



**Sickle Cell Disease Association of America, Inc.**  
**Standard CBO/Nonprofit Operations Requirements**

**A. Infrastructure**

1. CBO must be a non-profit organization in good standing as required by the IRS and state law.
2. CBO must maintain at least one (1) full-time or full-time equivalent (FTE) Executive Director or administrator with a focus on fundraising.
3. CBO must employ and utilize a minimum of two (2) community health workers (CHWs) who must be training with approved CHW program and HIPAA-certified; training must include academic background, skills, and field instruction.
4. CBO will make an effort to hire and/or maintain at least one (1) full-time or full-time equivalent (FTE) Hemoglobinopathy Educator or Counselor with a focus on community based care coordination.
5. CBO will maintain proper personnel policies and comply with all applicable employment laws.
6. CBO will maintain one or more business (corporate) bank accounts. All deposits of CBO funds will be into this (these) account(s).
7. CBO will maintain appropriate accounting systems and provide a capacity for backing up data.
8. CBO will conduct any annual business meeting as may be required by state law and/or CBO bylaws.

**B. Service Areas**

All CBO programs shall have documented a clearly defined geographic service area. This must be made known to the general public. The CBO is encouraged to provide joint programs in collaboration with other CBOs within the area.

**C. Funding**

1. CBO will conduct at least one or more fundraising activities each year. At least one of these activities should be non-event based (direct mail solicitation, planned giving program, membership drive, etc.) in order to demonstrate sustainability.
2. CBO will maintain an up-to-date database on all donors/sponsors. CBO may use its own select database with information reporting capability according to IRS reporting standards.

#### **D. Training and Development**

1. CBO will demonstrate efforts to participate in training and development.
2. CBOs are required to attend a virtual sub-awardee meeting each fall before or during the national convention. An executive director or program manager is required to attend, along with all grant-supported CHWs.
3. CBOs are required at a spring meeting; an executive director and/or program manager is requested. CBOs may bring up to 2 staff members; no CHWs are required to attend.
4. CBOs will be required to present project updates during meetings.

#### **E. Marketing and Communications**

1. CBO phone must be a dedicated line and listed in local phone books under the legal name of the CBO and its operating office address.
2. CBO will have access to a fax line and high-speed Internet capability.
3. CBO will maintain a local and statewide media list.
4. CBO will register with appropriate public health and social service organizations for information and referrals.
5. CBO will maintain at least 2 forms of content: a web site, brochure, Facebook page, or newsletter (published and distributed on a regular basis).

#### **F. Governance**

1. CBO boards will be elected (by members or directors, as appropriate) through a defined election process
  - i. Directors will have defined terms of office.
  - ii. Board committees or positions will be designated for various functions, such as finance, programs, nominating, etc.
2. CBOs will maintain all appropriate corporate records (meeting minutes, financial statements, contracts, leases, etc.) and make records available to the general public as may be required by state and/or federal law.
3. CBO boards will operate under an annual board-approved budget and program plan.
4. CBO will conduct, or cause to be conducted, an annual audit of finances. Such audit need not be a certified audit unless otherwise required.
5. CBO will adopt a *conflict of interest* policy and each director will sign a copy of the policy each year.
6. CBO will maintain a *directors and officers liability insurance policy*.
7. CBO will obtain event liability insurance coverage for all appropriate activities.
8. CBO will maintain required state and federal agency corporate filings.