



Annual Item Review

Board Item Review					
Document	Frequency	Org. Standard	Date for review	Date for Board	Ownership
Audit/990	Annual (t)	8.1, 8.2, 8.3, 8.4 990 – 8.6	January	January	Chief Financial Officer and CEO
Public Board Membership Review	Annual	5.1	December	January	CEO and Dev./Admin. Director
Private & Low Income Membership Review	Annual (3 yr renewals)	5.1, 5.2	December	January	CEO and Dev./Admin. Director
Annual CAHI meeting	Annual	N/A	January	January	CEO
Meeting of the Member (CAHI)	Annual	N/A	January	CAH Board: January	CEO and Admin Coordinator
CSBG- IS /Narrative report	Annual (t)	4.2, 4.3, 4.4	January	January	Community Services Director
Head Start ERSEA Update	Annual (t)	5.7	January	January	Head Start Director
Board Review of By-Laws/Selection Criteria	Annual (t)	5.3, 5.4 (copy received by Brd)	February	February	CEO and Dev./Admin. Director
Annual Report	Annual (t)	2.3	January	February	CEO
Performance Management Scorecard	Annual (t)	4.6	December	February	Business and Housing Director
Risk Assessment	Annual (t)	4.6	January	March	Business and Housing Director
Affirmative Action Report	Annual	7.7	January	March	Planning Director and HR Director
ROMA Training (Part I)	Every even year (t)	4.3, 7.9	February	March	Community Services Director
CSBG Needs Assessment Review	3-5 years (t) State & CAN guidelines)	3.1, 3.2, 3.3, 3.4, 3.5	February	March	CEO Planning Director/HR
Strategic Plan Update	Annual (t)	4.1, 4.3, 6.1, 6.2, 6.3, 6.4, 6.5	March	April	CEO
Fiscal Policy Review	Annual (t)	8.10	April	April	CFO
Funding Source Survey	Even numbered year	1.3, 2.2	March	May	CEO Planning Director
Staff Survey	Every even numbered year	2.2	March	May	CEO Planning Director
Stakeholder survey	Every odd numbered Year	3.2	March	May	CEO Planning Director
Conflict of Interest Board	Annual	5.6	May	May	CEO
Whistle Blower/ Agency Policy and Procedure approval – Fiscal if needed	Annual (t)	7.7	June	July	HR Director
CSBG Plan	Annual (t)	4.2, 4.3, 4.4	June	July	Community Services Director
ROMA training (Part II)	Even numbered years (t)	4.3, 7.9	July	August	Community Services Director
History of Community Action	Annual (t)	5.7	August	August	CEO
Board Manual	Annual (t)	5.8 – Board duties	September	September	CEO
Head Start Annual Orientation	Annual (t)	5.7	September	October	CEO Head Start Director

Agency Item Review				
Document	Frequency	Org. Standard	Date for review	Ownership
Update Staff Certification List	Annual	7.9	January	HR Director
Volunteer & staff auto insurance verification	Annual		January	HR Director
Legal Poster Review	Annual		January	Site Review Checklist – Admin 28
Agency Brochure Review 1	Bi-Annual	2.3	January /July	CEO and Development/ Admin. Director
Leadership Training Phase I	2-4 times per year (more if needed)	7.9		HR Director
Leadership Training Phase II	As needed	7.9	November	HR Director
Leadership Training Phase III	As needed	7.9		HR Director
Agency Brochure Review 2	Bi-Annual	2.3	July/ January	CEO and Development/ Admin. Director
NHAP Progress Reports	Annual		July	Community Services Director
Kansas Foreign Corp file	Annual		October	Administrative Coordinator
Investment Committee Mtg.	Annual		October	Assistant Fiscal Director
Board Room Program Storyboards	Annual		October	CEO and HR Director

In Touch Articles and Staff Newsletters				
Document	Frequency	Date	Method	Ownership
Code of Ethics/Principals Policies and Procedures	Annual	January	Staff Newsletter	CEO
Building Maintenance and Repairs	Annual	January	In Touch	HR Director
Incident Reporting Procedures	Annual	February	In Touch	HR Director
EAP/Help Net Website review	Annual	March	In Touch	HR Director
Safety Committee Contact Information	Annual	April	In Touch	HR Director
Confidentiality	Annual	April	Staff Newsletter	CEO
Working Safely in Summer Heat	Annual	May	In Touch	HR Director
Drug and Alcohol Free Policy & testing info	Annual	June	In Touch	HR Director
Attentive Driving	Annual	July	In Touch	HR Director
Incident Reporting Procedures	Annual	August	In Touch	HR Director
Emergency Response Plan	Annual	September	In Touch	HR Director
Branding	Annual	October	Staff Newsletter	CEO
How to avoid slips, trips & falls, Part I	Annual	October	In Touch	HR Director
How to avoid slips trips & falls Part II	Annual	November	In Touch	HR Director
EAP/Help Net Website review	Annual	December	In Touch	HR Director
ROMA	Monthly		In Touch	Community Services Director

ED Evaluation	Annual	7.4, 7.5	August	September	Executive Committee Board and HR Director
ROMA Training (Part III)	Even numbered years (t)	4.3, 7.9	September	October	Community Services Director
CHDO Board Income Verification	No longer required – see JH's files	5.1, 5.2	September	November	Business and Housing Director
Customer Survey	Every Year	1.3	October	November	CEO and Planning Director
CSBG National Performance Indicators (NPI)	Annual (t)	2.4, 4.2, 4.3, 4.4	November	November or December	Community Services Director (Assessment Committee review)
Board Self-Assessment	Even numbered years	2.2	November	December	CEO
Board Elections	Odd numbered years	5.1, 5.2, 5.3	November	December	Board Executive Committee and CEO
Agency Budget Approval	Annual	8.9	November	December	CFO