

Agency Capacity Evaluation

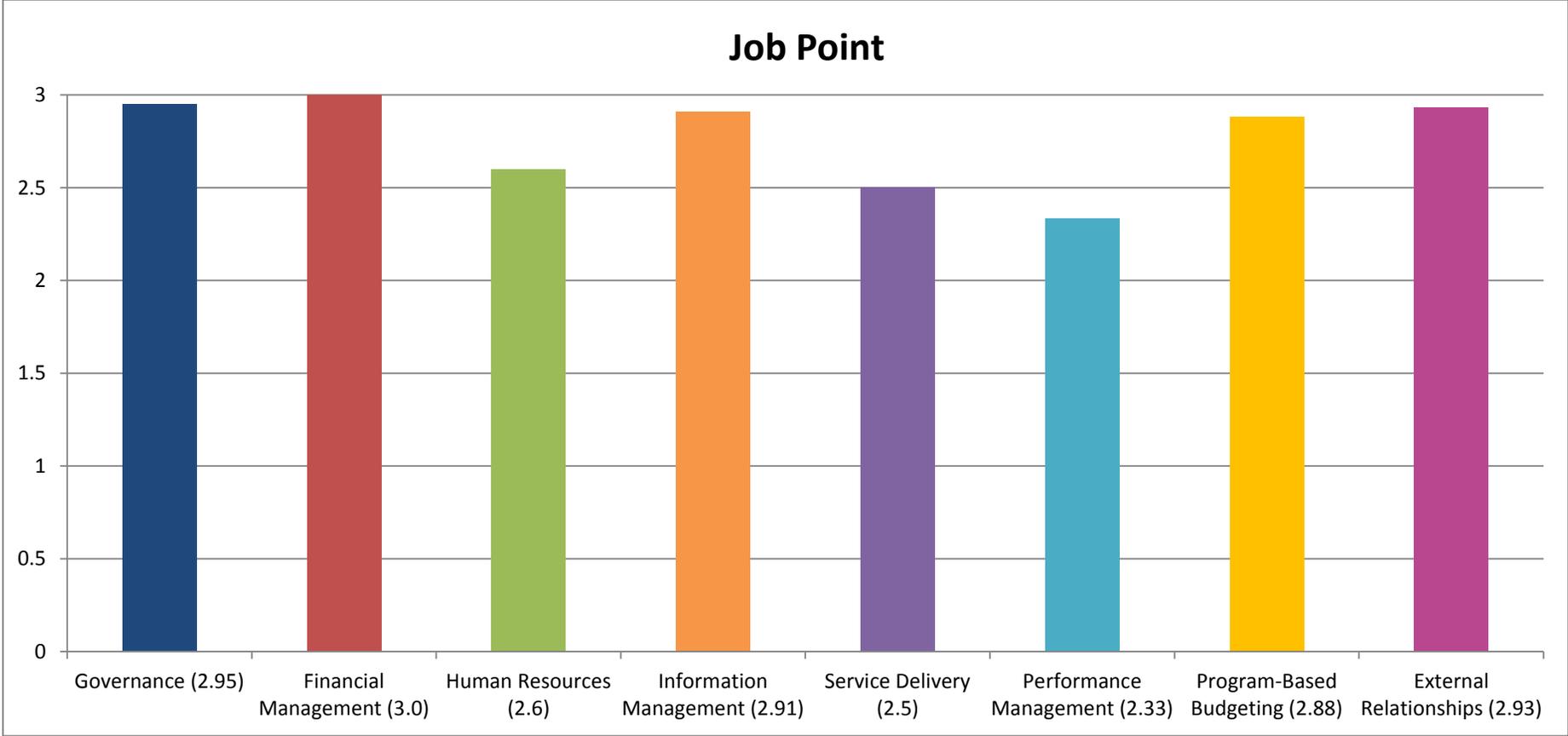
Agency: Job Point

Date of Review: August 21, 2015

Evaluation Valid: July 1, 2015-June 30, 2018

Overall Evaluation Score: 2.76

Scale
3 = High Level of Capacity
2 = Moderate Level of Capacity
1 = Low Level of Capacity



1. Governance: 2.95

	Response	Subheading Score	Category Score
Mission Statement	High – Clear expression of agency’s reason for existence	3	3.0
Vision Statement	High – Vision translates into a clear set of goals used to direct actions and set priorities	3	3.0
Board of Directors			
<ul style="list-style-type: none"> • Appropriate number of board members 	Required to have 15-21 board members, currently have 15 board members	3	
<ul style="list-style-type: none"> • Average rate 	Have maintained appropriate number of board members for 3 years	3	
<ul style="list-style-type: none"> • Terms and term limits 	3 year terms, 2 consecutive terms	3	
<ul style="list-style-type: none"> • Reflective of demographic served 	Yes – determined by observation	2	
<ul style="list-style-type: none"> • Role in goal setting and management 	Provide strong direction, support and accountability to programmatic leadership and engaged as a strategic resource	3	
<ul style="list-style-type: none"> • Family/business relationships 	No	3	
<i>Board of Directors Average Score:</i>		17/6=	2.83
Policies and Practices			
<ul style="list-style-type: none"> • Conflict of interest policy 	Yes - Reviewed by evaluator	3	
<ul style="list-style-type: none"> • Whistleblower policy 	Yes - Reviewed by evaluator	3	
<ul style="list-style-type: none"> • Document retention policy 	Yes - Reviewed by evaluator	3	
<ul style="list-style-type: none"> • Business continuity plan 	Yes - Reviewed by evaluator, <i>Long Range Plan 2012-2016</i>	3	
<ul style="list-style-type: none"> • Document meetings and track actions 	Yes- Reviewed by evaluator, Date: 7/7/2015	3	
<ul style="list-style-type: none"> • ED hiring process (Review and approval by independent persons, comparability data, and verification of the deliberation and decision) 	1) Review and approval by independent persons 2) Comparability data process indicated 3) Verification of deliberation – documentation maintained by board chair	3	
<ul style="list-style-type: none"> • Lobbying written policies and reported on IRS990 	Does not lobby	N/A	
<i>Policies and Practices Average Score:</i>		18/6=	3.0
Governance Capacity Score:		11.83/4=	2.95

2. Financial Management: 3.0

	Response	Subheading Score	Category Score
Policies, Practices, and Procedures			
<ul style="list-style-type: none"> Written financial policies and procedures 	Yes - Reviewed by evaluator	3	
<ul style="list-style-type: none"> Accountability standards or practices and controls to ensure accuracy 	General Accepted Accountability Standards adhered to, division of duties within the organization, checks and balances in place to ensure accuracy, adhere to the requirements of funders	3	
<ul style="list-style-type: none"> Accrual basis accounting 	Yes	3	
<i>Policies, Practices, and Procedures Average Score:</i>		9/3=	3.0
Oversight			
<ul style="list-style-type: none"> Person responsible for daily fiscal management 	Interim Director of Finance	Report	
<ul style="list-style-type: none"> Is this person dedicated to fiscal management 	Yes	3	
<ul style="list-style-type: none"> Who is responsible for budget development 	Interim Director of Finance and Executive Director	Report	
<ul style="list-style-type: none"> Treasurer 	Yes – Active Treasurer	3	
<ul style="list-style-type: none"> Board oversight 	Financial records are prepared by the Interim Director of Finance and presented by the Treasurer to the board at monthly meetings	Report	
<ul style="list-style-type: none"> Annual review overseen by board 	Yes	3	
<ul style="list-style-type: none"> Form 990 provided to the Board of Directors 	Yes	3	
<i>Oversight Average Score:</i>		12/4=	3.0
Insurance			
<ul style="list-style-type: none"> Workers' Compensation 	Yes	3	
<ul style="list-style-type: none"> Business Auto Liability 	Yes	3	
<ul style="list-style-type: none"> Commercial/General Liability 	Yes	3	
<ul style="list-style-type: none"> Directors and Officers Liability 	Yes	3	
<ul style="list-style-type: none"> Professional Liability 	Yes	3	
<i>Insurance Average Score:</i>		15/5=	3.0
Financial Management Capacity Score:		9.0/3=	3.0

3. Human Resources: 2.6

	Response	Subheading Score	Category Score
Employment Policies and Practices			
• Written personnel policies	Yes – Reviewed by evaluator	3	
• Non-discrimination policy	Yes – Reviewed by evaluator	3	
• Affirmative action plan	Yes – Reviewed by evaluator	3	
• Workforce reflective of demographic served	Yes – based on analysis of demographics of staff and clients	3	
• Labor laws clearly posted	Yes – Observed by evaluator	3	
• Criminal background checks on employees	Yes	3	
• Abuse and neglect checks	Yes	3	
• How often conducted	At employment and then at least every 3 years	Report	
<i>Employment Policies and Practices Average Score:</i>		21/7=	3.0
Staff Training and Development			
• New employee orientation	Yes	3	
• Staff development plan	No	1	
• Leadership development plan	No	1	
• Succession plan	No	1	
• License and certification	Yes – certification and license requirements adhered to	3	
<i>Staff Training and Development Average Score:</i>		9/5=	1.8
Volunteers			
• Screened and trained	Background checks, orientation, and training provided	3	
• How are volunteers utilized	Provide tutoring to clients, receptionist, assistant in career labs with job searches	Report	
<i>Volunteers Average Score:</i>		3/1=	3.0
Human Resources Capacity Score:		7.8/3=	2.6

4. Information Management: 2.91

		Subheading Score	Category Score
Policies and Procedures			
• Retention and destruction policies	Yes – Reviewed by evaluator	3	
• Funder requirements incorporated	Yes	3	
• Identify the records custodian	Facilities Manager	Report	
<i>Policies and Procedures Average Score:</i>		6/2=	3.0
Data Management			
• Client program and participation data	Yes	Report	
• Volunteer applications and records	Yes	Report	
• Personnel records	Yes	Report	
• Financial records	Yes	Report	
• Donor and contribution records	Yes	Report	
• Mailing list	Yes	Report	
• Workflow description	Yes	Report	
• Inventory of hardware and software	Yes	Report	
• Disaster readiness or recovery plan	Yes	Report	
<i>Data Collection Score:</i>		9 of 9 = High	3.0
• Who has access to program data	Direct service staff, Vice President, IT staff	3	
• Is program data backed-up	Yes	3	
• Validity and reliability	High – Agency has systems in place to ensure reliability and validity: Quality reviews conducted by Vice President on a quarterly basis, standard forms and training on data collection and entry	3	
• Data retained in accordance with policy	Yes	3	
<i>Program Data Management Average Score:</i>		12/4=	3.0
Confidentiality			
• Confidentiality policies and procedures	Yes	3	
• Confidentiality agreement for:			
○ Employees	Yes – Reviewed by evaluator	3	
○ Volunteers	Yes – Reviewed by evaluator	3	

○ Board members	Yes – Reviewed by evaluator	3	
● How often are they renewed	At employment or joining	Report	
● Regular trainings	Yes	3	
● Individual passwords for each computer	Yes	3	
● Privacy filters for monitors	Yes	3	
● Back-up protocol for collected data	Yes	3	
● Utilize paper shredders and/or secure recycling	Yes - both	3	
<i>Confidentiality Average Score:</i>		27/9=	3.0
Systems and Infrastructure			
● Meets current and anticipated needs	Yes	3	
● Challenges	None	Report	
● Upgrades in next two years	None planned, have recently had a large technology upgrade	Report	
● Off-site data storage	Yes	3	
● Data management software	Custom built data management system - Client Tracking System (CTS), WEBSTA for YouthBuild program, Apricot	Report	
● Network computer system	Yes	3	
● Network administrator on staff	Yes	3	
● Network back-up protocol	Yes	3	
● Utilize the following:			
○ Microsoft Office Suite	Yes	Report	
○ Commercial analytical software	No	Report	
● Rate systems for:			
○ Data collection	Moderate	2	
○ Data management	Moderate	2	
○ Data reporting	Moderate	2	
○ Data storage	Moderate	2	
<i>Systems and Infrastructure Average Score:</i>		23/9=	2.55
<i>Information Systems Capacity Score:</i>		14.55/5=	2.91

5. Service Delivery: 2.5

	Response	Subheading Score	Category Score
Program Services			
<ul style="list-style-type: none"> • Most successful aspect of program(s) 	Individual case management provided to each client to make necessary referrals for additional social service needs	Report	
<ul style="list-style-type: none"> • Barriers 	Population is very transient and long term follow up is hard to accomplish	Report	
Infrastructure			
<ul style="list-style-type: none"> • Meet current and anticipated needs 	Yes	3	
<ul style="list-style-type: none"> • Rate capacity for <ul style="list-style-type: none"> ○ Office building and meeting space ○ Parking ○ Storage 	Low Moderate Moderate	1 2 2	
<i>Infrastructure Average Score:</i>		8/4=	2.0
Policies, Practices, and Procedure			
<ul style="list-style-type: none"> • ADA compliance and documentation 	Yes – documentation from SIL assessment	3	
<ul style="list-style-type: none"> • Written non-discrimination in public accommodations 	Yes –Reviewed by evaluator	3	
<ul style="list-style-type: none"> • Fulfill staffing ratios 	None required	N/A	
<ul style="list-style-type: none"> • Do you solicit feedback from participants 	Program evaluation and satisfaction surveys	3	
<ul style="list-style-type: none"> • Customer grievance process 	Yes	3	
<i>Policies, Practices, and Procedure Average Score:</i>		12/4=	3.0
<i>Service Delivery Capacity Score:</i>		5/2=	2.5

6. Performance Management: 2.33

	Response	Subheading Score	Capacity Score
Performance Management			
<ul style="list-style-type: none"> Barriers and challenges 	It is a challenge to maintain contact with clients and conduct long term follow-up	Report	
<ul style="list-style-type: none"> Utilized to guide programming 	Shared with staff and board members, used to identify and address gaps in programming, budgeting revenue for the new fiscal year, and in determining staffing levels	3	
<ul style="list-style-type: none"> Consistent with other funders 	No – most other funders ask for 90 employment follow-up, City asks for 120 day employment follow-up	Report	
<ul style="list-style-type: none"> Communicated to board 	Yes	3	
<ul style="list-style-type: none"> Communicated to staff and volunteers 	Yes – to staff, not to volunteers	2	
<ul style="list-style-type: none"> Rate systems for <ul style="list-style-type: none"> Monitoring performance Reporting performance Utilizing performance for evaluation and planning 	<p>Moderate</p> <p>Moderate</p> <p>Moderate</p>	<p>2</p> <p>2</p> <p>2</p>	
<i>Performance Management Capacity Score:</i>		14/6=	2.33

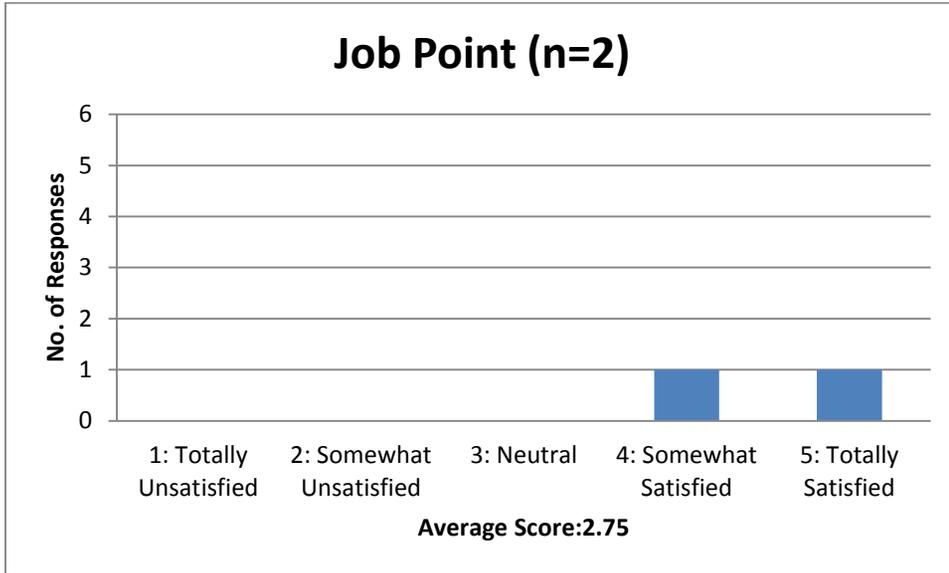
7. Program-Based Budgeting: 2.88

	Response	Subheading Score	Capacity Score
Program-Based Budgeting			
<ul style="list-style-type: none"> Procedures for developing and monitoring program budgets 	High – Well designed and informed budget development process: Interim Director of Finance works with Executive Director and program managers to develop budgets, process utilizes historical data, projected program needs and anticipated funding, presented and approved by the Board	3	
<ul style="list-style-type: none"> Does the process cover projected: <ul style="list-style-type: none"> Ongoing revenues and expenditures Occasional or special revenues and expenditures Capital expenditures 	Yes – all included	3	
<ul style="list-style-type: none"> Board members utilized 	Yes	3	
<ul style="list-style-type: none"> Annual program budgets tied to annual operational plan 	Yes	3	
<ul style="list-style-type: none"> Who is responsible for oversight 	Interim Director of Finance and Executive Director	Report	
<ul style="list-style-type: none"> Rate systems for: <ul style="list-style-type: none"> Developing program budgets Assessing data to recognize trends Working with staff to understand budgets Working with board to understand budgets Accurately forecasting change in the budget 	<p>High</p> <p>High</p> <p>High</p> <p>High</p> <p>Moderate</p>	<p>3</p> <p>3</p> <p>3</p> <p>3</p> <p>2</p>	
Program Based-budgeting Capacity Score:		26/9=	2.88

8. External Relationships: 2.93

	Response	Subheading Score	Capacity Score
External Relationships			
<ul style="list-style-type: none"> • Collaboration 	High – Have built, leveraged and maintained strong, high-impact relationships with a variety of relevant partners	3	
<ul style="list-style-type: none"> • Widely known and perceived to be engaged 	Yes	3	
<ul style="list-style-type: none"> • External partner feedback <ul style="list-style-type: none"> ○ Satisfaction ○ Effectiveness ○ Comments 	See attached	2.75 3	
<i>External Relationships Capacity Score:</i>		11.75/4=	2.93

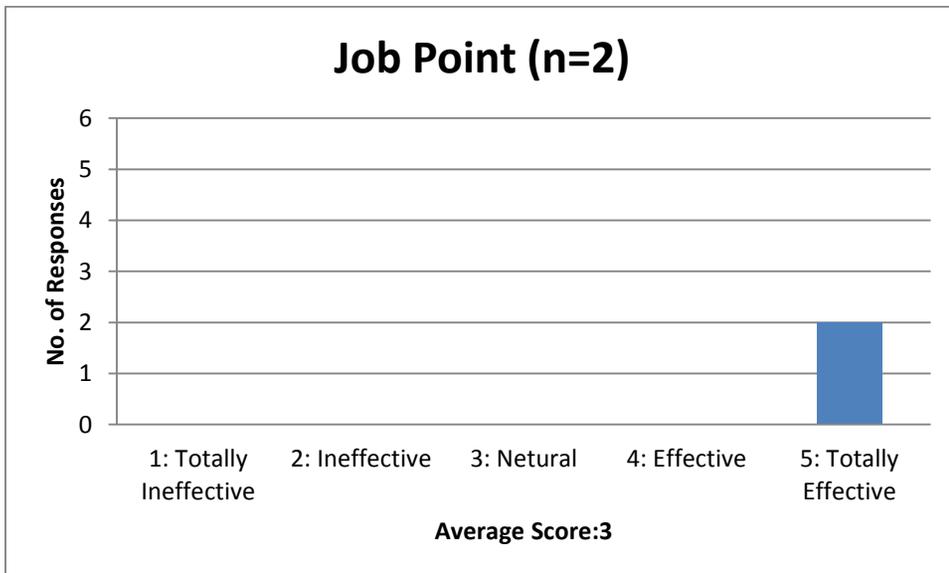
Please rate your overall satisfaction with your partnership with the agency.



Scale

- 3.0 = Totally satisfied
- 2.5 = Somewhat satisfied
- 2.0 = Neutral
- 1.5 = Somewhat unsatisfied
- 1.0 = Totally unsatisfied

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



Scale

- 3.0 = Totally effective
- 2.5 = Effective
- 2.0 = Neutral
- 1.5 = Somewhat ineffective
- 1.0 = Totally ineffective

Comments:

Job point is great for persons needing to upgrade their skill set with employment opportunities. Job Point was a very useful tool to us before the VA became highly involved. Now there seems to be limited participation space for other agencies. Job Point was a premium resource to us and we would love to see it become that again.

Job Point provides excellent services to generally anyone who wants to become a better citizen through work training, education, and obtaining valuable job searching skills.