



Operational Essentials Checklist

This is a checklist of essentials needed to effectively manage your organization’s programs, staffing, training and management needs. Don’t be intimidated by this list. Many of these can be developed over time, and there are blueprints and templates that you can customize to your specific needs and priorities for your organization

OPERATIONAL ESSENTIALS	Yes	No	N/A	If not, what changes do we need to make?
BUDGETING				
Annual Operating Budget (Board approved)				
Line item on the budget for repairs/construction-related incidentals				
Facilities- Annual checks of elevators, fire extinguishers, fire monitoring, etc.				
File Property Taxes/ Exemptions				
FEDERAL FINANCIAL REQUIREMENTS & COMPLIANCE				
Annual filing of IRS 990 Form Charitable Trust Registration				
Updated Grants management Accounts (SAMS, www.grants.gov , state, city, like LABAVN)				
Duns Number www.dnb.com				
Audited Financial Statements*				
Approved indirect cost rate Sample				
Centralized file (hard copy and digital) of all contracts				
Bookkeeper or Accountant (internal or outsourced)				

POLICIES & STATEMENTS				
Procurement Policy				
Grievance Policy				
Conflict of Interest/ Nepotism Policy (especially if applying for federal funding)				
Equity & Diversity Statement				
Sexual Harassment Policy				
STAFF TRAININGS & CERTIFICATIONS				
Anti-Bias Training				
CPR Certification				
Mediator Certification				
Sexual Harassment Training, plus acknowledgement, which may include deadline driven systems that will ensure compliance.				
Annual Violence Intervention Training				
BOARD RESPONSIBILITIES				
Organizational cost allocation plan (If you have multiple contracts, to figure out % of utilities, organizational overhead, to charge to each contract)				
Standard Board Resolution authorizing org to apply for grants <i>(use this, unless funders ask for a specific board decision on their particular grant)</i>				
Board Resolutions: include Board Giving stipulation with 100% participation <i>(for example, each board member is responsible to give or get \$10K a year, which further solidifies and demonstrates their commitment of time, talents, and financial resources)</i>				
Board responsibilities for positions				
Board By-laws and Charter: critically important; determine calendar year vs. fiscal year.				
HUMAN RESOURCES				
Human Resources Function (internal or outsourced)				

Operational – internal/external; insurances, including bonding to absolve org from responsibility if someone decides to run off with all the money...				
Operational Policies - general liability, workers comp, auto liability; policies for officers				
Job Descriptions (paid and volunteer positions)				
Timesheet Tracking for staff and volunteers				
Vendor Lists: including equity lens/methodology for obtaining vendors.Example: " X organization selects vendors based on inclusion, ensuring Black, Indigenous, POC, small businesses are centered in our selection process				
EVALUATIONS				
Program evaluations (if you don't currently evaluate programs, consider partnering with a local university. Many graduate student programs offer opportunities for their students to engage in evaluation)				
Annual Staff evaluations				

*Select a firm to be used consistently for company audits; you can release an RFP to use to make your selection. The selected firm should file any taxes, audit and review files/documents as needed; ultimately resulting in a unqualified result, meaning everything is as it should be

The Community Based Public Safety (CBPS) Collective is a collective of experts in building neighborhood leadership to advance safety -- the groups on the ground that do the work day in and day out to mediate conflict, get people in crisis into supportive services and put youth on a path away from violence and to stability. We represent and support the dozens of small, nonprofit, community-led grassroots organizations that, for decades, have been helping to forge peace, with little support or official recognition from policymakers, elected officials or funding agencies. Investing in the community-based public safety leaders is the key difference-maker in stopping violence, ending mass incarceration and setting the nation on a transformational course toward a shared safety model rooted in systems of care, healing and community self-determination.

The Collective's members are the premier national experts in the field. We have convened to preserve the integrity of the model and highlight Black and Brown practitioners' proven practices. The Collective will help CBPS rapidly build the infrastructure, capacity and support needed to scale with public funding.

<https://cbpscollective.org/>