensuring that the IRS Form 990 is completed annually and made available to the governing board for review.

Completion of IRS Form 990. The IRS Form 990 provides detailed information about the organization's financial activities, governance, and compliance with tax regulations.

1. Data Collection. [REDACTED] finance staff gathers all financial data, including revenue, expenses, assets, and liabilities, as well as information about governance and compliance. In addition, all regularly financial statements are gathered and made available to the tax preparation firm.

2. Preparation of Form 990. The form is prepared by the organization's financial team in concert with [REDACTED] LLC, to ensure that all required information is accurately reported. The Budget/Finance/Audit Committee is kept abreast of the status of Form 990 preparation.

3. Review and Approval. Before submission, the completed Form 990 is reviewed by staff to ensure accuracy and completeness; depending on the timing of completion, the form is also reviewed by the Budget/Finance/Audit Committee. Following submission, Form 990 is presented to the board of directors for review.

Availability for Board Review. [REDACTED] ensures that the completed IRS Form 990 is made available to board members for review, as required in its financial policies and procedures.

Documentation in Meeting Minutes. The review and acceptance of the IRS Form 990 are documented in the meeting minutes of the relevant board meetings.

([REDACTED] Financial Policies & Procedures 2023.09; MINUTES - [REDACTED] BUDGET, FINANCE, AUDIT COMMITTEE MEETING 04.27.2023; MINUTES - [REDACTED] BUDGET, FINANCE, AUDIT COMMITTEE MEETING 01.23.2025; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 07.25.2024; Civicus Interviews.)

Standard 8.7

The governing board receives financial reports at each regular meeting that include the following:

1. Organization-wide report on revenue and expenditures that compares budget to actual, categorized by program; and

2. Balance sheet/statement of financial position.

[REDACTED] wholly complies with Standard 8.7 by providing the board of directors with comprehensive financial reports at each regular meeting. In addition, reports are provided to the Budget, Finance, Audit Committee (which often meets in months when the full board is not meeting).

Components of Financial Reports. The financial reports are thorough and comprehensive. They include the following key components.

1. Organization-wide Report on Revenue and Expenditures. The report compares the budgeted revenue and expenditures to the actual figures, categorized by program. This format provides a clear, easily understood overview of each program financial performance. The report highlights variances between budgeted and actual amounts, enabling the board to more readily identify areas that may require attention or adjustment. A column at the end of the program summary reports provides notes for additional explanation or status comments from staff.

2. Statement of Financial Position. The statement of financial position details assets, liabilities, and net assets. This statement is helpful for understanding the [REDACTED] liquidity and overall financial stability.

3. Investment Summary. The financial statements include summaries of investments, including cash, mutual funds, endowment accounts, and corporate bonds.

4. Bank Balances. The financial report includes a line graph showing the historical level of bank balances in the operating, CGH operating, SMH operating, and HESI operating accounts. This group depicts the balances over a 30-month (or so) period.

5. Checks Greater than \$3,500, Credit Card Charges, Electronic Payments. The financial statements presented to the board include details of all payments greater than \$3,500 made by check, the most recent month's credit card charges, and the most recent month's electronic payments; the latter two are broken down by program. Details include the grant number, vendor, description of transaction, documentation, date, account, and amount.

6. Detailed Statements of Revenues and Expenditures by Program. The regular report includes detailed statements of revenues and expenditures by program; this portion of the report comprises the bulk of the financials.

Frequency and Documentation. The board (or committee, in off months) receives these financial reports at each meeting, ensuring that directors are consistently informed. This practice is documented in the meeting minutes.

General Comments. The comprehensive nature of financial statements presented to [REDACTED] directors assure transparency and accountability to the deepest levels, providing sufficient opportunity for discussion and informed decision making.

([REDACTED] Financial Policies & Procedures 2023.09; MINUTES - [REDACTED] BUDGET, FINANCE, AUDIT COMMITTEE MEETING 04.27.2023, et. al.; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 07.25.2024, et. al.; Board Financial Report 2025-01 January, et. al.; Civicus Interviews.)

Standard 8.8

All required filings and payments related to payroll withholdings are completed on time.

The timely completion of required filings and payments related to payroll withholdings is supported by multiple board meeting minutes and in interviews with staff.

Evidence of Timely Payments and Filings.

1. Financial Policies & Procedures Manual. [REDACTED] Financial Policies & Procedures outlines the agency's commitment to compliance with all payroll-related obligations, specifying that payroll withholdings must be calculated accurately and submitted to the appropriate authorities on time.

2. Audit Reports. Annual audits provide independent verification of [REDACTED] financial practices. Both audits provided conclude that [REDACTED] maintained effective internal controls over financial

reporting, including payroll processes. The auditors did not identify any material weaknesses or significant deficiencies related to payroll withholdings.

3. Form 990. Forms 990 are submitted to the IRS on time, demonstrating that [REDACTED] is compliant with federal tax regulations.

4. Tax Return Documentation. Tax returns provide evidence of compliance with payroll withholding requirements; these include detailed information about the organization's payroll expenses and withholdings.

([REDACTED] Financial Policies & Procedures 2023.09; 2022 (FYE23) [REDACTED] Tax Return - Client Copy; Audit, Final 09 30 21 FS - [REDACTED] Audit Final 09 30 22 FS; [REDACTED] 990 Draft - 2023 (FY24).)

Standard 8.9

The governing board annually approves an organization-wide budget.

Budget Development Process. The budget development process at [REDACTED] is outlined in the Financial Policies and Procedures manual. Steps to creating the annual budget include input from various departments and assurances that budget is in alignment with the agency's strategic goals. All relevant stakeholders contribute to budget development.

Presentation to Budget/Finance/Audit Committee. This committee reviews the proposed budget, has opportunities for questions, discussion, and modification, and ultimately approves the budget for presentation to the full board of directors.

Presentation to Board. Staff and Budget/Finance/Audit Committee members present the budget to the board of directors in a regular board meeting. Board member review and discuss the proposal in detail.

Formal Approval. The board of directors formally approves the organization's budget during a designated meeting.

([REDACTED] Financial Policies & Procedures 2023.09; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 09.26.2024, et. al.; MINUTES - [REDACTED] BUDGET, FINANCE, AUDIT COMMITTEE MEETING 09.26.2024, et. al. Civicus Interviews.)

Standard 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.

[REDACTED] Accounting & Financial Policies and Procedures Manual was reviewed in 2023 and updated September 28, 2023 ([REDACTED] Financial Policies & Procedures 2023.09).

Standard 8.11

A written procurement policy is in place and has been reviewed by the governing board within the past 5 years.

Detailed purchasing and procurement policies and procedures are included in the Accounting & Financial Policies and Procedures Manual. Policies indicate who has responsibility for making purchases, code of conduct in purchasing, non-discrimination in purchasing, procurement procedures, use of purchase orders, purchasing procedures, receipt and acceptance of goods, authorization and purchasing limits, required solicitations of quotations from vendors, extensions of due dates and receipt of late proposals, evaluation of alternative vendors, affirmative consideration of minority, small business and women-owned businesses, availability of procurement records, provisions included in all contracts, special purchasing conditions, right to audit clause, and vendor files and required documentation. Interviews with staff indicate sufficient understanding with these policies and procedures; audits indicate historical compliance (██████████ Financial Policies & Procedures 2023.09; Audit, Final 09 30 21 FS - ██████████ Audit, Final 09 30 22 FS; Civicus Interviews).

Standard 8.12

The organization documents how it allocates shared costs through an indirect cost rate or through a written cost allocation plan.

██████████ documents the allocation of shared costs through a written cost allocation plan. The current policy states the following components of the policy.

Direct Charged Costs. Program managers directly charge time and expenses to the programs they manage.

Allocated Costs. Examples include facility expenses allocated by square footage, telephone expenses allocated by the number of phones, and audit costs allocated via the Administrative Common Cost Pool.

Administrative Common Cost Pool. Includes administrative staff salaries and benefits, costs associated with administrative staff (e.g., rent, office supplies, travel), and other general administrative expenses.

Grant Allowability. Administrative costs charged to a grant will not exceed the allowable amount in the grant, and any shortfalls will be covered by other allowable sources.

Evidence of policy implementation includes the following.

Cost Allocation Plan Overview. The cost allocation plan is presented to the board by the CFO annually at the time of budget presentation and approval. The cost allocation plan, utilizes a multiple allocation base method.

Cost Allocation in Financial Reports. The Financial reports indicate that administrative expenses are allocated to grants in accordance with the board-approved cost allocation plan.

Budget Summary and Allocated Cost Centers. Grant budget summary sheets provided to the board and the Budget/Finance/Audit Committee include expenses for both administration and programming; costs are allocated in accordance with the cost allocation plan.

(██████████ Financial Policies & Procedures 2023.09; MINUTES - ██████████ BOARD OF DIRECTORS MEETING 09.26.2024, et. al.; MINUTES - ██████████ BUDGET, FINANCE, AUDIT COMMITTEE MEETING 02.27.2025, et. al.)

Standard 8.13

The organization has a written policy in place for record retention and destruction.

██████████ ██████████ Financial Policies & Procedures 2023.09 requires that records are retained as required by law and destroys them when appropriate. The destruction of records must be approved by the CFO and logged into the organization's Destroyed Records Log.

Retention Periods. The manual specifies retention periods for various types of records, including:

- Permanently Retained Records: Audit reports, depreciation schedules, general ledgers, minute books, property records, tax returns, trademark registrations, etc.
- Records Retained for 8 Years: Accident reports, accounts payable/receivable ledgers, cancelled checks, payroll records, sales records, subsidiary ledgers, etc.
- Records Retained for 3 Years: Bank reconciliations, bank statements, duplicate deposit slips, petty cash vouchers, physical inventory tags, etc.
- Records Retained for 1–2 Years: Routine correspondence, requisitions, receiving sheets, etc.

Destruction of Records

- Destruction must be approved by the CFO.
- Destroyed records are logged into the Destroyed Records Log.
- Sensitive data must be securely shredded when no longer needed.

(██████████ Financial Policies & Procedures 2023.09.)

Category Nine: Data and Analysis

The collection, reporting, and analysis of data is necessary to measure program outcomes and overall agency performance. Data should drive management and leadership of the organization, leading to proper evaluation, effective services, and evidence of success.

Standard 9.1

The organization has a system or systems in place to track and report client demographics and services customers receive.

Standard 9.2 emphasizes the necessity for organizations to establish effective systems to monitor and evaluate outcomes at various levels, including family, agency, and community. The components of targeted outcomes are found under Standard 6.3. Methods and systems utilized to successfully track and report client demographics and services includes the following.

CDS/HMIS (Homeless Management Information System). This system is used for tracking outcomes, demographics, and services related to housing services, case management, referrals, and other support services.

CDS/HAPPY. This system is utilized for tracking outcomes related to housing vouchers and affordable housing programs, including client data.

CHIMES. This system tracks client data and outcomes related to energy assistance and weatherization services.

CDS/Child Plus. This system tracks data and outcomes related to early childhood education programs.

CDS/MT Works. This system tracks client data and outcomes related to youth employment and training programs ([REDACTED] WORK PLAN 2024-2025, Legal Size.pdf).

Standard 9.2

The organization has a system or systems in place to track family, agency, and/or community outcomes.

[REDACTED] is steeped in outcome measurement. The following table identifies outcomes and systems in place to track success ([REDACTED] WORK PLAN 2024-2025, Legal Size.pdf).

Table 3: ██████████ Outcomes by Type, Area, and System Used to Measure

██████████ Outcomes by Type, Area, and System Used to Measure			
Outcome Type	Topic/Area	Activity/Measure	System(s) Used
Family	Housing Stability	Families and individuals obtain or maintain safe, affordable housing through programs like rapid rehousing, rent assistance, and weatherization.	CDS/HMIS, CDS/HAPPY
Family	Economic Self-Sufficiency	Youth and adults gain job readiness skills, employment, and increased income/benefits.	CDS/MT Works
Family	Health and Well-Being	Families receive heat assistance, energy efficiency services, and food support to improve living conditions and reduce financial burdens.	CHIMES, CDS
Family	Education	Children develop school readiness skills through Head Start programs, and youth achieve educational milestones like GEDs or post-secondary diplomas.	CDS/Child Plus, CDS/MT Works
Family	Civic Engagement	Families and individuals participate in community boards, councils, and volunteer activities to build empowerment and leadership skills.	Internal Records, CDS
Agency	Operational Excellence	Improved internal systems, staff training, and governance to enhance service delivery and resource management.	Internal Records
Agency	Resource Development	Securing funding streams for programs like permanent supportive housing and green technology initiatives.	Contracts, Internal Records
Agency	Public Awareness	Increased outreach and education about poverty, energy conservation, and available services.	Internal Records, Media Systems
Agency	Staff Capacity	Staff complete training programs to improve effectiveness in delivering services.	Internal Records
Community	Collaborative Systems	Partnerships with stakeholders (e.g., hospitals, nonprofits, government entities) to address poverty, homelessness, and health outcomes.	Internal Records, MOUs
Community	Social Determinants of Health	Development of integrated services to address housing, food insecurity, and health disparities.	CDS, Internal Records
Community	Behavioral Health Advocacy	Creation of housing solutions and system-level changes for individuals with behavioral health challenges.	Meeting Minutes, Contracts
Community	Climate Resilience	Advocacy for green technologies and safe environments during extreme weather events.	Meeting Minutes, Internal Records

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.

Analyses of family, agency, and community outcomes is ubiquitous. Minutes of board meetings report regular reporting, review, discussion, and—when appropriate—clarification or program modification for various programs. Examples include the following.

Minutes of one board meeting mention the Head Start Self-Assessment. The Head Start director reported on strengths and areas needing improvement, including enrollment and recruitment numbers. In another board meeting, reference the ROMA Performance Data was made, providing insights into program outcomes. The data is broken down by service line and county, indicating a detailed analysis of program participation and effectiveness.

The Budget/Finance/Audit Committee reviews summaries of program data, particularly in relation to expenses. This data includes program participation and outcomes.

In another board meeting, the board discussed the mental health system work of [REDACTED] and the collaborative's efforts, including program outcomes related to mental health services provided to the community.

(MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 05.23.2024.pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.25.2024.pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 03.28.2024.pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 01.23.2025.pdf; MINUTES - [REDACTED] BOARD OF DIRECTORS MEETING 07.25.2024.pdf, et. al.; MINUTES - [REDACTED] BUDGET, FINANCE, AUDIT COMMITTEE MEETING 01.25.2024, et. al.)

Standard 9.4

The organization submits its annual CSBG Information Survey data report and it reflects client demographics and organization-wide outcomes.

The various tracking systems and data sources utilized (CDS/HMIS, CDS/HAPPY, CHIMES, etc.) are used to complete the CSBG annual report, which is submitted on time (Civicus Interviews).

Risk Mitigation

[REDACTED]s operations include multiple appropriate and adequate risk identification and risk mitigation efforts. Some of these include the following.

Sound Fiscal Controls, Policies, and Procedures. [REDACTED] implements robust fiscal controls, policies, and procedures to ensure accurate financial reporting and responsible resource allocation. These measures mitigate risks by safeguarding assets, preventing fraud, and maintaining compliance with regulatory standards.

Adequate Insurance Policies. The agency maintains comprehensive insurance policies of all appropriate types, to protect against potential liabilities, property damage, and operational disruptions. These policies minimize financial risks and help ensure continuity of services in the face of unforeseen events.

Staff and Board Training and Certification. [REDACTED] regularly conducts training programs for staff and board members to enhance their skills and knowledge in governance, compliance, and program delivery. Training for staff includes position-specific training (including first aid and CPR). This investment of resources (in terms of time and expense) reduces risks by strengthening sensible and informed decision-making and improving operational effectiveness.

Conflict of Interest Policy and Its Enforcement. The organization enforces a clear conflict of interest policy to ensure transparency and impartiality among board members and staff. The annual formal review of the conflict of interest policy by the board, and the reciting of (and, at times, discussion about) the board conflict of interest statement is admirable. Staff are likewise expected to commit to impartial service delivery and decision making. The strict adherence to these board and staff policies mitigates risks of bias or unethical behavior, thereby preserving trust and integrity.

Contract Review and Approval Process. The agency follows a thorough contract review and approval process to evaluate terms, obligations, and risks before entering agreements. This oversight reduces legal and financial exposures.

Board Meeting Documentation: [REDACTED] board and committee meetings minutes are meticulously recorded; this approach prevents possible misinterpretation of decisions or false claims of unethical behavior. It also helps provide a culture of transparency in governance activities. This practice mitigates risks by ensuring accountability and, at times, providing a clear audit trail for compliance and oversight purposes.

[REDACTED] has adopted a Business Continuity/Succession Plan that leaves the organization well prepared for either planned or unplanned departure of the CEO.

Unplanned Departure of CEO

An unplanned departure could be triggered by death, permanent incapacitation, or termination of the CEO. In this event, the COO assumes the role of Interim CEO. If the COO is unavailable, the Fiscal Manager or an external consultant will be appointed.

In the first 24 hours after departure, an emergency meeting is held with the board executive committee; the action plan is reviewed, modified or, if necessary, created. Staff are notified, and organizational assets are secured.

In the first week following departure, the Interim CEO is confirmed, the transition committee is activated, communication with stakeholders is implemented, and recruitment planning initiated.

In the first 30 days after departure, regular updates to staff and stakeholders are provided and the organization honors the former CEO (if appropriate).

Planned Departure of CEO

Less Than 6-Month Notice. When a CEO announces a departure with less than six months' notice, [REDACTED] implements expedited procedures to ensure continuity. Key steps include the following.

First Two Weeks:

- Convene an emergency executive committee meeting to assess the situation, create an action plan and timeline, assign responsibilities, and notify board of directors.
- Appoint an Interim CEO (line of succession: COO, Fiscal Manager, or external consultant) if needed, with decision-making authority and possible temporary salary increase.
- Consult the Human Resources Manager or external experts on personnel issues.
- Notify ██████████'s attorney for legal guidance.
- Send written communication from the board chair to staff, detailing the CEO's departure, Interim CEO appointment, contact persons, hiring process, and information updates.
- Activate the executive committee as the transition committee to:
 - Communicate with key stakeholders (donors, funders, government agencies).
 - Assess need for consulting assistance (such as transition management or executive search).
 - Support the Interim CEO to ensure operational continuity.
 - Review the strategic plan, conduct a SWOT analysis, and identify priorities and desired CEO attributes.
 - Establish a recruitment and selection plan timeline.
 - Refer to the Personnel Policy Handbook for additional procedures.
- Form a CEO Search Committee, including executive committee, management team, and additional board members.

First Month:

- Continue to notify key stakeholders (donors, funders, lenders, partners, media, licensing agencies) and provide updates as needed.
- Provide progress updates to staff.

Second Month and Beyond (Until New CEO Assumes Position):

- Continue updating staff and stakeholders on progress.
- If appropriate, announce plan to honor former CEO.

At least Six-Month Notice. When a CEO announces a departure with at least six months' notice, ██████████ implements the following procedures to ensure continuity.

Initial Steps (Timeline set by Executive Transition Committee and CEO):

- Convene the executive committee to create an action plan timeline, assign responsibilities, and notify the board of directors of the impending departure.
- Consult the Human Resources Manager or external experts on personnel issues.
- Send written communication from board chair to staff, detailing the CEO departure, its circumstances (if appropriate), contact persons, hiring process, and information update schedule.
- Activate the executive committee as a Transition Committee to:
 - Communicate with key stakeholders (donors, funders, government agencies) about the situation and succession plan.

- Assess any need for consulting assistance (transition management or executive search).
- Review the strategic plan, conduct a SWOT analysis, and identify priorities and desired CEO attributes.
- Establish a recruitment and selection plan timeline.
- Refer to the Personnel Policy Handbook for additional procedures.
- Form a CEO Search Committee, including executive committee, management team, and additional Board members.
- Notify key stakeholders (donors, funders, lenders, partners, media, licensing agencies) and provide progress updates to staff.
- If appropriate, create and announce a plan to honor former CEO.
- Collaborate with staff to plan a celebration for the outgoing CEO.

The policy also outlines CEO transition expectations in the event of a planned departure, as well as the CEO hiring policy and procedures. As far as business continuity in the event of departure of the CEO, the plan is stellar.

Other Business Disruptions

To improve the business continuity plan, Civicus recommends expanding the current plan to include steps to take in the event of other business disruptions or closures. Events that could trigger extended or long-term business closures could include

- Natural disasters
- Legal or regulatory issues (particularly in today's federal government environment)
- Public health crises
- Supply chain disruptions or other resource shortages
- Severe and unexpected staffing shortages
- Cybersecurity breaches or significant internet or IT system failures
- Loss of major funding streams
- Community unrest
- Extended utility outages
- Environmental hazards
- Wildfires or forest fires
- Terrorism or acts of mass violence against ██████████ or the areas in which offices are located

Key components of such a plan could include risk assessment and business impact analysis, recovery objectives, continuity strategies, emergency response procedures communication plan, IT and data recovery plan, resource and supply chain management, training and awareness efforts; testing and exercises; and plan maintenance and review.

Additional Alignment Measures

As stated at the beginning of this report, this review also considers employee environment, team cohesiveness, and morale. These metrics are rated through an online survey of staff and board members, supplemented by one-on-one interviews.

Reminder Note About the Online Survey

The results of the survey are descriptive, not inferential. Because these results are applicable only to those who participated, they are not representative of the entire organization.

Employee Environment

A positive employee environment will almost always result in at least some outcomes being achieved. A negative employee environment will almost certainly guarantee failure. The online survey inquired about individual and shared workspace and facilities for adequacy, safety, and cleanliness.

Employees at Action are feeling the pressure of uncertainty regarding federal funding. Board and staff interviews indicated significant concern, and the online survey further confirm this. When the future of the organization—or of particular programs within the organization—is at risk, employee morale decreases. It is not unusual for employees to see everyday events or circumstances in the darkest possible light. This appears to be the case in the 2025 ratings of employee environment at [REDACTED]. Elements of the workplace that were viewed as excellent in 2023 and 2021 are now viewed cautiously.

Employees were asked whether they strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with multiple statements such as “I feel safe inside the building where I work,” or “Common areas shared by staff are clean and orderly.” The five options of agreement were converted to a five-point Likert scale for tabulation; in almost every case, mean ratings declined from 2023. The one statement that saw improvement (slight though it is) is “The physical space in which I work is clean and orderly”; the mean increased from 4.1 to 4.2.

Employee Environment at [REDACTED]

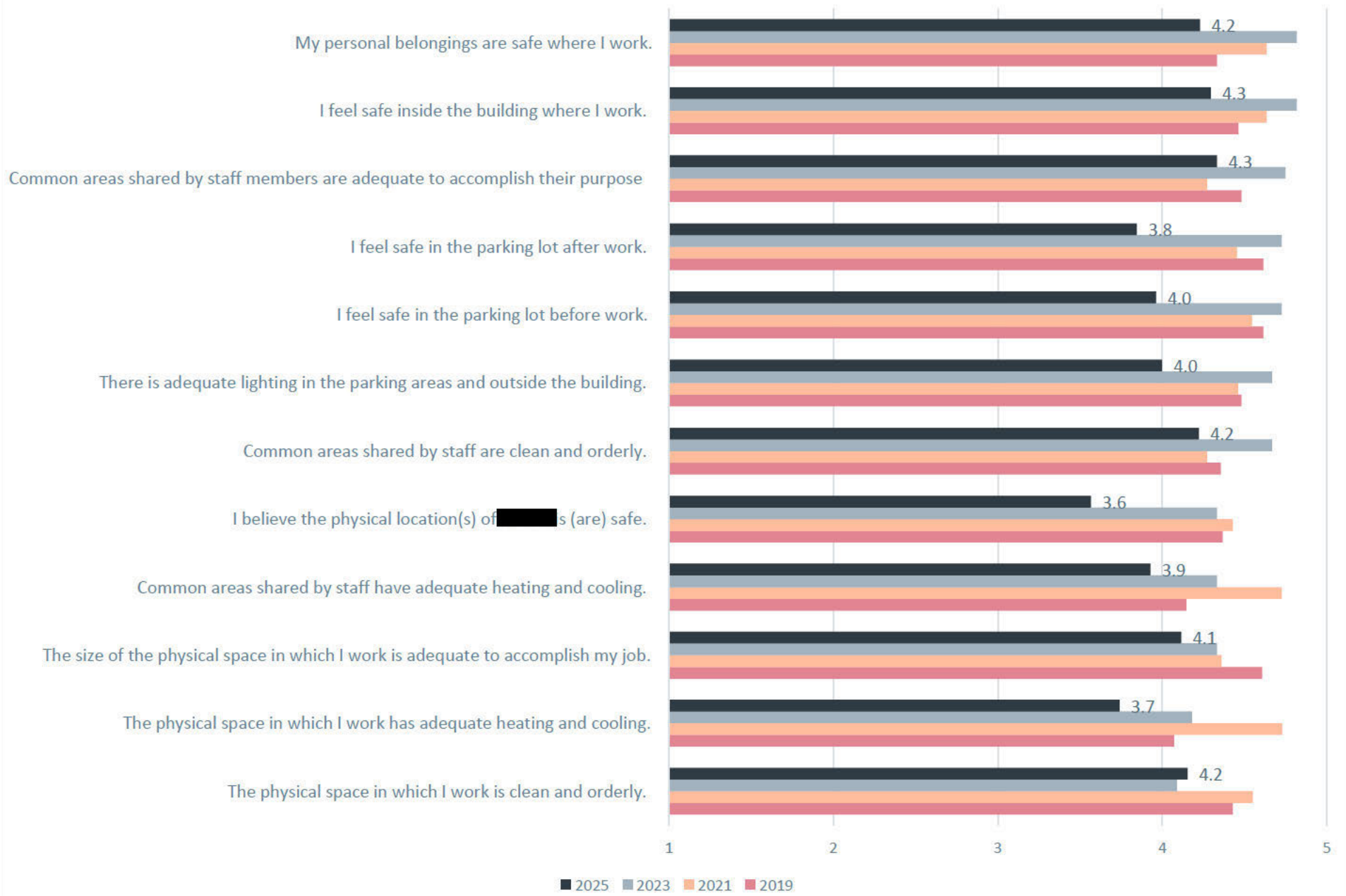


Figure 6: Employee Environment at [REDACTED]

Team Cohesiveness

Similar declines are seen in the team cohesiveness category, where every one of the 19 measures experienced a decline since 2023. While all declines are relatively small (less than 0.6), they should nonetheless be noted and monitored. For example, the statement, “Employees feel safe in expressing contrary opinions” dropped from 4.0 in 2023 to 3.6 in 2025—the same level as in 2014. However, caution should be exercised: these results reflect only those who participated in the survey, and the changes are minor.

Team Cohesiveness at [REDACTED]



Figure 7: Team Cohesiveness at [REDACTED]

Morale

An indicator—and a mirror—of organizational success is staff and board morale. A community action agency may be meeting all organizational standards, but if morale is low, success will be short-lived. Civicus measures morale both in live interviews with staff and board members and in the online survey. In the survey, two questions are asked. First, “Do you believe leadership will make changes based on the results of the study?” Historically, respondents with strong morale have confidence that the organization’s leadership (both board- and staff-level) is sufficiently secure and adequately invested to hear the perspectives of stakeholders, consider them, and take action. Second, the survey asks, “Overall, how happy are you with the way things are going at the organization?”

Staff and board members at ██████ believe in leadership—and they believe in it much more than in 2023. This year, 31 percent of respondents indicated they believe leadership will certainly make necessary changes, compared to zero percent in 2023. In fact, more respondents are confident leadership will make changes based on this survey than ever before. And the percentage who believe leadership will “definitely leave things as they are” dropped from 15.4 percent in 2023 to 13.8 percent in 2025.



Figure 9: As a result of this survey, leadership will...

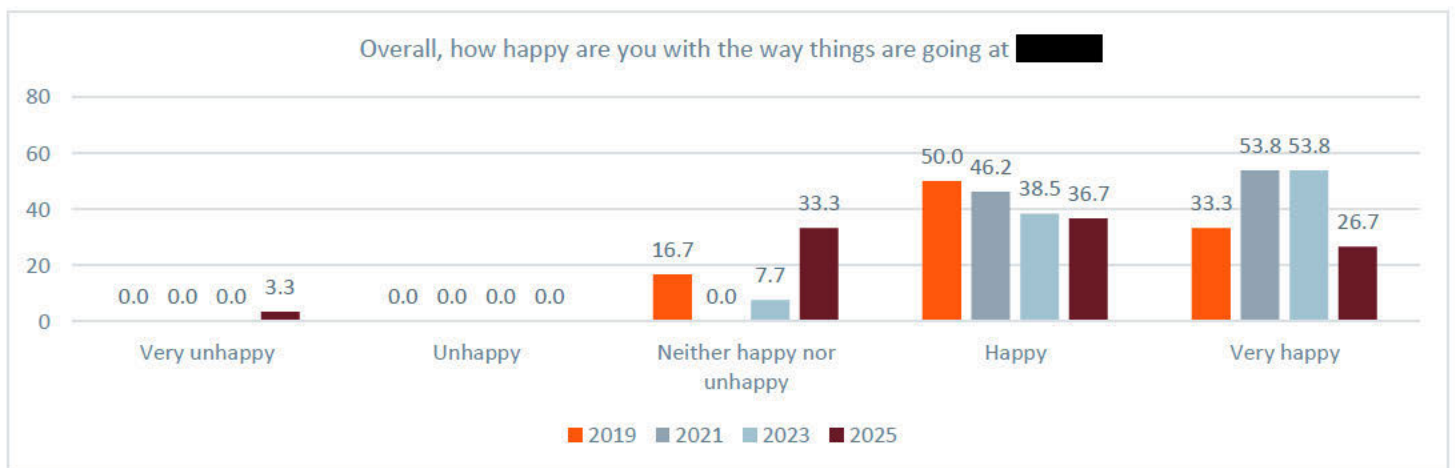


Figure 8: Overall, how happy are you with the way things are going at ██████

However, the concerns over stable funding at the federal level contribute to an uneasiness and insecurity at [REDACTED]. Fewer respondents are content than ever before, with only about two-thirds indicating they happy or very happy.

Conclusions

████████ continues to be a model community action agency, meeting every organizational standard and achieving extraordinary outcomes.

- Consumer input remains central to the planning, execution, and evaluation of all programs and initiatives.
- Community engagement is a strength, with genuine collaboration with other corporate partners, government, human service providers, faith-based organizations, and others playing preeminent position in the strategic plan and community action plan.
- The community assessment is strong. It relies on both quantitative and qualitative data and addresses all critical elements for sound strategic planning. It is utilized to assist in program adjustments, to validate assumptions, and to measure impact. It is built on stakeholder engagement, sound data, and expert input.
- Board governance is stable, and board members are fully engaged. The board is following the federal tripartite requirement. Board members understand and execute their fiduciary responsibilities with tremendous care. The board has systems in place to assure all necessary steps are taken to assure proper and adequate oversight, avoid conflicts of interest, advocate for the community and various stakeholders, and make sound decisions.
- Staff leadership continues to be exceptional in every way. Sensible and rational decisions are made through deliberate consideration of all available information. Proper reporting is accomplished at the program management, leadership team, and executive levels. Systems ensuring legitimate financial controls are followed; fiscal transparency is a core hallmark of leadership and the organization. The CEO exhibits unfaltering resilience and strength, even in the midst of uncertainty in funding streams.
- The strategic plan is reasonable and aspirational. Updated every year, it drives programming and is a standard for other community action agencies.
- Personnel policies are exemplary. Policies are clear, concise, and useful. Policies include a code of conduct, whistleblower protections and processes, written evaluations (including CEO evaluation conducted by the board), and all necessary policies for clear understanding of functional duties. Written job descriptions are available and regularly updated.
- Annual audits are clean and unqualified. Financial systems include reasonable controls; financial policies are clear and followed. Board oversight of financial transactions is sound. Procurement, payroll withholdings, and reimbursement procedures, as well as all other regular financial activities, are described in written policies that are understood by all necessary staff and board members.
- █████████ tracks and reports client demographics and services and all program outcomes. Reports are provided to program managers, leadership team members, and the board. The annual report is submitted on time.
- Although staff experience some anxiety over the immediate future, moral is good, team cohesiveness is moderate to strong, and employees are generally happy. Staff and board members exhibit substantial trust in the CEO and other staff leaders.

Recommendations

Business Continuity Planning. Although [REDACTED] meets all organizational standards, appropriately mitigates risk, and is well aligned—and is well prepared for a planned or unplanned CEO departure—Civicus recommends the organization create and implement an additional component to its current business continuity plan. The current plan is focused on departure of the CEO (meeting Standard 4.5); however, there are other events that could significantly disrupt Action's operations. Some of these events include

- Natural disasters;
- Public health crises;
- Severe and unexpected staffing shortages;
- Cybersecurity breaches or significant internet or IT system failures;
- Community unrest;
- Extended utility outages;
- Wildfires or forest fires; and
- Terrorism or acts of mass violence against [REDACTED] or the areas in which offices are located.

Action would do well to expand its current business continuity plan to include these types of events. Civicus recommends identifying two or three of the most likely events that could trigger a significant business disruption, then creating plans to continue operations for extended periods. Each year, additional scenarios could be identified and plans prepared. Over time, the agency will be well positioned to continue providing its core and necessary services, even in the face of significant challenges.

Risk Mitigation. [REDACTED] meets all risk-related standards. The Budget, Finance, and Audit Committee has explicit responsibility to monitor organizational risk and ensure adequate insurance coverage is provided. In addition, multiple financial controls are in place and practiced. Annual financial audits continue to be unqualified with no findings.

Other risks can be mitigated through development and implementation of a business continuity plan described above.

“Soft” risks such as inability to hire or retain competent talent, staff burnout, weak partnerships in the community, and data privacy breaches should also be formally and periodically considered. Civicus recommends development of a board-level policy regarding risk assessment and risk mitigation that establishes a review process and basic procedure. This policy could

- designate a board or staff committee (or hybrid committee) responsible for risk review;
- outline responsibilities of the committee (such as risk identification, evaluation, mitigation, etc.);
- call for a schedule for formal evaluations (annually, biennially, etc.); and
- require a formal report to the board.

Appendix A: Table of Standards

The following tables provide an overview of each standard and whether each standard is met. This overview identifies which the status of [REDACTED] without reading the full report.

Organizational Standards Review		Policy or procedure verified	Practice verified or reviewed
2025			
Standard 1.1	The Organization demonstrates low-income participation in its activities.	✓	✓
Standard 1.2	The Organization analyzes information collected directly from low-income individuals as part of the Community Assessment.	✓	✓
Standard 1.3	The Organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.	✓	✓
Standard 2.1	The Organization has documented or demonstrated partnerships across the community, specifically including other anti-poverty organizations in the area.	✓	✓
Standard 2.2	The Organization utilizes information gathered from key sectors of the community in assessing needs and resources. This would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.	✓	✓
Standard 2.3	The Organization communicates its activities and its results to the community.	✓	✓
Standard 2.4	The Organization documents the number of volunteers and hours mobilized in support of its activities.	✓	✓
Standard 3.1	The Organization conducted a Community Assessment and issued a report within the past 3 years.	✓	✓
Standard 3.2	As part of the Community Assessment, the Organization collects and includes current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for their service area(s).	✓	✓
Standard 3.3	The Organization collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the Community Assessment.	✓	✓
Standard 3.4	The governing board formally accepts the completed Community Assessment.	✓	✓
Standard 4.1	The governing board has reviewed the Organization's mission statement within the past 5 years and assured that:		
1	The mission addresses poverty; and	✓	✓
2	The Organization's programs and services are in alignment with the mission.	✓	✓
Standard 4.2	The Organization's Community Action Plan is outcome-based, anti-poverty focused, and ties directly to the Community Assessment.	✓	✓
Standard 4.3	The organization's Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (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.	✓	✓
Standard 4.4	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.	✓	✓
Standard 4.5	An organization-wide risk assessment has been completed within the past 2 years and reported to the governing board.	✓	✓

Organizational Standards Review		Policy or procedure verified	Practice verified or reviewed
2025			
Standard 5.1	The Organization's governing board is structured in compliance with the CSBG Act:		
1	At least one third democratically selected representatives of the low-income community;	✓	✓
2	With one-third local elected officials (or their representatives); and	✓	✓
3	The remaining membership from major groups and interests in the community.	✓	✓
Standard 5.2	The 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.	✓	✓
Standard 5.3	The Organization's bylaws have been reviewed by an attorney within the past 5 years.	✓	✓
Standard 5.4	The Organization documents that each governing board member has received a copy of the bylaws within the past two years.	✓	✓
Standard 5.5	The Organization's governing board meets in accordance with the frequency and quorum requirements and fills board vacancies as set out in its bylaws.	✓	✓
Standard 5.6	Each governing board member has signed a conflict-of-interest policy within the past two years.	✓	✓
Standard 5.7	The Organization has a process to provide a structured orientation for governing board members within 6 months of being seated.	✓	✓
Standard 5.8	Governing board members have been provided with training on their duties and responsibilities within the past two years.	✓	✓
Standard 5.9	The Organization's governing board receives programmatic reports at each regular board meeting.	✓	✓
Standard 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.	✓	✓
Standard 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 sufficient.	✓	✓
Standard 6.3	The approved Strategic Plan contains Family, Agency, and/or Community goals.	✓	✓
Standard 6.4	Customer satisfaction data and customer input, collected as part of the Community Assessment, is including in the strategic planning process.	✓	✓
Standard 7.3	The Organization has written job descriptions for all positions, which have been updated within the past 5 years.	✓	✓
Standard 7.4	The governing board conducts a performance appraisal of the CEO/Executive Director within each calendar year.	✓	✓
Standard 7.5	The governing board reviews and approves CEO/Executive Director compensation within every calendar year.	✓	✓
Standard 7.6	The Organization has a policy in place for regular written evaluation of employees by their supervisors.	✓	✓
Standard 7.7	The Organization has a whistleblower policy that has been approved by the governing board.	✓	✓
Standard 7.8	All staff participate in a new employee orientation within 60 days of hire.	✓	✓
Standard 7.9	The Organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.	✓	✓

Organizational Standards Review		Policy or procedure verified	Practice verified or reviewed
2025			
Standard 8.1	The organization's annual audit (or audited financial statements) is completed by a Certified Public Accountant on time in accordance with Title 2 of the Code of Federal Regulations, Uniform Administration Requirements, Cost Principles, and Audit Requirement (if applicable) and/or State audit threshold requirements.	✓	✓
Standard 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.	✓	✓
Standard 8.3	The Organization's auditor presents the audit to the governing board.	✓	✓
Standard 8.4	The governing board formally receives and accepts the audit.	✓	✓
Standard 8.5	The Organization has solicited bids for its audit within the past 5 years.	✓	✓
Standard 8.6	The IRS Form 990 is completed annually and made available to the governing board for review.	✓	✓
Standard 8.7	The governing board receives financial reports at each regular meeting that include the following:		
1	Organization-wide report on Revenue and Expenditures that compares Budget to Actual, categorized by program; and	✓	✓
2	Balance Sheet/Statement of Financial Position.	✓	✓
Standard 8.8	All required filings and payments related to payroll withholdings are completed on time.	✓	✓
Standard 8.9	The governing board annually approves an organization-wide budget.	✓	✓
Standard 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.	✓	✓
Standard 8.11	A written procurement policy is in place and has been reviewed by the governing board within the past 5 years.	✓	✓
Standard 8.12	The Organization documents how it allocates shared costs through an indirect cost rate, or through a written cost allocation plan.	✓	✓
Standard 9.1	The organization has a system or systems in place to track and report client demographics and services customers receive.	✓	✓
Standard 9.2	The organization has a system or systems in place to track family, agency, and/or community outcomes.	✓	✓
Standard 9.3	The Organization has analyzed its outcomes within the past 12 months.	✓	✓
Standard 9.4	The Organization submits its annual CSBG Information Survey Data Report, and it reflects organization-wide outcomes.	✓	✓

Appendix B: Summary of Risk Elements

The following table summarizes the risk elements that were reviewed as part of this assessment.

Organizational Risk Control Elements



2025

	Implementation Level			Notes
	Full	Partial	None	
Control				
CFR Requirements	•			
• Review of CFRS for each funding source	•			
• Policies and procedures to assure compliance with CFR requirements varying from OMB Circulars	•			
Control Activities				
Written fiscal and operational policies and procedures	•			
Top management review of financial and program activities	•			
Management reviews at program or functional level	•			
Controls over info processing/IT	•			
Physical controls over vulnerable assets	•			
Review of performance indicators	•			
Segregation of duties	•			
Proper execution of transactions and events	•			
Accurate and timely recording of events	•			
Access restrictions and accountability for resources and records	•			
Appropriate documentation of transactions and internal control	•			

Board Risk Management Oversight



2025

	Implementation Level			Notes
	Full	Partial	None	
Board Policies				
Conflict of interest	•			
CEO evaluation and compensation setting	•			
Audit policy	•			
Investment policy	•			
Risk management policy	•			Board Budget, Finance, and Audit Committee has responsibility to “review overall organizational risk management and adequacy of insurance carried by the organization”; Multiple other risk mitigation activities and procedures included in Accounting & Financial Policies and Procedures Manual.
Tri-partite board composition	•			
Board role in needs assessment and planning	•			
Implementation of Board Policies				
Conflict of interest procedures	•			
CEO evaluation	•			
CEO compensation review & setting	•			
Procedure for auditor selection & audit review	•			
Investment performance review	•			
Risk management review	•			
Board composition review	•			Board and CEO review composition as board vacancies emerge
Board participation in needs assessment and strategic planning	•			
Full Board Financial Oversight				
Establishing finance and audit committees	•			No separate audit committee
Review performance of finance and audit committees	•			See above
Annual budget approval	•			
Monthly financial statement review	•			
Review of annual independent audit	•			

Board Risk Management Oversight



2025

	Implementation Level			Notes
	Full	Partial	None	
Investment Oversight				
Policy review and update	•			
Selection of investment advisors/managers	•			
Review performance of investment managers	•			
Board Risk Management Oversight				
Review and revise (if necessary) management's risk assessment	•			Completed after biennial organizational standards and risk assessment
Identify risk appetite/tolerance levels	•			See above
Review management's risk mitigation plan	•			See above
Obtain periodic independent review of risk assessment and risk mitigation plan	•			
Review adequacy of insurance coverage	•			
Advise full Board regarding significant risks which have not been adequately mitigated	•			
Identify Board committee responsible for Compliance Oversight and establish committee charge	•			
Review compliance findings in independent audit and/or monitoring reports	•			
Monitor progress in resolving findings and improving compliance	•			
Review management's structure for achieving compliance	•			
Discuss management's compliance structure with independent auditor	•			

Program Manager Controls

2025

	Implementation Level			Notes
	Full	Partial	None	
Risk Assessment				
Program managers review each new funding agreement related to the manager’s program to identify compliance requirements and determine whether adequate control systems are in place to ensure compliance	•			
Program managers are required to report risk they observe and are clear about the process for reporting and investigating their concerns	•			
Program managers are regularly asked to participate in risk assessment discussions	•			
Control Environment				
The Board has established an environment which demands honesty and integrity and encourages all staff to report concerns without retaliation	•			
Management demonstrates the highest standards of honesty and integrity and encourages all staff to report concerns without retaliation	•			
Program managers seek feedback from staff they supervise to understand their perceptions regarding expectations for honesty and integrity	•			
Procedures for dealing with concerns about honesty and integrity are clear	•			
Program managers have confidence that “whistleblowers” will be treated respectfully and will not face retaliation	•			
Control Activities				
Program managers have meaningful input in the job descriptions and hiring decisions for all positions within their program	•			
Part 215—Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, and Other Nonprofit Organizations (OMB Circular A-110)				
• Program managers review and approve personnel activity reports for all employees Program managers directly supervise	•			
• Program managers utilize consistent procedures to be certain that employees Program managers supervise who function as supervisors are providing meaningful review of personal activity reports for those they supervise	•			
• Program managers are responsible for ensuring that all purchases made through Program managers program are necessary, reasonable and allowable	•			
• Program managers provide input into procurement requirements for goods and services	•			

Low-Income Board Representatives



2025

	Views sought and used	Needs improvement	Notes
Low Income Community Representatives are encouraged to:			
Share community perceptions about the integrity, honesty, and effectiveness of CAA services with management and with the Board committee conducting risk assessment.	•		
Share perceptions of community needs, including relative importance and urgency of various need areas as part of CAA's needs assessment process.	•		
Share perceptions regarding the match between the programs and services the CAA offers and community needs as part of the strategic planning process.	•		
Share perception regarding the effectiveness of the CAA's communication strategies in building broad awareness of the programs and services available to low income individuals and families as part of the <i>strategic planning and evaluation process</i> .	•		
Share understanding of other community resources, including changes in their availability, that may impact the demand for the CAA's services through the strategic planning process.	•		
Observe program activities and provide feedback about the treatment of participants and quality of services as part of Board evaluation of programs.	•		
Participate actively in the Board's discussion of the annual budget to understand the proposed use of resources and express your views about priorities for the use of unrestricted funds.	•		
Fully understand the role of the Board as a whole and the specific responsibilities of low income community representatives required under the terms of funding agreements, including the tri-partite Board requirements contained in the CSBG Act.	•		
Raise questions and offer observations based on your experience during Board discussions.	•		
Share observations regarding strategies that would support full participation by all low income representatives including meeting times, locations, the availability of child care, transportation, or other needed assistance, interpretation services, and other factors which could increase participation by low income representatives.	•		

Appendix C: Survey Results

The following are the survey instrument and frequency tables.

Mission, Vision, Values

Thank you for participating.

Thank you for participating in this Agency Alignment and Risk Assessment survey. This survey is being conducted on behalf of [REDACTED] by Civicus Consulting Group. You have been invited to participate in this survey because of your unique understanding of [REDACTED]. Your input is invaluable as we strive to improve our organization. It will take approximately 45 to 60 minutes to complete the questionnaire. **You may save your work and come back to the questionnaire at any time.**

If you feel uncomfortable answering any questions, you can withdraw from the survey at any point. However, doing so will mean that your voice and opinions will not be heard. Your survey responses will be kept strictly confidential and data from this research will be reported only in the aggregate, although some unattributed quotations may be used in the final report. Your information will be coded and will remain confidential. If you have questions at any time about the survey or the procedures, you may contact Michael Call at 815-985-6794 or by email at Michael@CivicusConsulting.com. Thank you very much for your time and support.

Please note that all information is confidential and anonymous. The results of this survey will be viewed only in the aggregate with all other responses.

What does [REDACTED] seek to accomplish as an organization?

Without referring to another website or to any material, what is the mission of [REDACTED]?

What values does [REDACTED] embrace?

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Employees live by these values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volunteers live by these values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The board of directors lives by these values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional comments:

Next

Accountability

Based on your own experience or on what you have heard from others, please indicate where each group falls on the following scales:

	1: Unorganized and loose	2	3	4	5: Highly organized and tight
Board of Directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organization as a whole	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Based on your own experience or on what you have heard from others, please indicate where each group falls on the following scales:

	1: No Accountability	2	3	4	5: High Accountability
Board of Directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organization as a whole	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Based on your own experience or on what you have heard from others, please indicate where each group falls on the following scales:

	1: Meaningless	2	3	4	5: Meaningful
Board of Directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organization as a whole	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Based on your own experience or on what you have heard from others, please indicate where each group falls on the following scales:

	1: Unknown	2	3	4	5: Well known
Board of Directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organization as a whole	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate the following

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	No experience with this
Employees have the information they need to get the job done.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees have the resources they need to get the job done.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees do what they say they will do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees do what is expected of them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees have clearly defined standards of conduct.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees have clearly defined standards of dress.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees have clearly defined hours that are worked.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees take responsibility for their actions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees take responsibility for accomplishing the tasks assigned to them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Confidential information about clients is not shared.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Confidential information about the organization is not shared.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Confidential information about employees is not shared.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Confidential information about donors is not shared.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
We have the best people possible staffing our organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
It's easy for us to hire the best people.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
All employees perform as expected.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Management is waiting for some employees to leave on their own.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
There are employees working here who should be terminated.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

Previous

Next

Employee Environment

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
The size of the physical space in which I work is adequate to accomplish my job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The physical space in which I work has adequate heating and cooling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The physical space in which I work is clean and orderly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Common areas shared by staff members are adequate to accomplish their purpose	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Common areas shared by staff have adequate heating and cooling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Common areas shared by staff are clean and orderly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I feel safe in the parking lot before work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I feel safe in the parking lot after work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
There is adequate lighting in the parking areas and outside the building.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I believe the physical location(s) of Action, Inc. is (are) safe.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I feel safe inside the building where I work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
My personal belongings are safe where I work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional Comments:

Previous

Next

Team Cohesiveness

Please rate the following ("team" also refers to board of directors if you serve on the board). ***For staff who serve on more than one team, please respond with your PRIMARY team being the focus.***

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
Employees are treated with respect and dignity.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
When conflicts arise, they are dealt with directly and constructively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees feel safe in expressing contrary opinions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Employees encourage and support each other.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team has a clear and shared understanding of our purpose.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team is moving in the same direction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Members of my team understand and utilize all forms and reports that we are expected to use.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
I am happy with my team.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team's values are written.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team's values are known by all members of our group.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team's values are shared by all members of our group.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
I am happy with the values my team espouses.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team knows what is expected of us as a group.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Members of my team demonstrate our values by their actions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team's goals are known by each member of the team.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team's goals are achievable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team's goals are aligned with Action's goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
Progress toward achieving my team's goals are tracked and reported.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____
My team as a clear plan to achieve our teams and Action's vision, goals, or objectives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> _____

Additional comments:

Strategic Orientation

Please rate the following

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
Our organization has a current strategic plan that will help us achieve our vision.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Staff and board members are familiar with our strategic plan and are following it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization has the right strategies in place to help us achieve our vision.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization has the right people in place to help us achieve our vision.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization has a business continuity plan in place in the event of a natural or other disaster.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization has a CEO succession plan in place.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

Previous

Next

Governance

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
Our board of directors has the right people in the right positions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors has the information they need to make decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors respects the roles of staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors allows staff to accomplish their work without meddling.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors is involved in staff work only at an appropriate level.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors sets the general direction and vision for our organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors maintains appropriate oversight for our organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors fulfills its fiduciary responsibilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors has just the right number of people serving.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors represents the organization appropriately.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our board of directors advocates for the organization in the community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Employees are aware of the board of directors role and responsibilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

Infrastructure: Technology

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
The computer and telephone systems ("IT system") we utilize allows us to get more done more efficiently.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The IT system is understood and used by all members of our staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I have received the training I need to use our IT system.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

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Infrastructure: Human Resources

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
I have a copy of or have access to our employee handbook or other set of employee policies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I have a copy of my job description.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I receive a written evaluation of my performance EITHER annually or on some other schedule.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I am aware of our organization's whistleblower protection policy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I received a new employee orientation within 60 days of being hired.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
I receive or have opportunities to receive training regularly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
My personal compensation is appropriate for my job requirements and my experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The compensation system we have is appropriate and adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The employee performance review system we have is appropriate and adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The hiring system we use is appropriate and adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The corrective action systems we use are appropriate and adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The termination system we use is appropriate and adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

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Infrastructure: Financial

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
The accounting systems and processes we use are appropriate and adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The billing system we use is understood by everyone who needs to understand it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The billing system we use is adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The accounting and financial reporting systems we use are adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

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Internal Communications

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
The internal communications systems we use are adequate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
The internal communications systems we use reach all the people who need the information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

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Strategic Orientation/Advancement

Please rate the following.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree	No experience with this
Our organization has a strategic communications, public relations, or marketing plan (may be part of an overall organizational strategic plan).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization has a strategic fundraising plan (may be part of an overall organizational strategic plan).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization is well known in the local community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization is well known among the people we seek to serve.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>
Our organization is well known among other stakeholders, such as donors, public officials, and others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <input type="text"/>

Additional comments:

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Outcomes

What outcomes (or goals or results) does your organization seek to achieve?

We achieve these outcomes (goals or results)...

- Rarely or never
- Some of the outcomes some or all of the time
- Most of the outcomes some of the time
- Almost all of the outcomes all of the time
- All of the outcomes all of the time

Additional comments:

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Leadership

As a result of this survey, leadership will...

- Definitely leave things as they are
 - Possibly make necessary changes
 - Likely make necessary changes
 - Certainly make necessary changes
-

Additional comments:

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2025 ██████████ Organizational Standards Questionnaire

Morale

Overall, how happy are you with the way things are going at your organization? (5 stars represents the most happy you or others could be.)

Me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Those I work with	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments:

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Demographic Information

Please note that all information is confidential and anonymous.

What is your PRIMARY role with the organization?

- Member of the Board of Directors
 - Paid Staff, VISTA, or AmeriCorps Member
 - Volunteer
 - Donor
 - Client
 - Other Stakeholder
-

Please mark the team within which you primarily work.

- Administration, CEO, Office Management
- CFO, Finance
- Human Resources
- IT
- Housing
- Heat
- Youth Empowerment
- Food & Nutrition
- Head Start
- Other (Please specify)

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Demographic Information, Part II

Please note that all information is confidential and anonymous.

How long have you been affiliated in any way with your organization?

- Less than 1 year
 - 1 year to 3 years
 - 4 years to 5 years
 - 5 years to 10 years
 - 11 years to 15 years
 - More than 15 years
-

What is your highest level of education?

- Did not graduate from high school or attain GED
- High school graduate or GED
- Trade or vocational school degree
- Some college
- Associate's degree
- Bachelor's degree
- Professional or advanced degree

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Final Comments

Please note that all information is confidential and anonymous.

Please write any final comments in the space below.

0 / 20000

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Submit

What does ██████ Seek to Accomplish in the Community?			
Category	Frequency	Description	Example Phrases
Assisting those with low incomes or in poverty	23	Providing help, support, or resources to low-income, poor, or vulnerable people.	"Help low income people," "Serve the underprivileged," "Reduce poverty"
Creating pathways out of poverty	10	Developing long-term solutions or opportunities to help people exit poverty.	"Pathways out of poverty," "Developing pathways out of poverty"
Providing specific services (housing, utilities, etc.)	7	Offering targeted assistance like housing, utilities, or food support.	"Support for housing, utilities, rent, and food," "Rental and heating assistance"
Serving the community broadly	7	Supporting the community as a whole, often without specifying poverty.	"Help the community of ██████" "Serve individuals in our community"
Advocacy and guidance	4	Advocating for or guiding individuals, especially those facing challenges.	"Advocating for low-income/homeless folks," "Offering guidance, resources"
Ending poverty	3	Explicit goal of eradicating poverty entirely.	"Ending poverty to individuals and families," "The mission is to end poverty"
Improving living situations	2	Enhancing quality of life for at-risk or struggling individuals.	"Improve their living situations," "Help them live better while in poverty"
Unity	1	Promoting community unity (unique response, possibly metaphorical).	"Unity"

What is [REDACTED] Mission Statement?			
Category	Frequency	Description	Example Phrases
Developing pathways out of poverty	27	Creating or providing opportunities to help people exit poverty.	"Developing pathways out of poverty," "Help people out of poverty"
Innovative, community-based, collaborative approaches	16	Emphasizing innovative, community-driven, and collaborative methods to address poverty.	"Innovative, community-based, collaborative approaches," "Collaboration and community based approaches"
Helping the disadvantaged or vulnerable	5	Supporting poor, homeless, or overlooked individuals.	"Help the disadvantaged," "Help the poor and overlooked," "Ensuring no one has to face poverty and homelessness alone"
Ending poverty	3	Explicit goal of eradicating poverty entirely.	"Commitment to ending poverty," "To end poverty"
Compassion and respect	3	Delivering services with compassion, professionalism, or respect for all.	"With compassion and professionalism," "Everyone is important and should be treated as such"
Building better futures	2	Helping families or individuals improve their long-term prospects.	"Help families build better futures," "Build better futures for their families"
Unsure	1	Respondent was uncertain of the mission.	"Unsure"

What Values Does [REDACTED] Embrace?			
Category	Frequency	Description	Example Phrases
Compassion/Empathy/ Care	20	Emphasizing kindness, empathy, care, or sensitivity toward clients.	"Compassion," "Empathy," "Care," "Sensitive to the needs of our clients"
Collaboration/Community	19	Valuing teamwork, community partnerships, or collaborative approaches.	"Collaboration," "Community action partner," "Community"
Accountability/ Transparency	16	Prioritizing responsibility, transparency, or integrity in operations.	"Accountability," "Transparency," "Integrity"
Dignity/Respect	6	Treating clients with respect and dignity.	"Dignity and respect," "Respect"
Equity/Fairness/Inclusion	4	Promoting fairness, inclusivity, or equity in services.	"Equity," "Fairness," "Inclusion," "Inclusive"
Empowerment/ Self-Esteem	3	Supporting clients' empowerment, self-esteem, or personal growth.	"Empowerment," "Self esteem," "Encouragement"
Innovation	2	Valuing creative or innovative approaches to problem-solving.	"Innovation"
Honesty/Integrity	2	Upholding honesty or moral integrity.	"Honesty," "Integrity"
Hope/Support	2	Inspiring hope or providing support to clients.	"Hope," "Support"
Hard Work	1	Valuing dedication and effort in work.	"Hard work"
Ideals	1	Upholding aspirational principles or ideals.	"Ideals"

Employees live by these values

	Frequency	Percent
Strongly disagree	2	5.9
Disagree	2	5.9
Neither agree nor disagree	4	11.8
Agree	19	55.9
Strongly agree	7	20.6
Total	34	100.0

Do you have any additional comments? (Following the section about [REDACTED]'s mission, values, and whether the board of directors, staff, and volunteers live by these values)

Category	Frequency	Description	Example Phrases
Critical Feedback	1	Expressing concerns about the organization's adherence to stated values, particularly among senior or long-term staff.	"I have not seen compassion, accountability, or collaboration come from senior staff or staff who have been there long term"
Positive Feedback	1	Praising the organization's staff for their dedication and alignment with values.	"The team at [REDACTED] is truly impressive... commitment to serving our community with integrity"
Neutral Observation	1	Acknowledging that not all staff consistently model values but are striving to do so.	"Unlikely that every employee hits the excellent mark every day... almost everyone is striving"

Board: Unknown-Well Known

	Frequency	Percent
1: Unknown	0	0.0
2	1	3.2
3	6	19.4
4	2	6.5
5: Well Known	22	71.0
Total	31	100.0

Staff: Unknown-Well Known

	Frequency	Percent
1: Unknown	4	12.5
2	3	9.4
3	6	18.8
4	11	34.4
5: Well Known	8	25.0
Total	32	100.0

Org: Unknown-Well Known

	Frequency	Percent	
1: Unknown	0	0.0	0.0
2	3	9.4	9.4
3	5	15.6	15.6
4	13	40.6	40.6
5: Well Known	11	34.4	34.4
Total	32	100.0	100.0

Board: Organized-Loose

	Frequency	Percent	
1: Unorganized and loose	0	0.0	0.0
2	0	0.0	0.0
3	4	12.1	12.1
4	14	42.4	42.4
5: Highly organized and tight	15	45.5	45.5
Total	33	100.0	100.0

Staff: Organized-Loose

	Frequency	Percent	
1: Unorganized and loose	1	2.9	2.9
2	1	2.9	2.9
3	9	26.5	26.5
4	14	41.2	41.2
5: Highly organized and tight	9	26.5	26.5
Total	34	100.0	100.0

Org: Organized-Loose

	Frequency	Percent	
1: Unorganized and loose	0	0.0	0.0
2	0	0.0	0.0
3	9	26.5	26.5
4	16	47.1	47.1
5: Highly organized and tight	9	26.5	26.5
Total	34	100.0	100.0

Board: Meaningless-Meaningful

	Frequency	Percent
1: Meaningless	2	5.9
2	2	5.9
3	4	11.8
4	14	41.2
5: Meaningful	12	35.3
Total	34	100.0

Staff: Meaningless-Meaningful

	Frequency	Percent
1: Meaningless	0	0.0
2	0	0.0
3	2	5.9
4	6	17.6
5: Meaningful	9	26.5
Total	17	50.0
Total	34	100.0

Org: Meaningless-Meaningful

	Frequency	Percent
1: Meaningless	0	0.0
2	1	3.1
3	6	18.8
4	4	12.5
5: Meaningful	21	65.6
Total	32	100.0

Org: Financially Vulnerable-Stable

	Frequency	Percent
1	13	38.2
2	3	8.8
3	11	32.4
4	7	20.6
Total	34	100.0

Department: Financially Vulnerable-Stable

	Frequency	Percent
1: Financially vulnerable	10	35.7
2	5	17.9
3	5	17.9
4	8	28.6
5: Financially stable	0	0.0
Total	28	100.0

Do you have any additional comments? (Following the section on semantic differential scales covering topics such as organization, fiscal stability, public awareness, etc.)

Category	Frequency	Description	Example Phrases
Federal Funding Instability/Threats	5	Concerns about instability or threats to federal funding impacting the organization.	"Federal funding instability," "Federal funding threatened," "Proposals to defund"
Political Vulnerability	3	Acknowledging the organization's vulnerability due to political climate or changes.	"Unprecedented time of vulnerability," "Vulnerable to political swings"
Fiscal Responsibility/Resilience	1	Praising the organization's fiscal responsibility despite external challenges.	"Remained fiscally responsible and well-prepared"
Confusion About Terms	1	Expressing uncertainty about the meaning of terms used in the survey.	"I don't know what you mean by meaningful and well known"

Employees have the information they need to get the job done.

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	4	12.9
Neither agree nor disagree	1	3.2
Agree	15	48.4
Strongly agree	11	35.5
Total	31	100.0

Employees have the resources they need to get the job done.

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	9.4
Neither agree nor disagree	1	3.1
Agree	19	59.4
Strongly agree	9	28.1
Total	32	100.0

Employees do what they say they will do.

	Frequency	Percent
Strongly disagree	1	3.3
Disagree	4	13.3
Neither agree nor disagree	5	16.7
Agree	13	43.3
Strongly agree	7	23.3
Total	30	100.0

Employees do what is expected of them.

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	2	6.7
Neither agree nor disagree	9	30.0
Agree	13	43.3
Strongly agree	6	20.0
Total	30	100.0

Employees have clearly defined standards of conduct.

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	9.4
Neither agree nor disagree	4	12.5
Agree	12	37.5
Strongly agree	13	40.6
Total	32	100.0

Employees have clearly defined standards of dress.

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	4	13.8
Neither agree nor disagree	4	13.8
Agree	15	51.7
Strongly agree	6	20.7
Total	29	100.0

Employees have clearly defined hours that are worked

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	2	6.9
Neither agree nor disagree	1	3.4
Agree	13	44.8
Strongly agree	13	44.8
Total	29	100.0

Employees take responsibility for their actions

	Frequency	Percent
Strongly disagree	2	6.7
Disagree	5	16.7
Neither agree nor disagree	7	23.3
Agree	10	33.3
Strongly agree	6	20.0
Total	30	100.0

Employees take responsibility for accomplishing the tasks assigned to them

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	10.3
Neither agree nor disagree	5	17.2
Agree	15	51.7
Strongly agree	6	20.7
Total	29	100.0

Confidential information about clients is not shared

	Frequency	Percent
Strongly disagree	1	3.3
Disagree	1	3.3
Neither agree nor disagree	5	16.7
Agree	11	36.7
Strongly agree	12	40.0
Total	30	100.0

Confidential information about the organization is not shared

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.2
Neither agree nor disagree	8	25.8
Agree	9	29.0
Strongly agree	13	41.9
Total	31	100.0

Confidential information about employees is not shared

	Frequency	Percent
Strongly disagree	2	6.7
Disagree	1	3.3
Neither agree nor disagree	7	23.3
Agree	8	26.7
Strongly agree	12	40.0
Total	30	100.0

Confidential information about donors is not shared

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	7	25.0
Agree	7	25.0
Strongly agree	14	50.0
Total	28	100.0

We have the best people possible staffing our organization

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	6	18.8
Neither agree nor disagree	3	9.4
Agree	14	43.8
Strongly agree	9	28.1
Total	32	100.0

It's easy for us to hire the best people

	Frequency	Percent
Strongly disagree	4	12.5
Disagree	9	28.1
Neither agree nor disagree	15	46.9
Agree	4	12.5
Total	32	100.0

All employees perform as expected

	Frequency	Percent
Strongly disagree	2	6.5
Disagree	6	19.4
Neither agree nor disagree	9	29.0
Agree	10	32.3
Strongly agree	4	12.9
Total	31	100.0

Management is waiting for some employees to leave on their own

	Frequency	Percent
Strongly disagree	2	6.9
Disagree	8	27.6
Neither agree nor disagree	11	37.9
Agree	7	24.1
Strongly agree	1	3.4
Total	29	100.0

There are employees working here who should be terminated

	Frequency	Percent
Strongly disagree	3	11.1
Disagree	6	22.2
Neither agree nor disagree	6	22.2
Agree	10	37.0
Strongly agree	2	7.4
Total	27	100.0

Employees are treated with respect and dignity

	Frequency	Percent
Strongly disagree	1	3.0
Disagree	1	3.0
Neither agree nor disagree	2	6.1
Agree	14	42.4
Strongly agree	15	45.5
Total	33	100.0

When conflicts arise, they are dealt with directly and constructively

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	5	17.9
Neither agree nor disagree	3	10.7
Agree	14	50.0
Strongly agree	6	21.4
Total	28	100.0

Employees feel safe in expressing contrary opinions

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	7	24.1
Neither agree nor disagree	5	17.2
Agree	10	34.5
Strongly agree	7	24.1
Total	29	100.0

Employees encourage and support each other

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.1
Neither agree nor disagree	3	9.4
Agree	14	43.8
Strongly agree	14	43.8
Total	32	100.0

Do you have any additional comments? (Following the survey section about how employees and clients are treated, whether employees, board, and organization are accountable, etc.)

Category	Frequency	Description	Example Phrases
Staffing Challenges	3	Issues related to hiring, retaining staff, or competing with private sector wages.	"Difficult to compete with private sector wages," "Hiring people is a current challenge"
Accountability/Conduct Concerns	1	Concerns about staff behavior or organizational accountability for addressing issues.	"Staff was talking about their child... in public"
Positive Leadership Feedback	1	Praise for HR leadership in managing staffing despite challenges.	██████████ is doing an outstanding job leading HR"
Organizational Transition/Turbulence	1	Acknowledging challenges due to organizational changes or transitions.	"In this time of change, there is expected turbulence"

The size of the physical space in which I work is adequate to accomplish my job

	Frequency	Percent
Strongly disagree	1	3.8
Disagree	2	7.7
Neither agree nor disagree	1	3.8
Agree	11	42.3
Strongly agree	11	42.3
Total	26	100.0

The physical space in which I work has adequate heating and cooling

	Frequency	Percent
Strongly disagree	1	3.7
Disagree	6	22.2
Neither agree nor disagree	1	3.7
Agree	10	37.0
Strongly agree	9	33.3
Total	27	100.0

The physical space in which I work is clean and orderly

	Frequency	Percent
Strongly disagree	1	3.8
Disagree	0	0.0
Neither agree nor disagree	1	3.8
Agree	16	61.5
Strongly agree	8	30.8
Total	26	100.0

Common areas shared by staff members are adequate to accomplish their purpose

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	2	7.4
Agree	14	51.9
Strongly agree	11	40.7
Total	27	100.0

Common areas shared by staff have adequate heating and cooling

	Frequency	Percent
Strongly disagree	1	3.6
Disagree	3	10.7
Neither agree nor disagree	2	7.1
Agree	13	46.4
Strongly agree	9	32.1
Total	28	100.0

Common areas shared by staff are clean and orderly

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.7
Neither agree nor disagree	3	11.1
Agree	12	44.4
Strongly agree	11	40.7
Total	27	100.0

I feel safe in the parking lot before work

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	11.1
Neither agree nor disagree	4	14.8
Agree	11	40.7
Strongly agree	9	33.3
Total	27	100.0

I feel safe in the parking lot after work

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	2	7.7
Neither agree nor disagree	7	26.9
Agree	10	38.5
Strongly agree	7	26.9
Total	26	100.0

There is adequate lighting in the parking areas and outside the building

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	11.1
Neither agree nor disagree	2	7.4
Agree	14	51.9
Strongly agree	8	29.6
Total	27	100.0

I believe the physical location(s) of [REDACTED] is (are) safe

	Frequency	Percent
Strongly disagree	1	3.3
Disagree	5	16.7
Neither agree nor disagree	7	23.3
Agree	10	33.3
Strongly agree	7	23.3
Total	30	100.0

I feel safe inside the building where I work

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	2	7.4
Agree	15	55.6
Strongly agree	10	37.0
Total	27	100.0

My personal belongings are safe where I work

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.8
Neither agree nor disagree	1	3.8
Agree	15	57.7
Strongly agree	9	34.6
Total	26	100.0

Do you have any additional comments? (Following the survey section about the physical environment where ██████ is located)

Category	Frequency	Description	Example Phrases
Limited Experience with Facilities	1	Indicating limited or no direct experience with the physical environment.	"Only have Board experience with facility/location"
Positive Feedback on Facilities	1	Praising the comfort and aesthetics of the office spaces for staff and clients.	"Fortunate to have a comfortable and aesthetic space"
Safety/Security Concerns	2	Expressing concerns about safety or security in the physical environment, including parking areas and client interactions.	"Parking areas are vulnerable to theft," "Instances of not feeling safe"

My team has a clear and shared understanding of our purpose

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	3	9.1
Agree	14	42.4
Strongly agree	16	48.5
Total	33	100.0

My team is moving in the same direction

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	9.4
Neither agree nor disagree	3	9.4
Agree	12	37.5
Strongly agree	14	43.8
Total	32	100.0

Members of my team understand and utilize all forms and reports that we are expected to use

	Frequency	Percent
Strongly disagree	1	3.1
Disagree	3	9.4
Neither agree nor disagree	3	9.4
Agree	14	43.8
Strongly agree	11	34.4
Total	32	100.0

I am happy with my team

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	9.1
Neither agree nor disagree	1	3.0
Agree	13	39.4
Strongly agree	16	48.5
Total	33	100.0

My team's values are written

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	6	18.2
Neither agree nor disagree	4	12.1
Agree	9	27.3
Strongly agree	14	42.4
Total	33	100.0

My team's values are known by all members of our group

	Frequency	Percent
Strongly disagree	1	3.0
Disagree	3	9.1
Neither agree nor disagree	4	12.1
Agree	15	45.5
Strongly agree	10	30.3
Total	33	100.0

My team's values are shared by all members of our group

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	3	9.1
Neither agree nor disagree	7	21.2
Agree	13	39.4
Strongly agree	10	30.3
Total	33	100.0

I am happy with the values my team espouses

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.2
Neither agree nor disagree	5	16.1
Agree	13	41.9
Strongly agree	12	38.7
Total	31	100.0

My team knows what is expected of us as a group

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.2
Neither agree nor disagree	1	3.2
Agree	15	48.4
Strongly agree	14	45.2
Total	31	100.0

Members of my team demonstrate our values by their actions

	Frequency	Percent
Strongly disagree	1	3.1
Disagree	1	3.1
Neither agree nor disagree	2	6.3
Agree	14	43.8
Strongly agree	14	43.8
Total	32	100.0

My team's goals are known by each member of the team

	Frequency	Percent
Strongly disagree	1	3.1
Disagree	4	12.5
Neither agree nor disagree	1	3.1
Agree	13	40.6
Strongly agree	13	40.6
Total	32	100.0

My team's goals are achievable

	Frequency	Percent
Strongly disagree	1	3.1
Disagree	1	3.1
Neither agree nor disagree	4	12.5
Agree	13	40.6
Strongly agree	13	40.6
Total	32	100.0

My team's goals are aligned with ████████ goals

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.2
Neither agree nor disagree	3	9.7
Agree	13	41.9
Strongly agree	14	45.2
Total	31	100.0

Progress toward achieving my team's goals are tracked and reported

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	5	16.1
Neither agree nor disagree	3	9.7
Agree	11	35.5
Strongly agree	12	38.7
Total	31	100.0

My team as a clear plan to achieve our teams and vision, goals, or objectives

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	4	12.9
Neither agree nor disagree	4	12.9
Agree	12	38.7
Strongly agree	11	35.5
Total	31	100.0

Do you have any additional comments? (Following the survey section about individual work teams, units, or departments, and for board members, about the board of directors)

Category	Frequency	Description	Example Phrases
Negative Team Dynamics/Conflict	1	Concerns about dysfunctional team behaviors, such as gossip, exclusion, or lack of collaboration.	"Teachers... talk bad [about] each other, be snippy... purposely not include others"
Positive Board Performance	1	Praise for the board of directors' engagement and effectiveness in supporting the organization.	"Board of Directors is highly engaged and productive"

Our organization has a current strategic plan that will help us achieve our vision

	Frequency	Percent
Disagree	1	3.4
Neither agree nor disagree	3	10.3
Agree	14	48.3
Strongly agree	11	37.9
Total	29	100.0

Staff and board members are familiar with our strategic plan and are following it

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	2	6.9
Neither agree nor disagree	6	20.7
Agree	14	48.3
Strongly agree	7	24.1
Total	29	100.0

Our organization has the right strategies in place to help us achieve our vision

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	2	6.9
Neither agree nor disagree	2	6.9
Agree	15	51.7
Strongly agree	10	34.5
Total	29	100.0

Our organization has the right people in place to help us achieve our vision

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.4
Neither agree nor disagree	6	20.7
Agree	13	44.8
Strongly agree	9	31.0
Total	29	100.0

Our organization has a business continuity plan in place in the event of a natural or other disaster

	Frequency	Percent
Strongly disagree	1	3.8
Disagree	3	11.5
Neither agree nor disagree	7	26.9
Agree	9	34.6
Strongly agree	6	23.1
Total	26	100.0

Our organization has a CEO succession plan in place

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	4.5
Neither agree nor disagree	9	40.9
Agree	7	31.8
Strongly agree	5	22.7
Total	22	100.0

Our board of directors has the right people in the right positions

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	8	32.0
Agree	8	32.0
Strongly agree	9	36.0
Total	25	100.0

Our board of directors has the information they need to make decisions

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	5	20.0
Agree	10	40.0
Strongly agree	10	40.0
Total	25	100.0

Our board of directors respects the roles of staff

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	7	26.9
Agree	8	30.8
Strongly agree	11	42.3
Total	26	100.0

Our board of directors allows staff to accomplish their work without meddling

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	6	24.0
Agree	9	36.0
Strongly agree	10	40.0
Total	25	100.0

Our board of directors is involved in staff work only at an appropriate level

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	7	29.2
Agree	8	33.3
Strongly agree	9	37.5
Total	24	100.0

Our board of directors sets the general direction and vision for our organization

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	4.0
Neither agree nor disagree	5	20.0
Agree	9	36.0
Strongly agree	10	40.0
Total	25	100.0

Our board of directors maintains appropriate oversight for our organization

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	2	7.7
Neither agree nor disagree	5	19.2
Agree	8	30.8
Strongly agree	11	42.3
Total	26	100.0

Our board of directors fulfills its fiduciary responsibilities

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.8
Neither agree nor disagree	6	23.1
Agree	8	30.8
Strongly agree	11	42.3
Total	26	100.0

Our board of directors has just the right number of people serving

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	10	41.7
Agree	8	33.3
Strongly agree	6	25.0
Total	24	100.0

Our board of directors represents the organization appropriately

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	7	26.9
Agree	8	30.8
Strongly agree	11	42.3
Total	26	100.0

Our board of directors advocates for the organization in the community

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	2	8.0
Neither agree nor disagree	4	16.0
Agree	10	40.0
Strongly agree	9	36.0
Total	25	100.0

Employees are aware of the board of directors' role and responsibilities

	Frequency	Percent
Strongly disagree	4	16.7
Disagree	4	16.7
Neither agree nor disagree	6	25.0
Agree	6	25.0
Strongly agree	4	16.7
Total	24	100.0

Do you have any additional comments? (Following the survey section about how well the board is doing its job)

Category	Frequency	Description	Example Phrases
Positive Board Performance	1	Praise for the board's collaborative, solutions-focused approach and leadership.	"Board of Directors is a collaborative, solutions-focused group, guided by exceptional leadership"
Lack of Knowledge About Board	1	Indicating no awareness of the board's composition or involvement.	"I don't know who the board is or how involved they are"

The computer and telephone systems (“IT system”) we utilize allows us to get more done more efficiently

	Frequency	Percent
Strongly disagree	4	16.0
Disagree	2	8.0
Neither agree nor disagree	6	24.0
Agree	10	40.0
Strongly agree	3	12.0
Total	25	100.0

The IT system is understood and used by all members of our staff

	Frequency	Percent
Strongly disagree	3	13.0
Disagree	6	26.1
Neither agree nor disagree	7	30.4
Agree	5	21.7
Strongly agree	2	8.7
Total	23	100.0

I have received the training I need to use our IT system

	Frequency	Percent
Strongly disagree	3	13.0
Disagree	3	13.0
Neither agree nor disagree	6	26.1
Agree	8	34.8
Strongly agree	3	13.0
Total	23	100.0

I have a copy of or have access to our employee handbook or other set of employee policies

	Frequency	Percent
Strongly disagree	1	4.0
Disagree	1	4.0
Agree	14	56.0
Strongly agree	9	36.0
Total	25	100.0

I have a copy of my job description

	Frequency	Percent
Strongly disagree	1	4.0
Disagree	2	8.0
Neither agree nor disagree	1	4.0
Agree	12	48.0
Strongly agree	10	40.0
Total	25	100.0

I receive a written evaluation of my performance EITHER annually or on some other schedule

	Frequency	Percent
Strongly disagree	1	4.0
Disagree	2	8.7
Agree	14	60.9
Strongly agree	7	30.4
Total	23	100.0

I am aware of our organization's whistleblower protection policy

	Frequency	Percent
Strongly disagree	1	4.0
Disagree	3	12.0
Neither agree nor disagree	3	12.0
Agree	11	44.0
Strongly agree	8	32.0
Total	25	100.0

I received a new employee orientation within 60 days of being hired

	Frequency	Percent
Strongly disagree	2	8.0
Disagree	1	4.0
Neither agree nor disagree	1	4.0
Agree	11	44.0
Strongly agree	10	40.0
Total	25	100.0

I receive or have opportunities to receive training regularly

	Frequency	Percent
Strongly disagree	2	7.7
Disagree	0	0.0
Neither agree nor disagree	0	0.0
Agree	12	46.2
Strongly agree	12	46.2
Total	26	100.0

My personal compensation is appropriate for my job requirements and my experience

	Frequency	Percent
Strongly disagree	1	4.2
Disagree	7	29.2
Neither agree nor disagree	3	12.5
Agree	8	33.3
Strongly agree	5	20.8
Total	24	100.0

The compensation system we have is appropriate and adequate

	Frequency	Percent
Strongly disagree	2	7.7
Disagree	4	15.4
Neither agree nor disagree	7	26.9
Agree	8	30.8
Strongly agree	5	19.2
Total	26	100.0

The employee performance review system we have is appropriate and adequate

	Frequency	Percent
Strongly disagree	2	8.3
Disagree	3	12.5
Neither agree nor disagree	5	20.8
Agree	8	33.3
Strongly agree	6	25.0
Total	24	100.0

The hiring system we use is appropriate and adequate

	Frequency	Percent
Strongly disagree	1	3.7
Disagree	1	3.7
Neither agree nor disagree	3	11.1
Agree	13	48.1
Strongly agree	9	33.3
Total	27	100.0

The corrective action systems we use are appropriate and adequate

	Frequency	Percent
Strongly disagree	2	8.7
Disagree	5	21.7
Neither agree nor disagree	5	21.7
Agree	6	26.1
Strongly agree	5	21.7
Total	23	100.0

The termination system we use is appropriate and adequate

	Frequency	Percent
Strongly disagree	1	4.5
Disagree	3	13.6
Neither agree nor disagree	6	27.3
Agree	7	31.8
Strongly agree	5	22.7
Total	22	100.0

Do you have any additional comments? (Following the survey section about human resources)

Category	Frequency	Description	Example Phrases
Concern About Performance Review Process	1	Criticism of the HR process for not sending the 2025 performance review for approval [REDACTED]	"This year's performance review, 2025, was never sent [REDACTED] for us to approve"

The accounting systems and processes we use are appropriate and adequate

	Frequency	Percent
Strongly disagree	1	4.0
Disagree	0	0.0
Neither agree nor disagree	5	20.0
Agree	8	32.0
Strongly agree	11	44.0
Total	25	100.0

The billing system we use is understood by everyone who needs to understand it

	Frequency	Percent
Strongly disagree	1	4.5
Disagree	0	0.0
Neither agree nor disagree	7	31.8
Agree	6	27.3
Strongly agree	8	36.4
Total	22	100.0

The billing system we use is adequate

	Frequency	Percent
Strongly disagree	1	4.8
Disagree	0	0.0
Neither agree nor disagree	4	19.0
Agree	8	38.1
Strongly agree	8	38.1
Total	21	100.0

The accounting and financial reporting systems we use are adequate

	Frequency	Percent
Strongly disagree	1	3.8
Disagree	1	3.8
Neither agree nor disagree	5	19.2
Agree	7	26.9
Strongly agree	12	46.2
Total	26	100.0

Do you have any additional comments? (Following the survey section about the financial state of the organization)

Category	Frequency	Description	Example Phrases
Positive Financial Leadership Feedback	1	Praise for leadership in building strong financial reporting systems.	"Thanks to [REDACTED] financial leadership... strong, reliable financial reporting systems"
Limited Experience as New Board Member	1	Indicating limited knowledge due to recent appointment to the board.	"I was just voted in as a new board member last week"
Reference to Audit Results	1	Noting that financial assessment is based on audit results, without elaboration.	"Based on audit results"

The internal communications systems we use are adequate

	Frequency	Percent
Strongly disagree	2	7.4
Disagree	1	3.7
Neither agree nor disagree	4	14.8
Agree	12	44.4
Strongly agree	8	29.6
Total	27	100.0

The internal communications systems we use reach all the people who need the information

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.7
Neither agree nor disagree	7	25.9
Agree	12	44.4
Strongly agree	7	25.9
Total	27	100.0

Our organization has a strategic communications, public relations, or marketing plan (may be part of an overall organizational strategic plan)

	Frequency	Percent
Disagree	2	8.7
Neither agree nor disagree	5	21.7
Agree	10	43.5
Strongly agree	6	26.1
Total	23	100.0

Our organization has a strategic fundraising plan (may be part of an overall organizational strategic plan)

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	4.5
Neither agree nor disagree	8	36.4
Agree	8	36.4
Strongly agree	5	22.7
Total	22	100.0

Our organization is well known in the local community

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.4
Neither agree nor disagree	1	3.4
Agree	12	41.4
Strongly agree	15	51.7
Total	29	100.0

Our organization is well known among the people we seek to serve

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	0	0.0
Neither agree nor disagree	1	3.4
Agree	12	41.4
Strongly agree	16	55.2
Total	29	100.0

Our organization is well known among other stakeholders, such as donors, public officials, and others

	Frequency	Percent
Strongly disagree	0	0.0
Disagree	1	3.7
Neither agree nor disagree	5	18.5
Agree	6	22.2
Strongly agree	15	55.6
Total	27	100.0

What outcomes (or goals or results) does your organization seek to achieve?

Category	Frequency	Description	Example Phrases
Reducing/Ending Poverty	13	Helping individuals and families move out of poverty or live better within it.	"Helping poverty," "End poverty," "Pathways out of poverty"
Housing Stability	8	Providing stable, affordable housing or preventing homelessness.	"Permanent, stable and affordable housing," "Prevents homelessness"
Basic Needs (Food, Energy, etc.)	6	Ensuring access to food security, heating, or other essential needs.	"Food security," "Afford heating bills," "Reduces energy hardship"
Education/School Readiness	4	Supporting early learning or school readiness for children.	"Educate young children," "Achieving School Readiness Skills"
Community Improvement	4	Enhancing the broader community or building systems to reduce poverty.	"Better our community," "Change community, build systems"
Effective Service Delivery	4	Providing high-quality, compassionate, or effective services to those in need.	"Providing services in the best way possible," "Effectively provide services"
Health Services Advocacy	2	Advocating for improved mental and physical health services.	"Advocate for better and expanded mental and physical health services"
Family Stability/Success	2	Helping families achieve lasting stability or success.	"Helps families build lasting stability," "Help children and their families succeed"
Comprehensive Grant/Department Outcomes	1	Achieving specific outcomes defined in a comprehensive plan for grants/departments.	"Defined outcomes for all grants and departments"

We achieve these outcomes (goals or results)...

	Frequency	Percent
Some of the outcomes some or all of the time	5	18.5
Most of the outcomes some of the time	9	33.3
Almost all of the outcomes all of the time	10	37.0
All of the outcomes all of the time	3	11.1
Total	27	100.0

As a result of this survey, leadership will

	Frequency	Percent
Definitely leave things as they are	4	13.8
Possibly make necessary changes	9	31.0
Likely make necessary changes	7	24.1
Certainly make necessary changes	9	31.0
Total	29	100.0

**Overall, how happy are you with the way things are going at your organization?
(5 stars represents the most happy you or others could be) Me**

	Frequency	Percent
1 star	1	3.3
2 stars	1	3.3
3 stars	5	16.7
4 stars	13	43.3
5 stars	10	33.3
Total	30	100.0

**Overall, how happy are you with the way things are going at your organization?
(5 stars represents the most happy you or others could be) Those I work with**

	Frequency	Percent
1 star	1	3.3
2 stars		
3 stars	10	33.3
4 stars	11	36.7
5 stars	8	26.7
Total	30	100.0

Do you have any additional comments? (Following the survey section about how happy the respondent is and how happy the respondent thinks those they work with are)

Category	Frequency	Description	Example Phrases
Negative Impact of Funding Cutbacks	1	Expressing discouragement due to funding cutbacks affecting happiness.	"Funding cutbacks are always discouraging"
Negative Workplace Culture	1	Criticizing workplace dynamics, including bullying, favoritism, and unkind management.	"Management and upper staff have been unkind and play favorites"

What is your PRIMARY role with the organization?

	Frequency	Percent
Members of the board	7	24.1
Paid staff, VISTA, or AmeriCorps	22	75.9
Total	29	100.0

Please mark the team within which you primarily work

	Frequency	Percent
Administration, CEO, Office Management	4	18.2
CFO, Finance	2	9.1
Housing	6	27.3
Heat	2	9.1
Youth Empowerment	2	9.1
Head Start	5	22.7
Other	1	4.5
Total	22	100.0

Which category of representative are you on the board of directors?

	Frequency	Percent
Representing elected officials	2	28.6
Representing community at large	5	71.4
Total	7	100.0

As a board member, I have Received a copy of the organization's bylaws sometime in the past two years

	Frequency	Percent
No	0	0.0
Not certain	1	14.3
Yes	6	85.7
Total	7	100.0

As a board member, I have Received and signed a conflict of interest policy within the past two years

	Frequency	Percent
No	0	0.0
Not certain	0	0.0
Yes	7	100.0
Total	7	100.0

As a board member, I have Received training on my duties and responsibilities within the past two years

	Frequency	Percent	
Not certain	1	14.3	
Yes	6	85.7	
Total	7	100.0	

As a board member, I have Received orientation WITHIN 6 MONTHS of joining the board

	Frequency	Percent	
Not certain	2	28.6	
Yes	5	71.4	
Total	7	100.0	

As a board member, I am encouraged to Share community perceptions about the integrity, honesty, and effectiveness of the agency's services with management and with the Board

	Frequency	Percent	
Never	0	0.0	
Rarely	0	0.0	
Occasionally	0	0.0	
Usually	0	0.0	
Always	7	100.0	
Total	7	100.0	

As a board member, I am encouraged to Share perceptions of community needs, including relative importance and urgency of various need areas as part of the agency's needs assessment process

	Frequency	Percent	
Never	0	0.0	
Rarely	0	0.0	
Occasionally	0	0.0	
Usually	0	0.0	
Always	7	100.0	
Total	7	100.0	

As a board member, I am encouraged to Share my perceptions regarding the match between the programs and services the agency offers and community needs as part of the strategic planning process

	Frequency	Percent	
Usually	1	14.3	
Always	6	85.7	
Total	7	100.0	

As a board member, I am encouraged to Share my perception regarding the effectiveness of the agency’s communication strategies in building broad awareness of the programs and services available to low-income individuals and families as part of the strateg

	Frequency	Percent
Never	0	0.0
Rarely	0	0.0
Occasionally	0	0.0
Usually	1	14.3
Always	6	85.7
Total	7	100.0

As a board member, I am encouraged to Share my understanding of other community resources, including changes in their availability, that may impact the demand for the agency’s services through the strategic planning process

	Frequency	Percent
Never	0	0.0
Rarely	0	0.0
Occasionally	0	0.0
Usually	1	14.3
Always	6	85.7
Total	7	100.0

As a board member, I am encouraged to Observe program activities and provide feedback about the treatment of participants and quality of services as part of Board evaluation of programs

	Frequency	Percent
Never	0	0.0
Rarely	0	0.0
Occasionally	0	0.0
Usually	2	28.6
Always	5	71.4
Total	7	100.0

As a board member, I am encouraged to Participate actively in the Board's discussion of the annual budget to understand the proposed use of resources and express my views about priorities for the use of unrestricted funds

	Frequency	Percent	
Never	0	0.0	
Rarely	0	0.0	
Occasionally	0	0.0	
Usually	0	0.0	
Always	7	100.0	

As a board member, I am encouraged to Share my perceptions in other areas in which my knowledge of the community is essential to effective operation of the agency?

	Frequency	Percent	
Never	0	0.0	
Rarely	0	0.0	
Occasionally	0	0.0	
Usually	0	0.0	
Always	7	100.0	

As a board member, I am encouraged to Fully understand the role of the Board as a whole and the specific responsibilities of low-income community representatives required under the terms of funding agreements, including the tri-partite Board requirements

	Frequency	Percent	
Never	0	0.0	
Rarely	0	0.0	
Occasionally	0	0.0	
Usually	1	14.3	
Always	6	85.7	
Total	7	100.0	

As a board member, I am encouraged to Fully understand the financial condition of the agency, including understanding its financial reports

	Frequency	Percent
Never	0	0.0
Rarely	0	0.0
Occasionally	0	0.0
Usually	1	14.3
Always	6	85.7
Total	7	100.0

As a board member, I am encouraged to Share my observations regarding strategies that would support full participation by all low-income representatives including meeting times, locations, the availability of child care, transportation, or other needed as

	Frequency	Percent
Never	0	0.0
Rarely	0	0.0
Occasionally	0	0.0
Usually	0	0.0
Always	7	100.0
Total	7	100.0

As a board member, I am encouraged to Raise questions and offer observations based on my experience during Board discussions

	Frequency	Percent
Never	0	0.0
Rarely	0	0.0
Occasionally	0	0.0
Usually	0	0.0
Always	7	100.0
Total	7	100.0

As a board member, I am encouraged to Share my perceptions about the effectiveness of board practices, including the processes used at board and committee meetings, as part of the Board's self-evaluation

	Frequency	Percent
Never	0	0.0
Rarely	0	0.0
Occasionally	0	0.0
Usually	0	0.0
Always	7	100.0
Total	7	100.0

How long have you been affiliated in any way with your organization?

	Frequency	Percent
Less than 1 year	4	14.3
1 year to 3 years	6	21.4
4 years to 5 years	3	10.7
5 years to 10 years	7	25.0
11 years to 15 years	2	7.1
More than 15 years	6	21.4
Total	28	100.0

What is your highest level of education?

	Frequency	Percent
High school graduate or GED	1	3.6
Some college	7	25.0
Associate's degree	3	10.7
Bachelor's degree	10	35.7
Graduate degree	7	25.0
Total	28	100.0

Do you have any additional comments? (Following the entire survey, providing an opportunity for respondents to offer any final input)

Category	Frequency	Description	Example Phrases
Positive Organizational Feedback	6	Praise for ██████'s mission, leadership, resilience, or overall performance.	"Surprisingly nimble in responding to curveballs," "Extremely well run and trustworthy"
Workplace Culture/ Communication Concerns	2	Issues with management, favoritism, or lack of connection between units (e.g., Head Start).	"Management... play favorites," "Big disconnect between ██████ and Head Start"
Funding and Political Challenges	2	Concerns about federal funding instability impacting morale, staff, and clients.	"Federal funding is in jeopardy," "Unpredictable political climate"
Limited Experience as New Board Member	1	Indicating limited knowledge due to recent board appointment.	"I have yet to be on boarded as a new board member last week"
Survey Question Clarity Issues	1	Noting that some survey questions were unclear for the respondent's position.	"Some of these questions didn't make sense for my position"
