



# NATIONAL CENTER ON Program Management and Fiscal Operations

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OMB Control Number: 0970-0401

Expiration Date: 6/30/2024

## PMFO Fiscal Consulting Initiative

### One-Year 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 15 minutes to provide your candid feedback to us so that PMFO can continuously monitor and improve the quality and impact of its services. This 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, Alma Bartnik, at [abartnik@donahue.umass.edu](mailto:abartnik@donahue.umass.edu) or (413) 577-2016.

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

*The purpose of this information collection is to improve future service delivery. Public reporting burden for this collection of information is estimated to average 15 minutes per respondent, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This is a voluntary collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1995, unless it displays a currently valid OMB control number. The OMB # is 0970-0401 and the expiration date is 06/30/2024. If you have any comments on this collection of information, please contact Alma Bartnik at [abartnik@donahue.umass.edu](mailto:abartnik@donahue.umass.edu).*

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

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

**For the remaining questions please consider the FCI consultation that your organization received approximately one year ago, ending on *[insert date here]*. As a reminder, the consultation was provided by *[insert name of consultant here]*.**

**The topics covered during your organization's FCI consultation included the following:** *[Piped-in text from tracking sheet.]*

Please click the "next" arrow below to answer questions related to your work with the FCI consultant in these areas.

**Q2. For each area covered during your FCI consultation, please indicate whether your organization has implemented any changes based on the consultation at this point in time.**

*[Note: List will be customized such that only areas that were covered during consultation will be shown.]*

|                                    | Yes<br>(Implemented at least some changes) | No<br>(Did not implement changes) |
|------------------------------------|--|-----------------------------------|
| Organizational Structure           | <input type="radio"/>                      | <input type="radio"/>             |
| Policies and Procedures            | <input type="radio"/>                      | <input type="radio"/>             |
| Budget Development, Monitoring     | <input type="radio"/>                      | <input type="radio"/>             |
| Fiscal Reporting                   | <input type="radio"/>                      | <input type="radio"/>             |
| Fiscal Systems / Internal Controls | <input type="radio"/>                      | <input type="radio"/>             |
| Cost Allocation                    | <input type="radio"/>                      | <input type="radio"/>             |
| Non-Federal Match                  | <input type="radio"/>                      | <input type="radio"/>             |
| Facilities                         | <input type="radio"/>                      | <input type="radio"/>             |
| Governance                         | <input type="radio"/>                      | <input type="radio"/>             |
| Wage Comparability                 | <input type="radio"/>                      | <input type="radio"/>             |

**Q3. Please indicate the primary reason for not implementing changes in each of these areas:**

*[Note: Items in table below are auto generated based on responses in Q2]*

|                                    | Not needed            | Not enough implementation support | Lack of buy-in from organization | Not enough time       | Not enough resources  | Unsure                |
|------------------------------------|-----------------------|-----------------------------------|----------------------------------|-----------------------|-----------------------|-----------------------|
| Organizational Structure           | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Policies and Procedures            | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Budget Development, Monitoring     | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fiscal Reporting                   | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fiscal Systems / Internal Controls | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Cost Allocation                    | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Non-Federal Match                  | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Facilities                         | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Governance                         | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Wage Comparability                 | <input type="radio"/> | <input type="radio"/>             | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**Q4a. Please briefly elaborate on the lack of implementation support for making changes in these areas:**

*[Question is displayed if “not enough implementation support” is selected for at least one item in Q3.]*

|  | Please elaborate: |
|--|-------------------|
| <i>[Items in table are auto generated based on “not enough implementation support” responses in Q3.]</i> |                   |

**Q4b. Please briefly elaborate on the lack of buy-in from members of your organization in these areas:**

*[Question is displayed if “lack of buy-in from organization” is selected for at least one item in Q3.]*

|   | Please elaborate: |
|---|-------------------|
| <i>[Items in table are auto generated based on “lack of buy-in from organization” responses in Q3.]</i> |                   |

**Q4c. Please briefly elaborate on the resource constraints in these areas:**

*[Question is displayed if “not enough resources” is selected for at least one item in Q3.]*

|   | Please elaborate: |
|---|-------------------|
| <i>[Items in table are auto generated based on “not enough resources” responses in Q3.]</i> |                   |

**Q5a. For each area that did not need any change, please identify the reason change was not needed:**

*[Question is displayed if “not needed” is selected for at least one item in Q3.]*

|   | The FCI consultant determined that change in this area was not needed | Our organization decided that the change was not needed | Other                 |
|---|---|---|-----------------------|
| <i>[Items in table are auto generated based on “not needed” responses in Q3.]</i> | <input type="radio"/>   | <input type="radio"/>                                   | <input type="radio"/> |

**Q5b. Please briefly describe your organization’s process for determining that these changes were not needed.** [Question is displayed if “our organization decided that the change was not needed” is selected for at least one item in Q5a.]

**Q5c. Please briefly describe the “other” reason changes were not needed.** [Question is displayed if “other” is selected for at least one item in Q5a.]

**Q6. For those areas in which your organization has implemented changes, to what extent was your organization able to apply the information or materials from the consultation?**

[Note: Items in table below are auto generated based on responses in Q2]

|                                    | To a great extent     | To a moderate extent  | To a small extent     | Not at all            | Unsure                |
|------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Organizational Structure           | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Policies and Procedures            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Budget Development, Monitoring     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fiscal Reporting                   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Fiscal Systems / Internal Controls | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Cost Allocation                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Non-Federal Match                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Facilities                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Governance                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Wage Comparability                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**Q7. For those areas in which your organization has implemented changes, please indicate how sustainable you believe these changes are for your organization.**

[Note: Items in table below are auto generated based on responses in Q2]

|                                    | Entirely sustainable  | Mostly sustainable    | Partially sustainable | Minimally/not at all sustainable | Unsure                |
|------------------------------------|-----------------------|-----------------------|-----------------------|----------------------------------|-----------------------|
| Organizational Structure           | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Policies and Procedures            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Budget Development, Monitoring     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Fiscal Reporting                   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Fiscal Systems / Internal Controls | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Cost Allocation                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Non-Federal Match                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Facilities                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Governance                         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |
| Wage Comparability                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |

**Q8a. As a result of the FCI consultation, to what extent was your organization able to do the following:**

|   | To a great extent     | To a moderate extent  | To a small extent     | Not at all            | Unsure                |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Implement the improvement plan that was developed during your FCI consultation                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Address needs identified for the program (e.g., in audit findings, corrective action plans, etc.) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Improve the fiscal <i>compliance</i> of the program   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Improve the fiscal <i>sustainability</i> of the program   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**Q8b. Please consider the improvement plan that was developed during your FCI consultation and that you have started to implement. To what extent has this improvement plan met your program's needs?**

- To a great extent
- To a moderate extent
- To a small extent
- Not at all
- Unsure

**Q9. Overall, how valuable was the FCI support to your organization's fiscal improvement efforts?**

- Very valuable
- Moderately valuable
- Slightly valuable
- Not at all valuable
- Unsure

**Q10a. Please give one or more specific examples of how support from the FCI consultation has had an impact on your organization. Please provide enough detail such that we can better understand this impact.** *[Question is displayed if "not at all valuable" is not selected for Q9.]*

**Q10b. Please give one or more specific examples of how support from the FCI consultation could have been made more valuable to your organization.** *[Question is displayed if "not at all valuable" is is selected for Q9.]*

**Q11. In addition to the FCI consultation, what other supports and resources have you used in the last year to support your fiscal improvement efforts [please check all that apply].** If you have not used any other supports or resources, please select the appropriate response option

- FCI Virtual Offerings
- Fiscal Institutes
- Head Start Fiscal Partnerships
- ECLKC Resources
- Direct support from Regional Office Staff
- Other – Please describe: \_\_\_\_\_
- I have not used other supports or resources in the last year to support fiscal improvement efforts.

**Q12. In thinking about your program's fiscal sustainability, in what areas do barriers remain? Please check all that apply.**

- Organizational Structure
- Policies and Procedures
- Budget Development, Monitoring
- Fiscal Reporting
- Fiscal Systems / Internal Controls
- Cost Allocation
- Non-Federal Match
- Facilities

- Governance
- Other (please describe): \_\_\_\_\_
- There are no areas in which barriers remain.

**Q13. What recommendations do you have for improving the PMFO Fiscal Consulting Initiative?**