

City of Columbia, County of Boone, and the
Heart of Missouri United Way
Social Service Agency 2012 Evaluation:

Economic Opportunity
Independent Living
Mental Health

Presented to:

Boone County Community Services Advisory Commission
Heart of Missouri United Way

by

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Introduction

The City of Columbia, County of Boone and the Heart of Missouri United Way contracted with Emily Johnson from the Institute of Public Policy, Truman School of Public Affairs at the University of Missouri to conduct an evaluation of the social services agencies in the Economic Opportunity, Independent Living, and Mental Health categories. All agencies included in this evaluation are funded by the United Way, have programs or services purchased by the City of Columbia and Boone County, or are jointly funded/purchased. This report also includes the evaluation report for the United Way's "other" funded programs that do not fit into the City and County's existing categories. This evaluation utilizes the tools and checklists developed in 2011 to collect the most accurate and useful information for evaluation of the agencies. This evaluation is the third of a three year evaluation process providing comprehensive evaluation in a staggered cycle by service category as follows:

2010 – Basic Needs and Emergency Services

2011 – Children, Youth, and Families

2012 – Economic Opportunity, Independent Living, Mental Health, Other

The year the programs are evaluated is intended to coincide with the year in which the City and County will issue a targeted RFP for the purchase of services in that service category. This report includes the evaluation of agencies in three service categories and the United Way "other" category.

Seven agencies, providing eight programs, are included in the Economic Opportunity category.

Agencies and programs include:

- Central Missouri Community Action
 - Getting Ahead Program
- Centro Latino de Salud, Educacion y Cultura
 - La Escuela Latina – Adult Education
- CHA Low-Income Service, Inc.
 - REWARD
- Job Point
 - Skills Training
 - Job Works – Employment Services
- Services for Independent Living
 - Youth Work Readiness
- Voluntary Action Center
 - Essential Transportation
- Youth Empowerment Zone
 - Working to the Top

Nine agencies, providing thirteen programs are included in the Independent Living category. Unlimited Opportunity is funded by the Heart of Missouri United Way to provide three programs in this category in Boonville. On February 4th, 2012

Unlimited Opportunity experienced a fire in their facility. Due to these circumstances, the Heart of Missouri United Way excused the agency from participating in the evaluation process.

Agencies and programs include:

- Alzheimer's Association
 - Respite Care
- Boone County Council on Aging
 - Senior Connect
- CHA Low-Income Services, Inc.
 - Independent Living Program
- Job Point
 - Employment Services for Persons with Disabilities
- Meals on Wheels
 - Home Delivered Meals
- MU Adult Day Connection
 - Adult Day Care
- OATS
 - Transportation for the Elderly
- Services for Independent Living
 - Transportation
 - Show-Me Tech
 - Community Living
- Unlimited Opportunities (Not Evaluated)
 - Family Support
 - Respite Care for Families
 - Community Employment Services

Two agencies, providing five programs, are included in the Mental Health category.

Agencies and programs include:

- Family Counseling Center of Missouri
 - Drug and Alcohol Counseling
 - Mental Health Counseling
 - Boonville/Fayette Outpatient
 - Columbia Outpatient
- Phoenix Programs
 - Out-Patient Substance Abuse Treatment

The Heart of Missouri United Way funds two additional programs that are not included in any other categories and were evaluated this year.

Agencies and programs include:

- Boone County Council on Aging
 - RSVP
- Family Health Center
 - Dental Program

There are five agencies that have a program or programs in more than one service category. Most of the program overlap occurs between the Children, Youth and Families programs

and the service categories evaluated in 2012. In order to reduce the burden on agencies with programs in more than one evaluation year, the agencies that participated in the evaluation in 2011 were only asked to complete an “update survey” which was distributed electronically to the executive director of each agency in February. Appendix E is a copy of the e-mail sent to each agency with instructions on how to complete the survey.

Updated information from overlap agencies was included in the individual agency summary found in this report. The evaluator used the tag - Update: - to indicate new information added to the report from overlap agencies. All external partnership information, comments, and checklist data was collected in 2011 and no additional information regarding these items was collected for this report.

The City/County and the Heart of Missouri United Way funded/purchased a total of 20 programs in the Economic Opportunity, Independent Living, Mental Health and Other service categories. Twelve programs in these categories were funded by the United Way, ten were purchased by the City/County, and six programs were funded/purchased jointly.

Methods

In fall of 2011, the evaluator once again worked with staff from the Heart of Missouri United Way and the Office of Community Services to begin the 2012 evaluation process.

All of the components of the evaluation template and capacity tools remained the same from the 2011 evaluation. Appendix F is a copy of the evaluation template used for the 2012 evaluation. The evaluator continued to use a modified version of the McKinsey Capacity Assessment Grid developed by Venture Philanthropy Partners¹ for evaluation and analysis. The McKinsey Grid sets criteria for reaching certain levels of capacity as determined by the data collected during the agency’s evaluation site visit. The required criteria needed for each level of capacity is clearly defined and articulated. Once again this year the modified McKinsey Capacity Assessment Grid was included in the packet of information that went to the agencies prior to their site visit. The Grid provides agencies with detailed information regarding the criteria used to determine their level of capacity.

The evaluator once again used the three new checklists, developed in 2011, to provide a more in-depth understanding of the agencies’ capacity in a few critical areas. These checklists were also sent to agencies prior to the evaluation visit in order to allow them to collect the appropriate information.

Checklists include:

- Confidentiality Checklist – Appendix G
- Financial Management Checklist – Appendix H
- Networks and Computer Systems Checklist – Appendix I

Each agency’s checklist is included in their individual summary report. A compilation of all checklists, within their category, can be found at the end of each category section.

The evaluator used the same system, developed in 2011, to collect data regarding an agency’s external relationships and partnerships. This process was developed to allow community partners to supply feedback to the evaluator regarding their opinion of their relationship with the evaluated agency and their opinion of the agency’s effectiveness in the community. All agencies were informed that their information would be reported only in the aggregate and would not be shared in a way that would identify the responder. The external partnership survey process was implemented as follows:

- During the initial evaluation visit each agency was asked to identify five key partners. The agency was asked to supply a contact name and e-mail address for each of the partners. In addition, the agency was asked to rate their overall satisfaction with the partnership and rate their opinion of the effectiveness of each agency in the community. If the evaluating agency provided information for another organization that was evaluated this year, that data are also included in the final report. Appendix J is the External Partnership template.
- Once all of the external partners were identified the evaluator e-mailed each identified partner and asked them to rate their overall satisfaction with the partnership and rate their opinion of the effectiveness of each agency in the community.
- Once the data was received the evaluator compiled the data and analyzed the information to complete the ‘External Relationships’ capacity category.

The external relationship survey is a good way to measure the perceptions of community partners regarding the agency’s effectiveness in the community. A total of 28 surveys were e-mailed and 16 were returned by external partners. The number of responses per organization are recorded on the graph for each agency (n=). Comments from the external partners are summarized following the graph in each agency report. All

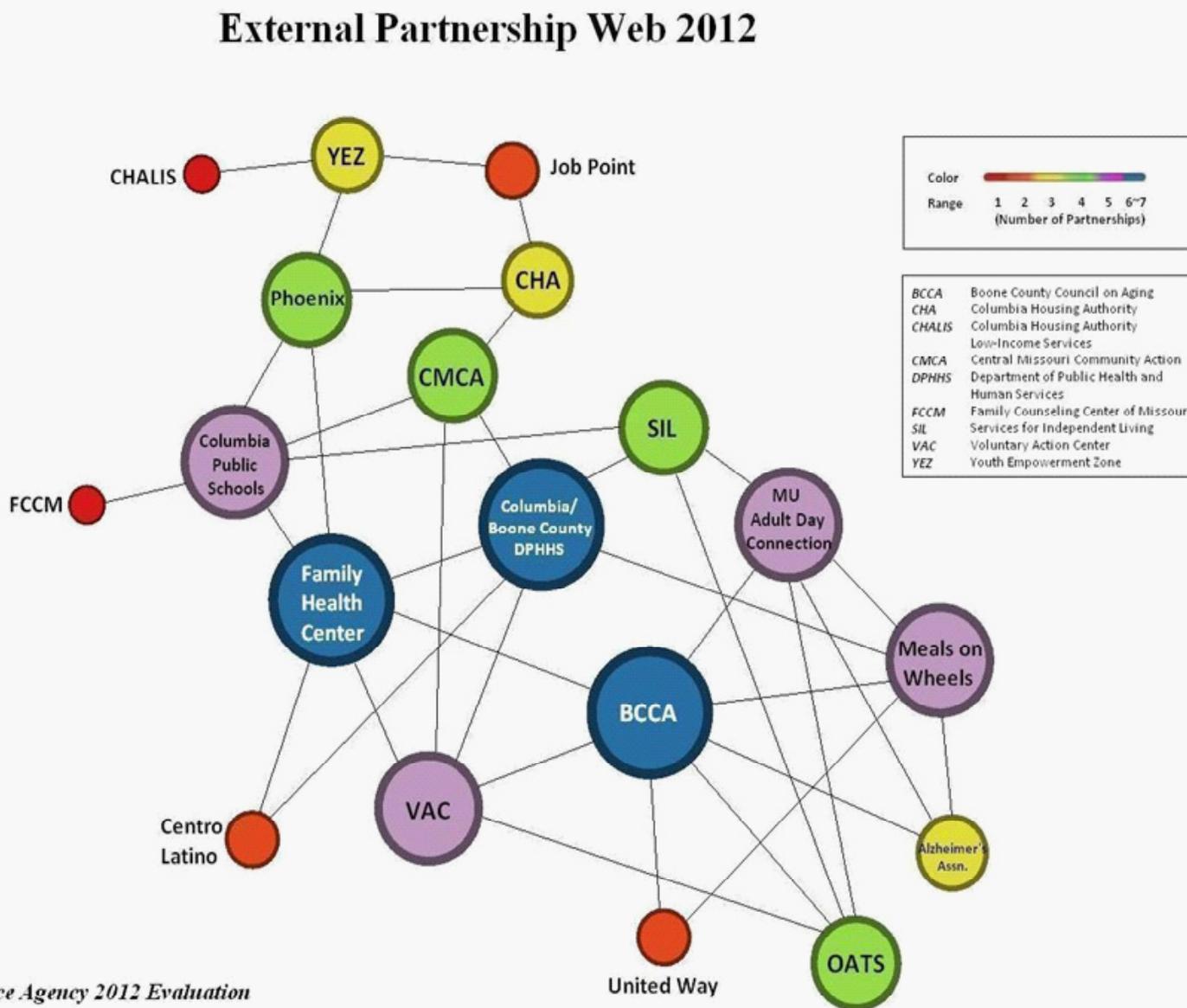
¹ McKinsey Capacity Assessment Grid, Venture Philanthropy Partners. www.venturephilanthropypartners.org

identifying information was removed in order to allow the responding agency to remain anonymous.

The evaluator used a modified version of Gephi 0.8 Beta, a visualization and manipulation software, to look more closely at the relationships among social service agencies that were evaluated in 2012. All of the evaluated agencies and any

partner, with two or more identified partnerships, were placed on the partnership web. The External Partnership Web gives a visual depiction of the multiple relationships and strength among partners in the community. The Gephi software uses size and color to indicate the number of partnerships for each agency. Figure 1 is a diagram of the External Partnership Web 2012.

Figure 1



Capacity Categories

Capacity categories that were evaluated are: Process and Delivery, Data Management, Performance Measurement, Financial Management, Program Budget, Systems and Infrastructure, Human Resources, and External Partnerships. For the purpose of this evaluation, capacity refers to the resources, knowledge, and processes that enable an organization to fulfill its mission. The evaluator analyzed criteria for each agency and assigned a capacity score.

Capacity Scores

- 4 – High level of capacity in place
- 3 – Moderate level of capacity in place
- 2 – Basic level of capacity in place
- 1 – Clear need for increased capacity

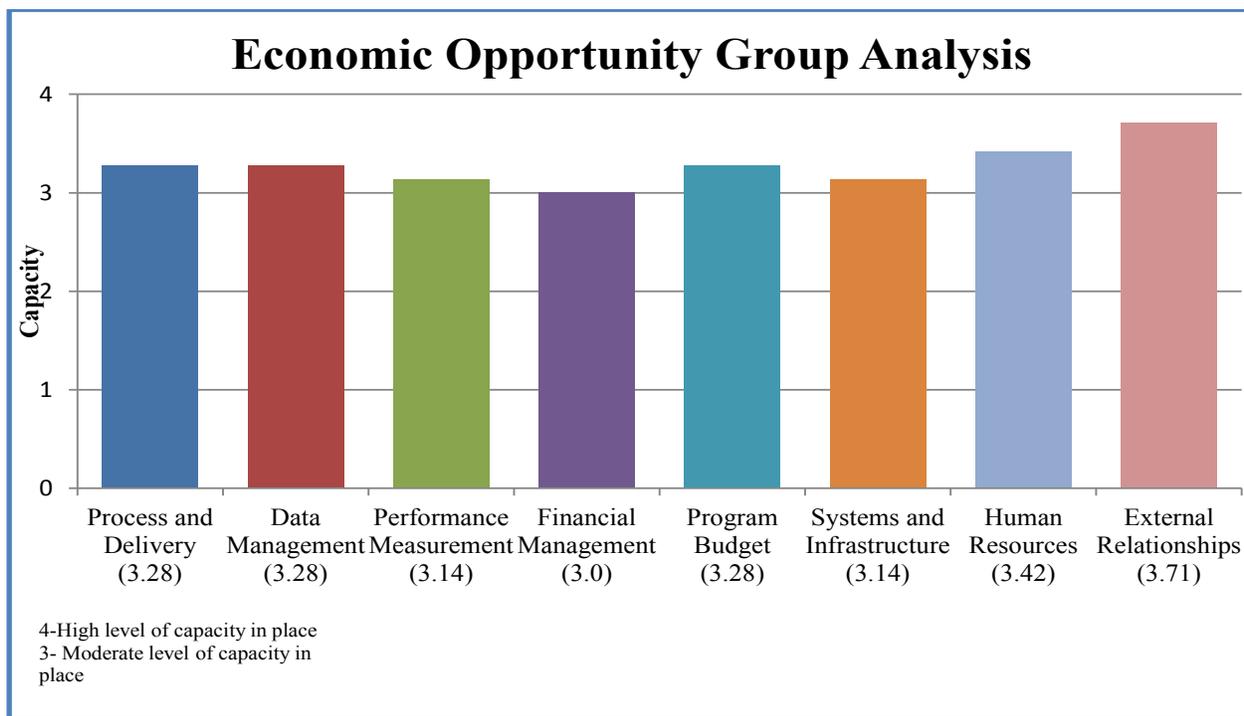
Capacity scores are reflective of the capacity needs and

opportunities of the agency and are not designed to evaluate the quality or impact of the agency or its programs. Appendix A includes the capacity evaluation summary for each agency in the Economic Opportunity category. Appendix B is the summary for the Independent Living agencies, Appendix C are the Mental Health agencies, and Appendix D are all Other agencies.

Group Analysis

In addition to the individual agency summaries, the evaluator analyzed the trends that emerged from analysis of the agencies as a group within their category. The United Way Other agencies are not included in any group analysis. Figure 2 is a summary of the agencies’ group capacity scores for Economic Opportunity. Figure 3 is a summary of the agencies’ group capacity scores for Independent Living. Figure 4 is a summary of the agencies’ group capacity scores for Mental Health.

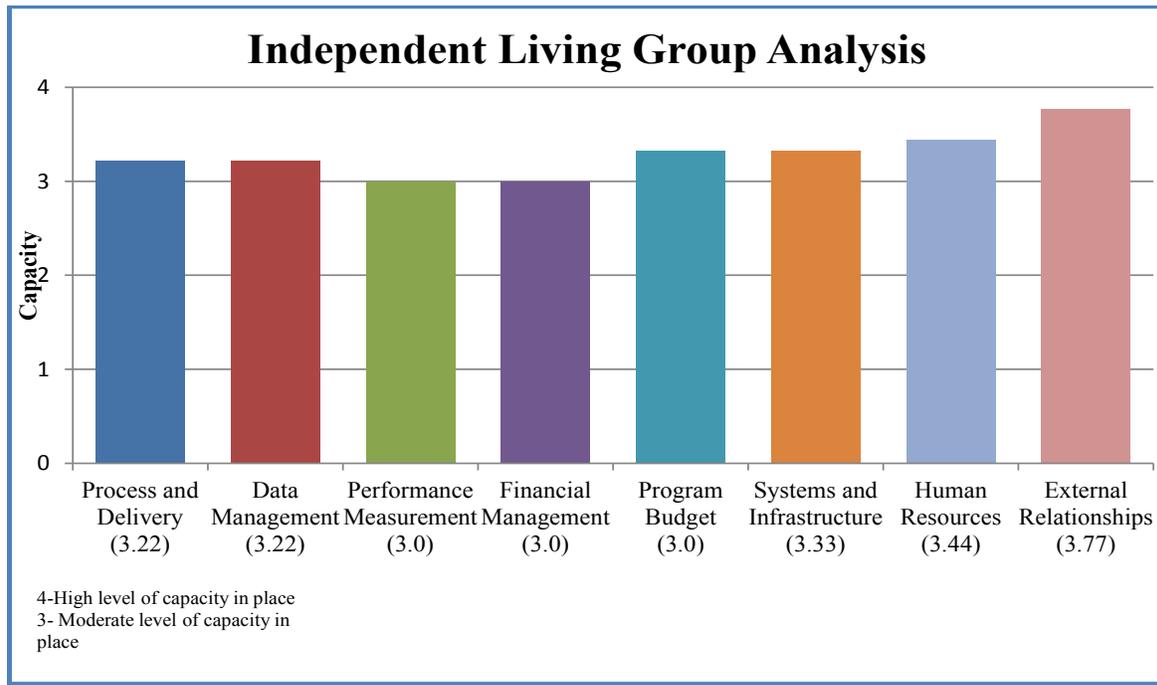
Figure 2



Economic Opportunity Group Capacity Scores- Listed Strongest to Weakest (7 Agencies)

- External Relationships – 3.71*
- Human Resources – 3.42*
- Data Management – 3.28*
- Process and Delivery – 3.28*
- Program Budget – 3.28*
- Performance Measurement – 3.14*
- Systems and Infrastructure – 3.14*
- Financial Management – 3.0*

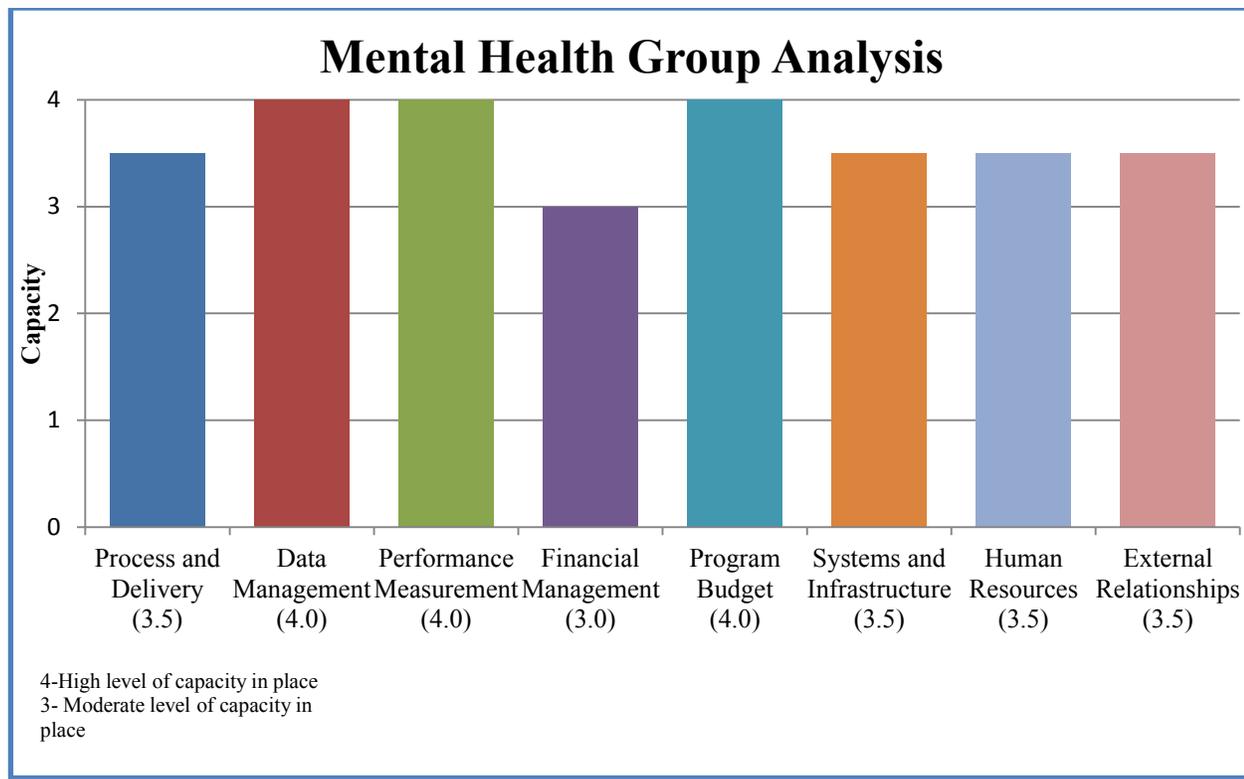
Figure 3



Independent Living Group Capacity Scores – Listed Strongest to Weakest (9 Agencies)

- External Relationships – 3.77*
- Human Resources – 3.44*
- Systems and Infrastructure – 3.33*
- Data Management – 3.22*
- Process and Delivery – 3.22*
- Program Budget – 3.20*
- Financial Management – 3.0*
- Performance Measurement – 3.0*

Figure 4



Mental Health Group Capacity Scores – Listed Strongest to Weakest (2 Agencies)

Data Management – 4.0

Performance Measurement – 4.0

Program Budget – 4.0

External Relationships – 3.5

Human Resources – 3.5

Process and Delivery – 3.5

Systems and Infrastructure – 3.5

Financial Management – 3.0

Capacity Observations

Overall, each category of programs performed very well in the individual and group capacity evaluation. External Relationships continue to be a capacity category where agencies excel. The external relationship survey is an effective way to gauge the quality of the agencies' partnerships and perception in the community. It is a struggle to accurately evaluate this category if partnering agencies do not return the surveys.

Human Resources and Systems and Infrastructure are the two categories that are weakened the most when economic circumstances are difficult. Agencies are usually slower to fill

vacant positions or make needed facility or technology upgrades. Despite these concerns both of these capacity categories ranked relatively high among these agencies.

Process and Delivery of services might be the most important category in this evaluation. Information in this category details the processes each agency has in place to conduct the business of providing services to their clients. Another important aspect of process and delivery is developing a strong system that allows for client feedback.

The Data Management and Performance Measurement categories are closely linked in this evaluation. The evaluator examines the systems and processes that the agency has in place to measure performance and the technological aspects of data management and reporting. As in previous evaluation, the ability to accurately measure performance is still a struggle for many agencies. However, a few Executive Directors expressed an increased awareness for the need of quality outcome measures and a desire to seek improved performance measures.

The Financial Management and Program Budget categories capture the extent to which policies, systems, and controls are in place to manage the agencies' finances and develop program budgets. Some agencies still struggle with how to integrate performance measurement into the development of their program budgets. This section also identifies the board of director's role in fiscal management and budget development. An agency with an active, supportive board of directors usually has the board take a leadership role in budget development. Agencies that have an advisory board usually rely on staff and directors to develop and manage the budget and expenditures.

Group Comparisons

In order to compare the capacity within the existing groups, the evaluator analyzed the four categories that have been evaluated under the current evaluation system: Children, Youth and Families, Economic Opportunity, Independent Living, and Mental Health. The evaluator conducted a Kruskal-Wallis ANOVA by using IBM SPSS Statistics 19 for analysis. Since data in the analysis contain a small number of observations and a limited scale (1 to 4), a non-parametric test was used to identify how groups differ from others independently in each evaluation category (Process and Delivery, Data Management, etc.). The analysis concludes that differences between the four groups are identified in only the category of Systems and Infrastructure ($p = .003$).

To further investigate which groups differ on Systems and Infrastructure a Tukey Post-Hoc test was conducted. It shows that within the category of Systems and Infrastructure, both Economic Opportunity (Group 2), and Independent Living (Group 3) showed a statistically significant difference in their scores compared to Children, Youth and Families (Group 1). Specifically, these groups both scored higher than Children, Youth and Families on their Systems and Infrastructure capacity score. This was the only statistically significant difference between all groups and categories.

Process Observations

United Way and the Community Impact Service Model

The Heart of Missouri United Way announced in February 2012 that the agency would move to the Community Impact Service Model for their partner agencies. This model focuses on four areas of impact: Education, Income, Health, and Safety Net. Some agencies, specifically in the Independent Living Category, expressed some concerns about future funding for their agencies, services, and clients. The evaluator provided the United Way with all comments and observations made regarding the Community Impact Service Model in an anonymous format.

Capacity Standards

As identified in the 2011 report, many agencies are not in the position to expend valuable time and resources to make the modifications necessary to score higher in many of the capacity categories as outlined by the McKinsey Grid. As with all evaluations, the McKinsey Grid provides a rigorous standard for excellence to encourage agencies to strive to meet the highest expectations. However, the limitations of time, finances, skills, and capacity can often hinder even the best agencies' ability to reach the highest standards.

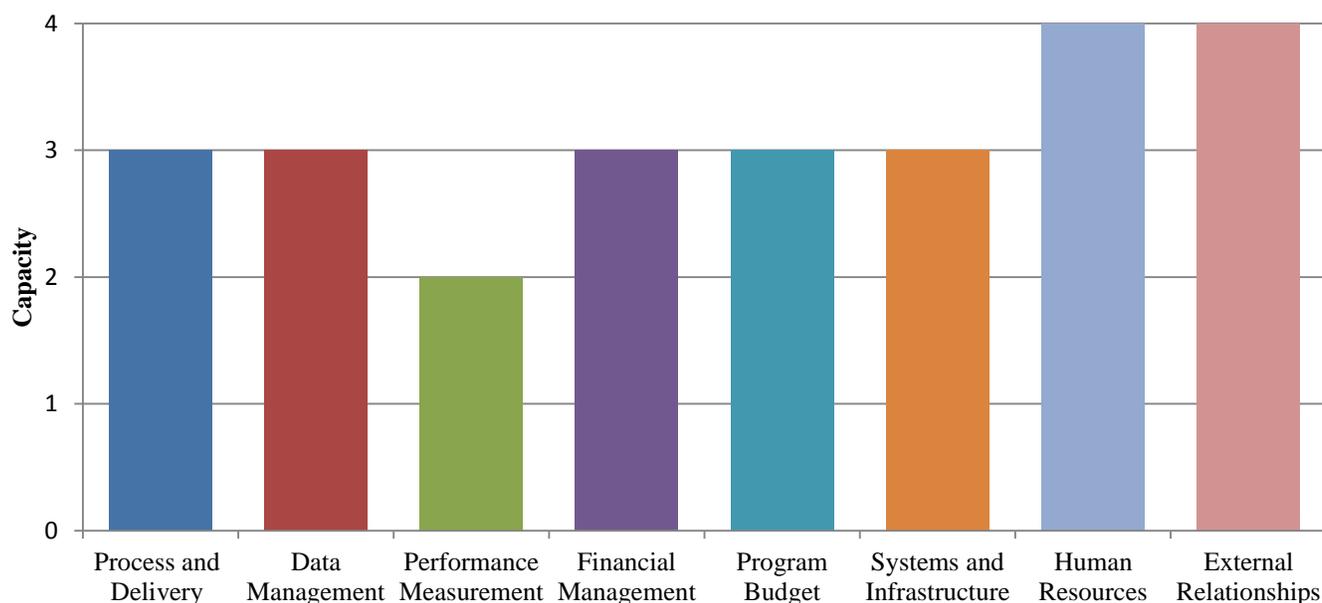
Conclusion

This evaluation is a useful tool to provide the Heart of Missouri United Way and the Boone County Community Services Advisory Commission with a measure of the capacity strengths and challenges of their organizations. The evaluation provides solid data for continued quality and capacity improvements among social services agencies serving individuals and families in the community.

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Economic Opportunity

Central Missouri Community Action



4 - High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Economic Opportunity

Programs: Getting Ahead

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in place in core areas. Processes are known and accepted by many and often used to increase impact. The agency has found success with the Getting Ahead class model which allows for one-on-one planning and discussion with clients.
- The agency uses a nationally recognized curriculum in the Getting Ahead class.
- The agency conducts a family assessment to determine the needs of the family. Pre- and post-assessments and surveys from the curriculum are utilized to gauge impact of the program.
- The agency has encountered barriers related to retention in the program mostly due to transportation issues and time constraints of the clients.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting.
- The agency tracks data using a statewide information management system to collect demographic data, need, interest, eligibility criteria and case notes.

- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for all collected data. Agency employees and volunteers sign a confidentiality agreement when they begin work and participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the reliability of the data by training staff in the field to input data and providing clear instructions to complete the needs assessment. The agency makes a concerted effort to ensure that the family or individual understands the questions and consent to any sharing of information within the agency.
- The agency ensures the validity of the data they collect by collecting data on all participants, backing up computer files with paper copies and checking and verifying data on a quarterly basis.

Performance Measures: Basic level of capacity in place

- The agency has a basic system in place for measuring progress and tracking outputs but have a harder time measuring impact through consistent tracking of outcome measures.
- The agency has recently had a staff change delivering this program and new staff is not aware of what outcome measures were previously being tracked. The agency is interested in using assessments and outcomes to help drive programming decisions.
- Performance is measured and tracked on a limited basis; the agency collects data on program activities and strives to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The agency's financial director is responsible for the day to day fiscal management of the organization.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a strong finance committee and finance department and a treasurer who plays an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical costs for the program, staff, equipment, supplies, and participant costs to determine the program budget.
- The agency occasionally utilizes performance measurement to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency's physical infrastructure is sufficient to meet the agency's current and anticipated needs. The agency utilizes classroom space that is adequate and accessible by their clients.
- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol, and uses software developed specifically for their agency.

Human Resources: High level of capacity in place

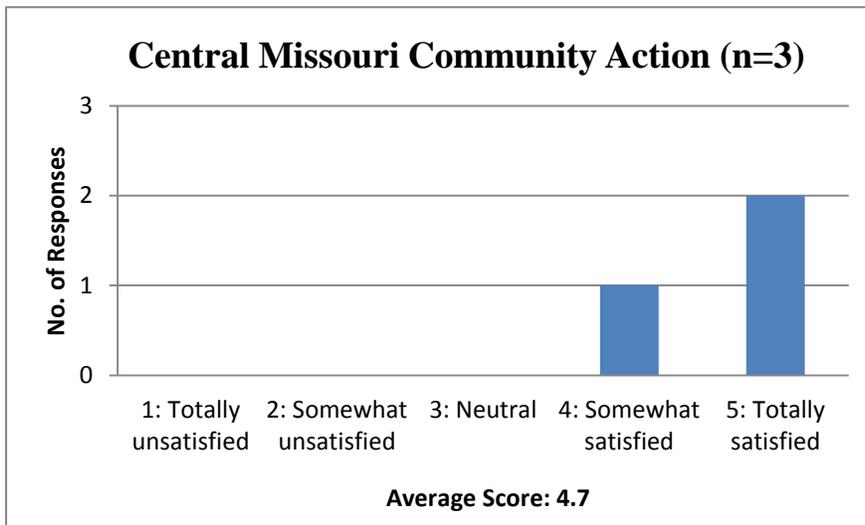
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. The agency uses volunteers from MU and Columbia College.

External Relationships: High level of capacity in place

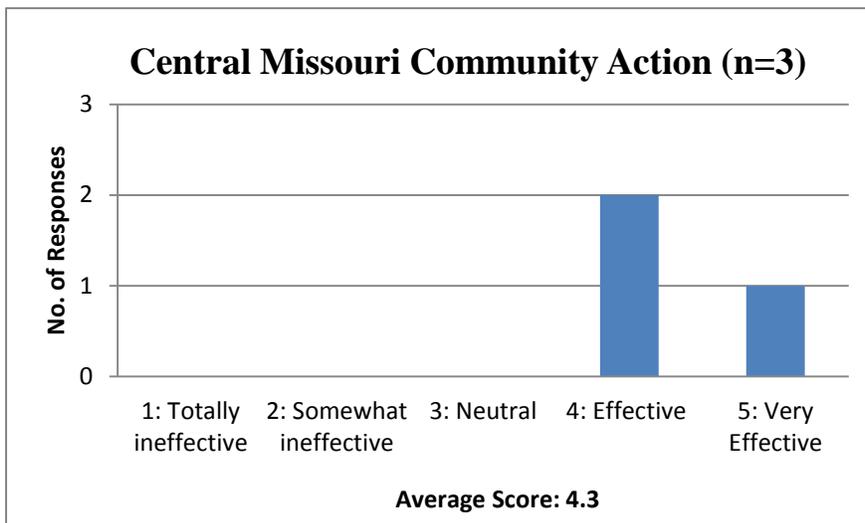
- The agency has built and leveraged some key relationships with relevant partners.
- The agency reports that they are widely known in the community and perceived to be actively engaged and responsive.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnerships Survey Completed by Partners:

CMCA is a strong community partner that has greatly benefitted in the past six years from new leadership. This new leadership has strengthened the agency’s mission and has brought vision to its strategic planning process. It is a multi-faceting organization that serves multiple counties and works hard to provide programs and services tailored to the individual needs of the communities it serves. CMCA is open to innovation and collaboration across governmental and organizational boundaries. The main focus of the agency is to alleviate poverty through multiple strategies that focus on the root causes of poverty. CMCA is very culturally competent and works well with the populations that the agency serves. Staff turnover and unpredictable funding from governmental sources have posed the greatest challenges to the effectiveness of the agency.

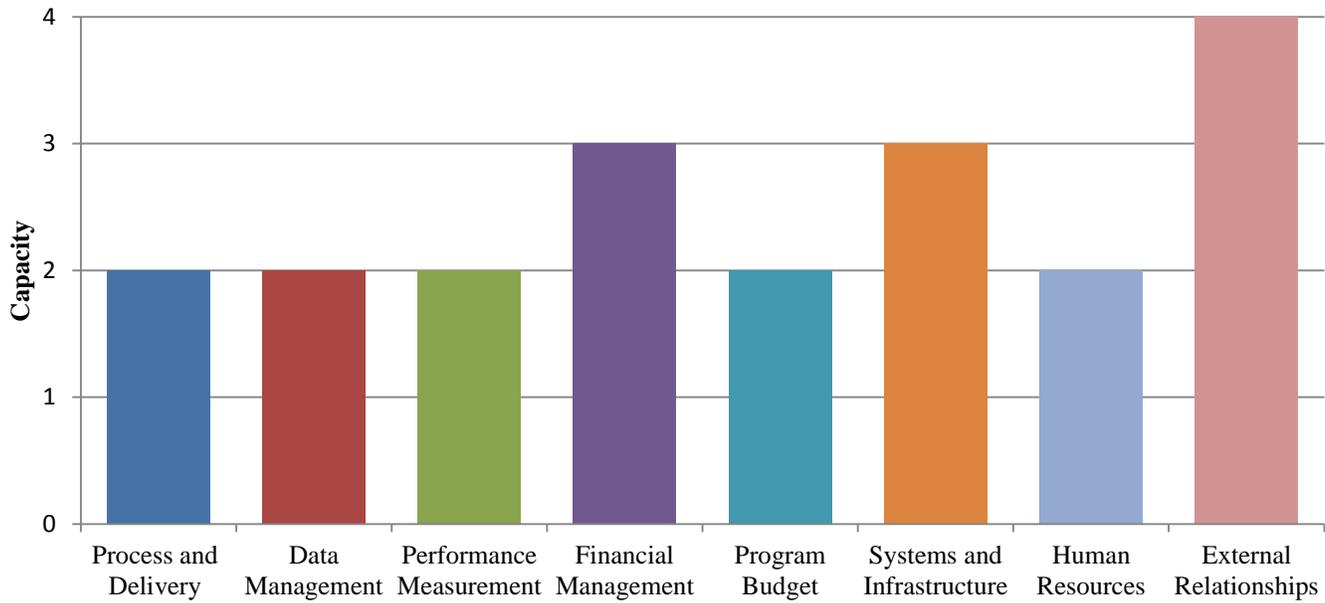
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Central Missouri Community Action	Y	N	Y	Y	N	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Central Missouri Community Action	Y	Y	Y	Y	Y	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Central Missouri Community Action	Y	Y	Y	N	Y	Y	Y	Y	Y	Y

Centro Latino de Salud, Educacion, y Cultura



4- High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Economic Opportunity

Programs: La Escuela Latina – Adult Education

Process and Delivery: Basic level of capacity in place

- The agency has a solid, well-designed set of processes in place in core areas. Processes are known and accepted by many and often used to increase impact.
- The agency does not utilize any recognized best practices or curriculum in service delivery
- Update: The agency measures performance by administering a pretest and subsequent progress exams at least twice per year. There is no formal system in place for program participant feedback.
- The agency has encountered barriers related to transportation, limited staff and economic barriers.
- Agency communicates information about processes and program delivery to the board of directors on a continual basis.
- The agency's facility is not currently ADA compliant; however an accommodation plan is in place to address needs whenever identified. The agency will be moving into a new facility that will be ADA compliant. Update: The agency is now located at 609 N. Garth and is ADA compliant.

Data Management: Basic level of capacity in place

- The agency has a system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers. Agency employees sign a confidentiality agreement when they are hired and

participate in ongoing training for confidentiality. The agency has policies for records maintenance.

- The agency strives to ensure the validity and reliability of the data by double-checking data to ensure accuracy.

Performance Measures: Basic level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency occasionally utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency collects data on program activities and outputs. Update: The agency administers pre-tests and progress exams to track individual improvements.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations.
- The board of directors reviews and approves the organizations financial statements, Federal Form 990, and annual audit on a regular basis.
- The board has a treasurer position that plays an active role in financial management and oversight.

Program Budget: Basic level of capacity in place

- The agency has a simple and adequate process for program budget development.
- The agency occasionally utilizes data to help guide program budget planning.

Systems and Infrastructure: Update: Moderate level of capacity in place

- The agency's physical infrastructure can be made to work well enough to suit the organizations most important and immediate needs; a number of improvements could greatly help increase effectiveness and efficiency. The agency is in the process of transitioning into a new facility which will be ready in 4-5 months. Update: The agency has relocated to 609 N. Garth. The new facility has large classrooms used for program delivery.
- The agency is using non-networked computers, and backs up data on an external drive. The agency utilizes the Microsoft Office Suite and funder provided data management software.

Human Resources: Basic level of capacity in place

- The agency has staff in key positions to handle the administration of programs. No staff positions can be paid with current funding.
- The agency's board provides direction, support, and accountability to the program goals. The board is fully informed of all major matters, and input and responses are actively sought and valued.

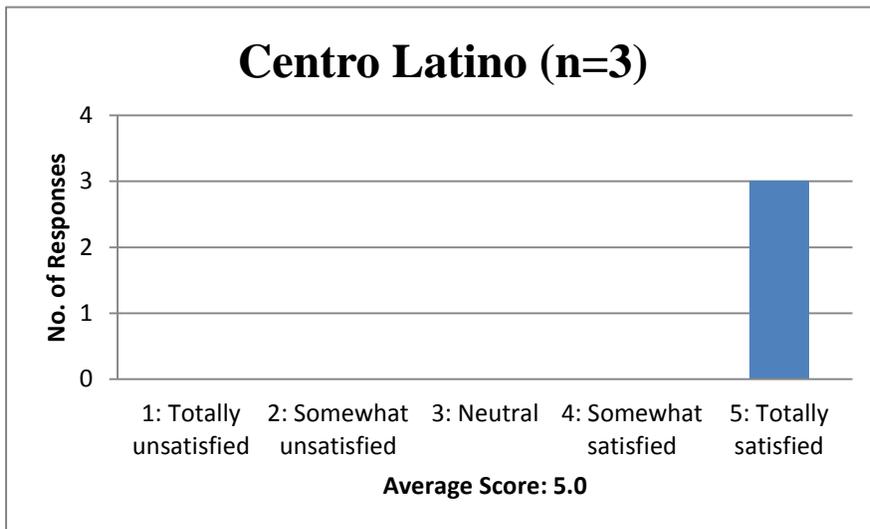
- The agency’s volunteers are capable and dedicated to the mission and vision of the organization. The volunteers are managed and contribute to the overall success of the organization.

External Relationships: High level of capacity in place

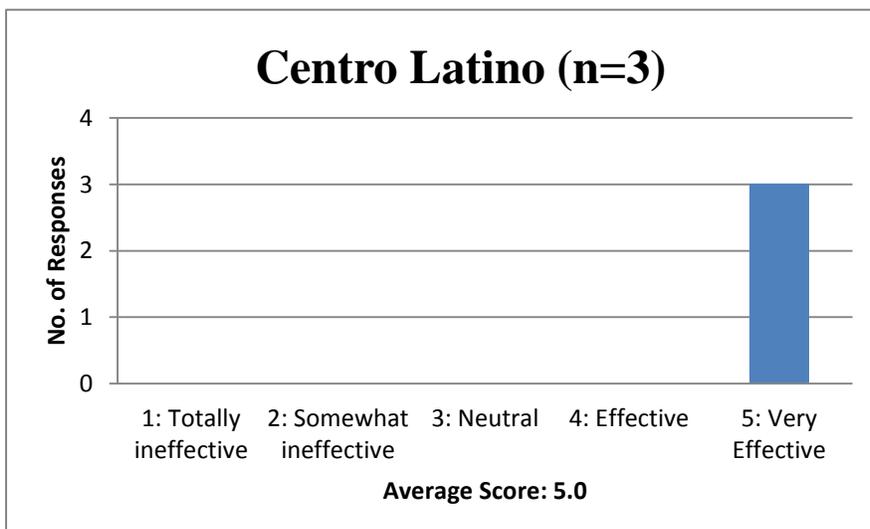
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they are well-known in the community and perceived as open and responsive to community needs.
- Update: The agency reports that their clients benefit from the many collaborations of Centro Latino, including: legal, health, translation, and consumer services.

Results of the External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners in 2011:

I have worked with Centro Latino for a number of years. We just completed a two year collaboration on a project called promotoras de salud. We met or exceeded expectations on all the variables we were monitoring. One phase of the project included helping 200 people access healthcare services during the funded period and we were actually able to help nearly twice that many people. The program was highly effective according to evaluation data. Centro Latino was a very good partner. They were good to work with, they followed through on all the services they were to provide and they were very effective in their work. It's one of the few organizations I truly enjoy working with.

In the context of the Columbia/Boone County community, Centro Latino is well-known across the agencies located in Columbia. Its services are unique, since they are targeted toward the Latino population which is growing in central MO. With regard to our agency, Family Health Center, Centro Latino provides translation services, referral to us for Latino's needing to establish primary medical/dental care, and referral of our patients to resources that can accommodate Spanish speaking clients. In addition, Centro Latino's director serves on the Board of Directors of Family Health Center and his insights and advocacy for the Latino population are very helpful in that context.

Boone County 4-H has had very successful collaborations with Centro Latino, helping us expand our Kids in the Kitchen program and starting a new 4-H club for Latino teens preparing for college.

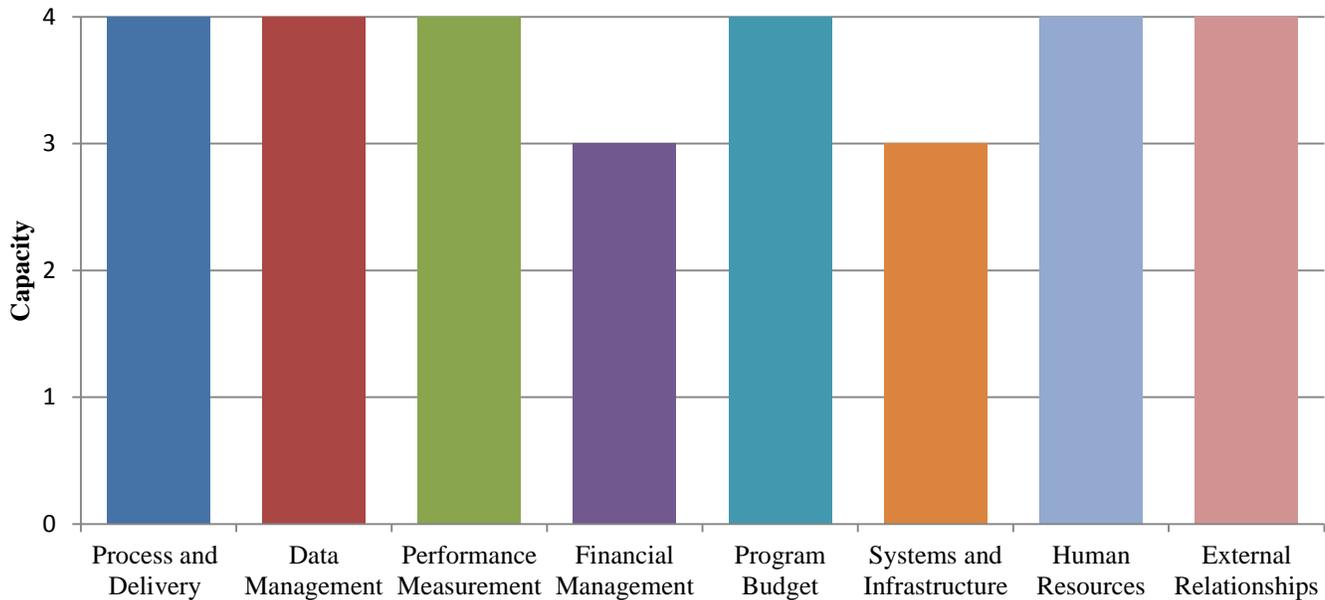
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Centro Latino de Salud, Educacion y Cultura	Y	N	N	Y	Y	Y	N	N

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Centro Latino de Salud, Educacion y Cultura	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Centro Latino de Salud, Educacion y Cultura	N	Y	N	N	N	Y	Y	N	N	Y

CHA Low-Income Service, Inc.



4 -High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Economic Opportunity

Programs: REWARD

Process and Delivery: High level of capacity in place

- The agency has a robust, well-designed set of processes in place in all areas. Processes are widely known, used and accepted and are key to ensuring full impact of the organization.
- Update: The REWARD program offers employers an incentive to hire a CHA resident and results in improved skills, confidence, and work history for the client.
- The agency conducts an annual satisfaction survey and has a suggestion box for feedback and comments.
- Agency communicates information to the board of directors on a continual basis. Policy, programming and service delivery decisions are made by staff.
- The agency has determined they are ADA compliant based on regular HUD inspections of the facility.

Data Management: High level of capacity in place

- The agency has a system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a back up protocol for collected data. Agency employees and volunteers sign a confidentiality agreement when they are hired and participate in ongoing training for

confidentiality. The agency has policies for records maintenance and utilizes paper shredders to destroy secure documents.

- The agency ensures the reliability of the data by providing consistent survey and reporting systems.
- The agency ensures the validity of the data by developing data logs based on the outputs and outcomes the agency has proposed to measure. The agency double checks data to ensure accuracy.

Performance Measures: High level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency regularly collects data on program activities, and outcomes.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations and procurement policies. Update: Effective September 2011, an accountant was hired to handle the financial functions for CHA Low-Income Service, Inc. CHA is now subject to a separate annual single audit conducted by independent accountants.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The board does not have a treasurer position, but utilizes in-house accountants.

Program Budget: High level of capacity in place

- The agency has a well-designed and informed program budget development process.
- The agency utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency's physical infrastructure is fully adequate for the current needs of the organization; infrastructure does not impede efficiency and effectiveness.
- The agency is using a network computer system, has a network administrator on staff, has network and PC back-up protocol, and utilizes commercial analytical software and funder provided data management software.

Human Resources: High level of capacity in place

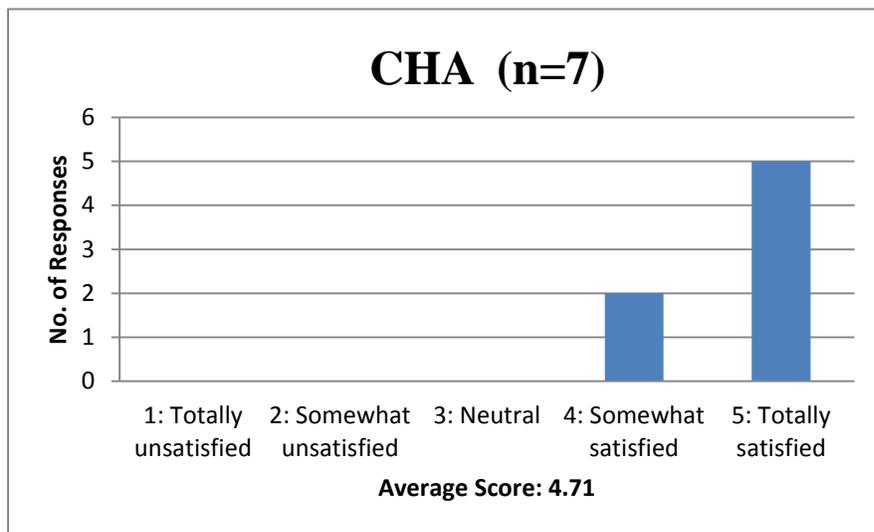
- The agency has the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization. The agency staff has excellent skills, and high ideals and standards.
- Update: As a result of the 21st Century Community Learning Center grant the agency has new and improved data management tools, staff training, and support of a certified teacher, counselor, volunteer coordinator, and a parent educator.
- The agency’s board serves in an advisory role to the agency.
- The agency’s volunteers are capable and dedicated to the mission and vision of the organization. The agency utilizes University Service Learning students who are aggressively screened and matched to the appropriate students. The volunteers are managed and contribute to the overall success of the organization.

External Relationships: High level of capacity in place

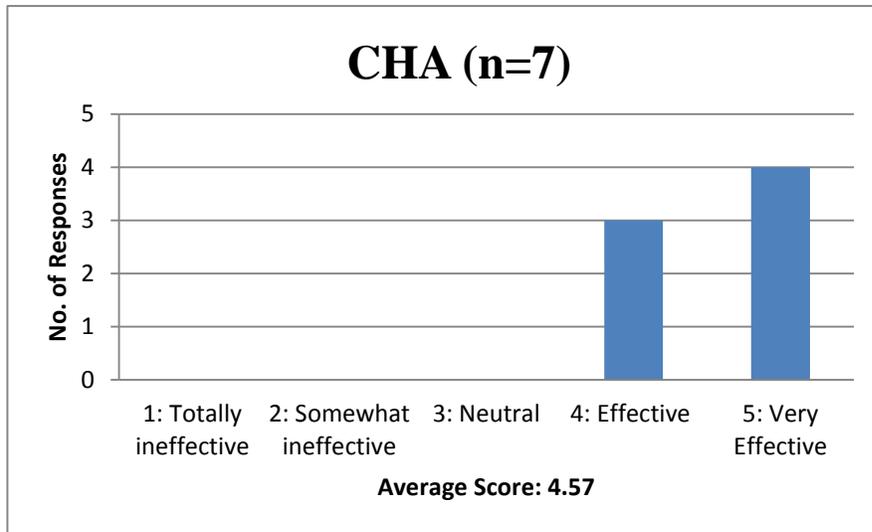
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they are well-known in the community and perceived as open and responsive to community needs.
- Results from the external relationship survey are as follows:

Results of the External Partnership Survey Completed by Partners in 2011:

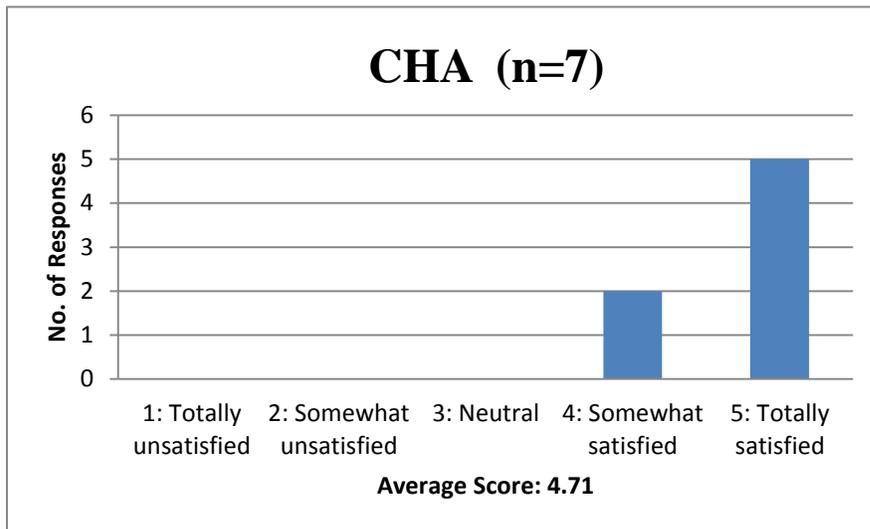
Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners in 2011:



CHA has always provided effective services to in-need residents, and from our experience, has been very receptive to take on university students to inform them about the social issues facing our community. We greatly value our partnership with CHA.

Strong leadership focused on ensuring public housing residents have access to healthy physical activity and food options.

This agency works very hard to provide effective services for residents of public housing and section 8. They are going above and beyond many other housing agencies in providing resources and programs for self-sufficiency and life skills. Additionally, they support community programs like the Youth Community Coalition that are able to impact youth and families all across Columbia. CHALIS is very willing to support community initiatives and has an open door for working together.

We are really enjoying YC2 and working with the Moving Ahead Program.

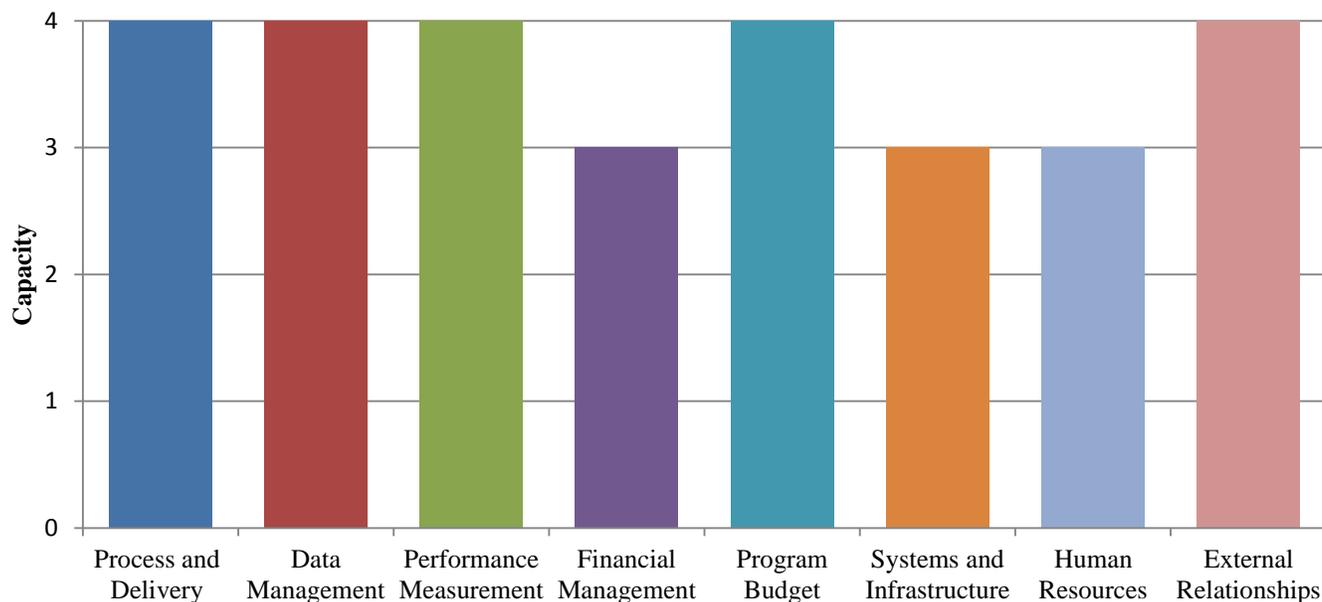
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
CHA Low-Income Services, Inc.	Y	Y	Y	Y	Y	Y	Y	N

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
CHA Low-Income Services, Inc.	Y	Y	Y	Y	N	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
CHA Low-Income Services, Inc.	Y	N	Y	Y	Y	Y	Y	Y	N	Y

Job Point



4 -High level of capacity in place
3- Moderate level of capacity in place
2- Basic level of capacity in place
1- Clear need for increased capacity

Category: Economic Opportunity

Programs: Skills Training
Job Works – Employment Services

Process and Delivery: High level of capacity in place

- The agency has a robust, lean, well-designed set of processes in place in all areas. Processes are widely known, used and accepted and are key to ensuring full impact of the organization.
- The agency utilizes scorecards, partnering meetings, input questionnaires, and focus groups for feedback, and has a formal complaint and grievance policy.
- The agency has encountered barriers related to a variety of family and environmental issues that their clients face.
- Agency communicates information about processes and program delivery to the board of directors on a continual basis.
- The agency has determined they are ADA compliant based on an external evaluation that is done by independent surveyors every three years.

Data Management: High level of capacity in place

- The agency has a system for data collection, management, and reporting. Update: Skills Training Program has added an Intake Support/Data Management Coordinator, which is determining eligibility, initial data entry, tracking outcome information and receptionist duties.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for collected data. Agency employees sign a confidentiality agreement when they are hired, and participate in ongoing training for confidentiality. The agency has policies for records maintenance and utilizes paper shredders to destroy secure documents.
- The agency ensures the reliability of the data by comparing the data to information from the previous quarter to identify and correct discrepancies when applicable.
- The agency ensures the validity of the data by developing survey questions and data logs based on the outputs and outcomes the agency has proposed to measure. Data is carefully reviewed and verified by the program director and the organization's Vice President prior to dissemination.

Performance Measures: High level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency occasionally utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency regularly collects data on program activities, and utilizes tools and assessments to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations. A fiscal member has been stationed at the CBY location one day per week for improved financial management of the complexities involved with housing development.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The board has a treasurer position that plays an active role in financial management and oversight.

Program Budget: High level of capacity in place

- The agency has a well-designed and informed program budget development process.
- The agency utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency's physical infrastructure can be made to work well enough to suit the organization's most important and immediate needs; a number of improvements could greatly help increase effectiveness and efficiency. The agency is seeking to consolidate all local Columbia staff into one facility.

- Update: As a result of the end of their DOC contract for employment services, the Reentry Opportunity Center closed as of June 30th.
- The agency is using a network computer system, has a network administrator on staff, has network and PC back-up protocol, and utilizes software developed for their agency and funder provided data management software.

Human Resources: Moderate level of capacity in place

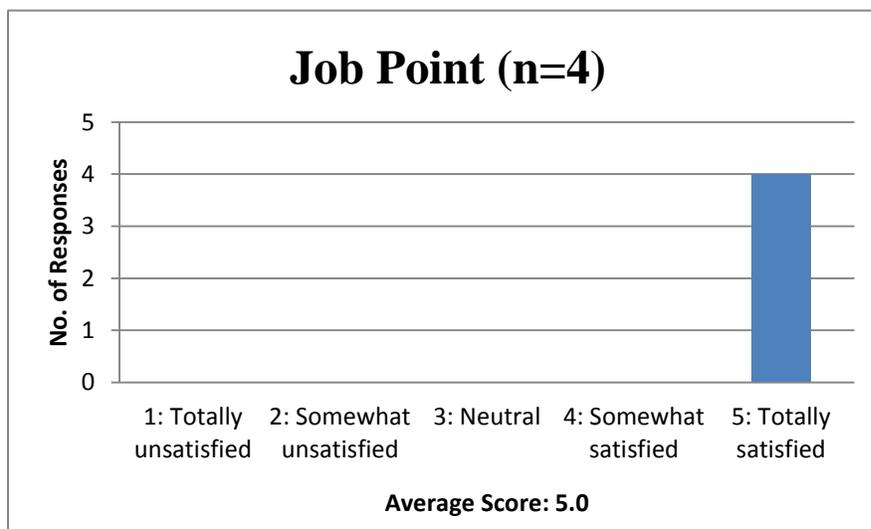
- The agency has the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization.
- The agency’s board provides direction, support, and accountability to the program goals. The board is fully informed of all major matters, and input and responses are actively sought and valued.
- The agency’s volunteers are capable and dedicated to the mission and vision of the organization. The volunteers are managed and contribute to the overall success of the organization.

External Relationships: High level of capacity in place

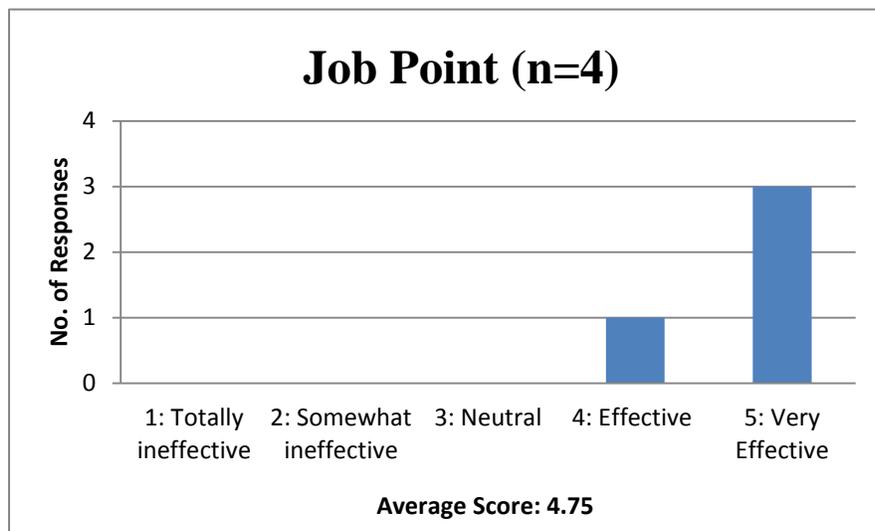
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they are well-known in the community and perceived as open and responsive to community needs.
- Results from the external relationship survey are as follows:

Results of External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners in 2011:

Job Point has been a strong partner and we hope to strengthen this partnership and find additional ways to work together.

All of my experiences with Job Point have been very positive. Effectively serving their clients is always their first priority. When faced with changes in funding sources or other unexpected changes in programming they quickly adapt and continue to provide services with minimal downtime. It is a pleasure to work with Job Point.

Job Point provides many positive and effective vocational and educational services to our clients.

Well-established, organized, and results-based.

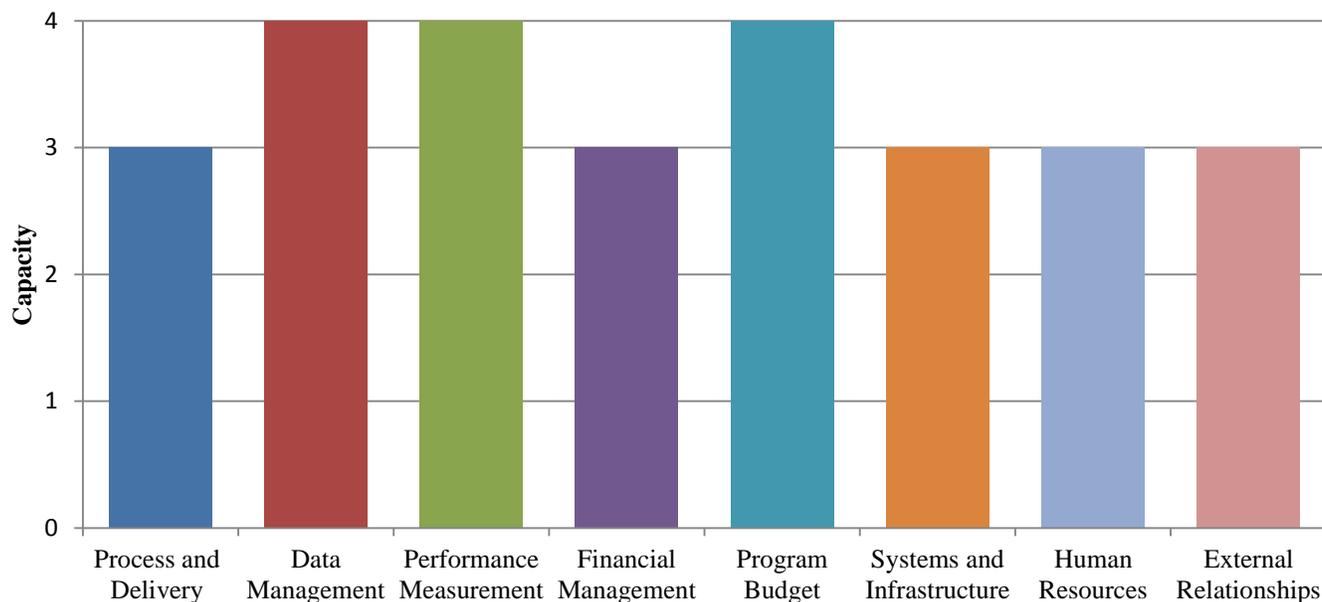
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Job Point	Y	Y	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Job Point	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Job Point	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

Services for Independent Living



4 -High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Economic Opportunity

Programs: Youth Work Readiness

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in place in core areas. Processes are known and accepted by many and often used to increase impact. Update: The Youth Work Readiness Program is designed to teach youth, ages 19-29, soft-skills relative to gainful employment.
- The agency conducts a client satisfaction survey at the completion of each program. The agency also conducts follow up with participants as part of independent living services.
- The agency has encountered barriers related to transportation not centered on one program and finding accessible space for activities.
- The agency communicates information about processes and program delivery to the board of directors on a continual basis.
- The agency has determined they are ADA compliant based on on-going internal evaluation.

Data Management: High level of capacity in place

- The agency has a system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for collected data. Agency employees sign a confidentiality agreement when they are hired and participate in ongoing training for

confidentiality. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.

- The agency ensures the reliability of the data by providing the same instructions to all participants for the completion of surveys.
- The agency ensures the validity of the data by developing survey questions and data logs based on the outputs and outcomes the agency has proposed to measure. The agency provides the survey to all participants following programming. The agency double checks data to ensure accuracy, and does a 20% review of files as a training tool.

Performance Measures: High level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency occasionally utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency regularly collects data on program activities, and has tools and assessments in place to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations. Update: The Executive Director and finance director have financial management responsibilities.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis. Update: The Board of Directors has the final authority on financial decisions that impact the agency.
- The board has a treasurer position that plays an active role in financial management and oversight.

Program Budget: High level of capacity in place

- The agency has a well-designed and informed program budget development process. Update: The program budgets are based on a 5% annual increase due to serving an increased consumer base.
- The agency utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency's physical infrastructure can be made to work well enough to suit the organization's most important and immediate needs; a number of improvements could greatly help increase effectiveness and efficiency. Update: Through the strategic planning process and significant growth, the Executive Director has identified the need for changes in the infrastructure. Ongoing discussion and board approval is needed before the changes are implemented.
- The agency is using a network computer system, contracts with a network administrator on an on-going basis, has network and PC back-up protocol, and utilizes funder provided data management software.

Human Resources: Moderate level of capacity in place

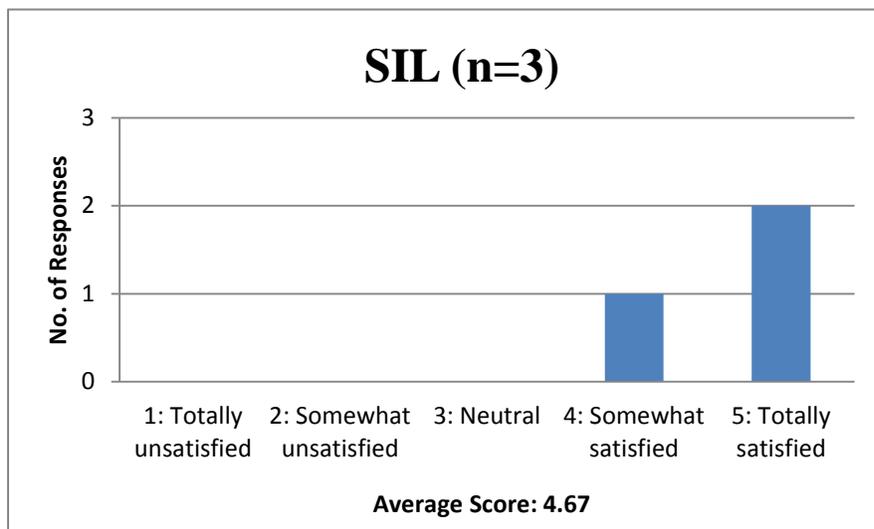
- The agency has the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization. Update: Through the strategic planning process and an internal audit of practices, SIL has identified improvements required in the Human Resources department. These are being addressed and monitored by a resource tool, which the Strategic Planning Committee reviews regularly.
- The agency’s board provides direction, support, and accountability to the program goals. The board is fully informed of all major matters, and input and responses are actively sought and valued.
- The agency’s volunteers are capable and dedicated to the mission and vision of the organization. The volunteers are managed and contribute to the overall success of the organization.

External Relationships: Moderate level of capacity in place

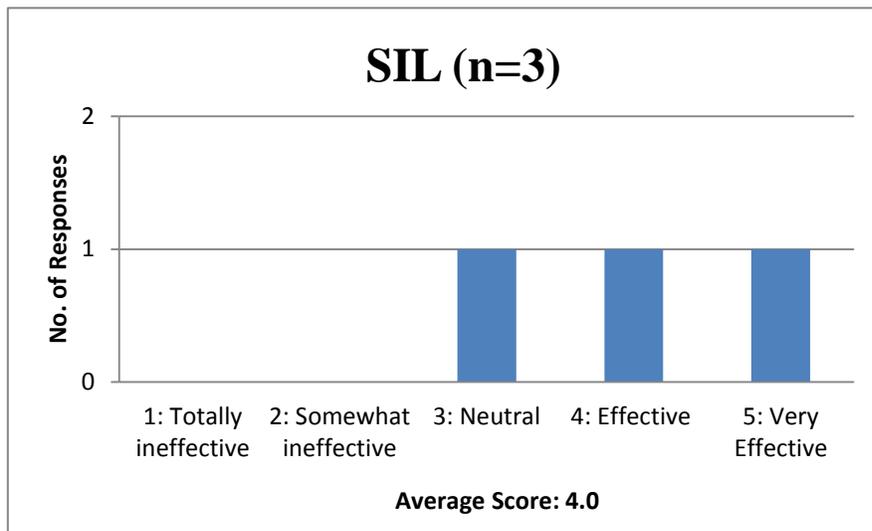
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they are well-known in the community and perceived as open and responsive to community needs.
- Update: Through the strategic planning process, SIL has learned that branding is needed to further develop relationships to meet the need of their customers and un-served and underserved populations.
- Results from the external relationship survey are as follows:

Results of External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed BY Partners in 2011:

This agency is one that is allowing persons with disabilities to live independently and they do it with integrity and respect for everyone they serve. Working with this agency allows our Adult Protective Service Workers someone to assist them in the work of advocating for adults in many areas. They are exceptional advocates and work tirelessly to assist their extraordinary population.

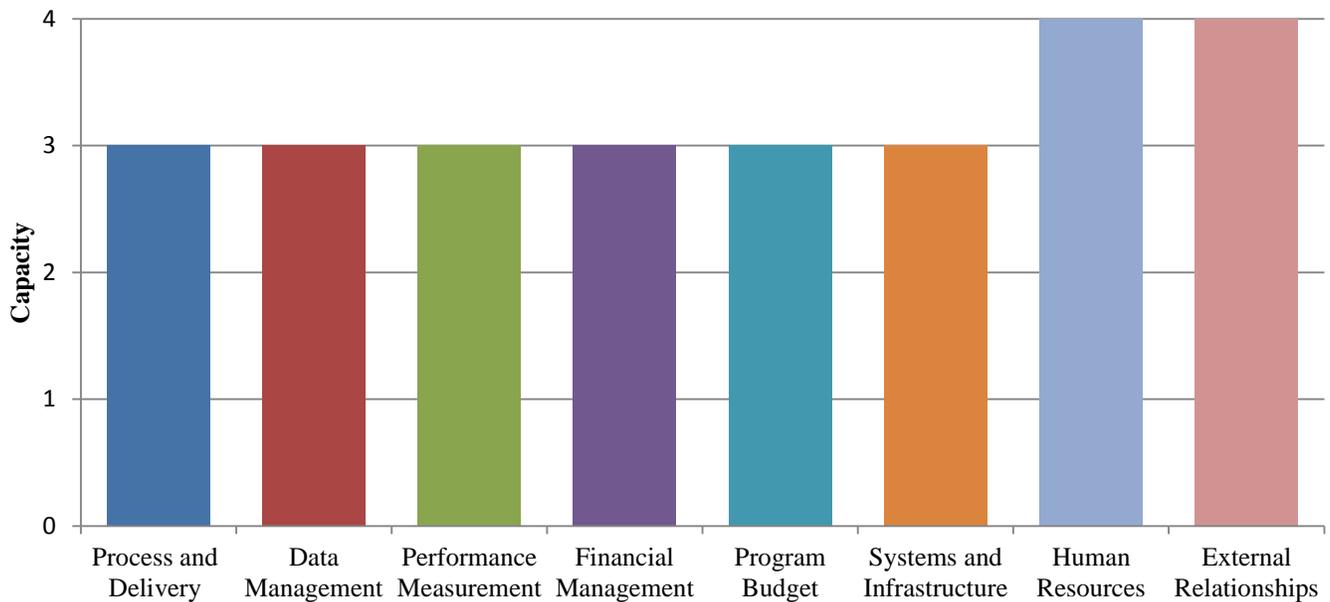
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Services for Independent Living	Y	N	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Services for Independent Living	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Services for Independent Living	Y	N	N	Y	Y	Y	Y	N	N	Y

Voluntary Action Center



4 - High level of capacity in place
 3 - Moderate level of capacity in place
 2 - Basic level of capacity in place
 1 - Clear need for increased capacity

Category: Economic Opportunity

Programs: Essential Transportation

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in core areas. Processes are known and accepted by many and often used to increase impact.
- The agency's model is not based on an evidence-based or model program.
- The agency conducts a satisfaction survey on the phone after the client has been provided car repair service. Clients who received bus tickets are given the survey when they return to the organization.
- The agency has encountered barriers related to limited resources available to the clients and bus fare increases. The agency usually runs out of money in October for these services.
- The agency communicates information about processes and program delivery to the board of directors ten times per year. The agency is discussing possible changes to the structure and process of the board.
- The agency believes they are ADA compliant, but does not have documentation to support that claim.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting. The agency is looking at upgrading their client database.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers and a backup protocol for all collected data. Agency employees and volunteers sign a confidentiality agreement when they begin work and participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the validity and reliability of the data by providing clear instructions and training to staff and reviews of how information is reported.

Performance Measures: Moderate level of capacity in place

- The agency has a system in place for measuring progress and tracking outputs. However the agency is limited in their ability to fully track significant outcomes for the program. The agency is looking at ways to improve their outcome measures and their ability to track those outcomes
- The agency utilizes performance measures in an ongoing review process. This process allows the agency to improve service delivery, increase effectiveness, and address issues as they arise.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The financial officer is responsible for the day-to-day fiscal management of the agency.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical data and anticipated need. The budget is totally dependent on the amount of funding provided for the services.
- The agency occasionally utilizes performance measurement data to help guide program budget planning. The agency is looking for ways to analyze and use performance measurement more fully.

Systems and Infrastructure: Moderate level of capacity in place

- The physical infrastructure is currently meeting the needs of the organization, however space and storage are limited.

- The agency is using a networked computer system, has a network administrator on staff, has network backup protocol, and uses software developed specifically for their agency. The agency is looking to upgrade their client database to capture additional information about clients.

Human Resources: High level of capacity in place

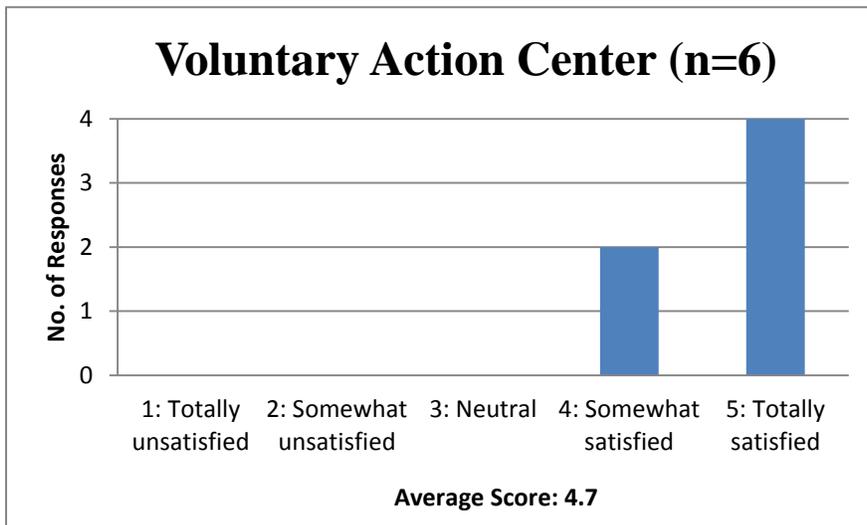
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization.

External Relationships: High level of capacity in place

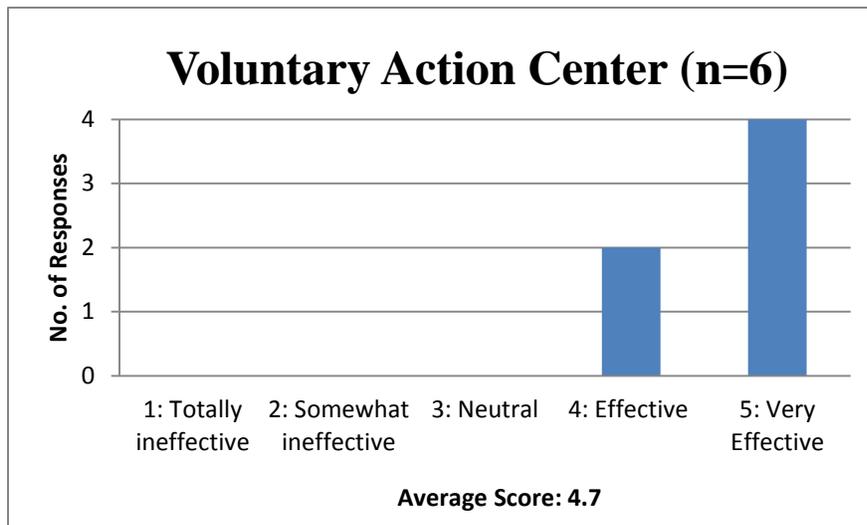
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they have a good referral network among local providers.
- The agency reports they are well known in the community and perceived to be actively engaged and responsive.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

The agency seems to me to be constantly active, involving the community, and providing needed service for families, children and the disadvantaged. I'm not totally familiar with their services, but those with which I have interacted were very helpful, well run and good to be involved with.

They are very easy to work with from our side of the relationship and most of the individuals that we serve that have worked with them, are extremely satisfied and grateful for their services.

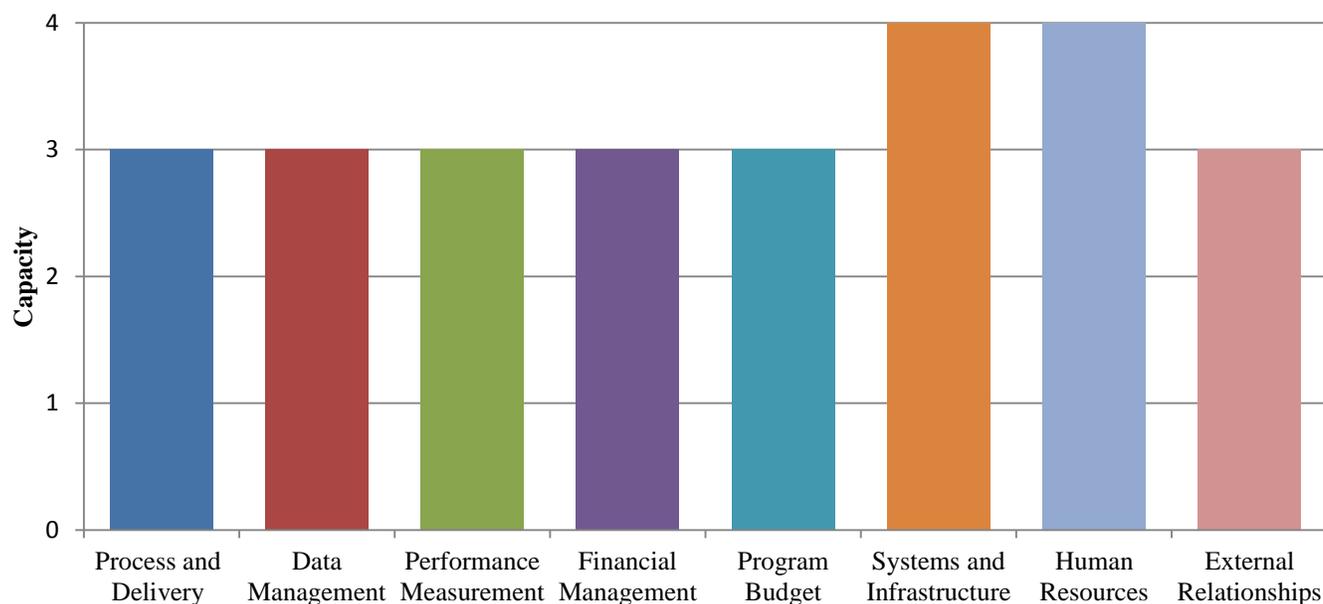
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Voluntary Action Center	Y	N	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Voluntary Action Center	Y	Y	Y	Y	Y	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Voluntary Action Center	Y	N	Y	N	Y	N	Y	Y	Y	Y

Youth Empowerment Zone



4 - High level of capacity in place
 3 - Moderate level of capacity in place
 2 - Basic level of capacity in place
 1 - Clear need for increased capacity

Category: Economic Opportunity

Programs: Working to the Top

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in core areas. Processes are known and accepted by many and are often used to increase impact.
- The agency uses a model developed by the Harlem Children's Zone and a nationally recognized curriculum.
- The agency does anonymous surveys for those completing job readiness training. The agency also does weekly phone calls, home visits, or contact on social media to get feedback and stay connected to clients.
- The agency has encountered barriers related to the mentorship aspects of their programs. The agency works hard to find good mentors, train them and ensure a good relationship among the client and mentor.
- The agency communicates information about processes and program delivery to the board of directors on a monthly basis. The agency provides the board with outreach program reports that address any problems and challenges in the agency.
- The agency has determined they are ADA compliant based on building specifications and certification from the builders.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers and a backup protocol for all collected data. Agency employees and volunteers do not sign a confidentiality agreement when they begin work and do not participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes paper shredders to dispose of secure documents.
- The agency ensures the validity and reliability of the data by providing clear instructions on how to complete the post training survey, training staff to input data, and double checking data entry for accuracy.

Performance Measures: Moderate level of capacity in place

- The agency has an adequate system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable. Update: The agency has refined their tracking system and is currently working to transfer tracking to one main database.
- The agency utilizes performance measures to help guide programming, measure effectiveness, and improve service delivery.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The agency's staff and staff from Job Point, their fiscal agent, are responsible for the day-to-day fiscal management of the organization. Update: Job Point no longer serves as the fiscal agent for YEZ, Henry C. Winfrey, CPA is now the fiscal agent for the organization.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical information and projections for the future. They work in conjunction with Job Point, their fiscal agent, to develop the budget.
- The agency occasionally utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: High level of capacity in place

- The physical infrastructure is well tailored to the organization’s current and anticipated needs. Update: The agency reports it has remained constant in staffing, funding, and facilities.
- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol, and uses some funder provided data management software.

Human Resources: High level of capacity in place

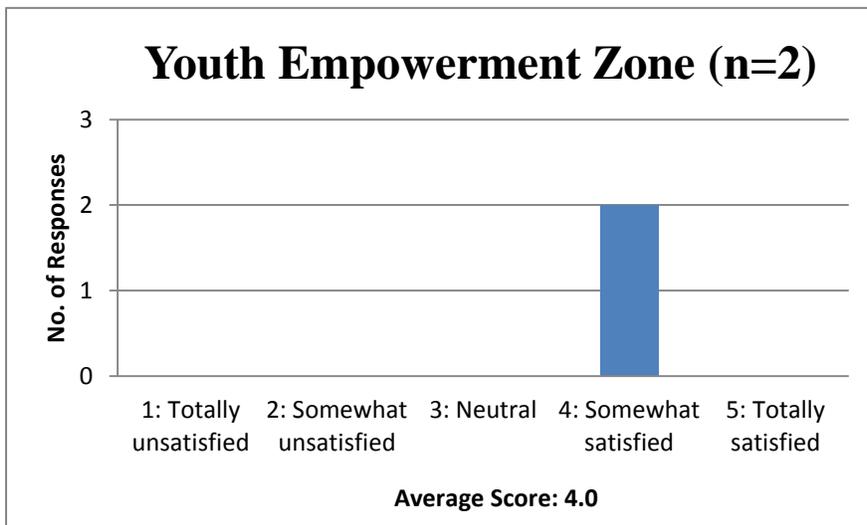
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. Volunteers serve as mentors by providing job readiness and job-specific training.

External Relationships: Moderate level of capacity in place

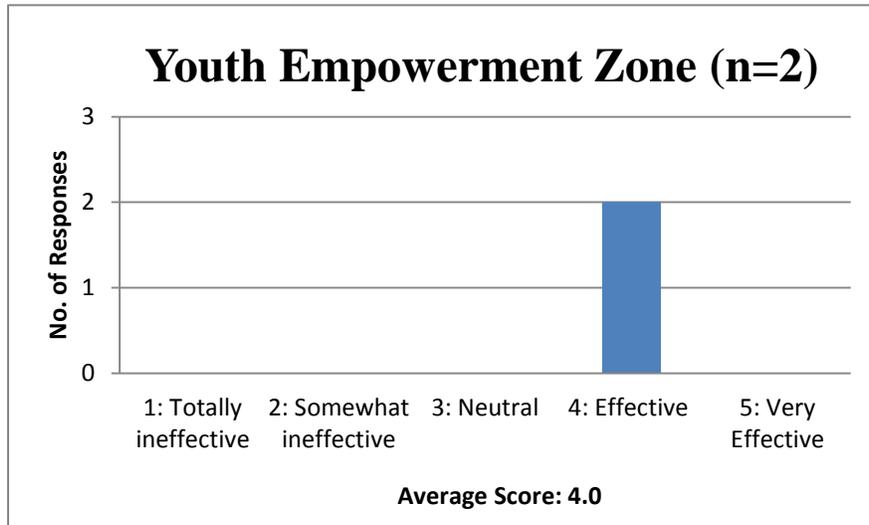
- The agency has built and leveraged some key relationships with relevant partners. The agency has a good working relationship with local school administrators who make referrals to the program.
- The agency feels they are well known in the community and perceived to actively engaged and responsive.

Results of External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



No Comments.

Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Youth Empowerment Zone	Y	Y	Y	N	N	Y	Y	N

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Youth Empowerment Zone	Y	Y	Y	Y	Y	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Youth Empowerment Zone	Y	N	Y	Y	Y	Y	Y	N	N	Y

Economic Opportunity Checklists

1. Confidentiality Checklist

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Central Missouri Community Action	Y	N	Y	Y	N	Y	Y	Y
Centro Latino de Salud, Educacion y Cultura	Y	N	N	Y	Y	Y	N	N
CHA Low-Income Services, Inc.	Y	Y	Y	Y	Y	Y	Y	N
Job Point	Y	Y	Y	Y	Y	Y	Y	Y
Services for Independent Living	Y	N	Y	Y	Y	Y	Y	Y
Voluntary Action Center	Y	N	Y	Y	Y	Y	Y	Y
Youth Empowerment Zone	Y	Y	Y	N	N	Y	Y	N

2. Financial Management

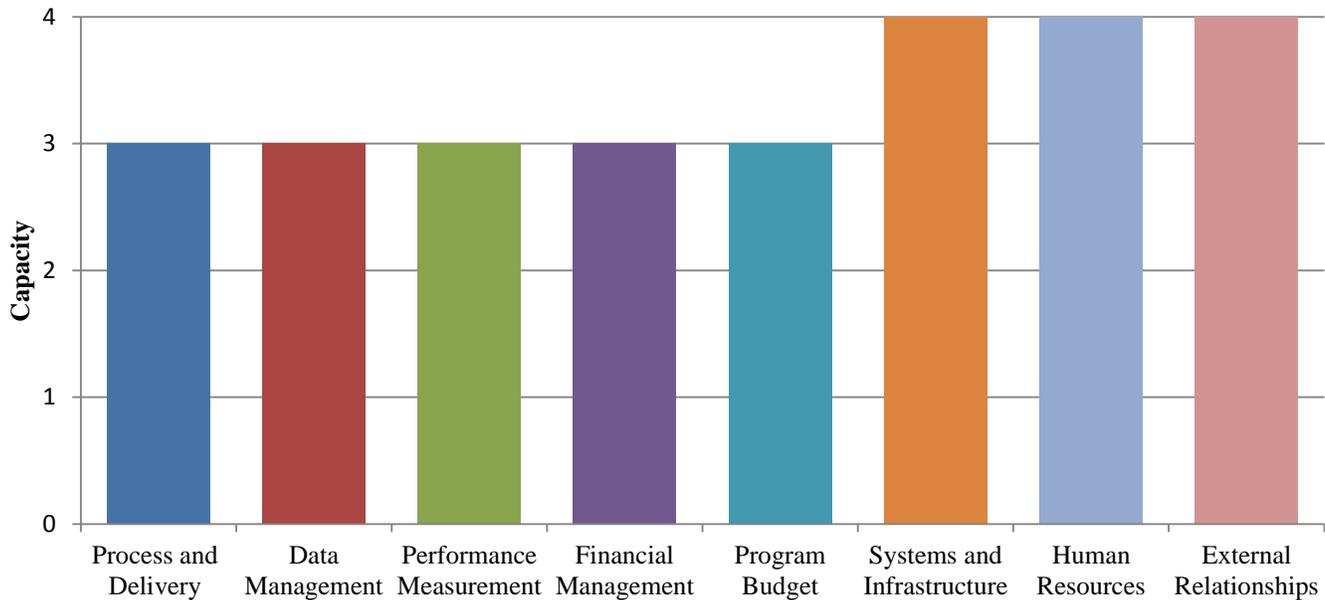
Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Central Missouri Community Action	Y	Y	Y	Y	Y	Y	Y
Centro Latino de Salud, Educacion y Cultura	Y	Y	Y	Y	Y	N	Y
CHA Low-Income Services, Inc.	Y	Y	Y	Y	N	Y	Y
Job Point	Y	Y	Y	Y	Y	N	Y
Services for Independent Living	Y	Y	Y	Y	Y	N	Y
Voluntary Action Center	Y	Y	Y	Y	Y	Y	Y
Youth Empowerment Zone	Y	Y	Y	Y	Y	Y	Y

3. Network and Computer Systems

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Central Missouri Community Action	Y	Y	Y	N	Y	Y	Y	Y	Y	Y
Centro Latino de Salud, Educacion y Cultura	N	Y	N	N	N	Y	Y	N	N	Y
CHA Low-Income Services, Inc.	Y	N	Y	Y	Y	Y	Y	Y	N	Y
Job Point	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Services for Independent Living	Y	N	N	Y	Y	Y	Y	N	N	Y
Voluntary Action Center	Y	N	Y	N	Y	N	Y	Y	Y	Y
Youth Empowerment Zone	Y	N	Y	Y	Y	Y	Y	N	N	Y

Independent Living

Alzheimer's Association



4 - High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Independent Living

Program: Respite Care

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in core areas. Processes are known, accepted by many, and often used to increase impact.
- The agency is affiliated with the national Alzheimer’s Association and localizes the national strategic plan to implement with local clients.
- The agency conducts a bi-annual caregiver survey which focuses on the use of AA funds, barriers to utilizing funds and specific outcomes: stress reduction and allowing the client to remain longer in his or her home.
- The agency has encountered barriers related to limited resources available to the clients and caregivers. The agency also struggles with helping families identify substitute caregivers for their clients.
- The agency communicates information about processes and program delivery to the board of directors on a monthly basis. The board has recently formed a program committee which will be more involved in programming.
- The agency has determined they are ADA compliant based on building codes and requirements of former tenants.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and a backup protocol for all collected data. Agency employees and volunteers sign a confidentiality agreement when they begin work and participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the reliability of the data by providing clear instructions on how to complete and return the caregiver survey. The agency also trains staff and volunteers on how to compile data and input into databases.
- The agency ensures the validity of the data they collect by distributing the caregiver survey and other reporting forms to all clients on a defined basis. The agency is requiring monthly completion of forms and submission of receipts for supplies and respite care.

Performance Measures: Moderate level of capacity in place

- The agency has an adequate system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable. The agency uses a caregiver survey distributed twice per year. The agency is limited in its ability to collect additional information to track the performance and outcomes of the agency.
- The agency utilizes performance measures to help guide programming, measure effectiveness, identify changes in need, identify problems or barriers, and to bolster advocacy work.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The Executive Director is responsible for the day-to-day fiscal management of the agency.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical and enrollment data to guide the budget development process.
- The agency occasionally utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: High level of capacity in place

- The physical infrastructure is well tailored to the organization's current and anticipated needs.

- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol, and uses software developed specifically for their agency.

Human Resources: High level of capacity in place

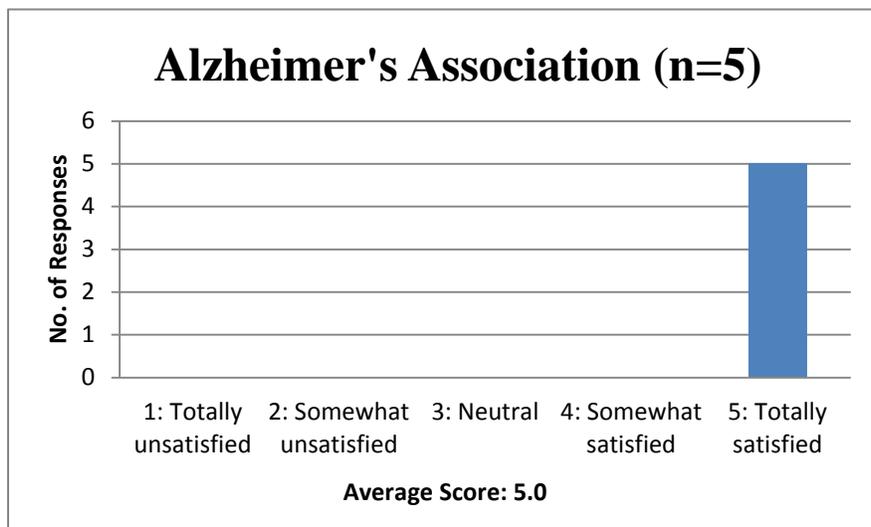
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. Volunteers are trained and utilized for tasks such as data entry.

External Relationships: High level of capacity in place

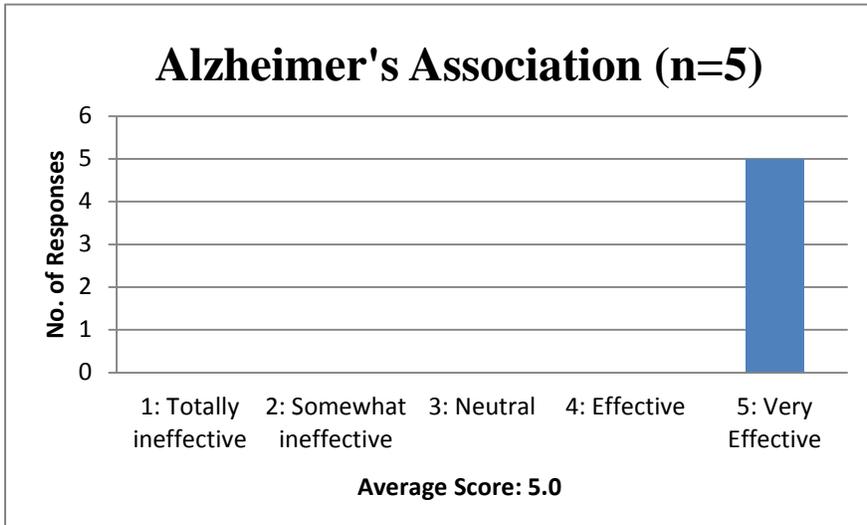
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they have a good referral network among local providers and are proud of the reputation they have built.
- The agency would like to increase knowledge in the community regarding the services and support they provide.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

<p>The Alzheimer’s Association provides needed services in the community such as respite care, educational workshops, care consultations and support groups. It is a pleasure to work with such dedicated staff.</p>
<p>Alzheimer’s Association is an invaluable information and support resource for growing numbers of families and individuals dealing with dementia.</p>
<p>Together we truly saved a client, neither of us could do it alone - but together - amazing!</p>
<p>This agency is outstanding in every way. I know we make many referrals to the agency and without exception the person referred has found them receptive and knowledgeable. The staff understands dementia but also is able to address the complexities of family dynamics /caregiver stress. The agency have various programs that touch the lives of many in very important and real ways - the respite program, SAFE Return and the LEARN MORE programs in particular come to mind. I cannot say enough in support of what this organization and staff provides. Their role becomes even more and more important as our population ages. This agency is a model for what an organization can do for quality of life.</p>

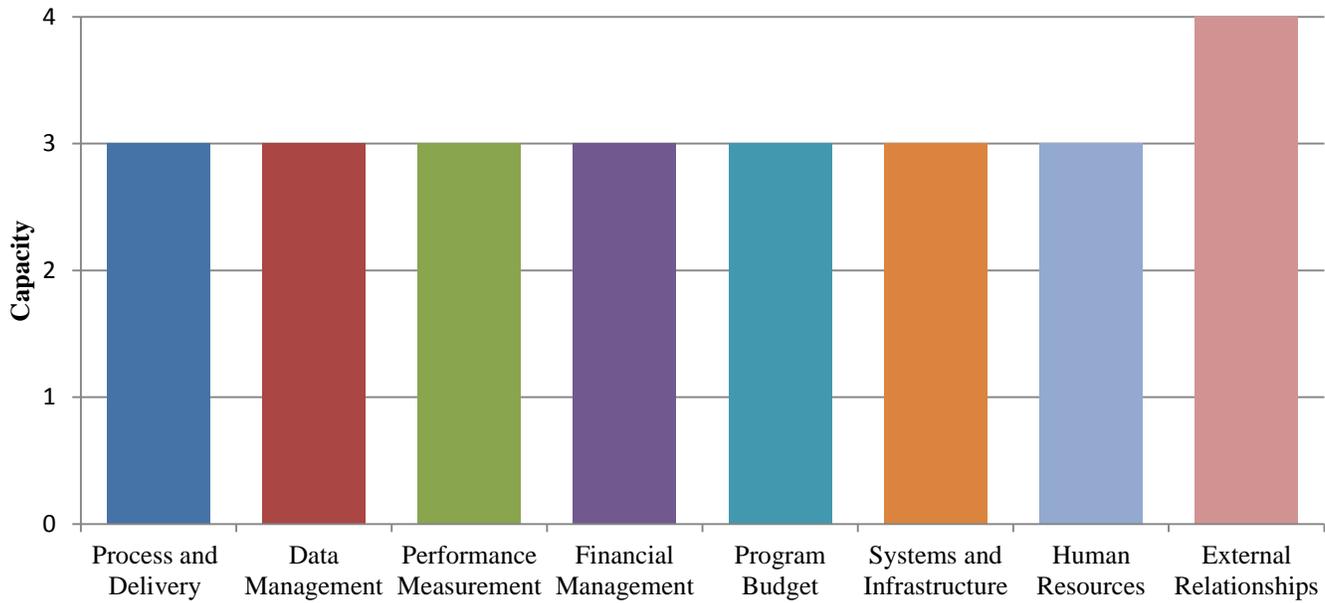
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Alzheimer's Association	Y	N	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Alzheimer's Association	Y	Y	Y	Y	Y	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Alzheimer's Association	Y	N	Y	N	Y	Y	Y	N	Y	N

Boone County Council on Aging



4 - High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Independent Living

Programs: Senior Connect

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in place in core areas. Processes are known and accepted by many and often used to increase impact. The Executive Director highlighted the development of common practices and procedures for program delivery and management.
- The agency uses program models developed by the Corporation for National Service.
- The agency conducts an annual client survey and a monthly telephone follow-up survey to determine the clients satisfaction with referrals and if their needs were met.
- The agency has encountered barriers related to uncertain future funding and previous funding cuts. The agency lacks the resources to provide crisis funding and home based mental health services, which are large needs for their population.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting.
- The agency uses timesheets, sign-in sheets, and call logs to collect data. Data are tracked using software developed specifically for the agency.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and a backup protocol for all collected data. Agency employees and volunteers participate in ongoing confidentiality training and are informed of confidentiality policies in the handbook. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the reliability of the data by training staff on data entry and management. The organization has developed good data rules to keep data consistent.
- The agency ensures the validity of the data they collect by distributing the annual survey to all clients and has systems in place to double check data for accuracy.

Performance Measures: Moderate level of capacity in place

- The agency has an adequate system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable.
- The agency utilizes performance measures to motivate and inform staff, set goals for the next year and improve performance. Agency staff meetings are based around outcomes and working towards improving service delivery.
- Performance is measured and tracked; agency collects data on program activities and strives to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The Executive Director is responsible for the day to day fiscal management of the organization.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical information and staff input to develop an agency-wide budget.
- The agency occasionally utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency’s physical infrastructure can be made to work well enough to suit the organizations immediate needs. Office space was tight prior to the cuts to RSVP funding. An upgrade to a larger server will approve the agency’s efficiency with data management.
- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol, and uses software developed specifically for their agency.

Human Resources: Moderate level of capacity in place

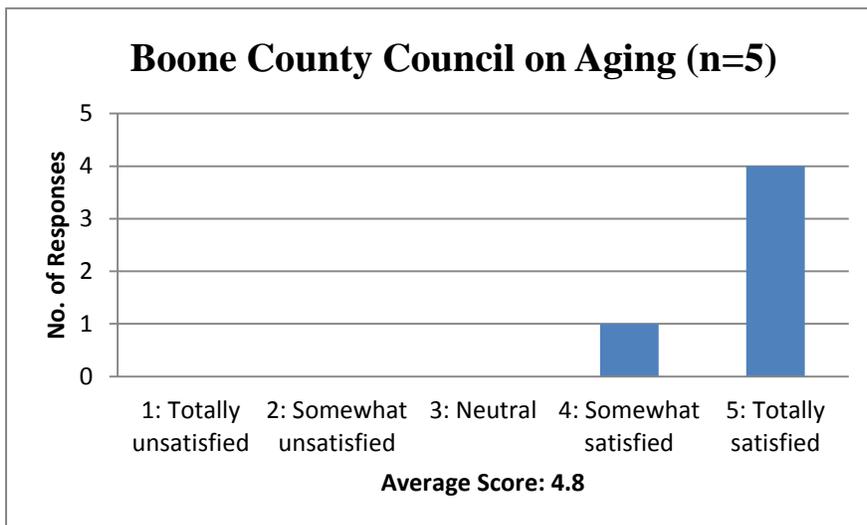
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization. However, with concerns about future funding for agency programs it is unclear if the organization will be able to maintain their current staff.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. Volunteers are trained to work well with seniors and adhere to a volunteer code of conduct.

External Relationships: High level of capacity in place

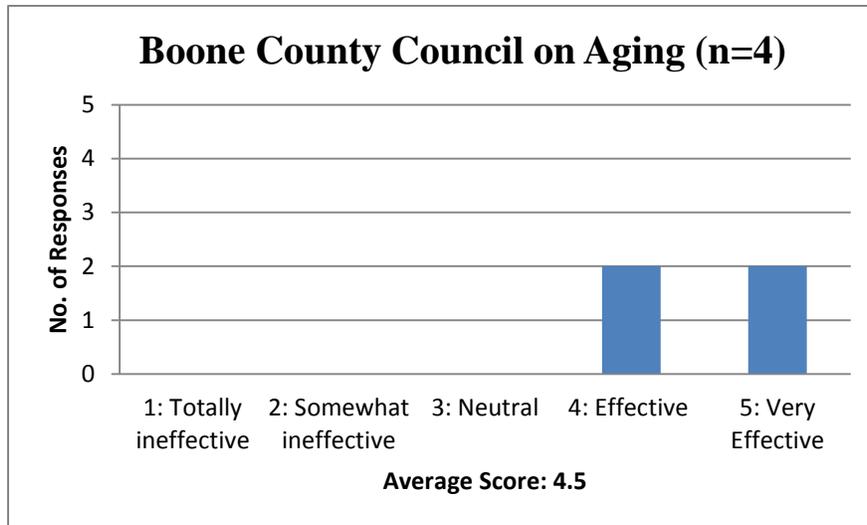
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they have a good referral network among local providers.
- The agency feels like they are not necessarily widely known in the community and are making some internal changes to emphasize the agency.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

Our agencies are able to coordinate very effectively to “wrap around” services to vulnerable and frail elders, and their family caregivers. They provide services that we can’t provide and vice versa. Frail elders largely become invisible to the community because many are homebound – but some of their living situations are horrendous due to poverty, dementia, family dynamics, and/or other physical frailties.

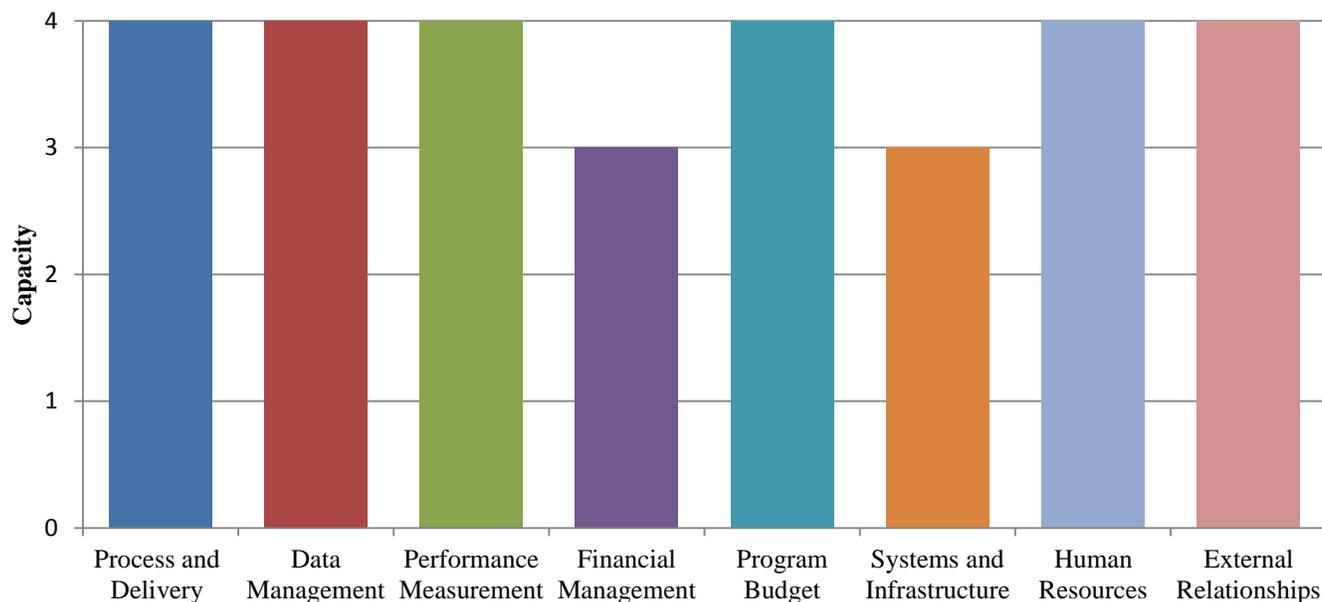
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Boone County Council on Aging	Y	N	Y	N	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Boone County Council on Aging	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Boone County Council on Aging	Y	Y	Y	Y	Y	Y	Y	Y	N	Y

CHA Low-Income Service, Inc.



4 -High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Independent Living

Programs: Independent Living Program

Process and Delivery: High level of capacity in place

- The agency has a robust, lean, well-designed set of processes in place in all areas. Processes are widely known, used and accepted and are key to ensuring full impact of the organization.
- Update: The Independent Living Program provides case management to targeted individuals in CHA's public housing and Section 8 program who are elderly or have a disability in order to help the individuals live independently as long as possible.
- The agency conducts an annual satisfaction survey and has a suggestion box for feedback and comments.
- Agency communicates information to the board of directors on a continual basis. Policy, programming and service delivery decisions are made by staff.
- The agency has determined they are ADA compliant based on regular HUD inspections of the facility.

Data Management: High level of capacity in place

- The agency has a system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for collected data. Agency employees and volunteers sign a confidentiality agreement when they are hired and participate in ongoing training for confidentiality. The agency has policies for records maintenance and utilizes paper shredders to destroy secure documents.
- The agency ensures the reliability of the data by providing consistent survey and reporting systems.
- The agency ensures the validity of the data by developing data logs based on the outputs and outcomes the agency has proposed to measure. The agency double checks data to ensure accuracy.

Performance Measures: High level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency regularly collects data on program activities, and outcomes.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations and procurement policies. Update: Effective September 2011, an accountant was hired to handle the financial functions for CHA Low-Income Service, Inc. CHA is now subject to a separate annual single audit conducted by independent accountants.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The board does not have a treasurer position, but utilizes in-house accountants.

Program Budget: High level of capacity in place

- The agency has a well-designed and informed program budget development process.
- The agency utilizes performance measurement data to help guide program budget planning. Update: The Independent Living Program has received additional funding changing a part-time position to a full-time position. As a result, there were some changes in the numbers of units and cost per unit of service.

Systems and Infrastructure: Moderate level of capacity in place

- The agency’s physical infrastructure is fully adequate for the current needs of the organization; infrastructure does not impede efficiency and effectiveness.
- The agency is using a network computer system, has a network administrator on staff, has network and PC back-up protocol, and utilizes commercial analytical software and funder provided data management software.

Human Resources: High level of capacity in place

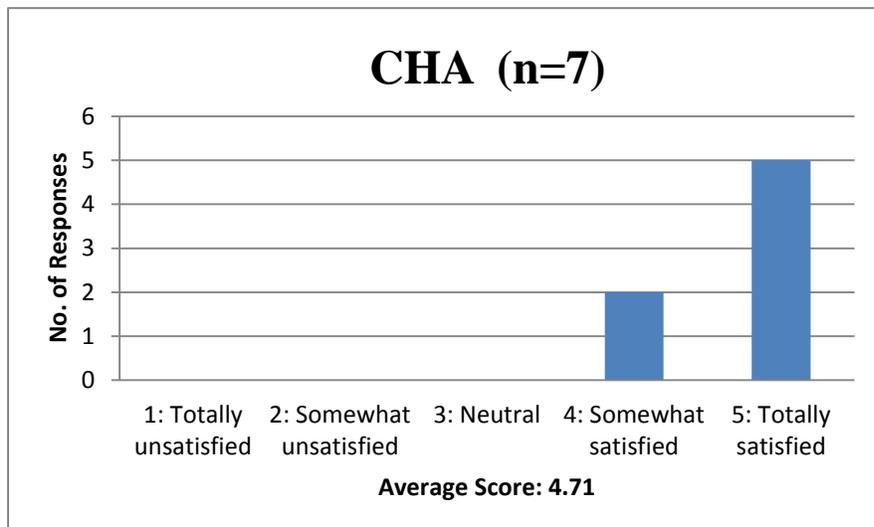
- The agency has the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization. The agency staff has excellent skills, and high ideals and standards.
- Update: As a result of the 21st Century Community Learning Center grant, the agency has new and improved data management tools, staff training, and support of a certified teacher, counselor, volunteer coordinator, and a parent educator.
- The agency’s board serves in an advisory role to the agency.
- The agency’s volunteers are capable and dedicated to the mission and vision of the organization. The agency utilizes University Service Learning students and who aggressively screened and matched to the appropriate students. The volunteers are managed and contribute to the overall success of the organization.

External Relationships: High level of capacity in place

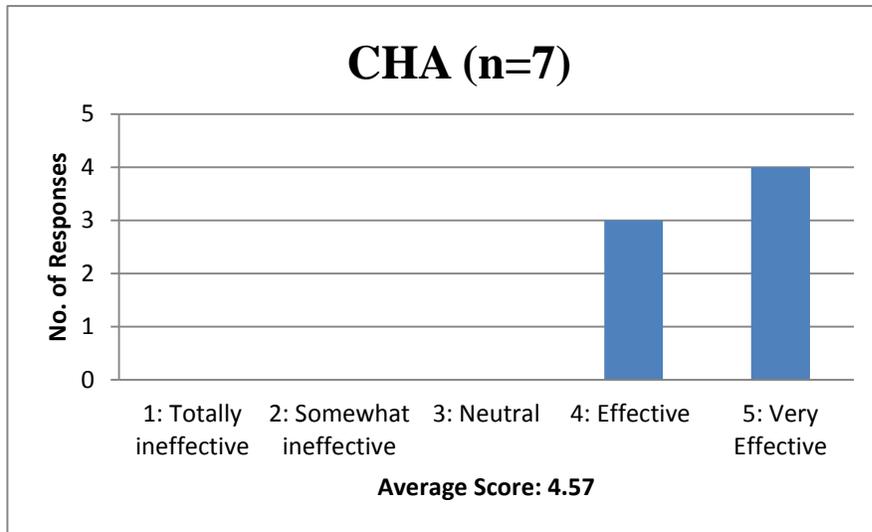
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they are well-known in the community and perceived as open and responsive to community needs.

Results of the External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners in 2011:

CHA has always provided effective services to in-need residents, and from our experience, has been very receptive to take on university students to inform them about the social issues facing our community. We greatly value our partnership with CHA.

Strong leadership focused on ensuring public housing residents have access to healthy physical activity and food options.

This agency works very hard to provide effective services for residents of public housing and section 8. They are going above and beyond many other housing agencies in providing resources and programs for self-sufficiency and life skills. Additionally, they support community programs like the Youth Community Coalition that are able to impact youth and families all across Columbia. CHALIS is very willing to support community initiatives and has an open door for working together.

We are really enjoying YC2 and working with the Moving Ahead Program.

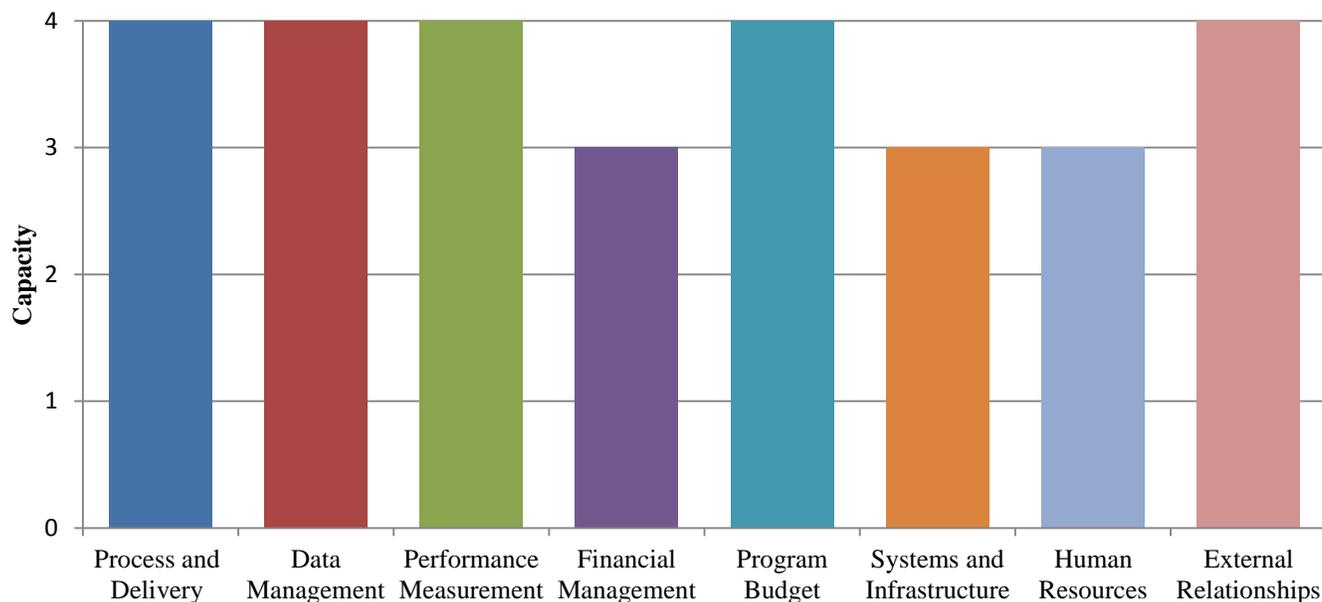
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
CHA Low-Income Services, Inc.	Y	Y	Y	Y	Y	Y	Y	N

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
CHA Low-Income Services, Inc.	Y	Y	Y	Y	N	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
CHA Low-Income Services, Inc.	Y	N	Y	Y	Y	Y	Y	Y	N	Y

Job Point



4 -High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Independent Living

Programs: Employment Service for Persons with Disabilities

Process and Delivery: High level of capacity in place

- The agency has a robust, lean, well-designed set of processes in place in all areas. Processes are widely known, used and accepted and are key to ensuring full impact of the organization.
- The agency utilizes scorecards, partnering meetings, input questionnaires, and focus groups for feedback, and has a formal complaint and grievance policy.
- The agency has encountered barriers related to a variety of family and environmental issues that their clients face.
- Agency communicates information about processes and program delivery to the board of directors on a continual basis.
- The agency has determined they are ADA compliant based on an external evaluation that is done by independent surveyors every three years.

Data Management: High level of capacity in place

- The agency has a system for data collection, management, and reporting. Update: Skills Training Program has added an Intake Support/Data Management Coordinator, which is determining eligibility, initial data entry, tracking outcome information, and receptionist duties.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for collected data. Agency employees sign a confidentiality agreement when they are hired, and participate in ongoing training for confidentiality. The agency has policies for records maintenance and utilizes paper shredders to destroy secure documents.
- The agency ensures the reliability of the data by comparing the data to information from the previous quarter to identify and correct discrepancies when applicable.
- The agency ensures the validity of the data by developing survey questions and data logs based on the outputs and outcomes the agency has proposed to measure. Data is carefully reviewed and verified by the program director and the organization's Vice President prior to dissemination.

Performance Measures: High level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency occasionally utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency regularly collects data on program activities, and utilizes tools and assessments to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations. A fiscal member has been stationed at the CBY location one day per week for improved financial management of the complexities involved with housing development.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The board has a treasurer position that plays an active role in financial management and oversight.

Program Budget: High level of capacity in place

- The agency has a well-designed and informed program budget development process. Update: Funding for the Project with Industry (PWI) grant was removed from the Federal budget thereby severely reducing this program budget.
- The agency utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency's physical infrastructure can be made to work well enough to suit the organizations most important and immediate needs; a number of improvements could greatly help increase

effectiveness and efficiency. The agency is seeking to consolidate all local Columbia staff into one facility.

- Update: In an effort to best utilize resources, all staff serving people with disabilities were moved from the Wilkes location to the administrative headquarters building on Nelwood Drive.
- The agency is using a network computer system, has a network administrator on staff, has network and PC back-up protocol, and utilizes software developed for their agency and funder provided data management software.

Human Resources: Moderate level of capacity in place

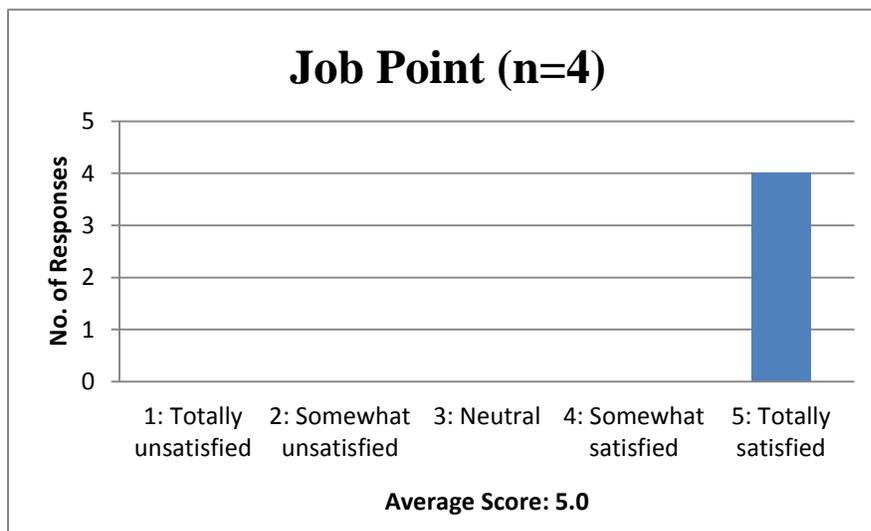
- The agency has the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization. Update: As a result of federal funding being eliminated, a staff layoff was necessary for the fiscal year beginning in July 2011.
- The agency's board provides direction, support, and accountability to the program goals. The board is fully informed of all major matters, and input and responses are actively sought and valued.
- The agency's volunteers are capable and dedicated to the mission and vision of the organization. The volunteers are managed and contribute to the overall success of the organization.

External Relationships: High level of capacity in place

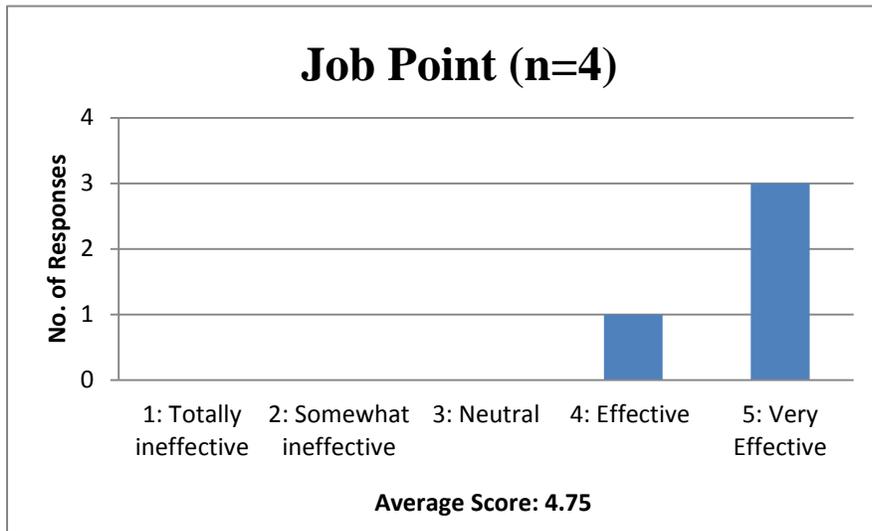
- The agency has built and leveraged some key relationships with relevant partners.
- The agency reports that they are well-known in the community and perceived as open and responsive to community needs.

Results of External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners in 2011:

<p>Job Point has been a strong partner and we hope to strengthen this partnership and find additional ways to work together.</p>
<p>All of my experiences with Job Point have been very positive. Effectively serving their clients is always their first priority. When faced with changes in funding sources or other unexpected changes in programming they quickly adapt and continue to provide services with minimal downtime. It is a pleasure to work with Job Point.</p>
<p>Job Point provides many positive and effective vocational and educational services to our clients.</p>
<p>Well –established, organized, and results-based.</p>

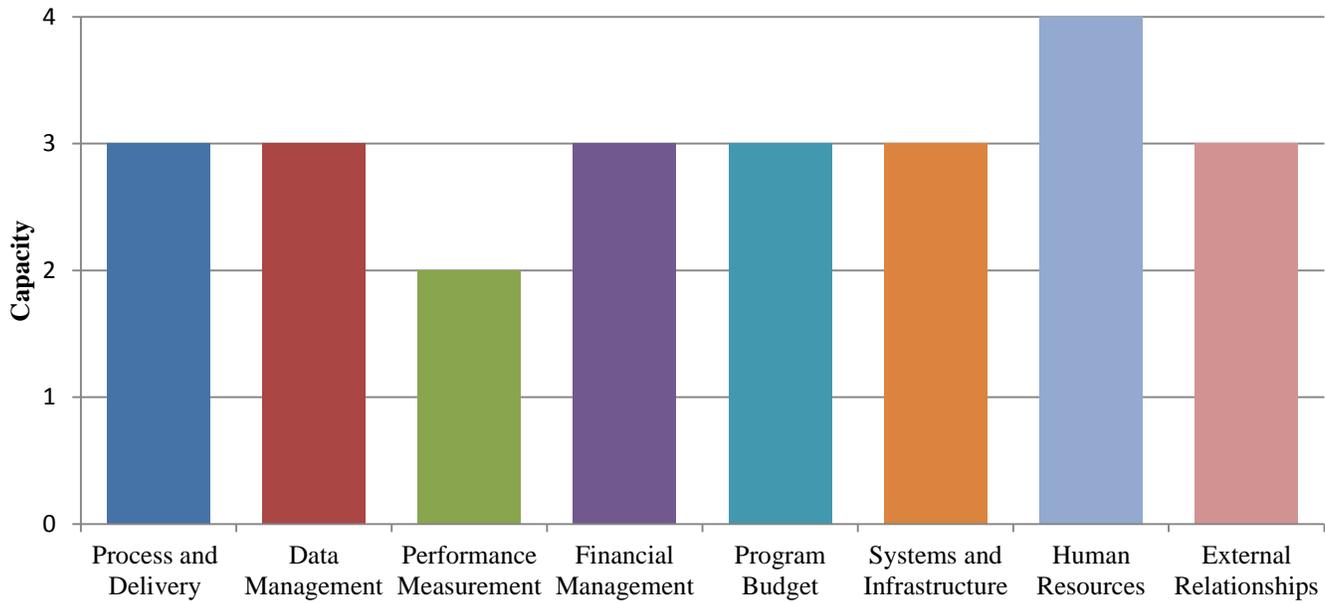
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Job Point	Y	Y	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Job Point	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Job Point	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

Meals on Wheels of Columbia



4 - High level of capacity in place
 3 - Moderate level of capacity in place
 2 - Basic level of capacity in place
 1 - Clear need for increased capacity

Category: Independent Living

Programs: Home Delivered Meals

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in core areas. Processes are known and accepted by staff often used to provide quality services.
- The agency is no longer affiliated with Meals on Wheels nationally and is independently operated. The national model is different than the model implemented locally.
- The agency conducts an annual client survey which focuses on increased nutritional intake, consistent contact by a volunteer, the ability to stay in one's home longer and reduced stress for families.
- The agency has encountered barriers related to concerns about future funding for the program. Another barrier is satisfying the clients with the food provided. Meals on Wheels does not have control over the food that is produced.
- The agency communicates information about processes and program delivery to the board of directors on a monthly basis. The board helps to identify trends and address issues.
- The agency has determined they are ADA compliant based on certification from the VA Hospital.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting. The agency's accounting system tracks the meals and clients in the program.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and a backup protocol for all collected data. Agency employees and volunteers do not sign confidentiality agreements but do participate in confidentiality training. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the reliability of the data by providing clear instructions on how to complete and return the client survey. All data is recorded by the same staff person.
- The agency ensures the validity of the data they collect by distributing the client survey to all clients. There is a double check system in place to reconcile the number of delivered meals with the number of meals produced by the hospital.

Performance Measures: Basic level of capacity in place

- The agency has a basic system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable. The agency uses an anonymous client survey distributed annually. The agency is limited in its ability to collect additional information to track the performance and outcomes of the agency.
- The agency utilizes performance measures to help identify needs and improve services.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The Executive Director and assistant are responsible for the day-to-day fiscal management of the agency. The agency has procedures in place to ensure proper fiscal management.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. An entire agency budget is produced for review by the board of directors. The agency relies on historical data with very stable expenses. The agency bases the budget strongly on the previous year's budget.
- The agency occasionally utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The physical infrastructure is well tailored to the organization’s current and anticipated needs. The agency does not have a waiting list and there is no limit on the number of meals that can be prepared.
- The agency is not using a networked computer system, and does not have a network administrator on staff. The agency has PC backup protocol, and would like a new system for accounting because of the complexity of the current system. The Executive Director reports that despite the basis computer system their current technology is adequate for the needs of the organization.

Human Resources: High level of capacity in place

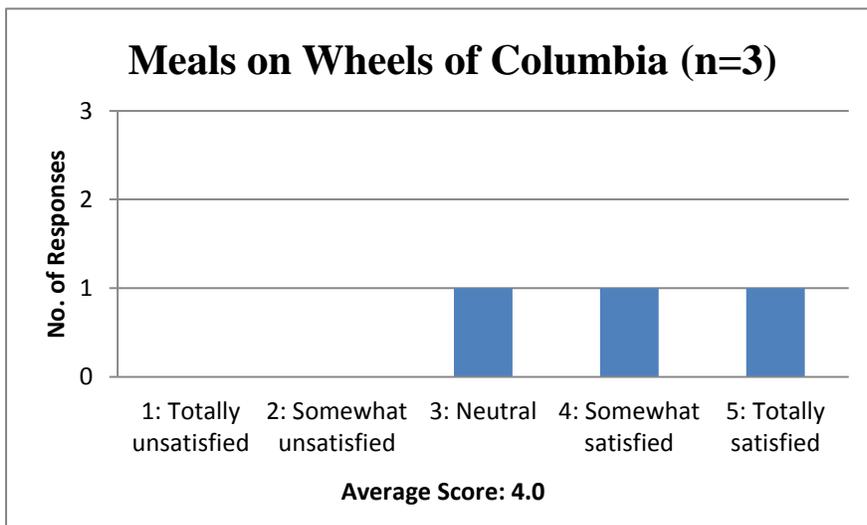
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. Volunteers are trained for meal delivery and interaction with clients and a pool of reliable volunteers has been established.

External Relationships: Moderate level of capacity in place

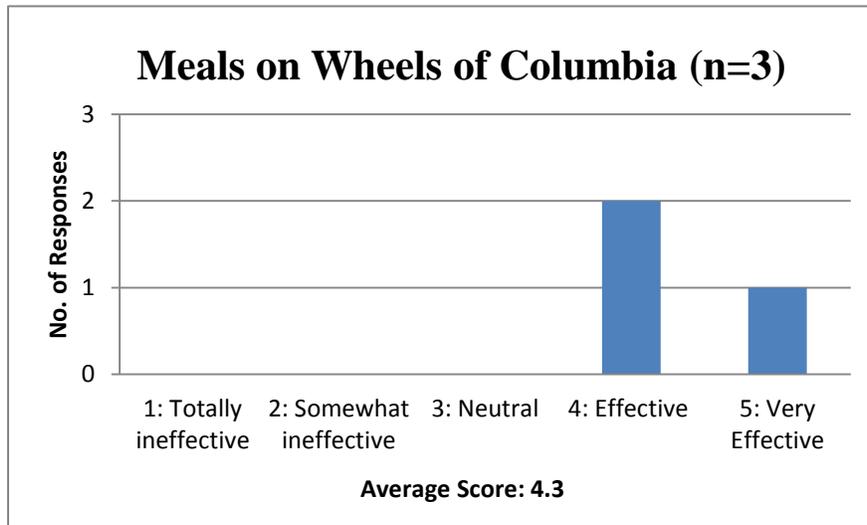
- The agency has built and leveraged some key relationships with relevant partners.
- The agency reports they are well known in the community and perceived to be actively engaged and responsive.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

Many of our clients wish the food was better.

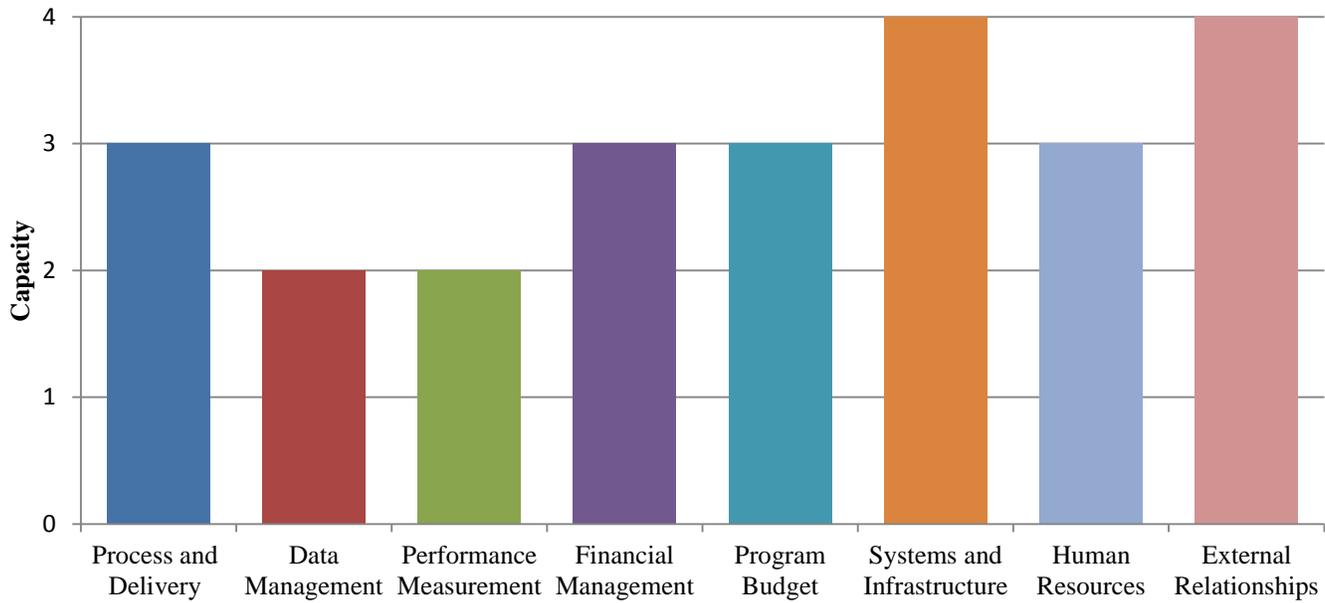
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Meals on Wheels of Columbia	Y	N	Y	N	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Meals on Wheels of Columbia	Y	Y	Y	Y	Y	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Meals on Wheels of Columbia	N	N	N	N	N	Y	Y	N	Y	N

MU Adult Day Connection



4 - High level of capacity in place
 3 - Moderate level of capacity in place
 2 - Basic level of capacity in place
 1 - Clear need for increased capacity

Category: Independent Living

Programs: Adult Day Center

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in core areas. Processes are known and accepted by many and used to improve performance and efficiency.
- The agency uses models focused on therapeutic intervention therapy and patient-centered care. The agency's model is geared to the needs of older adults.
- The agency conducts an annual caregiver evaluation which focuses on satisfaction with the program and facilities and addresses some outcomes related to independence, increased morale, and economic opportunity.
- The agency has encountered barriers related to lack of knowledge in the community about the need and services provided surrounding adult day care.
- The agency has a Community Advisory Committee that serves as an advisory board only.
- The agency has determined they are ADA compliant based on certification from the University of Missouri.

Data Management: Basic level of capacity in place

- The agency has a basic system for data collection, management, and reporting. All data collection is done through paper applications and forms. The office manager uses hard copy reports to tally information for reporting. The Executive Director reports that even though their data collection system is fairly basic it serves the needs of the organization and does not negatively affect efficiency.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers and a backup protocol for all collected data. Agency employees and volunteers sign a confidentiality agreement when they begin work and participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the reliability of the data by providing clear instructions on how to complete and return the annual caregiver evaluation. The agency only allows specific, trained staff to complete forms and reports to ensure consistency.
- The agency ensures the validity of the data they collect by distributing the caregiver survey to all clients and adhering to rigid records maintenance controls.

Performance Measures: Basic level of capacity in place

- The agency has a basic system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable. The agency uses a caregiver evaluation to collect information on outcomes related to improved morale and continued employment for caregivers. The agency is limited in its ability to collect additional information to significantly track the performance and impact of the agency.
- The agency utilizes performance measures to develop reports, gauge performance, and for public education.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The Executive Director is responsible for the day-to-day fiscal management of the agency. The University of Missouri provides fiscal oversight to the organization as well.
- The board of directors reviews and approves the organization's financial statements on a regular basis.
- The agency has a treasurer that serves in an advisory capacity.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical information and is provided possible scenarios from the University of Missouri regarding University funding.
- The agency occasionally utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: High level of capacity in place

- The physical infrastructure is well tailored to the organization’s current and anticipated needs.
- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol, and uses software developed specifically for their agency.

Human Resources: Moderate level of capacity in place

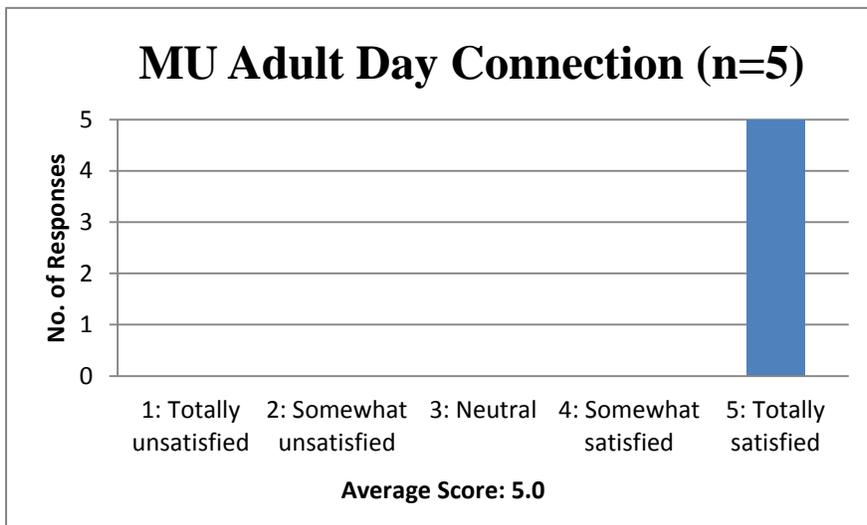
- With the resources they currently have, the agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization.
- The agency’s board serves in an advisory capacity.
- The agency’s volunteers are capable and dedicated to the mission of the organization.

External Relationships: High level of capacity in place

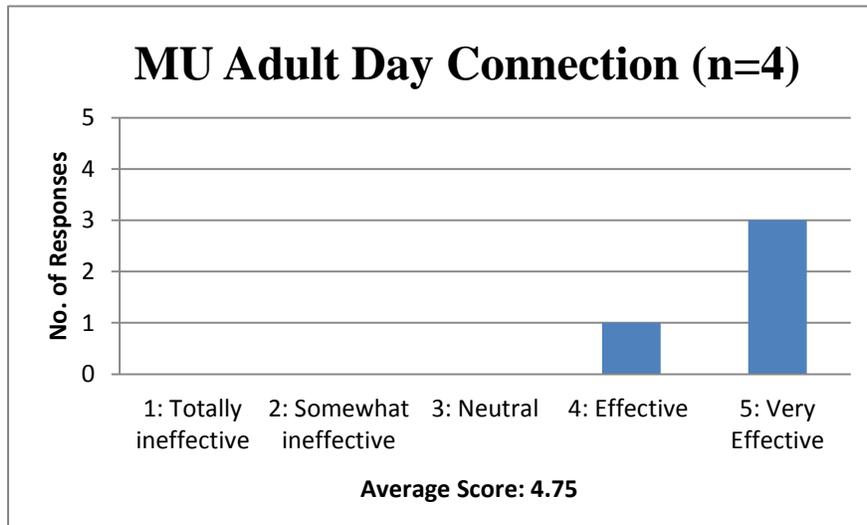
- The agency has built and leveraged some key relationships with relevant partners. The agency relies heavily on transportation partners to provide services for their clients. The agency uses partners for cross referrals for services.
- The agency would like to increase knowledge in the community regarding the services and support they provide and the work of adult day care.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

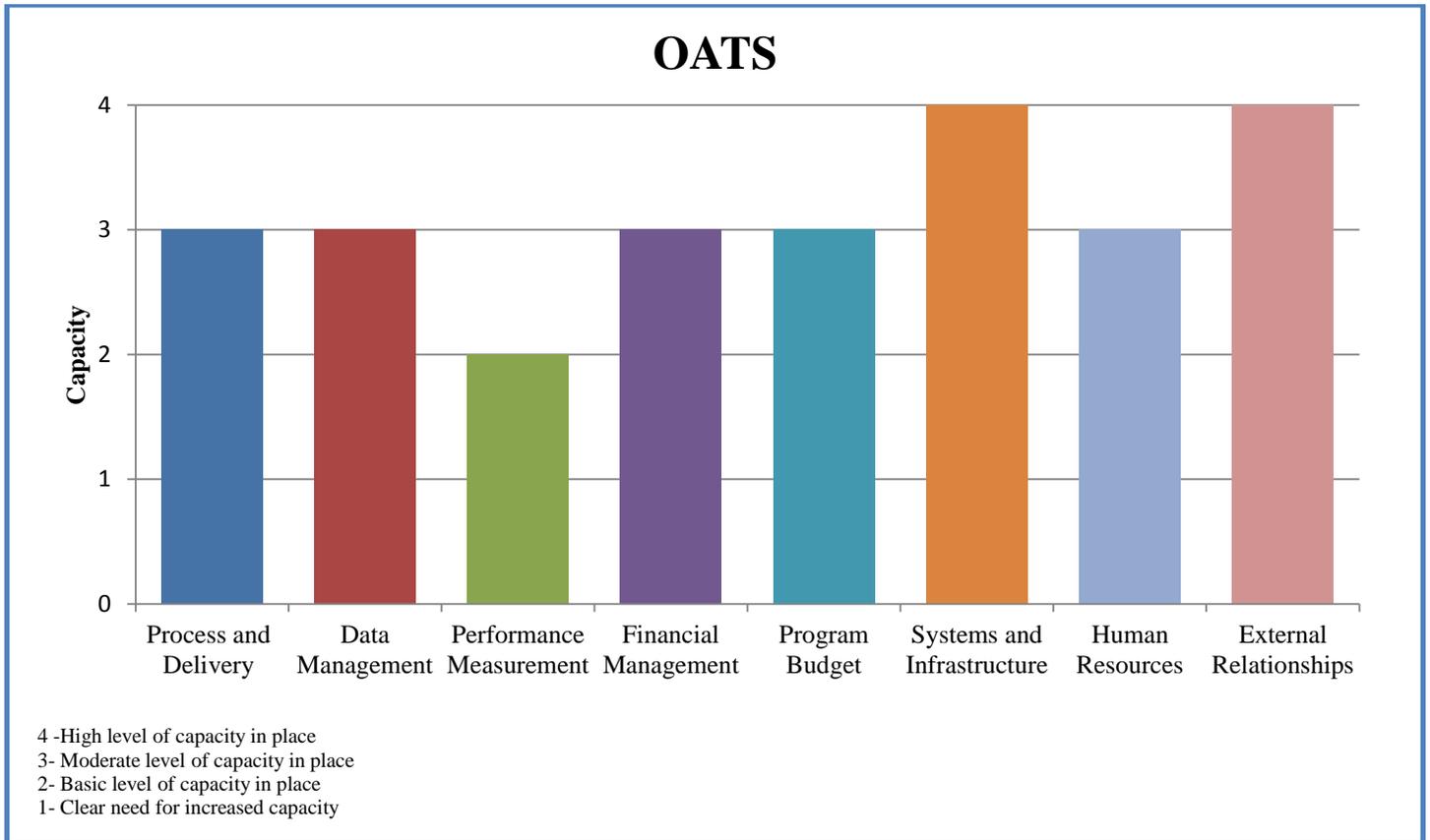
This service is targeted to a small population group, but there is intense need among this group. This service can make the difference between a family being overwhelmed with providing care and having sufficient support to continue providing care in the home versus nursing home placement. For some families who cannot afford nursing home care, this service might provide enough relieve to prevent family breakdown.

Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
MU Adult Day Connection	Y	Y	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
MU Adult Day Connection	Y	N/A	N	Y	N	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
MU Adult Day Connection	Y	N	Y	N	Y	Y	Y	N	N	Y



Category: Independent Living

Programs: Transportation for the Elderly

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in core areas. Processes are known and accepted by many and often used improve service delivery.
- The agency’s management are Certified Community Transit Managers and the agency is a member of the Missouri Public Transit Association. The OATS model is a best practice used throughout the nation.
- The agency collects information from clients about trip location, purpose, operating time, cost, user history and on time performance.
- The agency has encountered barriers related to the level of program funding, increased fuel, maintenance, and fleet update costs. The agency is also concerned about uncertain future funding. Specifically the Executive Director is concerned that as agencies propose programs to the United Way the transportation needs of clients will not be appropriately considered.
- The agency communicates information about processes and program delivery to the board of directors every other month. The board is a policy board that delegates oversight of operations to the Executive and Regional Directors.
- The agency has determined they are ADA compliant by audits and documentation from the US DOT Federal Transit Administration, administered by the Missouri Department of Transportation.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and a backup protocol for all collected data. Agency employees and volunteers sign a confidentiality agreement when they begin work and participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents. The agency also adheres to HIPPA guidelines.
- The agency ensures the validity and reliability by comparing trip logs and manifests for accuracy on a monthly basis.

Performance Measures: Basic level of capacity in place

- The agency has a basic system in place for measuring progress and tracking outputs. The agency is limited in its ability to collect additional information to track the performance and outcomes of the agency.
- The agency utilizes performance measures to improve service delivery and address scheduling and dispatching issues. The Executive Director would like to develop a comprehensive system to collect more detailed outcome data but has been unable to find the proper system or impact measures to date.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The finance director is responsible for the day-to-day fiscal management and works with regional directors to manage financial controls.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical data including operating hours and units of service. Income and cost factors are analyzed to determine the budget.
- The agency occasionally utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: High level of capacity in place

- The physical infrastructure is well tailored to the organization’s current and anticipated needs. The agency has recently made significant improvements to the fleet.
- The agency is using a networked computer system, has a network administrator on staff, and has network and PC backup protocol. The agency is piloting mobile data computers which would ensure extremely accurate data tracking instantly.

Human Resources: Moderate level of capacity in place

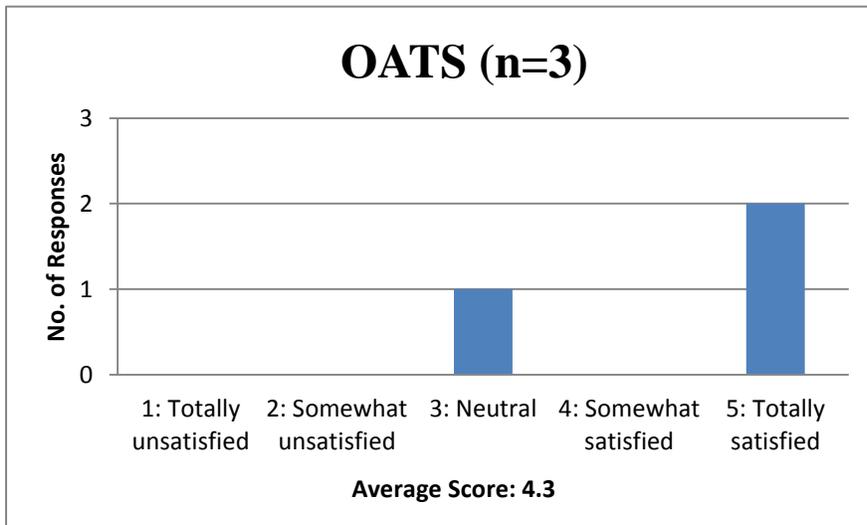
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization.
- The agency’s board serves in an advisory position and gives oversight operation to the Executive Director and Regional staff.
- The agency utilizes volunteers through the OATS County Support Committee.

External Relationships: High level of capacity in place

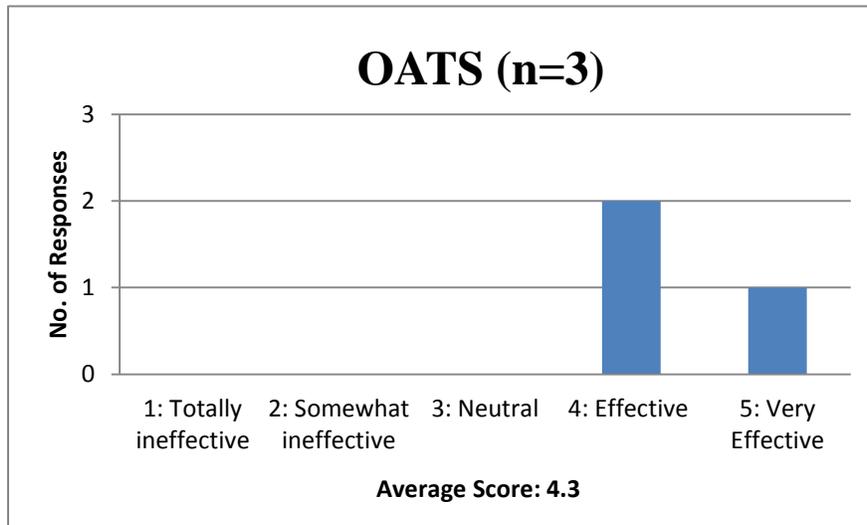
- The agency has built and leveraged some key relationships with relevant partners. The agency is contracted by local agencies and facilities to provide transportation to their clients.
- The agency feels like they are widely known in the community with more than 40 years of operation in the area.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

With funding cuts their services have also been cut in Columbia. We have created some "work arounds" but the service they provide to get our out-county clients into town is priceless!

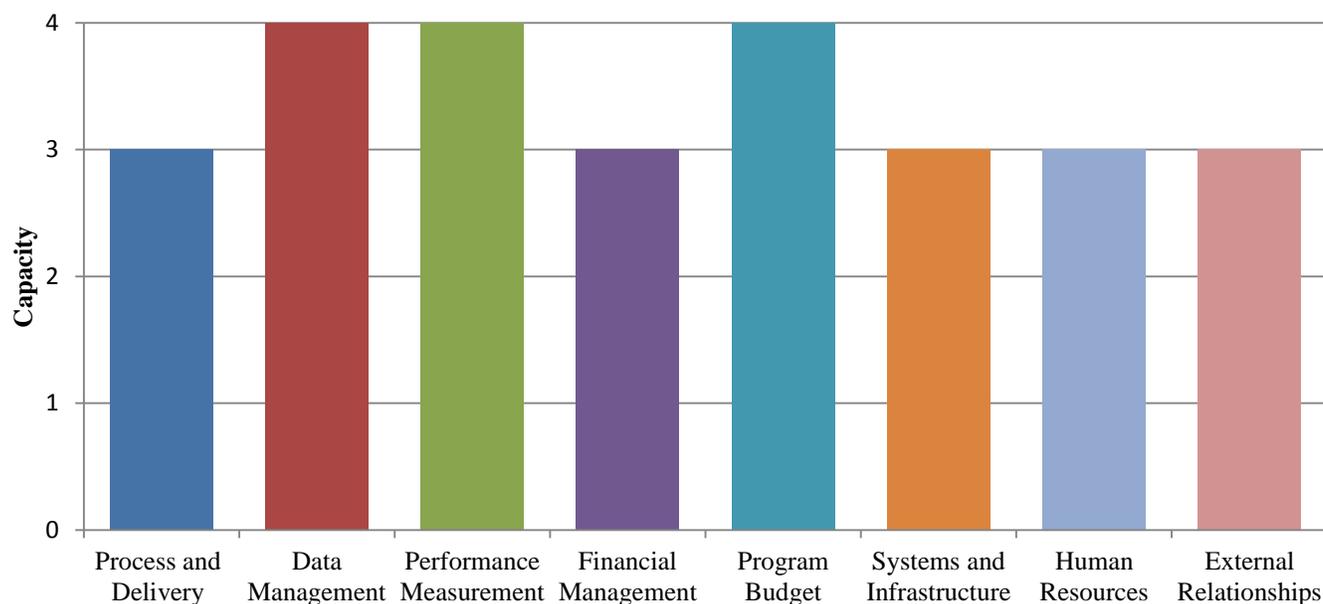
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
OATS	Y	N	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
OATS	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
OATS	Y	N	Y	N	Y	Y	Y	N	Y	N

Services for Independent Living



4 - High level of capacity in place
 3 - Moderate level of capacity in place
 2 - Basic level of capacity in place
 1 - Clear need for increased capacity

Category: Independent Living

Programs: Community Living
 Transportation
 Show-Me Tech

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in place in core areas. Processes are known and accepted by many and often used to increase impact. Update: Overall strategies are based upon individual need for each program, and in some instances, case management by a qualified independent living specialist. Individuals may access multiple programs for a comprehensive, person-centered independent living plan.
- The agency conducts a client satisfaction survey at the completion of each program. The agency also conducts follow up with participants as part of independent living services.
- The agency has encountered barriers related to transportation not centered on one program and finding accessible space for activities.
- The agency communicates information about processes and program delivery to the board of directors on a continual basis.
- The agency has determined they are ADA compliant based on on-going internal evaluation.

Data Management: High level of capacity in place

- The agency has a system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for collected data. Agency employees sign a confidentiality agreement when they are hired and participate in ongoing training for confidentiality. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the reliability of the data by providing the same instructions to all participants for the completion of surveys.
- The agency ensures the validity of the data by developing survey questions and data logs based on the outputs and outcomes the agency has proposed to measure. The agency provides the survey to all participants following programming. The agency double checks data to ensure accuracy, and does a 20% review of files as a training tool.

Performance Measures: High level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency occasionally utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency regularly collects data on program activities, and has tools and assessments in place to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations. Update: The Executive Director and finance director have financial management responsibilities.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis. Update: The Board of Directors has the final authority on financial decisions that impact the agency.
- The board has a treasurer position that plays an active role in financial management and oversight.

Program Budget: High level of capacity in place

- The agency has a well-designed and informed program budget development process. Update: The program budgets are based on a 5% annual increase due to serving an increased consumer base.
- The agency utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency's physical infrastructure can be made to work well enough to suit the organization's most important and immediate needs; a number of improvements could greatly help increase effectiveness and efficiency. Update: Through the strategic planning process and significant

growth, the Executive Director has identified the need for changes in the infrastructure. Ongoing discussion and board approval is needed before the changes are implemented.

- The agency is using a network computer system, contracts with a network administrator on an on-going basis, has network and PC back-up protocol, and utilizes funder provided data management software.

Human Resources: Moderate level of capacity in place

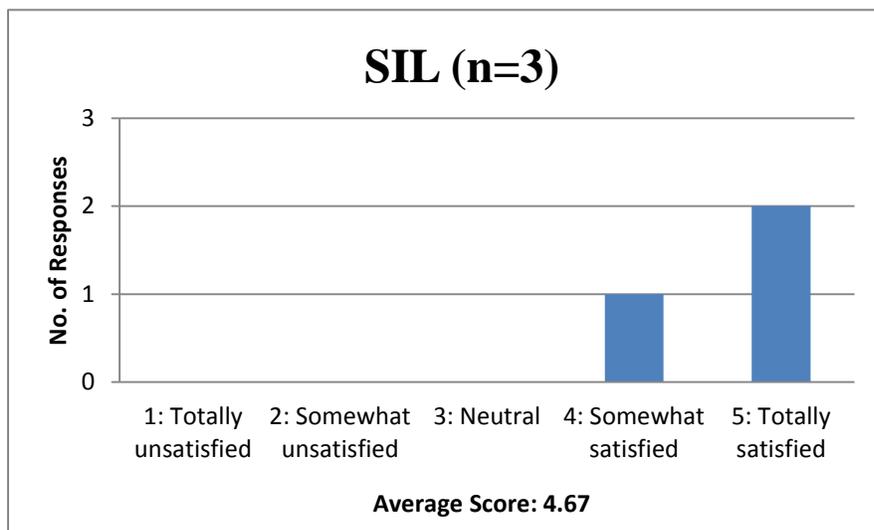
- The agency has the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization. Update: Through the strategic planning process and an internal audit of practices, SIL has identified improvements required in the Human Resources department. These are being addressed and monitored by a resource tool, which the Strategic Planning Committee reviews regularly.
- The agency’s board provides direction, support, and accountability to the program goals. The board is fully informed of all major matters, and input and responses are actively sought and valued.
- The agency’s volunteers are capable and dedicated to the mission and vision of the organization. The volunteers are managed and contribute to the overall success of the organization.

External Relationships: Moderate level of capacity in place

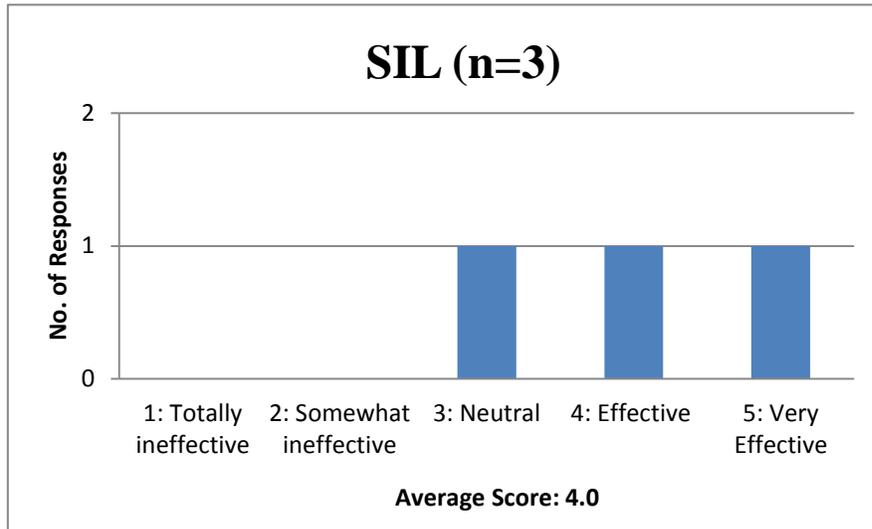
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they are well-known in the community and perceived as open and responsive to community needs.
- Update: Through the strategic planning process, SIL has learned that branding is needed to further develop relationships to meet the need of their customers and un-served and underserved populations.
- Results from the external relationship survey are as follows:

Results of External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed BY Partners in 2011:

This agency is one that is allowing persons with disabilities to live independently and they do it with integrity and respect for everyone they serve. Working with this agency allows our Adult Protective Service Workers someone to assist them in the work of advocating for adults in many areas. They are exceptional advocates and work tirelessly to assist their extraordinary population.

Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Services for Independent Living	Y	N	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Services for Independent Living	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Services for Independent Living	Y	N	N	Y	Y	Y	Y	N	N	Y

Independent Living Checklists

1. Confidentiality Checklist

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Alzheimer's Association	Y	N	Y	Y	Y	Y	Y	Y
Boone County Council on Aging	Y	N	Y	N	Y	Y	Y	Y
CHA Low-Income Services, Inc.	Y	Y	Y	Y	Y	Y	Y	N
Job Point	Y	Y	Y	Y	Y	Y	Y	Y
Meals on Wheels of Columbia	Y	N	Y	N	Y	Y	Y	Y
MU Adult Day Connection	Y	Y	Y	Y	Y	Y	Y	Y
OATS	Y	N	Y	Y	Y	Y	Y	Y
Services for Independent Living	Y	N	Y	Y	Y	Y	Y	Y

2. Financial Management

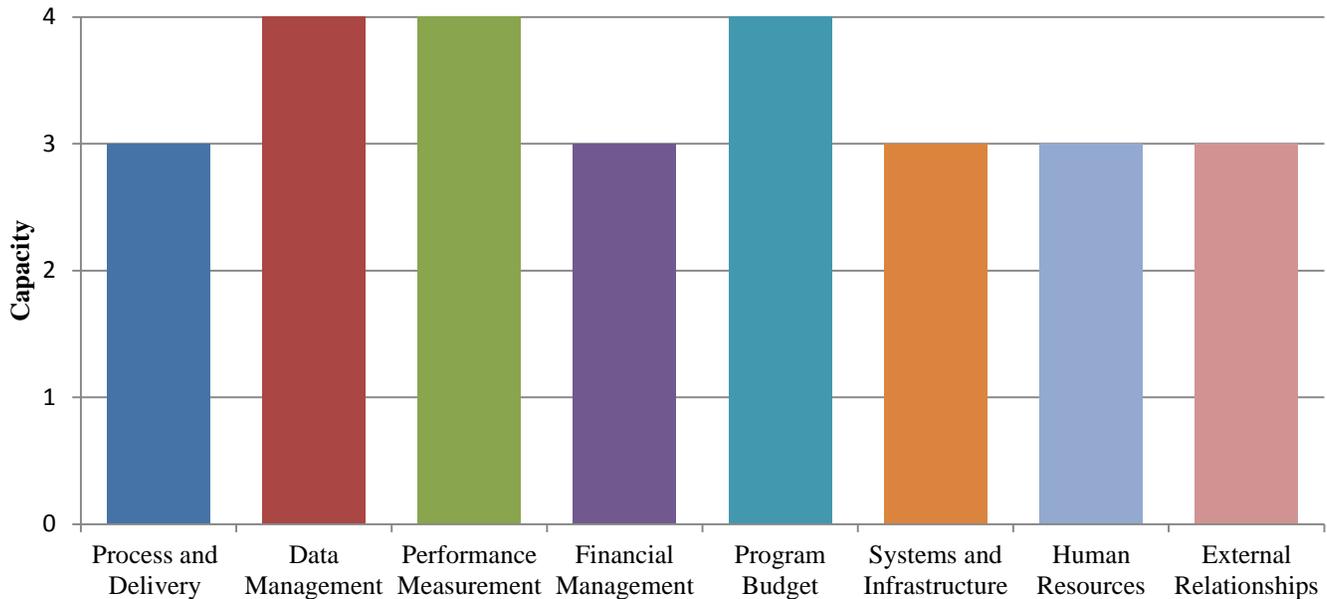
Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Alzheimer's Association	Y	Y	Y	Y	Y	Y	Y
Boone County Council on Aging	Y	Y	Y	Y	Y	N	Y
CHA Low-Income Services, Inc.	Y	Y	Y	Y	N	Y	Y
Job Point	Y	Y	Y	Y	Y	N	Y
Meals on Wheels of Columbia	Y	Y	Y	Y	Y	Y	Y
MU Adult Day Connection	Y	N/A	N	Y	N	N	Y
OATS	Y	Y	Y	Y	Y	N	Y
Services for Independent Living	Y	Y	Y	Y	Y	N	Y

3. Network and Computer Systems

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Alzheimer's Association	Y	N	Y	N	Y	Y	Y	N	Y	N
Boone County Council on Aging	Y	Y	Y	Y	Y	Y	Y	Y	N	Y
CHA Low-Income Services, Inc.	Y	N	Y	Y	Y	Y	Y	Y	N	Y
Job Point	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Meals on Wheels of Columbia	N	N	N	N	N	Y	Y	N	Y	N
MU Adult Day Connection	Y	N	Y	N	Y	Y	Y	N	N	Y
OATS	Y	N	Y	N	Y	Y	Y	N	Y	N
Services for Independent Living	Y	N	N	Y	Y	Y	Y	N	N	Y

Mental Health

Family Counseling Center of Missouri



4 -High level of capacity in place
 3- Moderate level of capacity in place
 2- Basic level of capacity in place
 1- Clear need for increased capacity

Category: Mental Health

Programs: Drug and Alcohol Counseling
 Mental Health Counseling
 Boonville/Fayette Outpatient
 Columbia Outpatient

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in place in core areas. Processes are known and accepted by many and often used to increase impact.
- The agency is licensed and accredited through the Department of Mental Health.
- The agency utilizes a consumer satisfaction survey that everyone is asked to complete. Update: The agency has changed the consumer satisfaction survey to make it more user friendly.
- The agency has encountered barriers related to high demand and limited resources which mean long waiting lists for delivery of services, lack of children’s therapists in the community, and transportation issues.
- Agency communicates information about processes and program delivery to the board of directors on a continual basis.
- The agency has determined they are ADA compliant based on annual inspections conducted by the Department of Mental Health.

Data Management: High level of capacity in place

- The agency has a robust system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for collected data. Agency employees sign a confidentiality agreement when they are hired and participate in ongoing training for confidentiality. The agency has policies for records maintenance and utilizes paper shredders and secure recycling for disposal of secure documents.
- The agency ensures the reliability of the data by providing the consistent instructions for completing satisfaction surveys.
- The agency ensures the validity of the data by developing survey questions and data logs based on the outputs and outcomes the agency has proposed to measure. The agency provides the survey to all clients for completion. The agency double checks data to ensure accuracy.

Performance Measures: High level of capacity in place

- The agency has developed outputs and outcomes that are reasonable and obtainable.
- The agency utilizes performance measures to help guide programming by looking at trends and identifying changes in need.
- Performance measured and progress tracked; agency regularly collects data on program activities, and utilizes tools and assessments to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- Agency has formal internal controls governing all financial operations.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The board has a treasurer position that plays an active role in financial management and oversight.

Program Budget: High level of capacity in place

- The agency has a well-designed and informed program budget development process.
- The agency utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency's physical infrastructure can be made to work well enough to suit the organizations most important and immediate needs; a number of improvements could greatly help increase effectiveness and efficiency. Update: The agency moved their Boonville office to 319 Main St. The new location is a much bigger facility and allows the agency to conduct groups in-house.

- The agency is using a network computer system, has a network administrator on staff, has network and PC back-up protocol, and utilizes software developed for their agency, commercial analytical software, and funder provided data management software. Update: The agency’s computer charting system was updated and staff continue to train and learn changes in the system

Human Resources: Moderate level of capacity in place

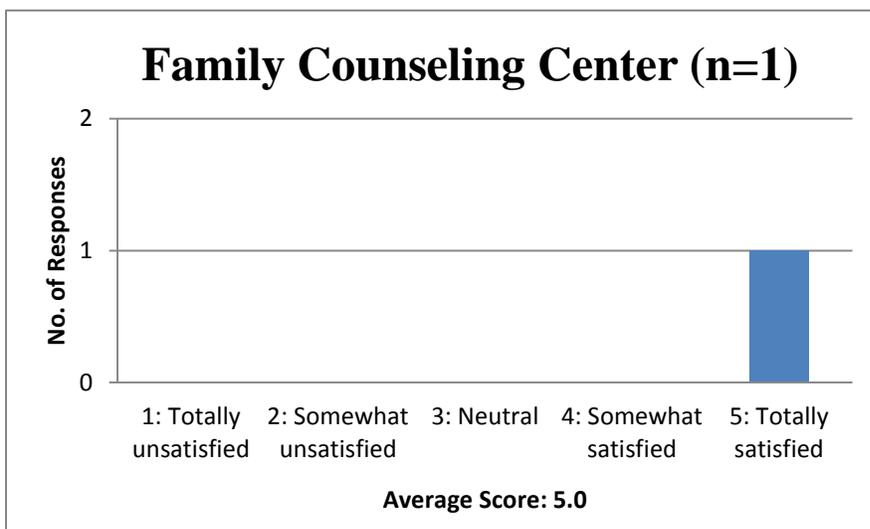
- Based on the agency’s current office capacity and resources they have the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization. The agency needs to add a counselor, but has nowhere to put that person and tight economic resources make it too risky to fill the position. Update: In the Boonville office there was a recent change in the therapist delivering services. The therapist working in Fayette has now extended his hours to see clients in Boonville.
- The agency’s board provides direction, support, and accountability to the program goals. The board is fully informed of all major matters, and input and responses are actively sought and valued.
- The agency’s utilizes volunteers who are managed and provide additional support to the organization.

External Relationships: Moderate level of capacity in place

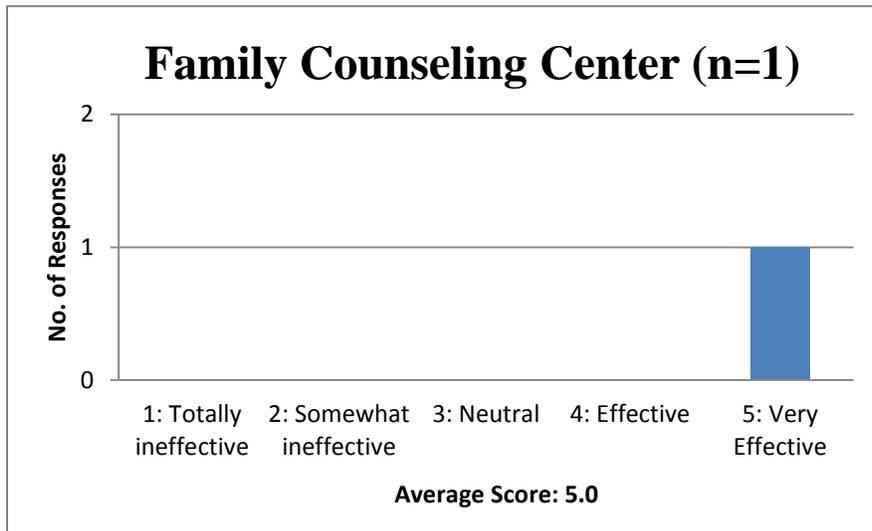
- The agency has built and leveraged some key relationships with relevant partners.
- The agency reports that they are well-known in the community and perceived as open and responsive to community needs.

Results of External Partnership Survey Completed by Partners in 2011:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed Partners in 2011:

It is truly a pleasure to work with Family Counseling Center of Missouri. Their focus is always on the betterment of community members that are in need and they go out of their way to do what they can, especially in this time of financial difficulty. Family Counseling Center of Missouri, through their programs, is a key player in the success of offenders in the community, thereby significantly enhancing the safety of the community.

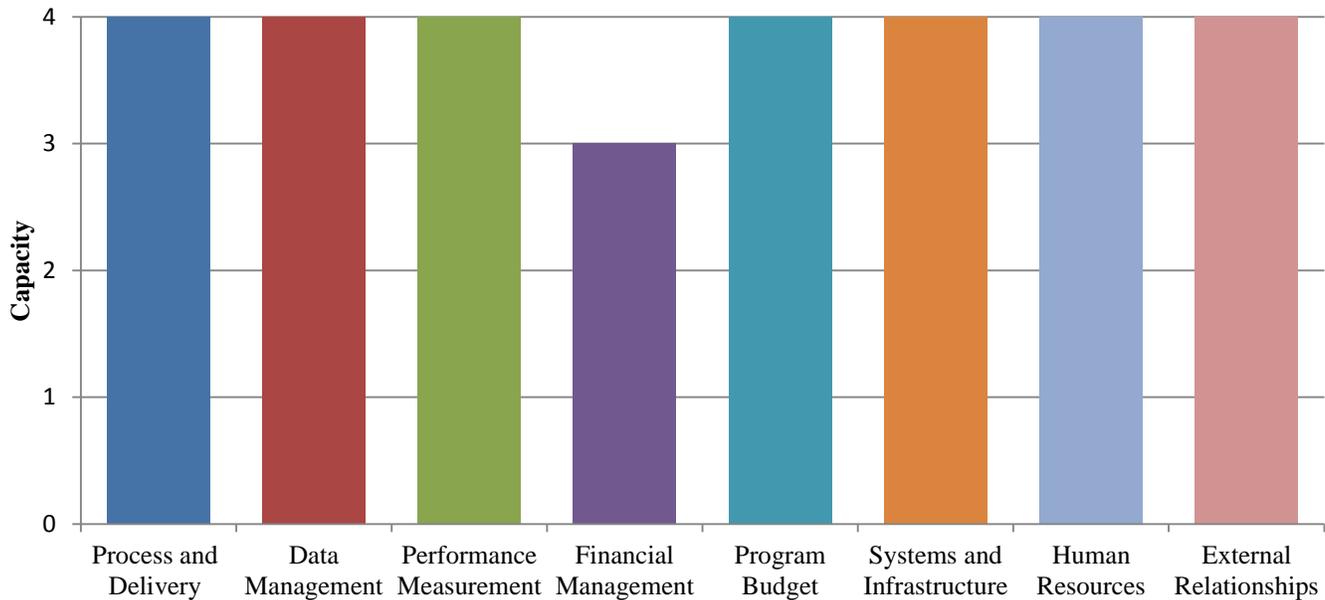
Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Family Counseling Center of Missouri	Y	Y	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Family Counseling Center of Missouri	Y	Y	Y	Y	Y	Y	N

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Family Counseling Center of Missouri	Y	N	Y	N	Y	Y	Y	Y	Y	Y

Phoenix Programs



4 - High level of capacity in place
 3 - Moderate level of capacity in place
 2 - Basic level of capacity in place
 1 - Clear need for increased capacity

Category: Mental Health

Programs: Out-Patient Substance Abuse Program

Process and Delivery: High level of capacity in place

- The agency has a robust well-designed set of processes in place in all areas. Processes are widely known, used and accepted and are key to ensuring full impact of the organization.
- The agency uses a modified therapeutic community model and several other best practices for the programming provided to their clients.
- The agency conducts an annual consumer satisfaction survey, does six month follow-up phone calls with all clients to capture outcomes on several domains
- The agency has encountered barriers related to limited resources available to the clients. Specifically the cost of service has increased without a rate increase from the Department of Mental Health.
- The agency communicates information about processes and program delivery to the board of directors on a monthly basis. The board takes a large role in external factors such as recent improvement to the website.
- The agency has determined they are ADA compliant based on building specifications and architectural certifications.

Data Management: High level of capacity in place

- The agency has a comprehensive system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers and a backup protocol for all collected data. Agency employees and volunteers sign a confidentiality agreement when they begin work and participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents. The agency adheres to HIPPA guidelines and has a computer security use policy.
- The agency ensures the reliability of the data by using established tools whenever possible, utilizing standard training practices, and providing drop down options for clinicians as often as possible.
- The agency ensures the validity of the data they collect by attempting to follow up with all clients. The agency has developed rigid data management guidelines to ensure accuracy.

Performance Measures: High level of capacity in place

- The agency has a well-developed, comprehensive system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable. The agency conducts an annual consumer satisfaction survey and does six month follow-up phone calls with all clients to capture outcomes on sobriety, housing, employment, criminal justice, mental health, and several other domains.
- The agency utilizes performance measures to improve programming, measure effectiveness, and to share with staff and board members.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The Chief Financial Officer is responsible for the day-to-day fiscal management of the organization.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: High level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on prior budgets, historical information and anticipated enrollment data to guide the budget development process.
- The agency extensively utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: High level of capacity in place

- The physical infrastructure is well tailored to the organization’s current and anticipated needs.
- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol, and uses software developed specifically for their agency.

Human Resources: High level of capacity in place

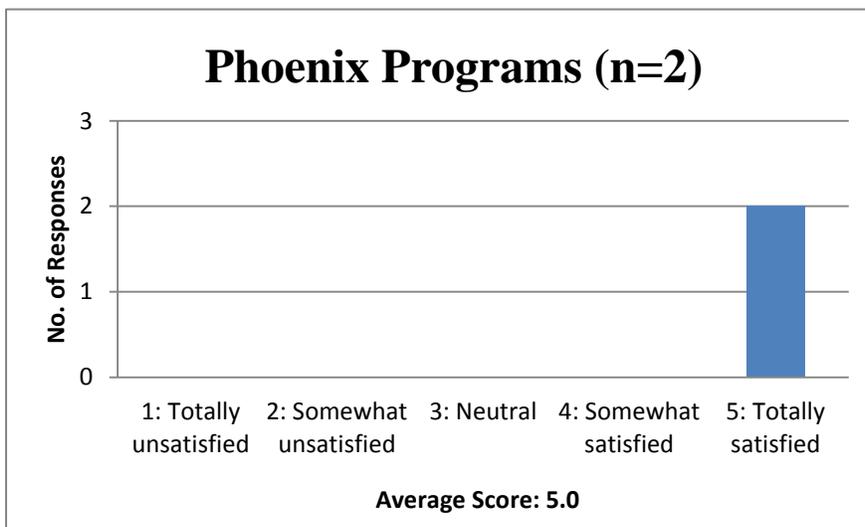
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization. The agency would like more staff in the medical field in order to integrate treatment with primary care.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. Volunteers activities are carefully tracked by the agency in order to capture how volunteers are being utilized.

External Relationships: High level of capacity in place

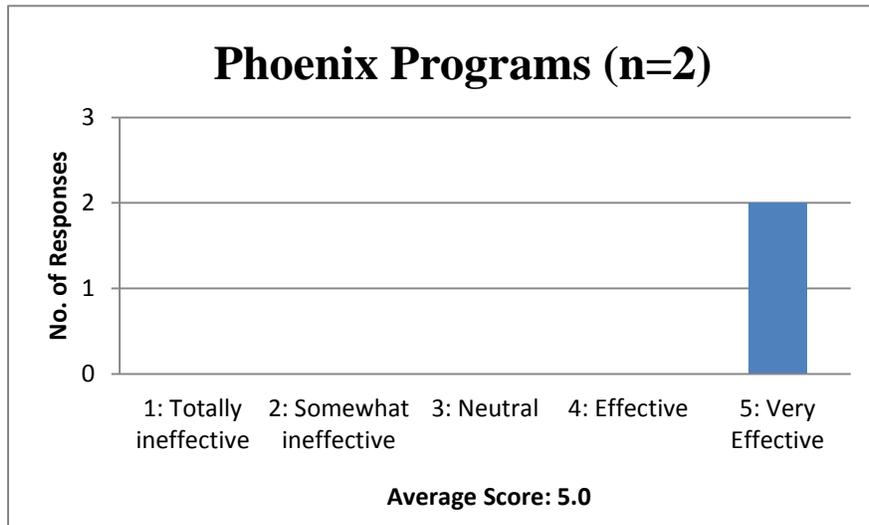
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they have a strong web of partnerships and lots of good connections in the community.
- The agency believes they are well known in the community and perceived to be actively engaged and responsive.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

Phoenix Programs is a key foundational agency in our community which has been consistently providing effective substance abuse treatment and support services to individuals and families for over 40 years. The agency has greatly expanded its ability to serve the community under its current leadership and has been innovative and visionary in its approach to treating substance abuse issues in our community. Substance abuse problems are often at the root of an individual or family crisis and are also adversely affecting the individual or family’s ability to be self-sufficient and live independently. Phoenix Programs has recognized the need to provide a continuum of services that enable individuals and families to move from homelessness and instability to self-sufficiency and independent living. They have also recognized the need to provide on-going community support services and to address the needs of persons who have been diagnosed with co-occurring disorders of substance abuse and mental health issues. Phoenix Programs has been effective in its approach in part due to its willingness to work in partnership with other community agencies. They realize that people with substance abuse issues also have multiple and interrelated needs that can only be addressed through effective coordination of services with other health and human service agencies.

Phoenix Programs is well established and organized. We subcontract with Phoenix to provide services to their youth.

Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Phoenix Programs	Y	Y	Y	Y	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Phoenix Programs	Y	Y	Y	Y	Y	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Phoenix Programs	Y	N	Y	N	Y	Y	Y	Y	N	Y

Mental Health Checklists

1. Confidentiality Checklist

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Family Counseling Center of Missouri	Y	Y	Y	Y	Y	Y	Y	Y
Phoenix Programs	Y	Y	Y	Y	Y	Y	Y	Y

2. Financial Management Checklists

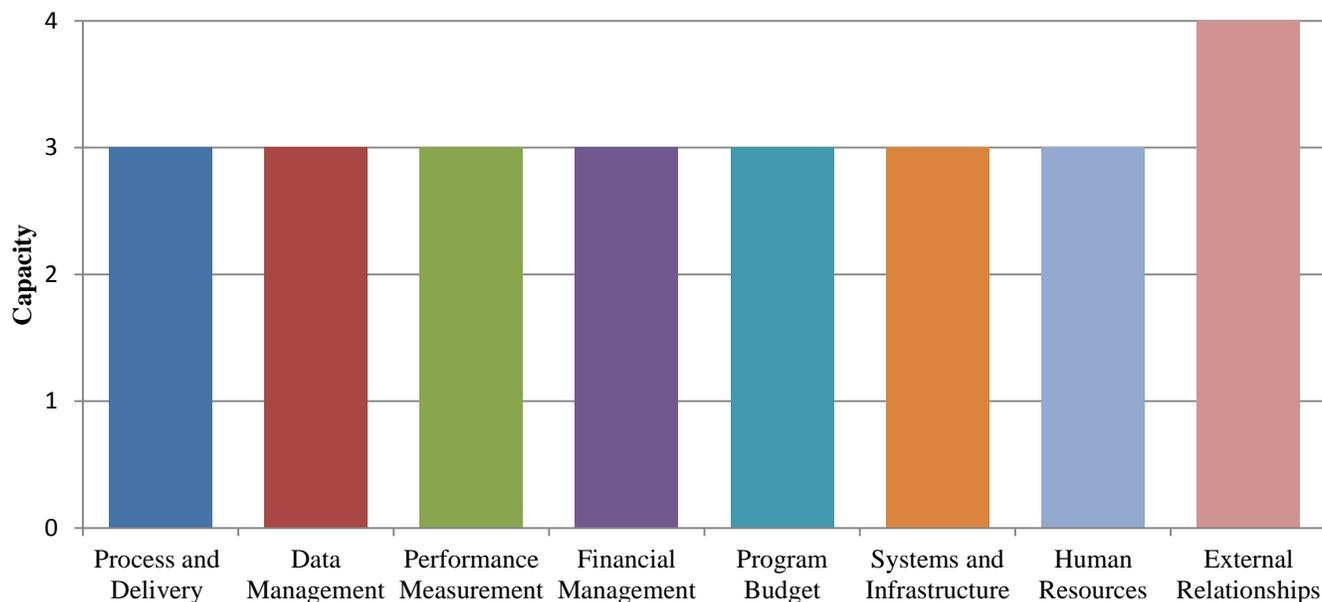
Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Family Counseling Center of Missouri	Y	Y	Y	Y	Y	Y	N
Phoenix Programs	Y	Y	Y	Y	Y	Y	Y

3. Network and Computer Systems

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Family Counseling Center of Missouri	Y	N	Y	N	Y	Y	Y	Y	Y	Y
Phoenix Programs	Y	N	Y	N	Y	Y	Y	Y	N	Y

United Way
Other

Boone County Council on Aging



4 - High level of capacity in place
 3 - Moderate level of capacity in place
 2 - Basic level of capacity in place
 1 - Clear need for increased capacity

Category: United Way Other

Programs: RSVP

Process and Delivery: Moderate level of capacity in place

- The agency has a solid, well-designed set of processes in place in core areas. Processes are known and accepted by many and often used to increase impact. The Executive Director highlighted the development of common practices and procedures for program delivery and management.
- The agency conducts an annual client survey and a monthly telephone follow-up survey to determine the clients satisfaction with referrals and if their needs were met.
- The agency has encountered barriers related to uncertain future funding and previous funding cuts. The agency lacks the resources to provide crisis funding and home based mental health services, which are large needs for their population.

Data Management: Moderate level of capacity in place

- The agency has an adequate system for data collection, management, and reporting.
- The agency uses timesheets, sign-in sheets, and call logs to collect data. Data are tracked using software developed specifically for the agency.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers and a backup protocol for all collected data. Agency employees and volunteers participate in ongoing confidentiality training and are informed of confidentiality policies in the handbook. The agency has policies for records maintenance and utilizes paper shredders and secure recycling to dispose of secure documents.
- The agency ensures the reliability of the data by training staff on data entry and management. The organization has developed good data rules to keep data consistent.
- The agency ensures the validity of the data they collect by distributing the annual survey to all clients and has systems in place to double check data for accuracy.

Performance Measures: Moderate level of capacity in place

- The agency has a system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable.
- The agency utilizes performance measures to motivate and inform staff, set goals for the next year, and improve performance. Agency staff meetings are based around outcomes and working towards improving service delivery.
- Performance is measured and tracked; agency collects data on program activities and strives to capture the impact of their programs.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The Executive Director is responsible for the day to day fiscal management of the organization.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: Moderate level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical information and staff input to develop an agency-wide budget.
- The agency utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: Moderate level of capacity in place

- The agency’s physical infrastructure can be made to work well enough to suit the organizations immediate needs. Office space was tight prior to the cuts to RSVP funding. An upgrade to a larger server will approve the agency’s efficiency with data management.
- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol, and uses software developed specifically for their agency.

Human Resources: Moderate level of capacity in place

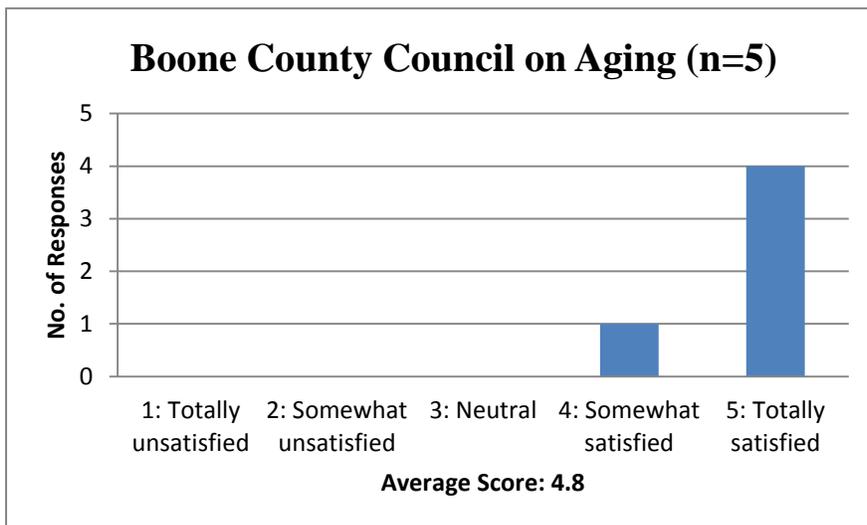
- The agency has the appropriate number of staff with a broad range of skills who are committed to the mission and vision of the organization. However, with concerns about future funding for agency programs it is unclear if the organization will be able to maintain their current staff.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. Volunteers are trained to work well with seniors and adhere to a volunteer code of conduct.

External Relationships: High level of capacity in place

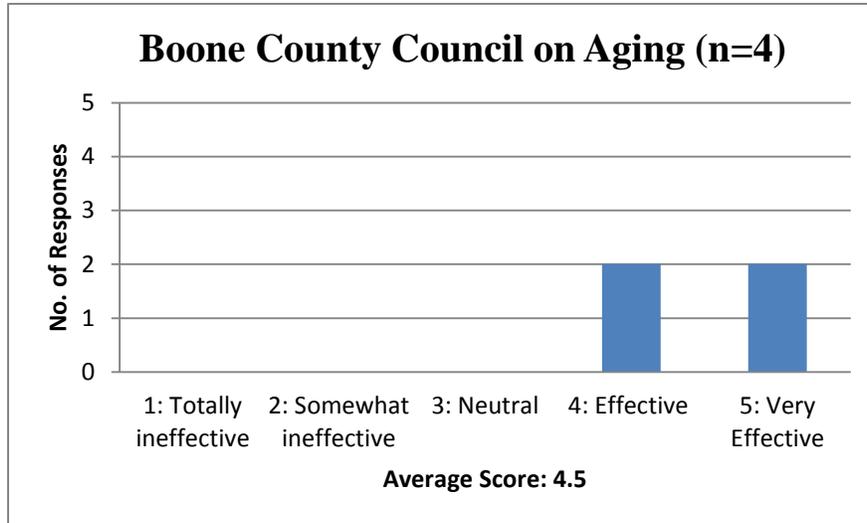
- The agency has built and leveraged some key relationships with relevant partners. The agency reports that they have a good referral network among local providers.
- The agency feels like they are not necessarily widely known in the community and are making some internal changes to emphasize the agency.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

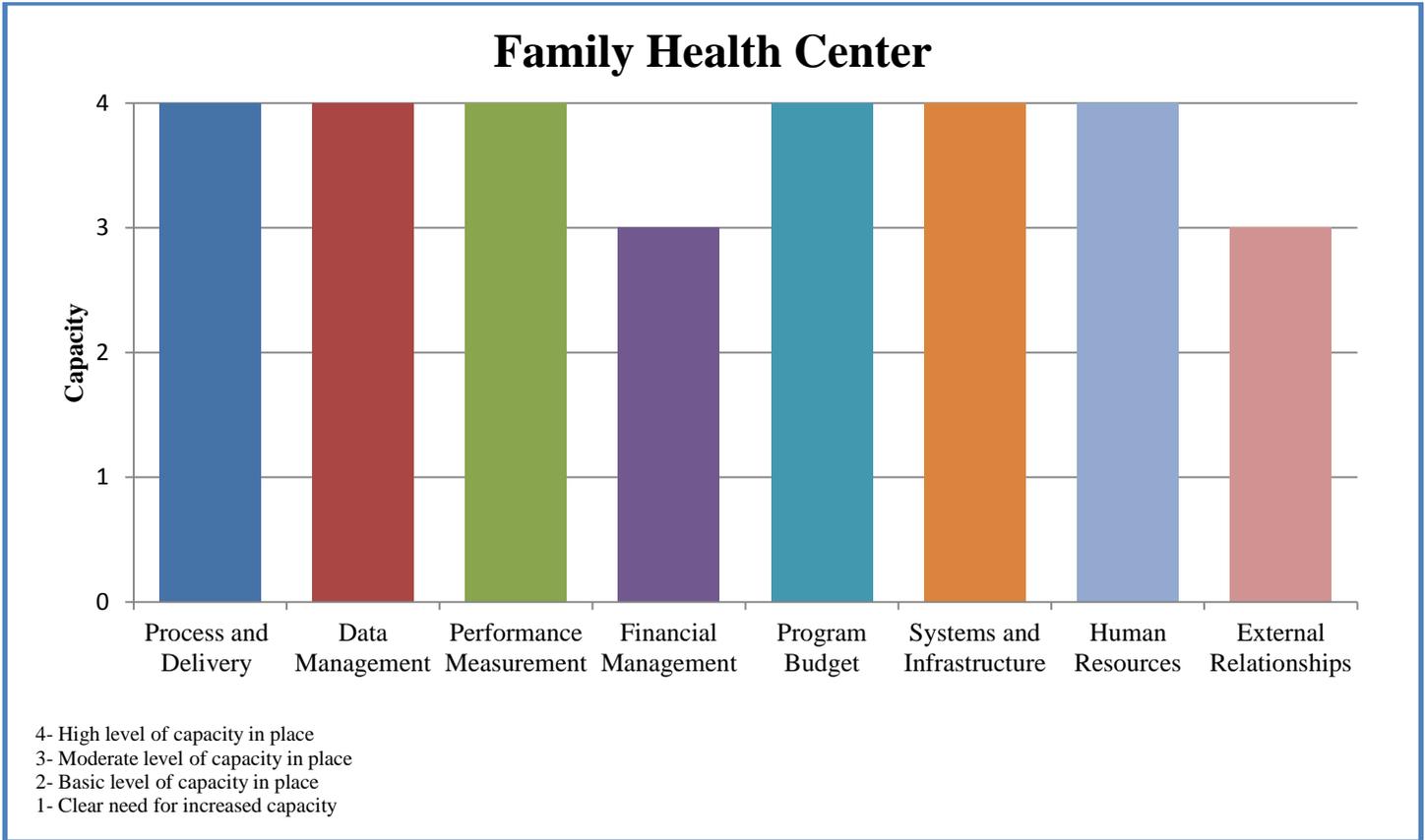
Our agencies are able to coordinate very effectively to “wrap around” services to vulnerable and frail elders, and their family caregivers. They provide services that we can’t provide and vice versa. Frail elders largely become invisible to the community because many are homebound – but some of their living situations are horrendous due to poverty, dementia, family dynamics, and/or other physical frailties.

Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Boone County Council on Aging	Y	N	Y	N	Y	Y	Y	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Boone County Council on Aging	Y	Y	Y	Y	Y	N	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Boone County Council on Aging	Y	Y	Y	Y	Y	Y	Y	Y	N	Y



Category: United Way Other

Programs: Dental

Process and Delivery: High level of capacity in place

- The agency has a robust and well-designed set of processes in place in all areas. Processes are widely known, used and accepted and are key to ensuring full impact of the organization.
- The agency uses a treatment plan completion model that is a best practice of the Oral Health Clinical Committee of the MO Primary Care Association.
- The agency conducts a quarterly satisfaction survey which evaluates treatment received and care provided.
- The agency has encountered barriers because they do not have the funding to meet the total need, so they must prioritize clients and services. There are also individual patient barriers such as transportation, time commitments, service co-pays, and education regarding the need for oral health.
- The agency communicates information about processes and program delivery to the board of directors on a monthly basis. A majority of the agency’s board of directors is comprised of patients.
- The agency has determined they are ADA compliant because of Federal requirements.

Data Management: High level of capacity in place

- The agency has a solid system for data collection, management, and reporting.
- The agency ensures the confidentiality of the data collected by utilizing password protected computers, and utilizing a backup protocol for all collected data. Agency employees, volunteers, and providers sign a confidentiality agreement and participate in ongoing confidentiality training. The agency has policies for records maintenance and utilizes secure recycling to dispose of secure documents. The agency also adheres to HIPPA compliance standards.
- The agency ensures the reliability of the data by standardizing the data entry and intake processes.
- The agency ensures the validity of the data they collect by distributing the patient satisfaction survey on a defined basis. Data are compared to Uniform Data System data generated for the calendar year and is compared to state and national comparative data. Data are also sampled to ensure reporting errors do not exist.

Performance Measures: High level of capacity in place

- The agency has a well-developed, comprehensive system in place for measuring progress and tracking outputs and outcomes that are reasonable and obtainable. The agency tracks the total number of dental treatment plans completed annually to measure impact.
- The agency utilizes performance measures to adjust appointment schedules and improve service delivery as well as for reporting quarterly to the Quality Improvement Committee.

Financial Management: Moderate level of capacity in place

- The agency has formal internal controls governing all financial operations. The senior staff accountant and the Chief Financial Officer are responsible for the day-to-day fiscal management of the agency.
- The board of directors reviews and approves the organization's financial statements, Federal Form 990, and annual audit on a regular basis.
- The agency has a finance committee and treasurer that play an active role in financial management and oversight.

Program Budget: High level of capacity in place

- The agency has a formal system for budget development and approval. The agency relies on historical data and national standards to guide budget planning.
- The agency extensively utilizes performance measurement data to help guide program budget planning.

Systems and Infrastructure: High level of capacity in place

- The physical infrastructure is well tailored to the organization's current and anticipated needs.

- The agency is using a networked computer system, has a network administrator on staff, has network and PC backup protocol. The agency is looking into new software including electronic medical records.

Human Resources: High level of capacity in place

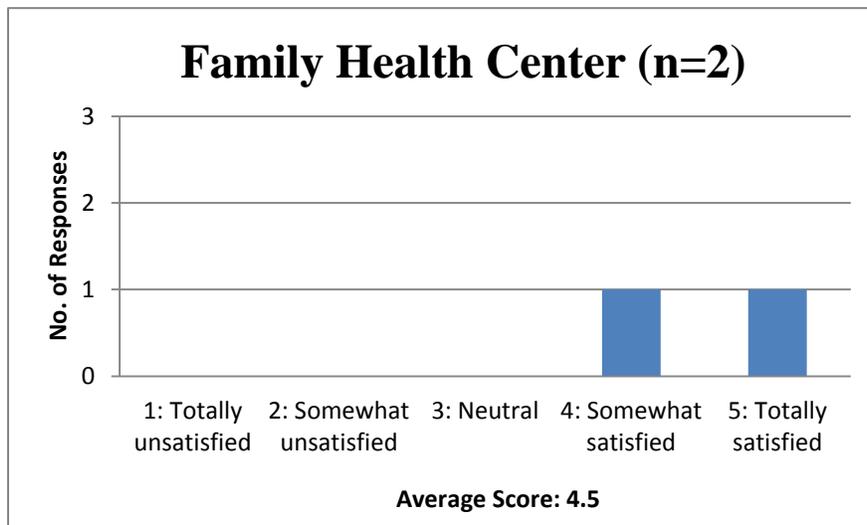
- The agency has the appropriate number of staff with a broad range of skills that who committed to the mission and vision of the organization.
- The agency’s board provides direction, support, and accountability to the program goals.
- The agency’s volunteers are capable and dedicated to the mission of the organization. Volunteers are used in definitive roles such as data collection and project development.

External Relationships: Moderate level of capacity in place

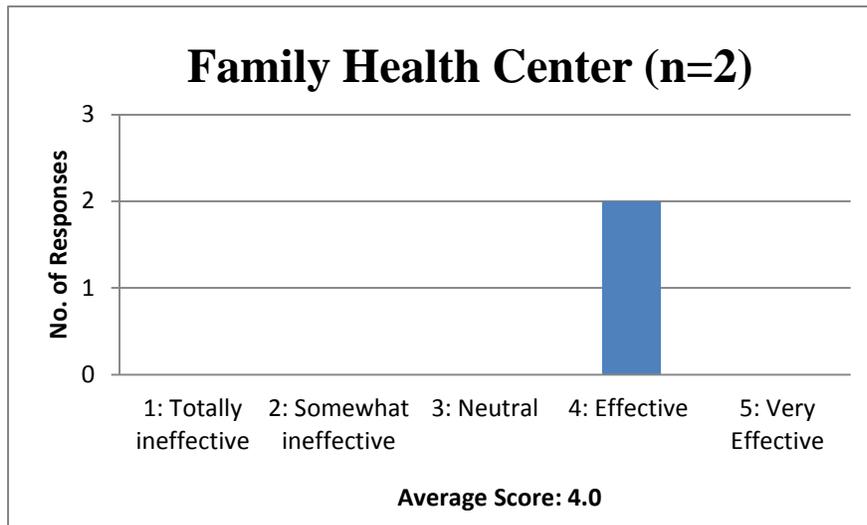
- The agency has built and leveraged some key relationships with relevant partners.
- The agency is working with a marketing consultant to broaden the community’s knowledge about the organization. The agency will do more advertisement on television this year in hopes of more efficiently reaching their clientele.

Results of External Partnership Survey Completed by Partners:

Please rate your overall satisfaction with your partnership with the agency.



Please rate your opinion of the effectiveness of each agency in the community.



Comments from External Partnership Survey Completed by Partners:

Family Health Center provides a provision of health care for individuals and families where personal insurance does not fully cover or they have no coverage at all. This Center is a wonderful community resource for many people and we utilize it frequently. The staff provides wonderful care. Would like to see more promotion of the Center however as some individuals in the community do not know it exists or what it does.

Checklists:

Agency	Confidentiality							
	Password	Privacy Filter	Back-up Protocol	Confidentiality Agreement	Regular Training	Maintenance Policies	Paper Shredder	Secure Recycling
Family Health Center	Y	N	Y	Y	Y	Y	N	Y

Agency	Financial Management						
	Financial Statement	Form 99N and Annual Audit	Process for Transactions and Payables	Controls and Policies	Treasurer Position	Training	External Advisor
Family Health Center	Y	Y	Y	Y	Y	Y	Y

Agency	Network and Computer Systems									
	Network	Non-networked Computers	Administrator on Staff	Contracted Administrator	Back-up Protocol Network	Back-up Protocol for PC	MS Suite	Commercial Analytical SW	SW Developed for Agency	Funder Provided Data Management SW
Family Health Center	Y	N	Y	N	Y	Y	Y	N	N	N

Appendix E – Update Survey Letter

Dear Executive Director:

As you are aware, all social service programs funded by the City of Columbia and County of Boone are required to participate in a process of independent program evaluation. The City, County, and HMUW are again contracting with the MU Institute of Public Policy, Truman School of Public Affairs to provide the evaluation services. This year we will evaluate three service categories: Economic Opportunity, Independent Living, and Mental Health. Your agency is contracted for program services in one of these categories; but, since you also have a program(s) in the Children, Youth and Family category, you received an evaluation site visit last year.

In order to make the evaluation process as efficient as possible, you will not be required to complete another site visit. However, we would like you to provide updates about any changes that have taken place since your last evaluation visit in regard to your agency's capacity in each of the capacity categories. We would also like a brief summary of the programs that you are implementing in the Economic Opportunity, Independent Living, or Mental Health categories. Please click on the following link and complete the online survey by **Monday, February 13th, 2012**.

https://umissouriipp.us2.qualtrics.com/SE/?SID=SV_bIcWhEL9grxOpTu

If you have any questions, you can contact me at:

Emily Johnson
(573) 884-5473
johnsonemi@missouri.edu

The following is a link to the Children, Youth and Family evaluation report from April of 2011 for your reference:

http://www.gocolumbiamo.com/CommunityServices/Programs/Social_Service/documents/2011EvaluationCYF-finalreport.pdf

If I need any additional information or have any other questions, I will follow up with a phone call.

Thank you,

Emily Johnson
Institute of Public Policy
Truman School of Public Affairs
University of Missouri
137 Middlebush Hall
Columbia, MO 65211
(573) 884-5473
(573) 884-4872 (fax)

Appendix F

City of Columbia/County of Boone Heart of Missouri United Way Social Service Agency 2012 Evaluation Template

Agency:

Category:

Program(s):

Date/Time of Visit:

Participants:

Questions? Contact: Emily Johnson
Institute of Public Policy
University of Missouri
johnsonemi@missouri.edu
(573) 884-5473

Process and Delivery

1. Please give a brief overview of your program including your target population and overall strategies.
2. What aspects of your program seem to be most successful with participants? Why do you think this is the case? How do you determine what aspects of your program as most successful?
3. What barriers to success have you encountered with your program?
4. What systems are in place to allow your consumers or community partners to supply feedback to your organization?
5. Is your agency ADA compliant? How do you determine if your agency is ADA compliant?
6. Please identify what models or best practices (if any) you utilize in the implementation of your program.
 - a. If you have not utilized a best practice or model program, are you aware of any that might fit your program? Please discuss.
7. How and what do you communicate about your organization's processes and program delivery to your board of directors? Does your board have a standing program committee? If so, describe their role in program planning, delivery, and assessment.

Data Management

8. Please describe your data collection, storage, and management techniques.
9. How do you ensure the confidentiality of the data you collect?
10. Please describe how you analyze and report data for this program.
11. Please describe the systems you utilize to ensure the validity and reliability of the data you collect and report.
12. How do you utilize the data to improve performance?
13. How and what do you communicate about your organization data management to your board of directors?

Performance Measures

14. Please describe the unit of service you report on for your program.
15. Please discuss how you measure your outputs. Please describe your ability to meet or exceed your projected outputs.
16. Please describe how you measure your outcomes. Please describe your ability to meet or exceed your projected outcomes.
17. Please describe the barriers or challenges you have experienced with performance measurement.
18. Please describe how information regarding performance measures is communicated to the board (including shortfalls or other issues).

Program Budgeting

19. Please describe your procedures for developing your program budget.
20. How do you utilize program data, including performance measures, to help develop your budget?
21. What is the cost per unit of service for your program?
22. How is the cost per unit determined when preparing your program budget?
23. How are board members utilized in the development of the program budget?

Financial Management

24. Please describe the controls and processes you have in place to ensure accuracy for financial management. Please describe any finance accountability standards or practices that you are required to or voluntarily participate in.
25. Who in your organization is responsible for the day to day fiscal management of your organization? Who is responsible for the development of budgets?

26. Does your board have a treasurer position? What is the role of the treasurer in the financial oversight of the organization? How often does the treasurer meet with staff? Which staff does the treasurer meet with? Describe the treasurer's interaction with your board regarding organizational finances.
27. Are financial reports and budgets prepared for the board of directors? Who prepares these reports? How and with what frequency are they shared with your board? Who presents this information to your board?

Program Capacity

Does your organization have the capacity to support your programming?

28. Systems and Infrastructure
 - a. Please discuss your current infrastructure and its ability to meet your current and anticipated needs.
 - b. Please describe the technology systems you utilize, including: computers, networks, and accessibility. Please describe the ability of your current technology systems to meet your current and anticipated needs.
 - c. Please describe the software and tools you utilized to access, collect, store, and report data.
29. Human Resources
 - a. Do you have the appropriate number of staff with a broad range of skills that are committed to the mission and vision of the organization? Please describe the skills and experience of your staff.
 - b. Does your board provide direction, support and accountability to the program goals? Please describe your board's role in goal setting and tracking.
 - c. How do you assess if your organization has effective management from your leaders?
 - d. Does your leadership have experience and standing in your organization and the community? Please describe their leadership experience and standing.
 - e. Are your volunteers capable and dedicated to the mission and vision of the organization? Please describe how your volunteers exhibit their dedication.
30. Performance Measurement utilization
 - a. Please describe your experience with utilizing performance measurements in your organization.
 - b. How do you utilize your performance measurement data to guide programming?
 - c. Are the performance measurements required under this funding consistent with other funders you report to? Please describe any similarities and differences among other funders.
31. External Relationships
 - a. Please describe the organizations you collaborate with in the community.
 - b. Is your organization widely known in the community and perceived to be actively engaged and responsive?
 - c. How and what do you communicate about your organizations external relationships to your board of directors?

32. Other comments

- a. Is there anything else regarding your agency or your programs that you would like to discuss?

Agency Feedback

33. You will be asked to provide the evaluator with anonymous feedback regarding the evaluation process following this visit.

	<u>Yes</u>	<u>NO</u>
Checklists: A. Confidentiality Checklist	_____	_____
B. Financial Management	_____	_____
C. Network and Computer	_____	_____
D. External Partners	_____	_____

Appendix G

Confidentiality Checklist

	YES	NO
1. Does your agency have individual passwords for each PC?	_____	_____
2. Does your agency use a privacy filter for individual monitors?	_____	_____
3. Does your agency have a back-up protocol for collected data?	_____	_____
4. Do employees sign a confidentiality agreement when they are hired?	_____	_____
5. Does your agency provide employees regular trainings for confidentiality?	_____	_____
6. Does your agency keep record maintenance policies and controls?	_____	_____
7. Does your agency have and utilize equipment such as paper shredders and secure recycling?	_____	_____
8. Are there any other steps that you take to ensure confidentiality?	_____	_____
If YES, please explain: _____		

Appendix H

Financial Management Checklist

	Yes	No
1. Does your board of directors review and approve the organization's financial statements on a regular basis?	_____	_____
2. Does your board review and approve the organization's federal form 990 and annual audit?	_____	_____
3. Does your board have a process for reviewing and approving large financial transactions or payables?	_____	_____
4. Does your board have a system of internal financial controls and policies?	_____	_____
5. Does your board have a treasurer position ?	_____	_____
6. Has your board had training in the area of finance for non profit management?	_____	_____
7. Have you contracted an accounting firm, bookkeeper or any external advisors for financial management?	_____	_____

Appendix I

Network and Computer Systems Checklist

	Yes	No
1. Is your agency currently using a network computer system?	_____	_____
2. Do you have computers that are not networked?	_____	_____
3. Do you have a network administrator on staff?	_____	_____
4. Do you contract a network administrator on an on-going basis?	_____	_____
5. Do you have a network back-up protocol?	_____	_____
6. Do you have a PC back-up protocol?	_____	_____
7. Do you utilize any of the following:		
a. Microsoft Office Suite	_____	_____
b. Commercial Analytical Software	_____	_____
c. Software Developed for your Agency	_____	_____
d. Funder Provided data management software	_____	_____

Appendix J

External Partners

Please identify 5 key partners of your agency, rate your relationship with the organization, and provide your opinion of their effectiveness in the community. Please also provide a contact name and e-mail address for your contact at the partnering agency so we can collect their opinions of your organization as well. Your information will remain confidential and will not be used in a way that will identify you or your organization.

1. Please list 5 community agencies or organization that you partner with most frequently. Please also provide a contact name and e-mail address.

A) _____

B) _____

C) _____

D) _____

E) _____

2. Please rate your overall satisfaction with your partnership with the agencies list above.

Totally **Somewhat** **Neutral** **Somewhat** **Totally**
unsatisfied **unsatisfied** **satisfied** **Satisfied**
√ √ √ √ √

	√	√	√	√	√
Agency A					
Agency B					
Agency C					
Agency D					
Agency E					

1. Please rate your opinion of the effectiveness of each agency in the community.

Totally ineffective **Somewhat ineffective** **Neutral** **Effective** **Very Effective**
√ √ √ √ √

Agency A					
Agency B					
Agency C					
Agency D					
Agency E					

2. Please provide any additional comments regarding your opinion of these agencies in the following space provided.

A) _____

B) _____

C) _____

D) _____

E) _____
