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2025 CSBG Organizational Standards

Review Name	2025 CSBG Organizational Standards	Total CSBG Org Standard Points Awarded	58.00
Program	CSBG 2024-2025-09	Total Points Percentage	100.00%
Beneficiary/Borrower Name	Har-Ca-Tus Tri-County Community Action Organization		

MAXIMUM FEASIBLE PARTICIPATION - Category one: Consumer Input and Involvement

CSBG Org Standards Review Question 1	Standard 1.1 The organization demonstrates low-income individuals' participation in its activities.	CSBG Org Standards Review Question 3	Standard 1.3 The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.
CSBG Org Standards Review Answer 1	Met	CSBG Org Standards Review Answer 3	Met
CSBG Org Standards Review Question 2	Standard 1.2 The organization analyzes information collected directly from low-income individuals as part of the community assessment.		
CSBG Org Standards Review Answer 2	Met		
Total Points Available Section 1	3		
Total Points Awarded Section 1	3		

MAXIMUM FEASIBLE PARTICIPATION - Category two: Community Engagement

CSBG Org Standards Review Question 4	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.	CSBG Org Standards Review Question 6	Standard 2.3 The organization communicates its activities and its results to the community.
CSBG Org Standards Review Answer 4	Met	CSBG Org Standards Review Answer 6	Met
CSBG Org Standards Review Question 5	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	CSBG Org Standards Review Question 7	Standard 2.4 The organization documents the number of volunteers and hours mobilized in support of its activities.

organizations, faith-based organizations, private sector, public sector, and educational institutions.

CSBG Org Standards Review
Answer 5

Met

CSBG Org Standards Review
Answer 7

Met

Total Points Available Section
2 4

Total Points Awarded Section
2 4

MAXIMUM FEASIBLE PARTICIPATION - Category three: Community Assessment

CSBG Org Standards Review
Question 8

Standard 3.1 The organization conducted a community assessment and issued a report within the past 3 years.

CSBG Org Standards Review
Question 11

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

CSBG Org Standards Review
Answer 8

Met

CSBG Org Standards Review
Answer 11

Met

CSBG Org Standards Review
Question 9

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).

CSBG Org Standards Review
Question 12

Standard 3.5 The governing board formally accepts the completed community assessment.

CSBG Org Standards Review
Answer 9

Met

CSBG Org Standards Review
Answer 12

Met

CSBG Org Standards Review
Question 10

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

CSBG Org Standards Review
Answer 10

Met

Total Points Available Section
3 5

Total Points Awarded Section
3 5

VISION AND DIRECTION - Category four: Organizational Leadership

CSBG Org Standards Review
Question 13

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.

CSBG Org Standards Review
Question 16

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

CSBG Org Standards Review
Answer 13

Met

CSBG Org Standards Review
Answer 16

Met

CSBG Org Standards Review Question 14	Standard 4.2 The organization's Community Action plan is outcome-based, anti-poverty focused, and ties directly to the community assessment.	CSBG Org Standards Review Question 17	Standard 4.5 The organization has a written succession plan in place for the CEO/executive director, 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.
CSBG Org Standards Review Answer 14	Met	CSBG Org Standards Review Answer 17	Met
CSBG Org Standards Review Question 15	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.	CSBG Org Standards Review Question 18	Standard 4.6 An organization-wide, comprehensive risk assessment has been completed within the past 2 years and reported to the governing board.
CSBG Org Standards Review Answer 15	Met	CSBG Org Standards Review Answer 18	Met
Total Points Available Section 4	6		
Total Points Awarded Section 4	6		

VISION AND DIRECTION - Category five: Board Governance

CSBG Org Standards Review Question 19	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.	CSBG Org Standards Review Question 24	Standard 5.6 Each governing board member has signed a conflict of interest policy within the past 2 years.
CSBG Org Standards Review Answer 19	Met	CSBG Org Standards Review Answer 24	Met
CSBG Org Standards Review Question 20	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.	CSBG Org Standards Review Question 25	Standard 5.7 The organization has a process to provide a structured orientation for governing board members within 6 months of being seated.
CSBG Org Standards Review Answer 20	Met	CSBG Org Standards Review Answer 25	Met
CSBG Org Standards Review Question 21	Standard 5.3 The organization's bylaws have been reviewed by an attorney within the past 5 years.	CSBG Org Standards Review Question 26	Standard 5.8 Governing board members have been provided with training on their duties and responsibilities within the past 2 years.

CSBG Org Standards Review Answer 21	Met	CSBG Org Standards Review Answer 26	Met
CSBG Org Standards Review Question 22	Standard 5.4 The organization documents that each governing board member has received a copy of the bylaws within the past 2 years.	CSBG Org Standards Review Question 27	Standard 5.9 The organization's governing board receives programmatic reports at each regular board meeting.
CSBG Org Standards Review Answer 22	Met	CSBG Org Standards Review Answer 27	Met
CSBG Org Standards Review Question 23	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.		
CSBG Org Standards Review Answer 23	Met		
Total Points Available Section 5	9		
Total Points Awarded Section 5	9		
VISION AND DIRECTION - Category six: Strategic Planning			
CSBG Org Standards Review Question 28	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.	CSBG Org Standards Review Question 31	Standard 6.4 Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.
CSBG Org Standards Review Answer 28	Met	CSBG Org Standards Review Answer 31	Met
CSBG Org Standards Review Question 29	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.	CSBG Org Standards Review Question 32	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.
CSBG Org Standards Review Answer 29	Met	CSBG Org Standards Review Answer 32	Met
CSBG Org Standards Review Question 30	Standard 6.3 The approved strategic plan contains family, agency, and/or community goals.		
CSBG Org Standards Review Answer 30	Met		
Total Points Available Section 6	5		
Total Points Awarded Section 6	5		

OPERATIONS AND ACCOUNTABILITY - Category seven: Human Resource Management

CSBG Org Standards Review Question 33	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.	CSBG Org Standards Review Question 38	Standard 7.6 The organization has a policy in place for regular written evaluation of employees by their supervisors.
CSBG Org Standards Review Answer 33	Met	CSBG Org Standards Review Answer 38	Met
CSBG Org Standards Review Question 34	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.	CSBG Org Standards Review Question 39	Standard 7.7 The organization has a whistleblower policy that has been approved by the governing board.
CSBG Org Standards Review Answer 34	Met	CSBG Org Standards Review Answer 39	Met
CSBG Org Standards Review Question 35	Standard 7.3 The organization has written job descriptions for all positions, which have been updated within the past 5 years.	CSBG Org Standards Review Question 40	Standard 7.8 All staff participate in a new employee orientation within 60 days of hire.
CSBG Org Standards Review Answer 35	Met	CSBG Org Standards Review Answer 40	Met
CSBG Org Standards Review Question 36	Standard 7.4 The governing board conducts a performance appraisal of the CEO/executive director within each calendar year.	CSBG Org Standards Review Question 41	Standard 7.9 The organization conducts or makes available staff development/training (including ROMA) on an ongoing basis.
CSBG Org Standards Review Answer 36	Met	CSBG Org Standards Review Answer 41	Met
CSBG Org Standards Review Question 37	Standard 7.5 The governing board reviews and approves CEO/executive director compensation within every calendar year.		
CSBG Org Standards Review Answer 37	Met		
Total Points Available Section 7	9		
Total Points Awarded Section 7	9		

OPERATIONS & ACCOUNTABILITY - Category eight: Financial Operations and Oversight

CSBG Org Standards Review Question 42	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 Administrative Requirements, Cost Principles, and Audit Requirement (if applicable) and/or State audit threshold requirements.	CSBG Org Standards Review Question 49	Standard 8.8 All required filings and payments related to payroll withholdings are completed on time.
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CSBG Org Standards Review Answer 42	Met	CSBG Org Standards Review Answer 49	Met
CSBG Org Standards Review Question 43	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.	CSBG Org Standards Review Question 50	Standard 8.9 The governing board annually approves an organization-wide budget.
CSBG Org Standards Review Answer 43	Met	CSBG Org Standards Review Answer 50	Met
CSBG Org Standards Review Question 44	Standard 8.3 The organization's auditor presents the audit to the governing board.	CSBG Org Standards Review Question 51	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.
CSBG Org Standards Review Answer 44	Met	CSBG Org Standards Review Answer 51	Met
CSBG Org Standards Review Question 45	Standard 8.4 The governing board formally receives and accepts the audit.	CSBG Org Standards Review Question 52	Standard 8.11 A written procurement policy is in place and has been reviewed by the governing board within the past 5 years.
CSBG Org Standards Review Answer 45	Met	CSBG Org Standards Review Answer 52	Met
CSBG Org Standards Review Question 46	Standard 8.5 The organization has solicited bids for its audit within the past 5 years.	CSBG Org Standards Review Question 53	Standard 8.12 The organization documents how it allocates shared costs through an indirect cost rate or through a written cost allocation plan.
CSBG Org Standards Review Answer 46	Met	CSBG Org Standards Review Answer 53	Met
CSBG Org Standards Review Question 47	Standard 8.6 The IRS Form 990 is completed annually and made available to the governing board for review.	CSBG Org Standards Review Question 54	Standard 8.13 The organization has a written policy in place for record retention and destruction.
CSBG Org Standards Review Answer 47	Met	CSBG Org Standards Review Answer 54	Met
CSBG Org Standards Review Question 48	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.		
CSBG Org Standards Review Answer 48	Met		
Total Points Available Section 8	13		
Total Points Awarded Section 8	13		

OPERATIONS AND ACCOUNTABILITY - Category nine: Data and Analysis

**CSBG Org Standards Review
Question 55** Standard 9.1 The organization has a system or systems in place to track and report client demographics and services customers receive.

**CSBG Org Standards Review
Answer 55** Met

**CSBG Org Standards Review
Question 56** Standard 9.2 The organization has a system or systems in place to track family, agency, and/or community outcomes.

**CSBG Org Standards Review
Answer 56** Met

**Total Points Available Section
9** 4

**Total Points Awarded Section
9** 4

**CSBG Org Standards Review
Question 57** 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.

**CSBG Org Standards Review
Answer 57** Met

**CSBG Org Standards Review
Question 58** Standard 9.4 The organization submits its annual CSBG Information Survey data report and it reflects client demographics and organization wide outcomes.

**CSBG Org Standards Review
Answer 58** Met