


ONE VOICE



CENTRAL TEXAS

Standards of Excellence
Guide & Self-Assessment

Updated December 2020

The mission of the One Voice Central Texas is to influence and educate policy makers and the public about what it takes for everyone in our community to thrive, and ensure our members have the tools and resources to be effective.



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Nonprofit Accountability Policy

The economic strength of Austin and health of its citizens depends on an effective, accountable and proactive nonprofit sector. One Voice Central Texas is committed to advancing public confidence and support for the nonprofit sector by exemplifying ethical practices, accountability and the highest standards of quality service.

One Voice is committed to the following:

1. Supporting accountability standards for nonprofits
2. Educating the public and funding organizations about nonprofit accountability standards and acceptable certifications
3. Supporting nonprofits to meet the accountability standards

Supporting Accountability Standards:

One Voice members are expected to complete the Standards Self-Assessment biennially. The self-assessment tool can be found at: <http://onevoicecentraltx.org/for-members/standards-resources/>

In addition, One Voice encourages members to undergo certification at the national level when appropriate and feasible. Examples of national certifications include:

- [Standards for Excellence:](#)
- [Council on Accreditation](#)
- [Better Business Bureau](#)
- [Charities Review Council](#)
- [America's Best Local Charities](#)
- [Commission of Accreditation of Rehabilitation Facilities \(CARF\)](#)

Educating the public and funding organizations about nonprofit accountability standards and acceptable certifications:

Through its resources, website and presentations, One Voice is committed to educating the community about acceptable nonprofit standards.

Supporting nonprofits to meet the accountability standards:

One Voice will identify ways to support nonprofits in meeting accountability standards. This may include activities such as identifying topics for member trainings, sharing supportive resources and policy examples, and encouraging Executive Directors to learn from one another.



Nonprofit Standards of Excellence Guide

Based on the national best practices models listed below, the following are some guidelines for One Voice members to consider as they internally assess and seek guidance for their own organization's practices. Several national sites offer guidelines and nonprofit accreditation. The [Council on Accreditation \(COA\)](#) provides the most detailed free resource on the standards that they expect, with specific recommendations on how to attain them.

Mission and Vision Statements

The organization's vision and mission should be revisited by the Board every 3-5 years.

Develop vision and mission statements (from <https://candid.org/>):

Vision and mission statements should articulate the essence of your organization's beliefs and values and define its place in the world. They establish the long-term direction that guides every aspect of an organization's daily operations.

To distinguish between the two, a vision statement expresses an organization's optimal goal and reason for existence, while a mission statement provides an overview of the group's plans to realize that vision by identifying the service areas, target audience, and values and goals of the organization.

You might think about answers to the following questions to guide your thinking:

Vision

- What are the values or beliefs that inform your work?
- What would you ultimately hope to accomplish as a result of your efforts?

Mission

- How do you plan to work toward this broad vision?
- For whose specific benefit does the organization exist?



Governance

Board Members

- Texas requires a minimum of three Board members; best practices suggest a minimum of seven unrelated members
- New Board members should receive an orientation to their duties as well as the organizational mission and programs
- Not more than one (or 10%, whichever is greater) directly or indirectly compensated member (e.g., Executive Director) serves as a voting member of the Board. Recommend that the Executive Director never votes
- Create clear conflict of interest policies that define the conflict of interest, have a mechanism to prevent the conflicted party from voting or making decisions on potentially conflicting transactions, and have a process for annual written disclosure of potential conflicts of interest
- Generally, Board members receive no compensation other than direct reimbursement of expenses
- Organizations should strive for Board members who reflect the diversity of the communities served by the organization and have the skills to accomplish their mission
- A minimum of one Board member should have a financial background
- Set terms for Board members and consider a limit to the number of consecutive terms that a Board member can serve. Many best practice sites recommend setting terms at between three and five years and setting a term limit of two consecutive terms.

Board Duties

- Set policy direction by engaging in on-going strategic planning
- Ensure that all legal requirements for operating as a non-profit organization are met
- Review and take action on findings of annual independent financial audit
- Enhance the organization's public standing through advocacy within the community on behalf of the organization
- Orient board members
- Actively engage in fundraising efforts
- Meet a minimum of four times per year, or in compliance with bylaws, with a majority of Board members in attendance
- Create written minutes that reflect the action of the Board, including Board committees
- Implement a Board committee structure which addresses the needs of the organization
- Create, review, and amend the organization's bylaws
- Adhere to conflict of interest policies
- Have written policies that address attendance and Board participation at Board meetings. Policies include a process to address noncompliance with meeting attendance
- Hire, regularly evaluate, and set compensation for the Executive Director
- Review and approve a business continuity plan that includes a succession plan for the organization's volunteer and executive leadership

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- Approve the budget annually and periodically assess the organization's financial performance in relation to the budget
- Annually prepare or approve a financial report for the organization for the preceding year. The report must conform to accounting standards as adopted by the American Institute of Certified Public Accountants and must include:
 - (1) A statement of support, revenue, and expenses;
 - (2) A statement of changes in fund balances;
 - (3) A statement of functional expenses; and
 - (4) A balance sheet for each fund.
- Review programmatic performance outcomes and evaluate program cost effectiveness, program efficiency, and outcomes for people served
- Periodically assess need for liability insurance & document decision regarding insurance in Board meetings
- Board manages and evaluates its own performance

Financial Management

General Financial Management:

- Complete the IRS 990 annually and file in a timely manner
- Be current on all tax obligations, including payroll taxes. Note: The Board is personally liable if payroll taxes are not made
- Have an independent annual audit (or financial review for agencies with \$500,000 budget or less) that is prepared in accordance with Generally Accepted Accounting Principles (GAAP), presented to and accepted by the Board, and made available to the community
- Avoid persistent or increasing annual operating deficits
- Prepare & submit financial statements to Board at least quarterly and explain variances from the budget
- Create financial policies that address:
 - a. Investment of assets
 - b. Internal fiscal control procedures
 - c. Purchasing practices
 - d. Unrestricted current net assets
 - e. Confidential process for reporting financial impropriety
 - f. Record retention and destruction
- Create and implement a plan to diversify funding
- Strive to maintain a three month to six-month operating reserve
- Board monitors the organization's annual spending on program activities vs. spending on administration or fundraising activities

Fundraising and Informational Materials:

- Ensure that all organizational materials that are distributed are accurate and truthful, and clearly describe the mission of the organization and the purpose or programs for which contributed funds will be used
- Consider creating an Annual Report that includes the following:

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- Organization's mission statement
 - Summary of the last year's program services accomplishments
 - Geographic areas served
 - Roster of the officers and members of the Board of Directors
 - Financial information including: total income in the last fiscal year, expenses in the same period including fundraising and administrative categories, and ending net assets
- Include on organization's website either a link to the Annual report or the organization's IRS Form 990 as well the physical address of the organization
 - Address the privacy concerns of donors by creating a privacy policy and addressing how the information collected from a donor is used
 - Maintain a policy that states that the organization will discontinue contacting a person based on their verbal or written request
 - Assure that the organization is complying with disclosure of information laws: <https://www.nonprofitexpert.com/public-disclosure-requirements/>
 - Consider a policy that addresses the organization's acceptance of gifts, and any limitations on the types of gifts that will be accepted
 - Fundraising personnel should not be paid based on a percentage of the amount raised or commission formula
 - All statements made by the nonprofit in fundraising appeals about the use of a contribution should be honored. Nonprofits should also honor the intent of a donor
 - Paid professional fundraisers should be properly registered and comply with all legal requirements
 - Provide periodic internal review of organization's compliance with known existing legal, regulatory, and financial reporting requirements and review results with Board members.

Human Resources

Personnel Policies & Procedures: Agencies should have personnel policies & procedures that address the following:

- a. Job descriptions
- b. Organizational chart
- c. Working conditions
- d. Employee benefits
- e. Vacation and sick leave
- f. Annual written employee evaluation
- g. Employee supervision
- h. Hiring and firing
- i. Orientation for new employees
- j. Grievance procedures
- k. Employee growth and development
- l. Criminal background checks (identify for which employees - recommended at a minimum for staff providing direct client services)
- m. Harassment, Whistleblower and EEOC Complaints

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- n. Confidentiality of employee, client, and organization records and information
- o. General standards of conduct, e.g., drugs/alcohol, smoking, attendance, etc.

Volunteer Policies and Procedures: Organizations should have volunteer policies and procedures that include:

- a. Initial assessment or screening
- b. Assignment to and training for appropriate work responsibilities
- c. On-going supervision evaluation and opportunities for advancement
- d. Criminal background checks, especially when providing direct client services

Health and Safety

- Create written health and safety policies that address licensure and/or certification issues
- Create risk management policies
- Ensure adequate and appropriate facilities/program space for client services
- Ensure adequate space and tools to enable staff to perform their jobs
- Create a disaster plan

Programs/Services

- Ensure programs and policies are aligned with the organization's mission statement
 - Ensure that programs are addressing community needs. This can be partially achieved by the organization participating in community planning processes
 - When available, ensure that programs are meeting recognized standards and best practices
 - Measure effectiveness of programs by evaluating program cost effectiveness, efficiency & client outcomes
 - Create mechanism for input, including client satisfaction, from program participants
 - Use evaluation results to strengthen the effectiveness of programs and make programmatic changes
 - Create clients' rights policies that include: client confidentiality, procedure for release of client information, and grievance procedures
 - Assure that activities of the agency are strictly non-partisan and fall within federal lobbying guidelines



Nonprofit Resource Guide

The resources listed herein can provide general guidance for nonprofits facing certain common issues and questions. Please do not use these resources as an alternative to professional guidance when addressing fundamental concerns.

Local Austin Resources:

- [One Voice Central Texas](#) – One Voice Central Texas is a coalition of the leadership of over one hundred nonprofit health and human service organizations working to make sure that everyone can contribute to our community and thrive. One Voice offers trainings, a buddy mentorship program, and an online resource library for members, as well as a members-only listserv through Mobilize.
- [Center for Nonprofit Studies at Austin Community College](#) – This organization aims to connect various nonprofits with the many resources available in Austin and to improve their organizational strength. The Center has an online resource library with large numbers of articles offering guidance around issues facing many nonprofits, including the [Principles & Practices for Nonprofit Excellence Guide](#). If you're looking for an array of viewpoints on fundraising, financial management, ethics, or strategic planning, scroll through the resources available. Additionally, their training sessions cover topics from grant-writing to financial oversight, with a strong focus on management issues. The Center also sponsors a Certificate in Nonprofit Leadership and Management.
- [Mission Capital](#) – This membership organization offers consulting services around several common issue areas, including strategy, operations, leadership transitions, and partnerships. They also conduct regular seminars and workshops. Mission Capital has a job bank and supports the 501(c)ommunity, a portal for member nonprofit professionals, board members, and volunteers to connect and share information, experiences, and ideas around nonprofit management and governance.
- [Texas Association of Nonprofit Organizations \(TANO\)](#) – TANO is the statewide association promoting Texas' growing nonprofit community. TANO's services include an extensive nonprofit knowledge center, statewide calendar and job bank, leadership and management learning opportunities, and public policy updates. TANO is a satellite program of the Nonprofit Risk Management Center and offers many of the Center's services throughout Texas.
- [Texas C-BAR \(Community Building with Attorney Resources\)](#) – Texas C-BAR has an excellent legal resource library and connects nonprofits with legal assistance. They provide pro bono assistance to nonprofits for non-litigation legal issues and help form new nonprofit organizations. Their legal resources include employment, fundraising, and corporate governance information. They focus on business law rather than litigation, which makes

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them unique within the state of Texas. While this organization serves the entire state of Texas, they are based here in Austin.

- [Regional Foundation Library](#) – For nearly 50 years, the Regional Foundation Library (RFL) has served as a bridge between grant-seeking and grant-making communities in Central Texas. Affiliated with both the Foundation Center headquartered in New York and The University of Texas at Austin's Division of Diversity and Community Engagement, the RFL offers free access to online tools for funding research as well as access to print and archival materials related to nonprofit formation, board development, strategic planning, and grant funding. A list of print resources in their library can be found at <http://www.librarything.com/catalog/AustinRFL/yourlibrary>.
- [Association of Fundraising Professionals \(AFP\) Greater Austin Chapter](#) - The purpose of the AFP Greater Austin Chapter is to foster a vibrant philanthropic community through nurturing fundraising professional excellence. They offer continuing education opportunities, resources, monthly luncheons on different topics, and an annual Central Texas Funders Forum.

National Nonprofit Resources:

- [Candid](#) – This site is designed for use by foundations but has valuable information for grant seekers as well. Though few of their resources are free, they offer many books and training courses which may be valuable for organizations with the budget to afford them. For larger organizations, their Annual Year in Review publication can help fundraising staff understand the landscape in which foundations are making their funding decisions.
- [GuideStar](#) – This site provides an index of publicly filed 990 forms for all nonprofits that have submitted them, including foundations. The site requires registration, but the free account grants access to the full 990 forms.
- [The Impact Foundry](#) – This site offers a broad overview of the nonprofit sector, and may be a good resource for potential board members or others who are not familiar with the nonprofit sector to bring them up to speed.
- [Blue Avocado](#) – Blue Avocado is the bimonthly newsletter of American Nonprofits, a membership organization that provides practical financial information and support to U.S. 501(c)(3) nonprofit organizations, staff, stakeholders and volunteers. It is created by and for community-based nonprofits.

Issue-Specific Resources

Governance

- [Boardsource](#) explores the responsibilities of board members in an extensive library of guides, tools, and written resources

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- [“Leading With Intent”](#) reports on BoardSource’s annual national survey tracking and analyzing trends in nonprofit board leadership. The report includes a framework for exploring the relationship between who serves on a board, how it is structured, the culture it cultivates, and the way that it does its work.

Diversity:

- Boardsource highlights research, articles, and resources related to diversity, inclusion, and equity in boards and across the social sector: <https://boardsource.org/research-critical-issues/diversity-equity-inclusion/>
- [“Awake to Woke to Work: Building a Race Equity Culture”](#) – This report from [Equity in the Center](#) explores the levers that drive change and the stages that mark transformation using the Race Equity Cycle. In collaboration with over 120 experts in the fields of DEI and race equity, they provide insights, tactics, and best practices to shift organizational culture and operationalize equity.
- [Race to Lead](#) – This report series from [Building Movement Project](#) and its accompanying website address the longstanding nonprofit racial leadership gap. Efforts to support, train and inspire aspiring leaders of color are important, but they are not enough to move the dial toward more diverse and equitable leadership. The Race to Lead survey data and analysis confront myths about race and leadership in nonprofits and provide structural recommendations for moving forward.
- [“Global Diversity and Inclusion Benchmarks: Standards for Organizations Around the World”](#)—This report explores benchmarks and standards related to diversity and inclusion as well provides an opportunity for self-assessment.
- [“Protocol for Culturally Responsive Organizations”](#) – This report by the Center to Advance Racial Equity at Portland State University is designed to assist organizations to assess an organizations practice and commitment to integrating cultural responsiveness across the organizations’ policies, practices, culture, and data collection and evaluation mechanisms.

Financial Management:

- The Nonprofit Association of Oregon’s financial management self-assessment tool can be used to determine areas of strength and weakness and set goals: <http://www.nonprofitoregon.org/sites/default/files/uploads/file/Fin%20Mgmt%20Self%20Assessment.pdf>
- The National Council of Nonprofits offers a library of resources on nonprofit financial management: <http://www.councilofnonprofits.org/resources/financial-management>
- The Free Management Library provides this well-indexed and linked overview of financial management for nonprofit organizations, including key annual activities and specific roles for professional assistance through bankers, treasurers, and accountants: http://managementhelp.org/finance/np_fnce/np_fnce.htm

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- A strong compendium of fundraising resources is available here: <http://managementhelp.org/nonprofitfundraising/index.htm>
- A comprehensive article in the Stanford Social Innovation Review explains how to identify and develop the right funding model for your organization: http://www.ssireview.org/articles/entry/finding_your_funding_model
- Ten nonprofit funding models: http://www.ssireview.org/articles/entry/ten_nonprofit_funding_models
- The Hogg Foundation for Mental Health is one of the Texas Cooperating Collections of nonprofit resources. Located at 3001 Lake Austin Boulevard on the 4th floor, this library is full of excellent fundraising resources.
- CompassPoint Nonprofit Services' template and guide to creating fiscal policies and procedures: <https://www.compasspoint.org/sites/default/files/documents/Guide%20to%20Fiscal%20Policies%20and%20%20Procedures.pdf>
- The Journal of Accountancy has an article "Best Practices for Nonexempt Organizations and Form 990" that details best practices for the 990 form: <http://www.journalofaccountancy.com/issues/2010/sep/20102725.html>

Health and Safety:

- This article from the Nonprofit Risk Management Center highlights key issues to consider in assessing workplace risk, as well as a sample workplace safety policy: <https://www.nonprofitrisk.org/resources/articles/workplace-safety-preserves-and-protects/>
- Occupational Safety and Health Administration (OSHA) is the division of the US Department of Labor tasked with assuring safe and healthful working conditions by setting and enforcing standards and by providing training, outreach, education, and assistance: www.osha.gov

Human Resources:

- General
 - [National Society for Human Resource Management](#), the world's largest HR professional society, shares numerous resources related to human resource management
 - The [Texas Workforce Commission](#) is a state agency that provides unemployment benefits and workforce development services to employers and jobseekers of Texas.:
 - [Department of Labor](#)
 - The [Equal Employment Opportunity Commission \(EEOC\)](#) is responsible for enforcing federal laws that make it illegal to discriminate against a job applicant or an employee because of the person's race, color, religion, sex, national origin, age, disability or genetic information. The EEOC website provides guidance on how the laws and regulations apply to specific workplace situations and provide resources that clarify existing EEOC positions.
 - The [EEOC's Small Business Fact Sheet](#) provides an overview of the legal obligations of small businesses under the federal employment anti-

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discrimination laws. It also provides information about other EEOC resources available for small business owners

- Volunteer Management
 - VolunteerMaine covers the basics in this volunteer management essentials guide, including a best practices checklist:
http://www.volunteermaine.org/shared_media/publications/old/E245B0A4d01.pdf
 - A-Z Volunteer Management Library is an extensive online library of materials related to non-profit volunteer management: <https://www.energizeinc.com/a-z>
- Culturally and Linguistically Appropriate Services (CLAS) Standards
 - The Think Cultural Health website sponsored by the Office of Minority Health has a wealth of information and resources on the CLAS Standards:
<https://www.thinkculturalhealth.hhs.gov/clas>
 - The CLAS Standards Blueprint is a comprehensive guide to the Standards that includes specific strategies for implementation:
<https://www.thinkculturalhealth.hhs.gov/assets/pdfs/EnhancedCLASStandardsBlueprint.pdf>
 - The National Center for Cultural Competence website has many tools for implementing the CLAS Standards and self-assessments to identify cultural competency gaps at your organization: <http://nccc.georgetown.edu/>
 - The Community Advancement Network (CAN) offers this toolkit to help organizations promote diversity, inclusion and cultural competence:
<http://canatx.org/CAN-Initiatives/ccdi/index.php>
- Employee Recruitment and Hiring
 - Bridgespan offers this nonprofit hiring toolkit that explores the eight steps to mitigate risk and ultimately lead to making a successful hiring decision:
<https://www.bridgespan.org/insights/library/hiring/nonprofit-hiring-toolkit>

Programs/Services:

- Program evaluation is increasingly important to funders. This article from the Free Management Library discusses types of evaluation tools and methods to choose among them: <https://managementhelp.org/evaluation/program-evaluation-guide.htm>
- 'Charting Impact' is a nationally-adopted evaluation tool. The St. David's Foundation currently uses this tool as part of their application process:
<https://independentsector.org/resource/charting-impact/>

Policies and Procedures:

- 501 Commons offers many resources on developing policies and procedures for volunteer management: <https://www.501commons.org/resources/tools-and-best-practices/volunteer-management>
- Ready.gov shares information on disaster preparedness for businesses, including templates for business continuity plans:
<https://www.ready.gov/business/implementation/continuity>

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- The Federal Emergency Management Agency (FEMA) offers emergency preparedness resources for businesses: <https://www.fema.gov/media-library/assets/documents/89510>

Communications:

- The [Colorado Nonprofit Association's Communications Toolkit](#) - a comprehensive guide to establishing communications guidelines, branding and marketing, and communications planning. The toolkit includes many tools and resources on working with the media, as well as sample communications plans, press releases, and more
- [National Reframing Human Services Initiative](#) - an evidence-based communication strategy for building public understanding of the human services sector and the will to support the important work taking place in the diverse communities human service organizations serve
- [Frameworks Institute](#) - helps mission-driven organizations communicate about social issues in ways that build public will to support progressive change
- Web/Tech Resources
 - [Google Apps for Nonprofits](#) – free cloud services for nonprofits
 - [TechSoup](#) – provides access to donated and discounted tech products and services, including high-quality refurbished hardware, and software from Adobe, Microsoft, Cisco, Intuit, and Symantec:
 - [Google Analytics](#) – free tool that measures the success of your web presence:
- Resources on Social Media
 - [Hootsuite](#) – use to manage all your social media accounts on one platform -
 - [Social Media Club Austin](#) – a local group where you can go to get more information about social media
 - [Social Media Breakfast Austin](#) – local meet-ups to learn more about social media:
 - [The Millennial Impact Project](#) – a project that produces research to help organizations, corporations, and individuals understand the best approaches to cultivate interest and involvement among the Millennial generations (born 1980-2000):

Community Leveraging and Fundraising Opportunities:

- [Planet Green](#) – offers a recycle fundraising program through which organizations can send in used inkjet cartridges, cell phones, and small electronics for free and receive funds back from Planet Green:
- [Give as You Get](#) – portal through which you can purchase items online from participating businesses to donate a percentage of the purchase to a local nonprofit of your choice:

Advocacy:

- [Bolder Advocacy](#) – provides nonprofits and foundations with the resources and tools to help navigate complex advocacy rules and regulations. Users can access how-to's, fact sheets, and reports that help nonprofits stay up-to-date on advocacy and connect with a coach for one-on-one technical assistance and trainings.



One Voice Standards Self-Assessment Tool

One Voice Central Texas is committed to advancing public confidence and support for the nonprofit sector by exemplifying ethical practices, accountability and the highest standards of quality service. One Voice members agree to complete and submit the One Voice Standards Self-Assessment Tool to One Voice biennially. Members can use this self-assessment tool to:

- Ensure that their agency is meeting best practices
- Identify the key strengths of their organization
- Identify areas for improvement

One Voice uses the aggregated results to identify potential topics for trainings and workshops throughout the year as well as resources and guidance to include in the [One Voice Standards Accountability Guide](#) provided to members.

All information received about a specific organization or individual through the Standards of Excellence self-assessment remains confidential.

The standards listed in the Self-Assessment Tool were determined using the following resources:

- [Standards for Excellence](#)
- [Council on Accreditation](#)
- [Better Business Bureau](#)
- [Charities Review Council](#)
- [America's Best Local Charities](#)
- [Commission of Accreditation of Rehabilitation Facilities \(CARF\)](#)
- [IRS 990 Form](#)
- [Journal of Accountancy](#)
- [Unrelated Business Income Tax](#)
- [IRS Earned Income Tax Credit Information](#)
- [Fair Labor Standards Act](#)
- [Required Employment Postings](#)
- [Uniformed Services Employment and Re-Employment Act of 1994](#)
- [CLAS Standards](#)
- [Health Information Privacy](#)
- [Maine Standards of Excellence](#)
- [Global Diversity & Inclusion Benchmarks](#)

If you would prefer to complete a digital version of the self-assessment, please [click here](#).

Disclaimer: The self-assessment tool should not be construed as legal services to any organization or individual.

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Organization: _____

Standard		Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
Governance	Organization is legally authorized to operate as a non-profit. (Texas Nonprofit Corporations Act, US-26 U.S.C. Sec.6104(d))	Bylaws/Articles of Incorporation; IRS Determination Letter 501(c)3; Forms 1023, 990	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has a registered agent and office and has filed informational report not more than once every four years upon request by the secretary of state. The report provides information regarding the corporation's registered agent and registered office, and the names and addresses of its current officers and directors, and is required regardless of the corporation's tax status. BOC § 22.357.	Registered agent, office and periodic report filed with Texas Secretary of State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Board hires, evaluates, and sets the compensation of the Executive Director (ED).	Annual Executive Director evaluation; hiring policy; Executive Compensation policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization's Board is sufficiently active, capable and diverse to guide, plan and support the achievement of the organization's mission and goals.	Board list detailing experience and demographics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization collaborates with community programs and members to advocate for issues of mutual concern.	Examples of collaborative efforts; MOUs and partnership agreements; participation in One Voice Central Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Board and ED responsibilities are clearly outlined in the bylaws. All Board Members receive a copy of the Articles of Incorporation and Bylaws. (GSA)	Bylaws/Articles of Incorporation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	All Board members receive an orientation to the organization.	Orientation materials/procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization maintains up-to-date copies of minutes from all Board meetings. Minutes document attendance as well as Board and Committee action.	Board minutes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Board members, volunteers and staff adhere to the organization's conflict of interest policy.	Conflict of Interest Policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization does long-term, strategic planning.	Strategic Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has written Succession plan that outlines the succession of authority.	Succession Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The Board, staff and volunteers understand advocacy rules as they pertain to the organization.	Minutes of board meeting, policy manuals, advocacy policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Standard		Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
Financial Management	The organization has assigned responsibility for meeting all filing and reporting requirements to appropriate directors or staff. (GSA recommendations)	Minutes of board meeting, policy manuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The board or a board committee regularly determines that all filing and reporting requirements have been met in a timely manner, or that appropriate and timely corrective action has been taken. (GSA recommendations)	Board minutes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization carries general liability, property and casualty and Directors & Officers insurance. If applicable, organization maintains Errors and Omissions by social workers or other professional liability insurance.	Insurance Policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The board evaluates itself.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Board is representative of the community it serves.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Management	The organization provides clear, accurate information to the community about its programs, activities and finances.	Annual Report; marketing materials, Form 990 publicly available for last 3 years (26 USC 501©(3))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Fundraising activities are conducted in an ethical, financially responsible manner.	Fundraising policies/procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization demonstrates financial accountability and viability through sound financial management practices. The organization follows Generally Accepted Accounting Principles (G.A.A.P.).	Audit or financial statements and any accompanying recommendations; current budget, Board approved financial policies including conflict of interest, gift acceptance, whistleblower, 990 review and document retention and destruction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization's budget is reviewed and approved by the board on an annual basis.	Budget; board meeting minutes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Management	The organization follows the following IRS requirements:	Each organization conducts either an internal financial review or outside audit and those findings are presented to the Board. Outside audit presented by auditor:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> • The organization conducts annual financial reviews or audits and files appropriate and timely 990 forms annually with the IRS. • Organization notifies IRS of material changes to organizational purpose and activities (26 U.S.C. Sec. 501 © (3)) • Compliance with Public Support Test if relying on for Public Charity status (26 U.S.C. Sec. 1701 (b)(1)(a) vi or Sec 509(a)(2)) 	<ul style="list-style-type: none"> • To ensure the audit process is objective, there should be independent oversight, preferably through a standing or ad hoc audit committee. No member of this committee should be employed by the nonprofit or the audit firm. (National Council of Nonprofits) • Best Practice: The organization periodically rebids audit contract or 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Standard	Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
	<p>asks for rotation of individual lead auditor. (National Council of Nonprofits)</p> <ul style="list-style-type: none"> Best Practice: Larger organizations (\$2M & up) should establish an audit committee of the board that does not share members with and works independently of the board's finance committee and any staff of the organization or audit firm. (See, e.g., CA Nonprofit Integrity Act of 2004, ME Nonprofit Standards) 					
<p>Sarbanes-Oxley – The two requirements below are the only provisions that apply to nonprofits:</p> <ul style="list-style-type: none"> Whistleblower Protection Laws (18 U.S.C. Sec.1107) Organization complies with document retention & destruction requirements (18 U.S.C. Sec 1519) 	Policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization complies with IRS disclosure, substantiation, and reporting requirements for charitable contributions received. (990, 26 U.S.C. Section.170(f)(8))	Fundraising policies/procedures, donor acknowledgement letters for “quid pro quo” gifts and gifts of \$250 or more	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In spending endowed or other restricted funds, organization complies with Texas Uniform Prudent Management and Institutional Funds Act.	Audit or financial statements, gift agreements showing donor intent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization observes the IRS prohibition on political campaign activities. (26 U.S.C. Sec. 501©(3))	Financial policies/procedures, conflicts of interest and personnel policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization reported and paid tax on Unrelated Business Income and made form 990-T for last 3 years publicly available. (UBIT- IRS Publication 596 (2015))	Tax forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization complies with Federal limitations on lobbying activities. Has enacted 501(h) status to have clear and generous limits on lobbying or can demonstrate that lobbying is an “insubstantial part” of activities. (26 U.S.C.501(c)(3) Sec.4911)	Audit or financial statements. Complete IRS form 5768 to obtain 501(h) status. https://www.irs.gov/pub/irs-pdf/f5768.pdf	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If the organization is the fiscal agent for another organization, it monitors the other organization's performance and compliance with corporate formalities. (Recommendation based on GSA standards)	Memorandum of Understanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization has adopted a conflict of interest policy for transactions and meets all requirements for transactions involving a conflict of interest including transactions with organizations under its control. (990)	Financial policies, audited financials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Standard		Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
Human Resources	Organization considers using minority-owned businesses fairly and equitably when competitively bidding on services.	Written affirmative action policy statement; stated preference own minority-owned business in RFP templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization has a fundraising plan to ensure sustainability.	Written fundraising plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization has a donor privacy policy in place.	Donor privacy policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization utilizes a donor tracking system.	Donor database	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Board is formally engaged in resource development.	Board dues/giving policy; fundraising committee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Resources	The organization does not unlawfully discriminate against any person or category of persons and comply with the City of Austin non-discrimination policy.	Discrimination prohibition policy that prohibits discrimination against an individual because of race, creed, color, religion, national origin, sexual orientation, gender identity, disability, sex or age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Policy prohibits personnel or volunteers from engaging in any form of harassment, as defined by federal, state, or local law.	Harassment policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization complies with the Uniformed Services Employment and Re-Employment Rights Act of 1994 (38 U.S.C. Secs. 4301-4335)	Employment Policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization hires qualified personnel as outlined in the job posting/description.	Job descriptions; applicant screening documents (interview questions, application, resume, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has an equal opportunity hiring policy that governs hiring practices.	Equal opportunity hiring policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The Executive Director reviews and approves the salary structure and ranges of staff annually, and benchmarks salaries every three years with comparable data.	Budget; salary schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Background checks are conducted on all employees and volunteers who will be working in residential facilities or with children, the elderly or other vulnerable populations.	HR procedures for screening new-hires	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization has formal mechanisms through which employees, volunteers and people served can express and resolve grievances.	Whistleblower and discrimination policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Standard	Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
Organization has written policies/procedures that are reviewed regularly.	Policy Manual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization posts or provides to employees all required employment notices and posters required by law. Federal required postings: EEOC Consolidated; OSHA; Wage & Hour; Employee Polygraph Protection Act. See: http://www.twc.state.tx.us/businesses/posters-workplace	Posters and policy manuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If the organization collects health information from employees and/or people served, complies with HIPAA (42 U.S.C. Secs. 300gg et. seq., 29 U.S.C. 1181 et. seq., 42 U.S.C. 1320 d et. seq.)	Confidentiality/Non-disclosure policies and forms. Personnel files. Confidential health information is maintained separately.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization maintains personnel records for at least 4 years. Some government funders require up to 8 years.	Personnel files and file logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization obtains completed I-9 and W-4 forms for all new employees. (8 U.S.C. Sec. 1324a)	Personnel files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization withholds federal income taxes, pays employer taxes and timely deposits payroll taxes (26 U.S.C. Sec. 3402)	Financial accounting and payroll records, employee pay stubs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization files quarterly wage reports with the IRS. (26 U.S.C. Sec. 3402)	IRS Form 941	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization provides each current or former employee with a completed IRS W-2 form of previous year earnings by January 31. Fines assessed if late. (26 U.S.C. Sec. 3402)	Completed W-2 forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization has properly classified employees and complies with all wage and hour laws, including the Fair Labor Standards Act, Texas Pay Day Act.	Policy manuals and procedures, payment of authorized overtime to non-exempt employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Executive compensation is not unreasonably high. (26 U.S.C. Sec. 4958 (Form 990)). The organization has used comparability data to determine executive compensation.	Form 990	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization complies with IRS rules regarding independent contractors, documents these relationships with an appropriate contract and reports compensation to contractors on Form 1099. (Treas. Reg 31.3121(d)- 1 ©, 31.3401 ©- 1(b))	Signed contracts, IRS Form 1099	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Standard		Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
Programs	The organization provides a notice about the Earned Income Tax Credit to each employee from whom it did not withhold income tax. (IRS Publication 596)	Copy of IRS Notice 797 in personnel file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization complies with all health care and other employee benefit plan requirements	Plan documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization complies with employment related filing requirements of the Texas Workforce Commission, including filing of Form C-1 and if required, quarterly wage reports with payment of unemployment insurance tax.	Filed reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization utilizes a formal process for the purpose of measuring, improving, and developing workforce skills.	Examples include coaching notes, progress reports and/or an assessment tool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	If the organization has 100 or more employees, the EE0-1 Report, otherwise known as The Employer Information Report, is submitted to the EEOC and the Department of Labor's Office of Federal Contract Compliance Programs.	Complete EE0-1 report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has a written grievance policy and procedure for employees.	Employee grievance policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health and Safety	Organization's facilities are correctly zoned, and its premises are safe for use by personnel and visitors and meet all applicable ADA standards.	Relevant licenses, Appropriate regulations, Certificates of Occupancy and other documentation of compliance, Meets Fire Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has a written Business Continuity Plan that addresses risks and prepares for a disaster.	Business Continuity Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	If organization has more than 10 employees in the preceding 12 months, the organization completes OSHA 300, 300a, and 301 log (unless exempt).	Post 300A Summary of Work-Related Injuries and Illness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Programs/Service	The rights and dignity of people served are respected throughout the organization.	Confidentiality policy; client rights statement; consent and release of information forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Standard		Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
Progress	Progress towards annual program performance targets are reviewed regularly and revised as needed based on outcomes.	Sample performance measures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Client satisfaction and/or follow-up surveys are conducted and summary data is analyzed.	Survey tools; summary report of data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization actively solicits community input when developing and evaluating programming.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Services are accessible in the language(s) of the people served by the organization.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has a written grievance policy and procedure for people served.	Client grievance policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization collaborates with other organizations to prevent duplication of services.	Memorandums of Understanding (MOUs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	The organization regularly assesses the value add of services offered.						
	Organization is accessible to the public for general information and compliance with disclosure laws. (26 U.S.C. Sec 6104 (d))	Contact information available on materials such as brochures, business cards, website. Names of Board members available on website.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communications	The organization clearly communicates its mission to the community.	Mission statement; marketing materials (brochure, website, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization strives to have a clearly defined, written communication plan for internal and external communications.	Written communications plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Standard		Evidence	Have in Place	In Development	Not Feasible	Need Technical	Not Applicable
Diversity & Inclusion	Organization regularly reviews and updates policies and procedures for developing public statements and positions on issues.	Policies and procedures; one or more clearly identified spokespersons that are authorized to make public statements on behalf of the organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has a social media policy that delineates who can represent the organization on social media.	Written social media policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization has a well-defined brand utilized in communications.	Formal branding guidelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Communication materials are accessible in the language(s) of the people served by the organization.	Translated materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diversity & Inclusion	Organization has completed a diversity and inclusion self-assessment (i.e. Global Diversity and Inclusion Standards open source self-assessment): http://centreforglobalinclusion.org/gdib/	Completion of an organizational self-assessment around diversity and inclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Organization tracks compliance with the national culturally and linguistically appropriate standards (CLAS) or has a plan to meet the CLAS standards. http://minorityhealth.hhs.gov/templates/browse.aspx?lvl=2&lvlID=15	Record of services offered, annual training for service providers, interpretation services available where needed. Staff & Board strive to meet CLAS standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Addendum to be Completed if Organization Receives Federal Funding

Standard	Evidence	Have in Place	In Development	Not Feasible	Need Technical Assistance	Not Applicable
Organization complies with OMB Circulars A-133, A-110, A-122. If organization expends more than \$750,000 in Federal funds annually, obtains Single Audit.	A-133 Single Audit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization follows a procurement policy and investigates or competitively bids potential transactions to ensure new purchases or contracts are free from conflicts of interest, reasonably priced at fair market value or are otherwise favorable to the organization. (A-122, Uniform Guidance on Grant Administration, 2 C.F.R. 200.317-326. New regulations passed in 2014.)	Financial policies, audited financials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization complies with Drug-Free Workplace Act of 1988 (41 U.S.C. Section 701 et. seq.)	Policy manuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Comments: If applicable, please provide any further explanation for any of your checklist responses.

Comments on N/A Responses: If you listed N/A or any standards, please explain here:

Do you have policies or procedures that you are willing to share with members in the resource section of the website? If so, please list.

Are you willing to serve as a resource to other members in any of the areas listed in the checklist? If so, please indicate which areas.



Member Agreement to Support Non-Profit Standards

As a member of One Voice Central Texas, I agree to the following:

My organization will:

- Support accountability standards for non-profits
- Educate the public and funding organizations about non-profit accountability standards and acceptable certifications
- Assist in identifying capacity building needs of non-profits
- Support non-profits to meet the accountability standards

In addition, my organization has completed an internal assessment of our operations using the One Voice baseline standards.

Executive Director

Organization

Date

My organization would appreciate additional training and support in the following areas:

- 1.
- 2.
- 3.
- 4.



One Voice Confidentiality Statement

I understand that all information received about a specific organization or individual through the Standards of Excellence Self-Assessment will remain confidential. The information may only be used to help identify areas of future programming or other forms of technical assistance.

Executive Director

Organization

Date