

Organizational Standards and ROMA

A Crosswalk

ORGANIZATIONAL STANDARDS RELATED TO ASSESSMENT

Category One: Consumer Input and Involvement

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.

Category Two: Community Engagement

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. This would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.

Category Three: Community Assessment

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

Standard 3.5 • The governing board formally accepts the completed Community Assessment.

Category Four: Organizational Leadership

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

Category Six: Strategic Planning

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

Category Nine: Data and Analysis

Standard 9.1 • The Organization has a system or systems in place to track and report customer demographics and the services they 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's governing board and staff leadership have analyzed the agency's outcomes within at least the past 12 months and identified any necessary operational or strategic program adjustments and improvements.

ORGANIZATIONAL STANDARDS RELATED TO STRATEGIC PLANNING

Category Four: Organizational Leadership

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 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.

Category Six: Strategic Planning

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 self-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 included in the strategic planning process.

Standard 6.5 • The governing board has received an update(s) on meeting the goals of the Strategic Plan within the past 12 months.

Category Eight: Financial Operations and Oversight

Standard 8.9 • The governing board annually approves an organization-wide budget.

Category Nine: Data and Analysis

Standard 9.3 • The organization's governing board and staff leadership have analyzed the agency's outcomes within at least the past 12 months and identified any necessary operational or strategic program adjustments and improvements.

ORGANIZATIONAL STANDARDS RELATED TO IMPLEMENTATION

Category One: Consumer Input and Involvement

Standard 1.1 • The Organization demonstrates low-income participation in its activities.

Standard 1.3 • The Organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.

Category Two: Community Engagement

Standard 2.1 • The Organization has documented or demonstrated partnerships across the community (for a specific purpose) including other anti-poverty organizations in the area.

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.

Category Four: Organizational Leadership

Standard 4.4 • The governing board receives an annual update on the success of specific strategies included in the Community Action plan.

Category Five: Board Governance

Standard 5.9 • The organization's governing board receives programmatic reports at each regular board meeting.

Category Six: Strategic Planning

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.

Category Seven: Human Resource Management

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.

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.

Standard 7.3 The organization has written job descriptions for all positions, which have been updated within the past 5 years.

Standard 7.6 The organization has a policy in place for regular written evaluation of employees by their supervisors.

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.

Category Nine: Data and Analysis

Standard 9.1 • The Organization has a system or systems in place to track and report customer demographics and the services they 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's governing board and staff leadership have analyzed the agency's outcomes within at least the past 12 months and identified any necessary operational or strategic program adjustments and improvements.

ORGANIZATIONAL STANDARDS RELATED TO ACHIEVEMENT OF RESULTS

Category One: Consumer Input and Involvement

Standard 1.3 • The Organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.

Category Two: Community Engagement

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.

Standard 2.3 • The Organization communicates its activities and its results to the community.

Category Four: Organizational Leadership

Standard 4.4 • The governing board receives an annual update on the success of specific strategies included in the Community Action plan.

Category Five: Board Governance

Standard 5.9 • The organization's governing board receives programmatic reports at each regular board meeting.

Category Six: Strategic Planning

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

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.

Category Nine: Data and Analysis

Standard 9.1 • The Organization has a system or systems in place to track and report customer demographics and the services they 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's governing board and staff leadership have analyzed the agency's outcomes within at least the past 12 months and identified any necessary operational or strategic program adjustments and improvements.

Standard 9.4 • The organization submits its annual CSBG Information Survey data report and it reflects client demographics and organization-wide outcomes.

ORGANIZATIONAL STANDARDS RELATED TO EVALUATION (ANALYSIS) OF DATA

Category One: Consumer Input and Involvement

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.

Category Two: Community Engagement

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.

Category Three: Community Assessment

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.

Category Four: Organizational Leadership

Standard 4.4 • The governing board receives an annual update on the success of specific strategies included in the Community Action plan.

Standard 4.6 • An organization-wide, comprehensive risk assessment has been completed within the past 2 years and reported to the governing board.

Category Five: Board Governance

Standard 5.9 • The organization's governing board receives programmatic reports at each regular board meeting.

Category Six: Strategic Planning

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

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.

Category Seven: Human Resource Management

Standard 7.4 • The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.

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

Category Eight: Financial Operations and Oversight

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 8.6 • 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.

Category Nine: Data and Analysis

Standard 9.1 • The Organization has a system or systems in place to track and report customer demographics and the services they 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’s governing board and staff leadership have analyzed the agency’s outcomes within at least the past 12 months and identified any necessary operational or strategic program adjustments and improvements.