



New Agency Program and Fiscal Improvements Checklist

OPWDD approves this agency’s application to become an OPWDD funded provider. However, OPWDD finds there are some areas the agency must strengthen in order to be successful. This checklist identifies these areas.

Background

Agency must continue to resolve any current program and/or fiscal difficulties.

Program

Agency must strengthen its plan to ensure quality and effectiveness of services

Agency would benefit by having staff/volunteers with more experience and expertise.

Agency must strengthen its organizational staffing plan.

Agency must strengthen its understanding of the regulatory requirements.

Agency does not have a strong outline for a policy and procedure manual for the service(s) proposed; agency must submit a complete policy and procedure manual before a service can be provided.

Governance

Agency’s board should have more individuals with diverse experience and expertise.

Agency must strengthen its board minutes; minutes should demonstrate that the board is informed about agency’s programs and finances, and is overseeing the Executive Director.

Board must meet more regularly.

Board must ensure that it always adheres to its bylaws.

Agency must ensure board members receive training within acceptable timeframe.

Fiscal

Agency's fiscal plan should be strengthened as it lacks detail, seems unrealistic in parts and/or doesn't adequately explain variances.

Agency's start-up funds or cash reserve are adequate but a greater cushion is recommended.

Agency should provide more detail on the source of its operational funds.

Agency should work on obtaining staff/board with greater fiscal expertise.

Agency must continue to work on repaying all outstanding debts and/or disallowances

Agency must strengthen its fiscal recording system.

Agency must strengthen its financial policies and procedures.