Needs Assessments and Strategic Plans

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Sponsored by: US Department of Housing & Urban Development (HUD)

TABLE OF CONTENTS

DEVELOPING STRATEGY – CHDO RESOURCES

- Overview
- Identifying Programs and Services to achieve desired outcomes
- Identifying Production Goals for Programs and Services

RESOURCES

- DHCR Strategic Planning & Needs Assessment Requirements for NPCs/RPCs

Course Description

Learn how and why strategic thinking and effective planning – soundly grounded in understanding of your community needs as assets – are keys to your organizational survival and success. As resources shrink and community renewal needs grow, CHDOs have to think more strategically about their work.

In this workshop on needs assessment and strategic planning, you will learn to use concrete steps and tools to organize an assessment of your community needs and assets. You will walk away with a clear understanding of how the needs assessment findings can guide your strategic planning process and how to create a strategic plan that will serve as a powerful management tool for you and your board of directors.

Training Objectives

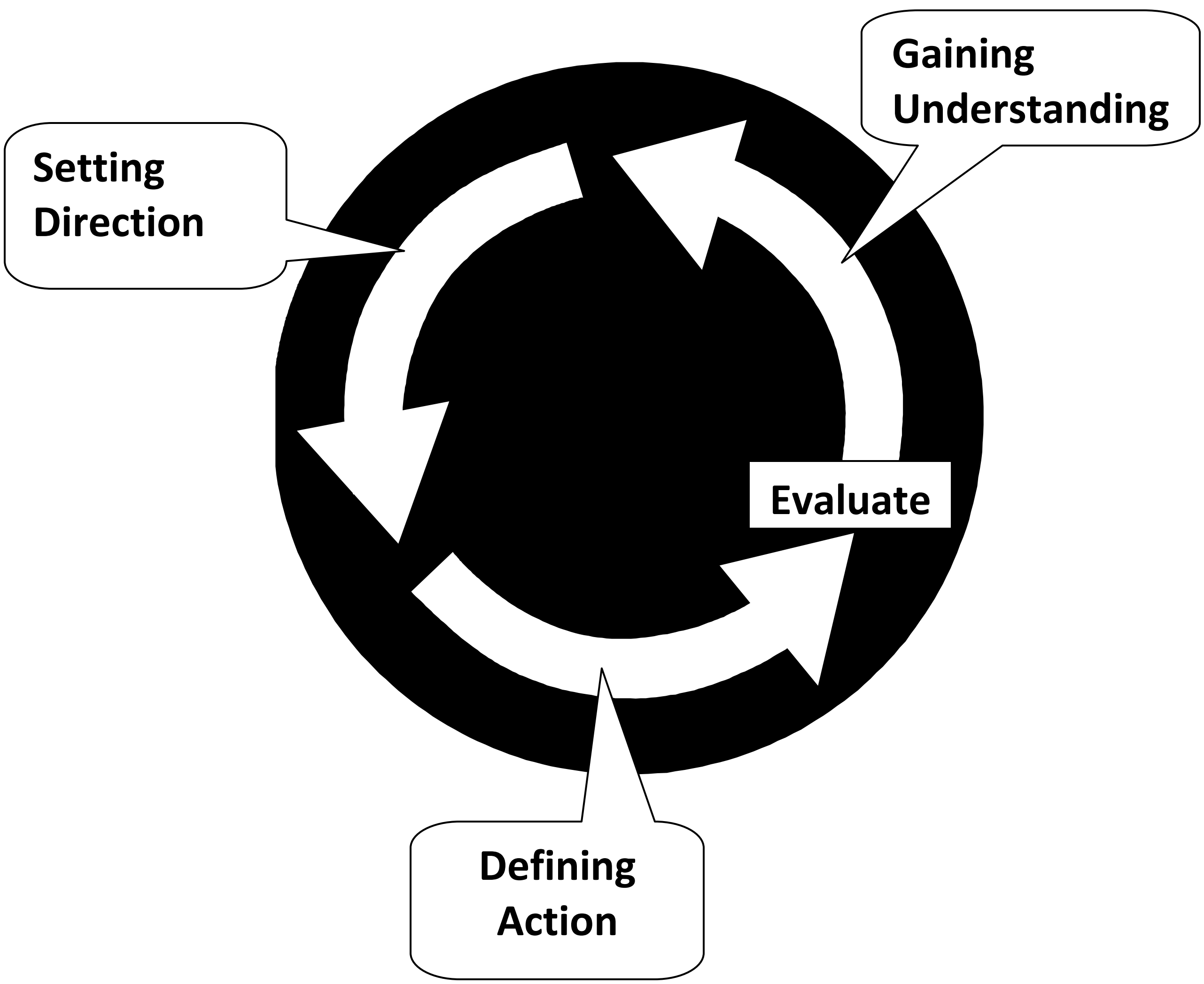
By the end of the training, participants will:

- Understand the connection of needs assessment to strategic planning, as well as the challenges and benefits of using these management tools.
- Be familiar with six steps involved in conducting a needs assessment .
- Learn specific needs assessment data sources, tools & techniques.
- Learn a simple format for strategic plan documents and options in processes for developing them.
- Have concrete tools and new ideas for conducting needs assessments and strategic planning processes.

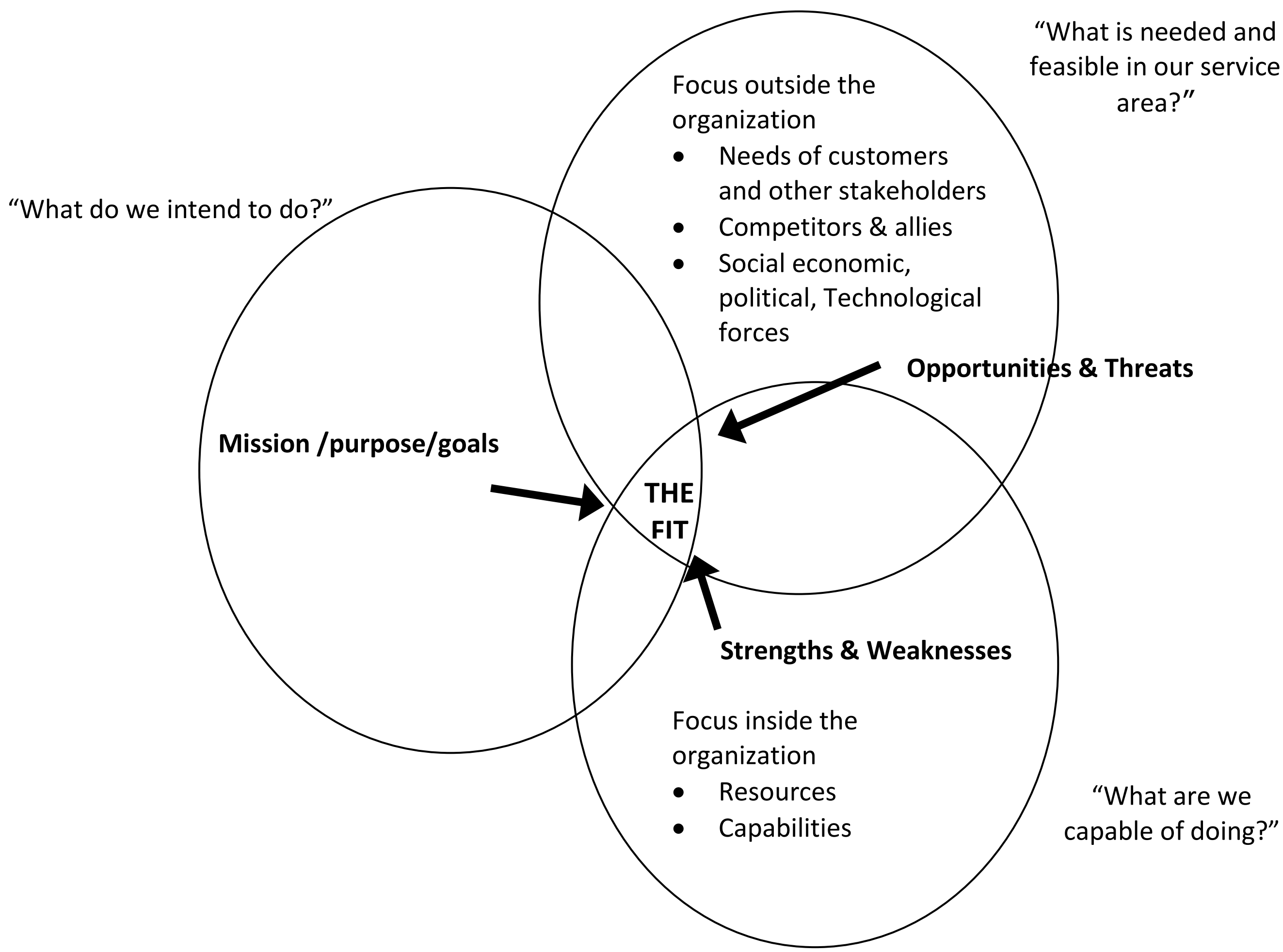
Agenda

10:00am	**Welcome**
10:15am	I. Introduction to Strategic Planning
10:45am	II. Six Steps to Conducting a Needs Assessment
12:00pm	**Lunch Break – On your own**
1:00pm	III. Setting Direction – Outcomes
1:45pm	IV. Developing Strategy – CHDO resources
2:30pm	V. Tying it all together
3:00pm	**Adjourn**

Introduction to Strategic Planning



Finding "The Fit" --- Strategic Planning



Source: Strategic Planning Workbook for Non Profit Organizations, Byran W. Barry, Amherst H. Wilder Foundation

Attributes of Useful Strategic Plans

- Explain in an understandable and credible way what you are going to do and why you are doing it that way.
- Are tools that the Board of Directors and the staff can use as a management tool to guide decision-making and day-to-day work.
- Provide a basis for measuring success, which can then be used to refine strategies and programs, and make the case for continued funding.
- Are created with a process that engages stakeholders to think about what they are doing and what they really want to accomplish.
- Keep organizations focused on the outcomes instead of the activities.
- Test, affirm, correct and codify intuition and logic of leadership so that funders and other stakeholders can invest their time, money and energy with confidence.
- Keep the organization attuned to market forces and customer attitudes that impact their work.

Updating Existing Plans and Getting Outside Assistance

Updating Existing Plans

- **Review the existing planning documents**
  - Comprehensiveness – does it meet current funding requirements?
  - Relevance to current market (environment), organizational capacity, activities (programs/services) known opportunities
- **Review outcomes for updating/creating a new plan**
  - Significant organization transition – new executive director, new board leadership, recent growth/downsizing, etc.
  - Expand funding opportunities

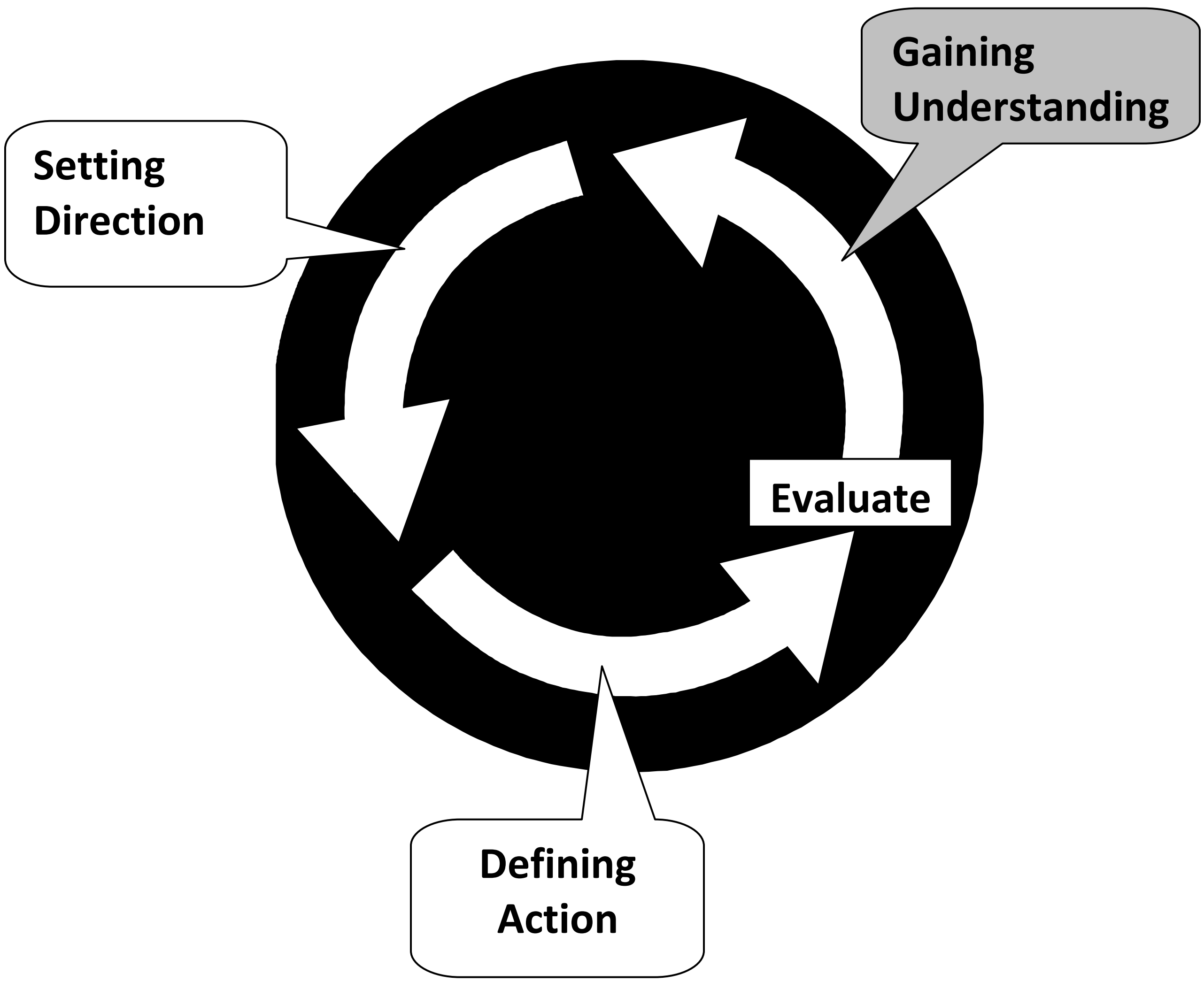
- Increased earned income (fees)
- Engage stakeholders – residents, board members, funders, staff, customers…
- Aligning staff
- Focusing PR, marketing efforts – raise funds, increase productivity, move products (i.e. rent units, sell houses, fill classes, etc.)

- **Decide what components of the plan need updating**
- **Create an approach to updating that targets the necessary components**
  - Ensure that communication to the planning "team" is clear about the comprehensiveness of the planning effort or the targeted approach being undertaken
  - Mix approaches of gaining stakeholder input and involvement

Outside Help

- **Over-all facilitator**
  - Works closely with organization leadership to set outcomes for the planning process and develop the planning process
  - Facilitates meetings (retreats), organizes committee work, types up notes, keeps the whole process on track and moving smoothly
  - Writes the final product(s)
- **Needs assessment**
  - Works closely with organization leadership to define data needs (develops research questions)
  - Collects data (primary and/or secondary)
  - Analyzes and interprets data
  - Writes assessment report
  - Writes the summary or highlights for inclusion in other documents
  - Assists in linking the important findings to strategic and work planning issues

Six Steps to Conducting Needs Assessments



Designing a Needs Assessment Plan: Who, When, What

Overview of Needs Assessments

- **Needs Assessment** is a method of gathering information to understand the environment in which an organization is operating.

- A written **Needs Assessment** should reflect your knowledge of the issues facing the community and include <u>highlights</u> of data collection and research.

- **Needs Assessment** helps to ensure the development of meaningful and achievable strategic and work plans and to chart a course for successful program and service delivery.

- **Needs Assessment** plays a critical role in the work and business planning process by helping an organization to define:

    - what businesses to pursue;

    - what group of people or geographic area to target as its customers based upon supply and demand; and

    - what price to charge for products and services.

- **Market Analysis** moves beyond **Needs Assessment** focuses in on what your potential customer base wants, what it is willing to pay for and what price it will pay. It's not just about what is needed, but what will "sell" be it new homes, loan products, rental units or small business development programs.

- **Needs Assessment** also identifies other "players" (Competition/Allies) delivering similar or related products and services.

- The activities conducted during a **Needs Assessment** and the information obtained provides the <u>quantitative</u> and <u>qualitative</u> data needed to formulate a market strategy.

- **Needs Assessment** in of itself does not ensure the success of a program or product, or the delivery of a product. It provides the data necessary to make informed decisions and take calculated risks on what services or products to offer.

Timing:

- **Needs Assessment** is best timed earlier rather than later in any planning process.

- Updating a **Needs Assessment** or **Market Analysis** before launching new programs or services, can help the organization understand the potential demand.

- Information gathered during a **Needs Assessment** will set the stage for developing an organization's outcomes, selecting an appropriate target market as well as setting priorities and production forecasts for programs, products and services.

- **Needs Assessment** data can get old fast. Some information can be updated on a regular basis. **Needs Assessment** should be an on-going process.

Who to Involve:

- Choices include: **staff, board committee, volunteers, interns, and consultants**. Costs versus benefits need to be defined in order to choose between what combination of people you'll use.

- **Staff** – remember time equals money. Does the CHDO realistically have the time to undertake the type of analysis desired? Do they have the skills?

- **Board Committee** – it is very helpful to have board input into developing the approach to needs assessment. They can also be very useful in assisting with interpreting the data (analysis) and connecting the needs assessment to the strategic planning phase.

- **Volunteers** – (beyond board committees). Needs Assessment can be one place to engage many volunteers and can be linked to efforts to engage residents in community change. This may be one vehicle to meet several objectives, besides just creating a needs assessment. Needs assessment can be a product offering information about the market and a process by which community members understand the needs of their community and become invested in working for change.

- **Interns** – usually a good source of affordable labor. Be careful to select interns that have the skills to do what is being asking of them. Also, very few are "self-directed". Someone will need to spend time with them framing the questions, deciding what data to collect and checking on their progress. Sometimes, you have to work around their semester schedules.

- **Consultants** – can be very helpful, yet they cost money. You need to know what you want them to do for you and then make sure you choose one that has those skills.
    - What portions of the planning process will they be involved with?
    - Will they work with the board committee and staff?
    - Will they help frame the questions and decide what data to collect?
    - Will they only use secondary data sources or produce primary data sources?
    - Will they work with you on analysis or will they do that alone?
    - Will they work with you on linking the analysis with program implications?
    - Can you use a consultant for an initial market analysis and then create a system to update it "in-house"?

Organizing the Process:

- Gather any existing studies, plans or analyses that have been done already.
- Set a budget and timeline for your analysis.
- Inventory resources available that you can utilize – skills, knowledge, funding, volunteers….
- Be clear about who will be doing what, assigning tasks and accountability.

Six Steps to a Useful Needs Assessment

A few things to keep in mind before you start:

Know your geography – It will be important to understand your market definition in geographic terms. The data sources will not always have flexible geography so you may need to compromise or account for using various geographies. For example, your geography may be a county, a region, a city/town, a ZIP code, a US Census Tract/Block Group, or a neighborhood. You may need to know several 'definitions' of your neighborhood in order to navigate various data sets.

Compared to what? – Sometimes you'll want to compare your market data to what is happening elsewhere in order to gauge its significance. It is helpful to understand national, regional, or community-wide trends so you can judge the trends within your smaller market area. Think about what you might want to use as a comparison before you start so you can collect the comparable data while collecting your market area data.

No data set is perfect – Every data set has some flaws, none of them is perfect. Accept that and understand what might be flawed so you can understand how it might skew the results, but "don't let the perfect be the enemy of the good".

Look at the whole picture – Use the data sets suggested here in conjunction with one another. Independent data sets may support or contradict each other, looking at them together may help you have a fuller understanding of your market. Often they raise new questions about the market. Keep looking for the interesting story in your data.

Don't get lost in the data – Data collection can become overwhelming. Try to keep yourself focused by trying to answer specific research questions about your market.

Step 1: Understanding General Trends through Consuming Other Information that Affects your Market.

- Take advantage of other people's knowledge and efforts by learning from their work.
- Listen, look, read, keep up-to-date and informed.
- Possible sources:
  - www.knowledgeplex.org (including email updates)
  - www.enterprisecommunity.org (including RSS feed)
  - www.nw.org
  - www.planetizen.com (including email updates or RSS feed)
  - National Association of Realtors® www.realtor.org/Research
  - Government RSS Feeds www.usa.gov/Topics/Reference_Shelf/Libraries/RSS_Library/Business.shtml

⇒ Business and Economic RSS Feeds (Economic overview from BEA); Family, Home and Community RSS Feeds (Census Bureau)

  - State of the Nation's Housing (Joint Center for Housing at www.jchs.harvard.edu)
  - www.stablecommunities.org

- www.foreclosure-response.org
- www.vacantproperties.org

Step 2: Articulating Intuition from Day-to-Day Work into Research Questions.

- Don't underestimate your intuition's role in market understanding; use it as a base to ask questions that will verify, confirm or contradict your intuition.
- You know a lot about your market from your day-to-day activities; use a framework to organize your knowledge in terms of defining the market.
- Your framework should include: who your customers are or could be, what they want/need, who is your competition, how big is your market, what changes are occurring in your community that impact the products/services you offer.
- Once your framework is in place, develop your research questions by filling in the holes and testing your assumptions.

Step 3: Data Collection: Finding Answers to Research Questions in Data

- Consider how you can get answers to your research questions.
- Create an inventory of secondary data sources available to you.
- Primary vs. Secondary data – primary is created for a specific research question; secondary data already exists. Start with secondary data sources, use primary data to round out your analysis.
- Qualitative information can also assist efforts to round out the picture, but should not be the only data considered. Balance qualitative and quantitative data.
- Don't forget to look at the data you have in-house about your customers.

Step 4: Refining Research Questions.

- Do, don't over do.
- Establish a time frame for collecting data, include an initial phase, then review results, revise data needs, and collect more data.

Step 5: Analyzing Data.

- Spend time analyzing the data. Start by getting an overview of your data.

- Talk to people about what you've found (committee members, staff, industry peers).

- Look at the data visually – use maps, graphs, charts and tables. Sometimes you'll see trends or implications in one visual presentation that you didn't in another.

- Revisit the data in various formats from the perspective of the original question that led you to collect the data; what is significant about your data is related to this question.

- Contextualize your findings:
    - In order to bring out the meaning and significance of a number it often needs to be related to other numbers (use percentages, per capita and other rates and indexes);
    - Relate your data to that of other localities, so a ranking becomes possible, or to previous findings, so trends become visible;
    - You can relate your findings to benchmarks in order to evaluate them in relationship to a specific standard or ideal outcome.

Step 6: Interpreting & Using Data.

- Be open to the fact that your data collection and analysis may have raised new questions that are important to investigate.

- A true needs assessment and planning process implies that information gathered may change the status quo. An organization should use the newly gained knowledge to strengthen program design, implementation and delivery.

- Ask yourself if your existing product mix is meeting the market demand or if new product/program niches exist.

- Use the information to develop an appropriate market strategy. Are you sending messages that attract the appropriate customers to your programs? How and where can you reach your customers?

- Markets change. The need for analysis is on-going. Try to incorporate on-going mechanisms for collecting and analyzing market data.

Data sources:

1. **Dataplace – www.dataplace.org –**

Built by KnowledgePlex, DataPlace aims to be your one-stop source for housing and demographic data about your community, your region, and the nation. The site not only assembles a variety of data sets from multiple sources, but it also provides tools and guides to assist you in analyzing, interpreting, and applying the data.

2. **US Census – www.census.gov**

American Fact Finder on the Census site gives access to 1990, 2000 US Census as well as the American Community Survey. The site also has building permit data (Censtats.census.gov/bldg/bldgprmt.shtml), population and housing projections (http://www.census.gov/popest/estimates.php) , and business patterns (Censtats.census.gov/cbpnaic/cbpnaic.shtml).

3. **Federal Financial Institutions Examination Council (FFIEC) – www.ffiec.gov**

FFIEC site provides access to Home Mortgage Disclosure Act (HMDA) data from 1997-2006 (each year is typically released in the fall of the next year, so 2007 data should be available soon). Access is available at the MSA level or by downloading the entire national data set which allows analysis to the US Census Tract Level and for areas falling outside MSAs. Community Reinvestment Act (CRA) data about small business lending is also available at this site.

4. **USPS Vacant Address Data --** www.huduser.org/DATASETS/usps.html

HUD has entered into an agreement with the United States Postal Service (USPS) to receive quarterly aggregate data on addresses identified by the USPS as having been "vacant" or "No-Stat" in the previous quarter. HUD is making these data available for researchers and practitioners to explore their potential utility for tracking neighborhood change on a quarterly basis. The potential power of these data is that they represent the universe of all addresses in the United States and are updated every three months. Under the agreement with the USPS, HUD can make the data available publicly at the Census Tract level provided users agree to the terms and conditions of the click-on sublicense.

5. **NYS School Report Cards --** www.nystart.gov/publicweb/Splash.do

The New York State Report Cards provide enrollment, demographic, attendance, suspension, dropout, teacher, assessment, accountability, graduation rate, postgraduate plan, career and technical education, and fiscal data for public and charter schools, districts, and the State. For each reporting year, a companion database containing statewide data in many of the above areas is also provided for statistical analysis purposes. Looking at data on student demographics and free/reduced lunch statistics can help estimate more current income, race and ethnicity statistics for your service area. School catchment areas are not always aligned with specific neighborhoods so care needs to be taken in terms of interpreting where the kids that go to each school live.

6. **National Association of Realtors --** www.realtor.org/research/research/ehspage

NAR research section has quarterly reports on home sales volumes and median prices, only on the MSA level. They do have regular reports about the home buying industry. National Association of Home Builders (www.nahb.org/) has housing industry research as well, look under their ‘publications’ link, ‘housing economics’.

7. **NYS Department of Labor --** www.labor.state.ny.us/workforceindustrydata/index.asp

This site has unemployment and job statistics.

8. **NYS Office of Real Property Services** -- www.orps.state.ny.us/munipro

ORPS has data for counties and towns throughout NYS. The site provides municipal profiles that include information on tax rates, taxable parcels and median sales prices.

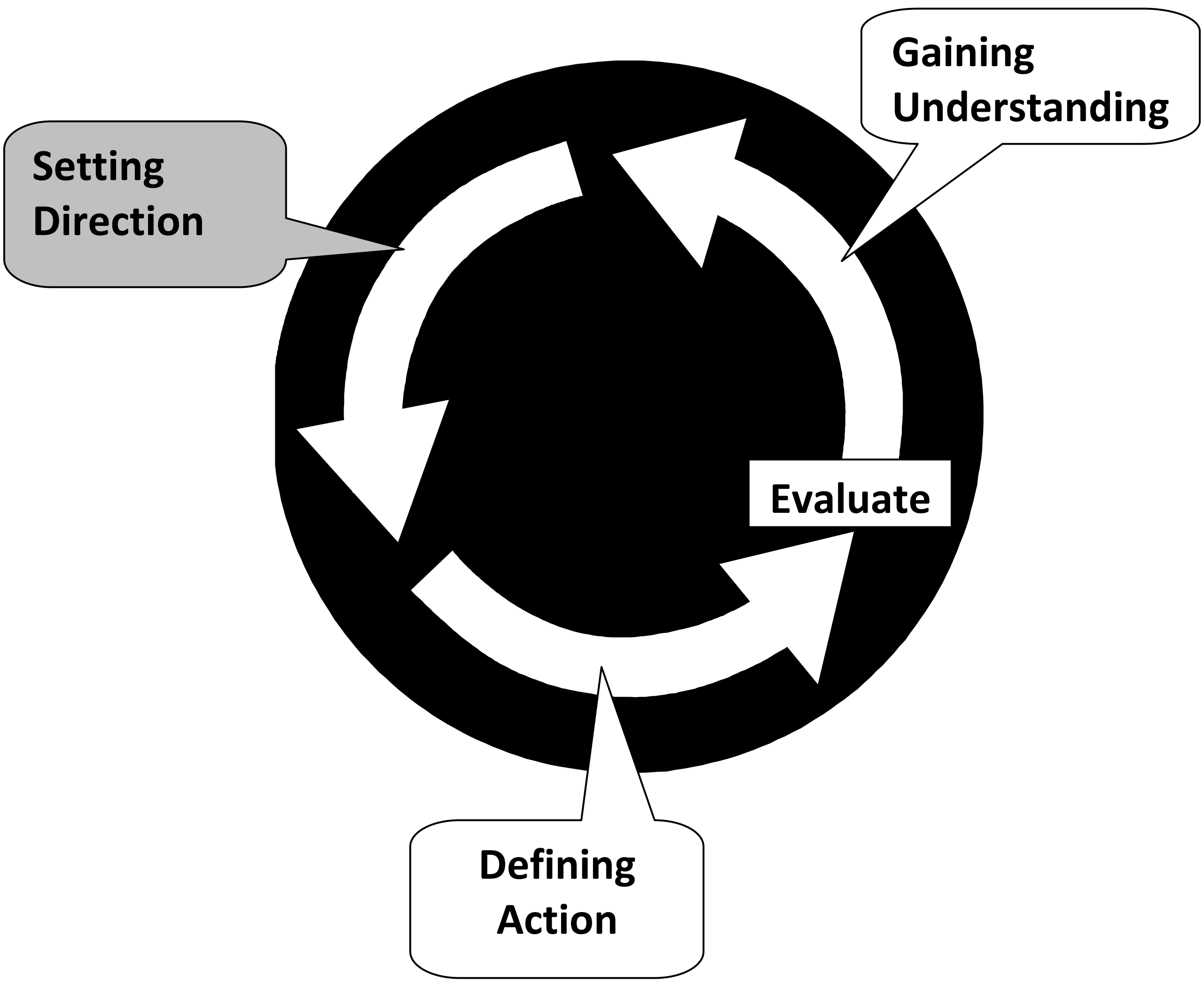
9. **National Low Income Housing Coalition --** http://www.nlihc.org/oor/oor2008/

Out of Reach is a side-by-side comparison of wages and rents in every county, Metropolitan Area (MSAs/HMFAs), combined nonmetropolitan area and state in the United States. For each jurisdiction, the report calculates the amount of money a household must earn in order to afford a rental unit at a range of sizes (0, 1, 2, 3, and 4 bedrooms) at the area’s Fair Market Rent (FMR), based on the generally accepted affordability standard of paying no more than 30% of income for housing costs. From these calculations the hourly wage a worker must earn to afford the FMR for a two-bedroom home is derived. This figure is the Housing Wage.

10. **Policymap** – http://www.policymap.com

Similar to Dataplace, PolicyMap is a geographic based data portal. It was created by The Reinvestment Fund (TRF) in Philadelphia. The have some data sets available for free (log-in required) and enhanced data sets available through subscription. The subscription also allows for uploading organizational databases for mapping.

Setting Direction -- Outcomes



Overview: Setting Direction

Once you've gained an understanding of your market and your constituency's needs, you will undertake a process of setting direction. Specifically, this phase explores and answers questions such as:

- To what end does this organization exist?
- Whom do we serve?
- What specific impacts do we home our work will have on the needs in our service area, in the short and long term?
- How can we measure or estimate progress toward outcomes?
- What do we need to know about our direction in order to evaluate and choose some strategies over others?

Mission and Purpose

CHDOs are expected to demonstrate s strong understanding of the opportunities and threats of market forces and constituent need. This requires thoughtful alignment of mission/purpose to the needs assessment and consideration of internal strengths and weaknesses.

Organizational missions do not change frequently, yet strategic planning provides an opportunity for an organization to "touch base" to ensure their mission is still relevant and on target.

A good mission statement can actually guide the organization's decisions and work on a daily basis.

Parts of a Mission Statement

	Example: Affordable Housing	**Example: Community Renewal**
To what end does this organization exist?	The mission of XYZ is to build and preserve the supply of affordable housing...	The mission of XYZ is to build and preserve healthy neighborhoods…
Whom does it serve?	For low- and moderate-income households in Metropolis…	For current and future neighbors in the City of Metropolis…
How does it do it?	By creating new units, protecting existing units, and working for policies that promote affordable housing.	By cultivating sustainable, mixed-income real estate markets and building neighbors' ability to manage day-to-day issues.

The Mission Test: Can you say "yes" to these questions?

1. Does it describe
   - The end to which the organization exists?
   - Who it serves?
   - How it does that?

2. Is it consistent with your assessment of needs and market trends for the next 3-5 years?

3. Do the board and staff know it, understand it, and use it to guide the work and decisions of the organization?

4. Bonus question: Would it make sense to an outsider?

Tips for a Mission Review and Recommitment

- ***After*** they've heard the results of the current needs assessment, ask your board and staff to complete the mission test to assess the usefulness of the mission.

- If the mission needs work, have a session of board and other stakeholders as appropriate to reconstruct the mission statement. Start by reviewing the results of the current needs assessment. Then ask each person to answer the questions To what end? For whom? How do we do it? on a worksheet. Next put people in pairs and ask them to merge their answers. Then create small groups of pairs and repeat. Finally, work with the group to put the answers in the form of a mission statement.

Outcomes and Measures of Success

It is useful to plan and evaluate at three levels: Capacity, Performance and Outcomes.

- We evaluate **Capacity** by examining the ability of an organization to perform key functions such as governance, leadership, financial management, resource development, program delivery, communication and networking.

- We evaluate **Performance** by measuring the goods and services (outputs) provided in relation to planned objectives. This can include efficiency as well as effectiveness measures.

- We evaluate **Outcomes** by identifying relevant **Measures** or indicators and using them to estimate progress. This is a systematic way to explain the benefits that result from a program for the people, organizations, communities and systems for which those programs were designed.

People are usually most challenged by Outcomes.

Evaluation Resources:
www.nw.org/evaluation

Some Points about Outcomes

- They are the hoped-for consequences of your activities on individuals and/or communities.
- They are the big-picture change you want to see and at least *contribute* to achieving in your service area.
- They are often not achievable in the short-term; they can be a mix of short-term, intermediate and long-term.
- They do not have to be achievable only through your work. You may need partners.
- They do not have to be measurable on their own. They do need to be accompanied by measures or indicators by which you can *estimate* progress. Knowing whether or not positive change is happening is a management tool for you.
- They will be impacted by more variables than your work alone. In other words, outcomes are useful whether or not you can control all the variables that affect them.

- Measures of success are the indicators you plan to track to measure your progress toward achieving the outcomes.

Why Are Outcomes Important?

- When we are clear about outcomes, we are able to consider and try a variety of activities in order to get the best impact.
- Outcomes express the direction we are headed so that *board and staff* can align their thinking and actions to achieve the greatet impact on what matters most to the organization.
- Outcomes express the direction we are headed so that *others* can understand our rationale, fund us or partner with us with confidence, align their activities to help achieve the outcomes, etc.

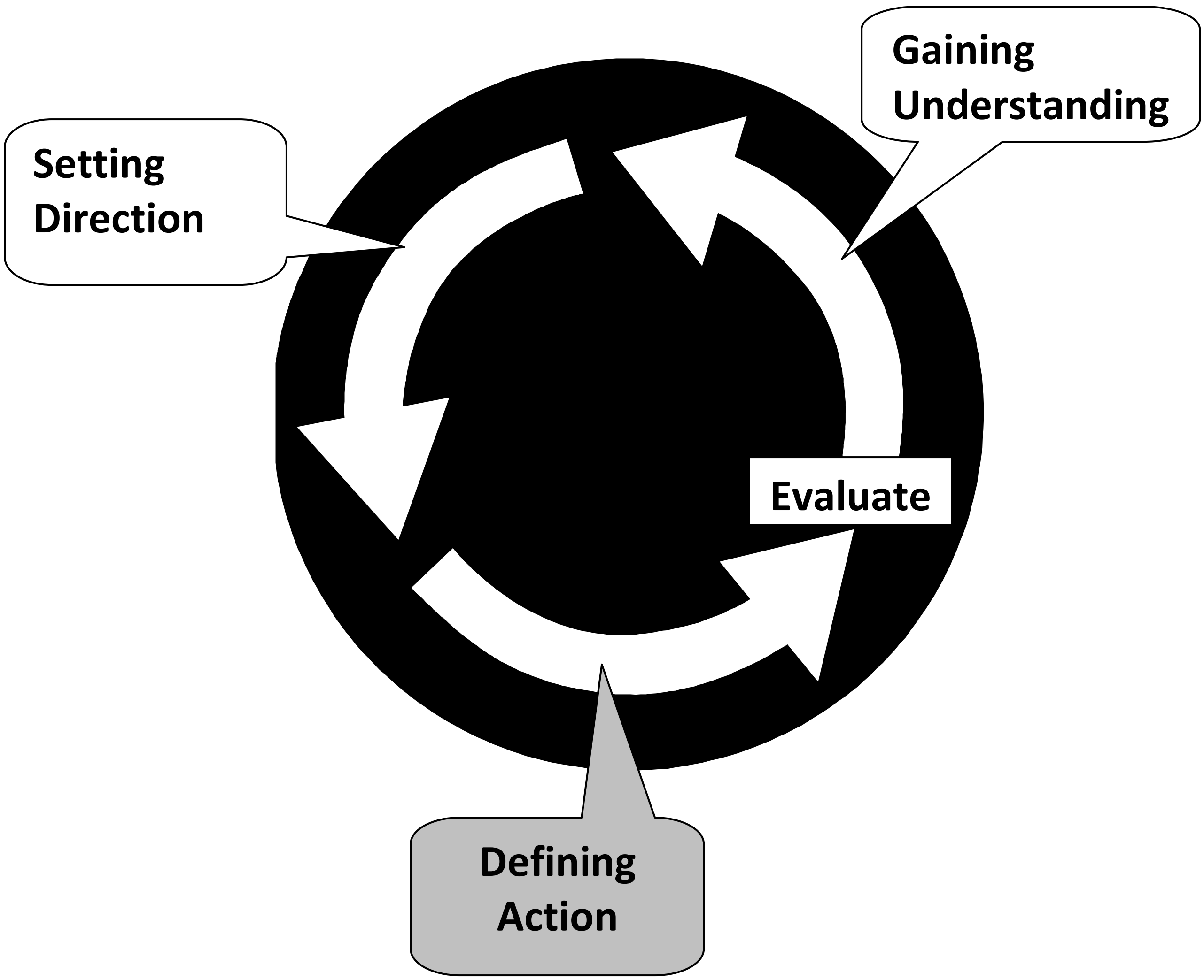
How Do You Identify Outcomes?

There are a couple of ways to identify outcomes – ideally, you will do both to make sure you are addressing the issues in your community.

1. Start with your existing and proposed activities (programs, partnerships, advocacy), and ask yourself why you are doing them. What are the consequences you hope your programs will have on individuals and/or communities in the short and long term?

2. Start with your needs assessment, and ask yourself what change in those findings you want to see and contribute to achieving.

Developing Strategy – CHDO Resources



Overview: Developing Strategy – CHDO Resources

The last phase of strategic planning is developing the strategy your organization will employ to fulfill your mission and achieve the outcomes. In this phase, you and your stakeholders can explore and answer questions such as:

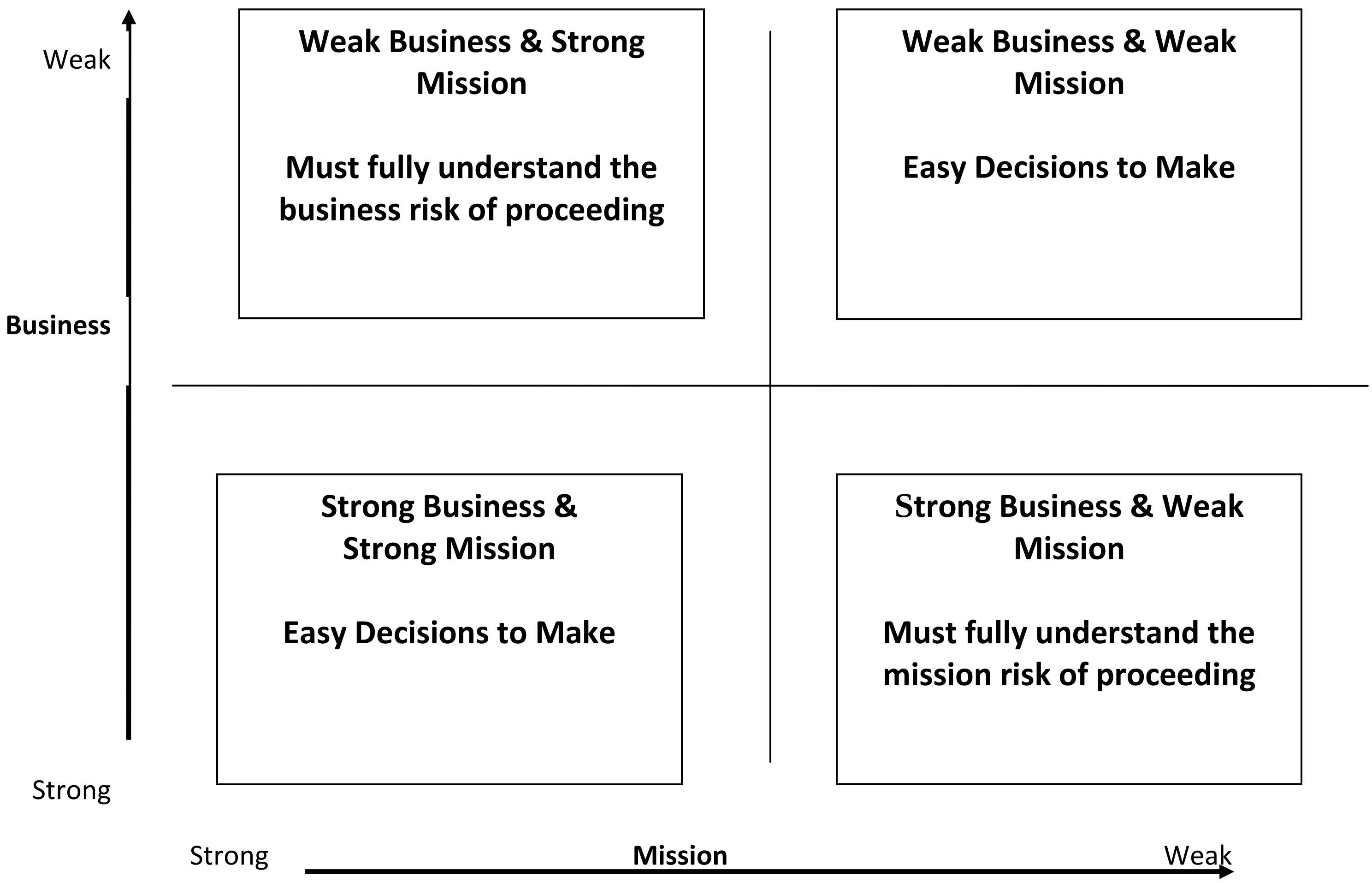
- What are the range of strategic approaches we could use to achieve the outcomes?
- What are our organizational strengths and weaknesses? What is our best niche in responding to community needs?
- To what extent do our programs and services help accomplish our mission and deliver business benefits?
- What production goals will we set for the coming year?
- What resources will we use to deliver programs and services?

Identifying Programs and Services to achieve desired outcomes

- Strategy expresses the approach your organization will take to achieve the outcomes. It is not a program; in fact there could be several programs operated at any given time to operationalize the strategy.
- Strategy directly relates to the need or opportunity your addressing from the needs assessment phase.
- Examples of strategy:
  - Prevent loss of affordable housing units through foreclosure intervention in high risk neighborhoods.
  - Prevention of vacancies and erosion of neighborhood confidence through foreclosure intervention in high risk neighborhoods.
- Strategic choices also consider internal organizational strengths and weaknesses.
- Creating a SWOT – strengths, weaknesses, opportunities and threats – analysis can help in this process.

Identifying Production Goals for Programs and Services

- Programs and services are the activities we do to enact strategy directions and achieve outcomes.
- Organizations consider both mission reasons and business reasons for choosing programs to implement. On the next page is a matrix that presents four categories of programs based on their relative value in accomplishing the mission and delivering business benefits to the organization.


Weak
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Common Pitfalls

When identifying programs and services, there are a few common pitfalls to watch out for:

1. **Reliable funding sources can sometimes grow to be confused with programs.** For example, consider an organization dedicated to neighborhood revitalization that has always used CDBG funding to implement a program for high-impact exterior improvements. Now what if the CDBG rules change and can only be used in the future for acquisition of foreclosed vacant homes, and rehab to code compliance? Does the funding define the program or do the needs assessment and the organization define the program? Some organizations have, with good intentions and over the course of years, altered their entire program structure around a couple of funding sources to the point that their default mission is to administer those funding sources. They lose sight of their purpose and fail to expand funding to accomplish their true outcomes.

2. **Programs are only tools for accomplishing outcomes - effective organizations are careful to be outcome-driven rather than program-driven.** If an organization's leadership is not focused on the outcomes, it can become easy to see the organization's purpose as administering certain programs. The problem with this is that it reduces the organization's ability to notice when the programs are not achieving the outcome, and to switch to new programs when necessary. This drift to a program focus is reinforced by the typical organizational structure of board committees and staff divisions, which are usually all grouped around programs and rarely around outcomes.

3. **Remember to align the programs with the needs assessment and the outcomes.** When you identify programs for the next planning period, press your planning group to ensure that the programs are logical responses to the needs assessment and the outcomes. Are there any other ways that the outcomes could be accomplished? A particular program may do some good for someone, but is it the most effective tool for the job?

4. **Be sure to include any staff who will have to implement the programs in their development.** Line staff know things about how programs work that board members, managers and consultants don't. They must be involved at this point or your program design may be flawed and difficult to implement.

Resources

Division of Housing and Community Renewal
Neighborhood and Rural Preservation Program
Requirements

Needs Assessment and Strategic Planning – two day workshop material – Fall 2008
http://www.dhcr.state.ny.us/Programs/NPP/Initiative/Needs.htm

Needs Assessment and Strategic Plans

- Contract requirement for Fiscal Year 2008 – 2009
- Will need to be in place for Fiscal Year 2009 - 2010
- Will be required every three years
- Must be in place in order to pass Certification
- Needs Assessments and Strategic Plans must be available for review by Regional Representatives
- Needs Assessment and Strategic Plans will not need to be updated during the 3 year period, this will be accommodated in a Work Plan Modification
- If already in place they must not be more than three years old

Program Certification

- Due every three years
- Certification can be done at anytime up until June 30, 2009
- Certification must be completed by June 30, 2009 in order to continue with the program
- Companies should review Certification and prepare necessary documentation prior to field visits
- Regional Representatives will visit Company and complete Certification
- If you do not pass Certification with your Rep you may go to the Supervisors in the Region
- You must have the Certification signed by the Executive Director and the Board Chairperson
- Falsifying the Certification is grounds for termination