

**BELOW-MARKET RENT SPACE ORGANIZATIONAL ASSESSMENT CHECKLIST**

Organization Name:

**SECTION A: ASSESSMENT CRITERIA**

Performance Level			CRITERIA	Organization/Program Evidence	NOTES
L	M	H			
			<b>RESPONSIVE</b>		
		<input checked="" type="checkbox"/>	<b>1. Uses systems to track the needs of the community</b> (Q16, Q38, Q39, Q40, Q42). <b>(C1)</b>		
			Can demonstrate that:		
			a) uses demographics, statistics and other information on design, delivery and evaluation of services.		
			<b>2. Services/programs address a demonstrated community service need</b> (Q39, Q40, Q41). <b>(C1)</b>		
			Can demonstrate that:		
			a) the service need has been identified through the use of demographics, statistics and other information;		
			b) the service need is solvable and backed up by data;		
			c) the service need fits with the organizational mandate.		
			<b>3. Shows leadership in organizational planning and priority setting at the Board level</b> (Q14, Business and/or Strategic Plan). <b>(C1, C2)</b>		
			Can demonstrate that:		
			a) a current strategic plan is maintained;		
			b) uses an annual workplan, evaluation plans and program plans.		
			<b>ACCESSIBLE</b>		
			<b>4. Board of Directors reflects the community served</b> (Q18, Q19, Q20, Q21, Q23, Q24, Q25, Q30, Q31, Q36a, Q46a, Access and Equity Policies). <b>(C1, C2)</b>		
			Can demonstrate that:		
			a) equity seeking groups within the focus community are represented at all levels of the organization;	based info from Website	
			b) appropriate outreach strategies are used to increase participation of equity seeking groups at all levels of the organization;		
			c) a registered voting membership is actively recruited to reflect the community served;		
			d) the organization's Access and Equity policy is incorporated into the allocation of resources;		
			e) training budget for staff to encourage internal promotion of equity seeking groups, outreach budget for hiring and/or participants sufficient for translation and inclusion of Community newspapers.		
			<b>5. Collaborates with other services</b> (Q16, Q32b,c). <b>(C2)</b>		
			Can demonstrate that:		
			a) participates in networks and works with other organizations to address community needs		
			<b>6. Programs/services/space are free or affordable for the indended participants</b> (Q47a, Q47b) <b>(C1)</b>		

			Can demonstrate that:		
			a) programs are free, or		
			b) can justify having fees and have an accessibility policy and procedure to wave fees, and have waved fees in the past		
<b>Performance Level</b>			<b>CRITERIA</b>	<b>Organization/Program Evidence</b>	<b>NOTES</b>
L	M	H			
			<b>EFFECTIVE</b>		
			<b>7. Is governed by a Board of Directors that is responsible for the management of the organization's resources</b> (Q22, Q24, By-Laws, Constitution). <b>(C2)</b>		
			Can demonstrate that:		
			a) the Board regularly develops and reviews key policy areas;		
			b) the By-laws are reviewed to reflect organization changes;		
			c) the Board supervises the Executive Director.		
			<b>8. Uses a community development approach in addressing organizational, program and community issues</b> (Q18, Q30, Q33, Q42a, Q42b, Constitution, By-Laws, Access and Equity Policy). <b>(C1, C2)</b>		
			Can demonstrate that:		
			a) the stakeholders and community members are consulted regarding performance and programs;		
			b) builds community capacity of community members;		
			c) existence of partners roles identified, role contributes to effectiveness, no duplication of activities;		
			d) use of in-kind supports/contributions;		
			e) structures and activities are in place to support the leadership and participation of community members and equity seeking groups.		
			<b>9. Builds capacity in the target community</b> (Q26, Q27, Q45a,b,c) <b>(C1)</b>		
			Can demonstrate that:		
			a) leadership training is available for programs/services participants;		
			b) the programs increase the community skill base, social networks and/or voluntary resources;		
			c) the programs, services have had a positive impact on a significant number of participants.		
			<b>10. Has organizational, operational and governance systems and structures needed to deliver proposed services</b> (Q1-7, Q13, Q29, Q28, Q36a, By-laws, Constitution). <b>(C2)</b>		
			Can demonstrate that:		
			a) dedicated organization office and program space exist for the ongoing operation of the organization and program delivery; <i>(applicable only to existing tenants)</i>		
			b) paid staff support the operation of the organization and the programs;		

		c) active committees support the organization's governance and operations (e.g. nominating, personnel, finance, program): HR policies, job descriptions, training, training budget, volunteer co-ordinator and policies scheduled	
		<b>11. Organization is financially viable</b> (Q32a, Q32b, Q32c, Q33, Q34b, Q35, Q36a, Q36b, Q36c, Q36d, Audited Financial Statement, Audit checklist, Reserve Checklist). <b>(C2)</b>	
		Can demonstrate that:	
		a) has reasonable unrestricted reserves which can be justified by a reserve policy and business plan;	
		b) has current audited financial statements;	
		c) has diverse funding base including fund raising and in-kind support.	

Performance Level			CRITERIA	Organization/Program Evidence	NOTES
L	M	H			
			<b>ACCOUNTABLE</b>		
			<b>12. Is accountable to the organization membership through the Board of Directors</b> (Q21, Q22, Q23, By-Laws). <b>(C1, C2)</b>		
			Can demonstrate that:		
			a) a Board of Directors is elected at the AGM in accordance with the By-Laws;		
			b) the number of voting members at the AGM is greater than the number of Board members.		
			<b>13. Recruits a registered voting membership reflective of the community served</b> (Q18, Q19). <b>(C1)</b>		
			Can demonstrate that:		
			a) a registered voting membership is actively recruited and reflects the community served.		
			<b>14. Facilitates the active participation of registered members at all levels of the organization</b> (Q21). <b>(C1)</b>		
			Can demonstrate that:		
			a) the members participate as service volunteers and on the Board of Directors and committees;		
			b) information is provided to members (e.g. newsletters, annual reports, membership meetings).		
			<b>15. Uses volunteers at all levels of the organization</b> (Q28). <b>(C2)</b>		
			Can demonstrate that:		
			a) has service volunteers, committee volunteers, and volunteer board members;		
			b) the number of volunteers is greater than the number of board members.		
			<b>16. Maintains sound financial management practices</b> (Q32a, Q32b, Q32c, Q33, Q34b, Q35, Q36a, Q36b, Q36c, Q36d, Audited Financial Statement, Audit checklist, Reserve Checklist). <b>(C2)</b>		
			Can demonstrate that:		
			a) there is evidence of active management of financial resources including:		

		✓ overall finances managed by Finance Committee		
		✓ regular Board review of Financial reports and approves budgets		
		✓ produces an annual audited financial statement		
		b) meets requirements of audit review (audit checklist).		
		<b>17. Applies an evaluation tool to measure the effectiveness of the programs (Q44a, Q44b) (C2)</b>		
		Can demonstrate that:		
		a) evaluation tools such as surveys, tests, interviews and consultations are used to determine whether the programs/services have met their designed goals;		
		b) indicators of success are used to quantify the valuation results;		
		c) evaluation reports are provided to management staff and committees;		
		d) participants are involved in the evaluation of the programs.		
<b>ORGANIZATION PERFORMANCE ASSESSMENT</b>		<b>18. Areas of Concern:</b>	<b>19. Overall Risk Assessment Organization assessed as:</b>	
<b>L</b>	<b>M</b>	<b>H</b>	<b>LOW</b>	<b>Medium</b> <b>High</b>

**SECTION B: ORGANIZATION ELIGIBILITY TO OBTAIN LEGAL TITLE TO S.37 ASSET**

<b>Organization:</b>		
YES	NO	
High Performance Medium Performance	Low Performance	Organization has an acceptable level of <u>performance</u> , as indicated on the Organizational Performance Checklist
Low Risk Medium Risk	High Risk	Organization has an acceptable level of <u>risk</u> , as indicated on the Organizational Risk Assessment Cf

**Conclusion:**

YES	<p>Organization <b>meets requirements to receive legal title of s. 37 Asset:</b></p> <p>High Perf.-Low Risk                      Med. Perf.-Low Risk                      High Perf.-Med. Risk</p> <p>1. Prospective <b>Owner</b> : Continue to Section C  <del>2. Existing Tenant: Sign Service Agreement and Renew Lease</del></p>
YES/NO	<p>Organization <b>does not meet requirements to legal title of s. 37 Asset:</b></p> <p>1. Prospective <b>Owner</b> : <b>Rejected</b>  <del>2. Existing Tenant: Provide continued tenancy conditions and:-</del></p> <p><del>1) Access Community Development Unit resources;</del>  <del>2) Consult with ARO if tenant is City grant recipient;</del>  <del>3) Identify re-assessment timelines;</del>  <del>4) Initiate eviction process if no improvement.</del></p>

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Med. Perf.-Med. Risk

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**SECTION C: RANKING FOR ELIGIBILITY TO RECEIVE LEGAL TITLE TO S. 37 ASSET**

\* This section is applicable only for assessment of the Prospective **Owner**

Ranking/Coding		BMR Priority Criteria:	Evidenced by:
YES	<b>NO</b>	<b>1. Alignment with Neighbourhood-Specific Needs, Goals and Objectives</b>	
High	Medium	The organization addresses demonstrated community service need.	
	Low	The organization's objectives and long-term goals are aligned with neighbourhood-specific needs. The organization's programs are aligned with other neighbourhood-specific resources/programs.	
YES	<b>NO</b>	<b>2. Target Community:</b>	
High	Medium	The organization serves a specific under-served target population within the neighbourhood.	
	Low	The organization has a proven track record and is accepted within the community/neighbourhood. The organization's Board of Directors reflects the community served.	
YES	<b>NO</b>	<b>3. Quality of Services:</b>	
High	Medium	The programs/services respond to a demonstrated neighbourhood/community-specific service gap.	
	Low	The programs/services use a proven, effective model of service delivery. Evaluation tools are applied to measure the effectiveness of the programs/services.	
YES	<b>NO</b>	<b>4. Likelihood of organization achieving its stated objectives:</b>	
High	Medium	The organization has operational and governance structures needed to deliver proposed programs.	
	Low	The organization maintains sound financial management practices.	
YES	<b>NO</b>	<b>5. Likelihood of organization best utilizing the s. 37 Asset</b>	
High	Medium	There is a match between required and available office space.	
	Low	There is a match between required and available programming space. The organization's utilization of space is aligned with the needs of other organizations.	

**Conclusion: The organization's ranking is (circle one):**

1	<b>YES:</b>	<b>5/5</b>
2	<b>YES:</b>	<b>4/5</b>
3	<b>YES:</b>	<b>3/5</b>
4	<b>YES:</b>	<b>2/5</b>
5	<b>YES:</b>	<b>1/5</b>
6	<b>YES:</b>	<b>0/5</b>