



NATIONAL CENTER ON

Program Management and Fiscal Operations

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## **PMFO Fiscal Consulting Initiative Follow-Up Survey**

This survey is part of a comprehensive and ongoing evaluation of services provided through the PMFO Fiscal Consulting Initiative (FCI). We ask that you take 5 minutes to provide your candid feedback to us so that PMFO can continuously monitor and improve the quality and impact of its services. This brief survey is voluntary, and all feedback will be kept private. To help ensure privacy, results will be shared in summary form only. Individuals will not be identified in our reports.

Please note that some survey items use a multi-point scale. If you are taking the survey on your phone, you may have to scroll down to see the entire scale. When finished, click the "Submit" button at the bottom of the final page to record your responses. You are free to move throughout the survey and change responses until you click "Submit."

If you have any questions about this survey, or if you experience technical issues, please contact the FCI survey administration coordinator, Katie Ness, at [kness@donahue.umassp.edu](mailto:kness@donahue.umassp.edu) or (413) 577-2004.

*THE PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13)*

*Public reporting burden for this collection of information is estimated to average approximately 5 minutes per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information.*

*An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.*

**Q1. Which of the following best describes your position with your organization?**

- ☐ Head Start / Early Head Start Director
- ☐ Executive Director
- ☐ Chief Financial Officer
- ☐ Fiscal / Accounting Staff
- ☐ Governing Body / Tribal Council Member
- ☐ Policy Council Member
- ☐ Other (please describe): \_\_\_\_\_

**Q2. Reflecting back on your work since the FCI consultation, how satisfied are you with the following:**

|   | Extremel<br>y<br>Satisfied | Satisfied             | Not<br>Satisfied      | Extremel<br>y Not<br>Satisfied | Did not<br>complete<br>task / NA |
|---|----------------------------|-----------------------|-----------------------|--------------------------------|----------------------------------|
| Your ability to develop an improvement plan that meets your program's needs | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Your ability to implement some or all of the improvement plan.              | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |

**Q3. Which of the following topics were covered during your organization's FCI consultation? (Please check all that apply.)**

- ☐ Cost Allocation
- ☐ Fiscal Systems Design
- ☐ Non-Federal Share
- ☐ Indirect Cost Rates
- ☐ Accounting Software
- ☐ Strategic/Sustainability Planning
- ☐ Facilities and Capital
- ☐ Reporting and Record Keeping
- ☐ Fiscal Policies and Procedures
- ☐ Budgeting

**Q4. Were any other topics covered during your organization's FCI consultation?**

- ☐ Yes (please describe: \_\_\_\_\_)
- ☐ No

**Q5. For each topic covered in your FCI consultation, please indicate whether you have implemented any changes based on the consultation:**

*[Note: Items in table below are auto generated based on responses in Q3]*

|                                   | Yes<br>(Implemented at least some<br>changes) | No<br>(Did not implement<br>changes) |
|-----------------------------------|---|--------------------------------------|
| Cost Allocation                   | <input type="radio"/>                         | <input type="radio"/>                |
| Fiscal Systems Design             | <input type="radio"/>                         | <input type="radio"/>                |
| Non-Federal Share                 | <input type="radio"/>                         | <input type="radio"/>                |
| Indirect Cost Rates               | <input type="radio"/>                         | <input type="radio"/>                |
| Accounting Software               | <input type="radio"/>                         | <input type="radio"/>                |
| Strategic/Sustainability Planning | <input type="radio"/>                         | <input type="radio"/>                |
| Facilities and Capital            | <input type="radio"/>                         | <input type="radio"/>                |
| Reporting and Record Keeping      | <input type="radio"/>                         | <input type="radio"/>                |
| Fiscal Policies and Procedures    | <input type="radio"/>                         | <input type="radio"/>                |
| Budgeting                         | <input type="radio"/>                         | <input type="radio"/>                |

**Q6. Please indicate the reason for not implementing changes in each of these areas:**

*[Note: Items in table below are auto generated based on responses in Q5]*

|                                   | Not needed            | Too difficult         | Not enough time       | Not enough resources  |
|-----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Cost Allocation                   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fiscal Systems Design             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Non-Federal Share                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Indirect Cost Rates               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Accounting Software               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Strategic/Sustainability Planning | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Facilities and Capital            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Reporting and Record Keeping      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fiscal Policies and Procedures    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Budgeting                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**Q7. For those areas in which you did implement changes, how satisfied were you with your ability to apply the information or materials from the consultation?**

*[Note: Items in table below are auto generated based on responses in Q5]*

|                                   | Extremel<br>y<br>Satisfied | Satisfied             | Not<br>Satisfied      | Extremel<br>y Not<br>Satisfied | Did not<br>complete<br>task / NA |
|-----------------------------------|----------------------------|-----------------------|-----------------------|--------------------------------|----------------------------------|
| Cost Allocation                   | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Fiscal Systems Design             | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Non-Federal Share                 | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Indirect Cost Rates               | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Accounting Software               | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Strategic/Sustainability Planning | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Facilities and Capital            | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Reporting and Record Keeping      | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Fiscal Policies and Procedures    | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |
| Budgeting                         | <input type="radio"/>      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>          | <input type="radio"/>            |

**Q8. Are there any additional fiscal topics with which your organization needed assistance that were not covered during your FCI consultation?**

- ☐ Yes
- ☐ No

**Q9. With which of the following additional fiscal topics did your organization need assistance? (Please check all that apply).**

- ☐ Other (Please describe: \_\_\_\_\_)

- ☐ Cost Allocation
- ☐ Fiscal Systems Design
- ☐ Non-Federal Share
- ☐ Indirect Cost Rates
- ☐ Accounting Software
- ☐ Strategic/Sustainability Planning
- ☐ Facilities and Capital
- ☐ Reporting and Record Keeping
- ☐ Fiscal Policies and Procedures
- ☐ Budgeting

**Q10. Please rate the degree to which you agree with the following statements regarding the Fiscal Consultation:**

|   | False                 | Somewhat True         | True                  | Very True             | Did Not Apply TA / NA |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| The Fiscal Consultation led to improvements to the fiscal <i>compliance</i> of my program     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| The Fiscal Consultation led to improvements to the fiscal <i>sustainability</i> of my program | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**Q11. What barriers remain to improving your program's fiscal sustainability? (Please check all that apply.)**

- ☐ Other (please describe): \_\_\_\_\_
- ☐ Cost Allocation
- ☐ Fiscal Systems Design
- ☐ Non-Federal Share
- ☐ Indirect Cost Rates
- ☐ Accounting Software
- ☐ Strategic/Sustainability Planning
- ☐ Facilities and Capital
- ☐ Reporting and Record Keeping
- ☐ Fiscal Policies and Procedures
- ☐ Budgeting

**Q12. What recommendations do you have for improving the PMFO Fiscal Consulting Initiative?**

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