

Calendar of Required Actions for Public CSBG Eligible Entities

Compiled by the



Maintain

- 1.1 The department demonstrates low-income individuals' participation in its activities.
- 1.3 The department has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the tripartite/advisory body, which may be met through broader local government process.
- 2.1 The department has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty departments in the area.
- 2.3 The department communicates its activities and its results to the community.
- 2.4 The department documents the number of volunteers and hours mobilized in support of its activities.
- 4.2 The department's Community Action plan is outcome-based, anti-poverty focused, and ties directly to the community assessment.
- 4.3 The department'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 department documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.
- 4.5 The department adheres to its local government's policies and procedures around interim appointments and processes for filling permanent vacancy.
- 5.1 The department's tripartite board/advisory body is structured in compliance with the CSBG Act:
 1. Selecting the board members as follows:
 - At least one third democratically-selected representatives of the low-income community;
 - One-third local elected officials (or their representatives); and
 - The remaining membership from major groups and interests in the community; or

2. Selecting the board through another mechanism specified by the State to assure decision-making and participation by low-income individuals in the development, planning, implementation, and evaluation of programs.

5.2 The department's tripartite board/advisory body 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.

7.6 The department follows local government policies for regular written evaluation of employees by their supervisors.

7.7 The department provides a copy of any existing local government whistleblower policy to members of the tripartite board/advisory body at the time of orientation.

8.13 The department follows local government policies for record retention and destruction

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

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

As Needed/More frequent than annually

5.5 The department's tripartite board/advisory body meets in accordance with the frequency and quorum requirement and fills board vacancies as set out in its governing documents.

5.7 The department has a process to provide a structured orientation for tripartite board/advisory body members within 6 months of being seated.

5.9 The department's tripartite board/advisory body receives programmatic reports at each regular board/advisory meeting.

7.2 The department follows local government policies in making available the employee handbook (or personnel policies in cases without a handbook) to all staff and in notifying staff of any changes.

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

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

8.7 The tripartite board/advisory body receives financial reports at each regular meeting, for those program(s) the body advises, as allowed by local government procedure.

Annually

4.4 The tripartite board/advisory body receives an annual update on the success of specific strategies included in the Community Action plan.

6.5 The tripartite board/advisory body has received an update(s) on progress meeting the goals of the strategic plan/comparable planning document within the past 12 months.

- 7.4 The department follows local government procedures for performance appraisal of the department head.
- 7.5 The compensation of the department head is made available according to local government procedure.
- 8.1 The Department's annual audit is completed through the local government process in accordance with Title 2 of the Code of Federal Regulations, Uniform Administrative Requirements, Cost Principles, and Audit Requirement (if applicable) and/or State audit threshold requirements. This may be included in the municipality entity's full audit.
- 8.2 The department follows local government procedures in addressing any audit findings related to CSBG funding.
- 8.3 The department's tripartite/advisory body is notified of the availability of the local government audit.
- 8.4 The tripartite board/advisory body is notified of any findings related to CSBG funding.
- 8.9 The tripartite board/advisory body has input as allowed by local government procedure in the CSBG budgeting process.
- 9.3 The department has presented to the tripartite board/advisory body 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.
- 9.4 The department submits its annual CSBG Information Survey data report and it reflects client demographics and CSBG-funded outcomes.

Every 2 years

- 4.6 The department complies with its local government's risk assessment policies and procedures.
- 5.4 The department documents that each tripartite board/advisory body member has received a copy of the bylaws within the past 2 years.
- 5.6 Each tripartite board/advisory body member has signed a conflict of interest policy, or comparable local government document, within the past 2 years.
- 5.8 Tripartite board/advisory body members have been provided with training on their duties and responsibilities within the past 2 years.

Every 3 years

- 1.2 The department analyzes information collected directly from low-income individuals as part of the community assessment.
- 2.2 The department 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 departments, faith-based departments, private sector, public sector, and educational institutions.

3.1 The department conducted or was engaged in a community assessment and issued a report within the past 3 years, if no other report exists.

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

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

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

3.5 The tripartite board/advisory body formally accepts the completed community assessment.

Every 5 years

4.1 The tripartite board/advisory body has reviewed the department's mission statement within the past 5 years and assured that:

1. The mission addresses poverty; and
2. The CSBG programs and services are in alignment with the mission.

6.1 The department has a strategic plan, or comparable planning document, in place that has been approved reviewed and accepted by the tripartite board/advisory body within the past 5 years. If the department does not have a plan, the tripartite board/advisory body will develop the plan.

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.

6.3 The approved strategic plan, or comparable planning document, contains family, agency, and/or community goals.

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

7.3 The department has written job descriptions for all positions. Updates may be outside of the purview of the department.