

QUESTIONNAIRE TITLE

Questionnaire for OCS -- JOLI Grantees in the US

Introductory Explanation

Dear OCS-JOLI Grantee:

This year, the Office of Community Services (OCS) is collecting key information about the Job Opportunities for Low-Income Individuals (JOLI) projects in the United States. The questionnaire (attached) will collect information concerning outcomes and management. Should you have any questions concerning this questionnaire or the work of AED, you may contact Dr. Rose Ann Renteria at rrenteria@aed.org or by calling (202) 884-8608.

The Paperwork Reduction Act (PRA) of 1995 - Burden Statement

Public reporting burden for this collection of information is estimated to average 1.5 hours including the time for reviewing instructions, gathering and maintaining the data needed, and completing and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. OCS grantees should not use more than 3 hours in total to complete the questionnaire.

What if no data are available to complete the questionnaire?

As needed, simply "click" on the box marked "Data Not Available". As stated in the burden statement (above), OCS grantees must not use more than 3 hours total to complete the questionnaire.

What if my organization has both CED and JOLI projects to report on?

There are separate questionnaires for each Program area. Please complete a CED questionnaire for the CED grant and a JOLI questionnaire for the JOLI grant.

BEGIN JOLI QUESTIONNAIRE

i. Date questionnaire is being completed	Month (pull down)	Day (pull down)	Year (pull down)
ii. Name of person completing the questionnaire	First Name		Last Name
iii. Job Title			
iv. Telephone Number			
v. Email			

PROJECT DESCRIPTION

Instructions

Please review the following information about your project. If the information is correct, click "yes." If the information is incorrect, click "no" and provide correct information in the space provided.

1. Organization Name	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	Click 1 only if no, please input correct info: <input type="text"/>
2. JOLI Grantee Project Number	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	if no, please input correct info: <input type="text"/>
3. Approved JOLI Award Amount	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	if no, please input correct info: <input type="text"/>
4. Project Start Date	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	if no, please input correct info: <input type="text"/>
5. Project End Date	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	if no, please input correct info: <input type="text"/>
6. Did your project start as planned on the above date?	<input type="radio"/> Yes Go to 7 <input type="radio"/> No Go to 6a		

6a If not, what was the actual start date?

6b Why was the start date delayed?

7. Are your project activities on schedule as stated in your work plan? Yes Go to 8
 No Go to 7a

7a Please indicate main reasons for the delay in your schedule.

8. Did your organization purchase equity in a business with JOLI grant funds? Yes
 No

9. Did your organization create a revolving loan fund with JOLI grant funds? Yes
 No

10. What is the geographic location of your JOLI project? Click 1 only Rural
 Urban

11. Please indicate if any of the following development designations apply to the geographic area in which this JOLI project is taking place: Click all that apply Empowerment zone
 Enterprise zone
 Enterprise community
 Renewal community
 Other:

12. During project implementation with which organizations have you coordinated with for participant referrals? Click all that apply Local TANF office(s)
 Local employment agency(cies)
 Local child support enforcement agency(cies)
 State TANF office(s)
 State employment agency(cies)
 State child support enforcement agency(cies)
 Other:

13. How many board members does your organization have?

For the following questions, please note that some board members may be classified in more than one category:

13a How many of your board members would you classify as civic leaders?

13b How many of your board members would you classify as business leaders?

13c How many of your board members would you classify as local residents of the JOLI project area?

PROJECT OUTCOMES

Instructions

Please provide information below. This information will be used to summarize key JOLI project outcomes.

AED understands that some of the data requested below may not be currently collected or available. However, last year, we found that some JOLI grantees could provide this type of information. With that in mind, please provide the data requested if you can.

As needed, please "click" on "data not collected" to complete the questionnaire.

NEW BUSINESS CREATION & RETENTION

14. At this point, has your JOLI projected Yes Go to 14a

created new businesses?

No

14a How many new businesses have been created?

14b Of the new businesses created, how many have stayed in operation for at least 12 months?

New businesses stayed in operation 12+ months:

NEW JOB CREATION

15. Has your JOLI project created full- and/or part-time jobs for individuals?

Click 1 only

Yes

Our project has created BOTH part-time and full-time jobs

Go to 16 and 17

Yes

Our project has created full-time jobs only

Go to 16 then skip to 18

Yes

Our project has created part-time jobs only

Go to 17 then skip to 23

No

Our project has not created jobs

Go to 23

Data not available

16. How many full-time jobs have been created to date during the JOLI grant period in question?

16a What job strategy has been used for this JOLI grant?

Click all that apply

- Business Creation
- Business Expansion
- Microenterprise
- Non-traditional Job Training & Placement
- Self-employment
- Other -- Please provide a description of your project:

16b What is the average hourly starting wage of the full-time jobs that have been created to date during the JOLI the grant period?

16c How many of the full-time jobs that have been created to date offer health care benefits?

16d How many of the full-time jobs created to date offer retirement benefits?

16e How many of the full-time jobs created to date provide paid sick leave?

16f How many of the full-time jobs created to date offer profit sharing benefits?

17. How many part-time jobs have been created to date during the JOLI grant period in question?

JOB RETENTION

Data not available

18. How many of the full-time jobs created by the JOLI project have been retained in the community for at least six months?

Full-time jobs retained 6+ months:

Data not available

19. How many of the full-time jobs created by the JOLI project have been retained in the community for at least 12 months?

Full-time jobs retained 12+ months:

20. Did any employer or business already operating in the community decide NOT to shut down or relocate to a different location outside the community as a result of this project?

Yes

Go to 22a

No

Don't Know

Data not available

20a How many existing jobs were retained in the community as a result of the JOLI funded project?

EMPLOYMENT & RETENTION OF TARGET POPULATION

Data not available

21. For full-time jobs that have been created during the grant period, please indicate how many positions have been filled by Low-Income Individuals?

21a What was the average hourly starting wage for these Low-Income Individuals?

21b How many of these individuals retained their jobs for at least six months?

Who retained full-time jobs 6+ months:

21c How many of these individuals retained their jobs for at least 12 months?

Who retained full-time jobs 12+ months:

22. For full-time jobs that have been created during the grant period, please indicate how many positions have been filled by TANF recipients?

22a What was the average hourly starting wage for these TANF recipients?

22b How many of these TANF recipients retained these jobs for at least 6 months?

TANF recipients who retained 6+ months:

How many of these TANF recipients retained these jobs for at least 12 months?

TANF recipients who retained 12+ months:

INDIVIDUALS TRAINED

23. Were you funded with this JOLI award to train individuals?

Click 1 only

Yes

Go to 24a

No

Our JOLI has not trained individuals

23a At this point, how many individuals in total have been trained by your project?

Data not available

23b At this point, how many Low-Income Individuals have been trained by your project?

23c At this point, of all individuals trained by your project, how many received TANF at the start of the training?

DOLLARS LEVERAGED

24. Has your JOLI grant leveraged additional project dollars?

Click 1 only

Yes

Go to 25a

No

If your project was suppose to leverage additional funding and has not, please explain why:

text box

Go to 26

24a At this point, how many total dollars has your JOLI project leveraged?

Data not available

24b At this point, how many total dollars have been leveraged directly from loans?

24c At this point, how many total dollars have been leveraged directly from government funds?

24d At this point, how many total dollars have been leveraged directly from the private sector?

24e In your opinion, what have been the key positive outcomes of leveraging U.S. dollars?

PROJECT MANAGEMENT

Instructions

Please provide information below on your project's overall capacity. This information will be used to summarize project management successes and challenges. The questions below use the McKinsey Capacity Self Assessment Grid; AED has revised questions and questionnaire responses as needed.

The questions below allow grantees to self-assess their overall management. With that in mind, please circle the questionnaire response that best describes your JOLI project management.

GOALS/ PERFORMANCE TARGETS

1

2

3

4

<p>25. How would you rank your organization's strategy to define project goals/performance targets?</p>	<p>Performance targets are non-existent or few; targets are vague, or confusing, or either too easy or impossible to achieve; not clearly linked to strategy, and may change from year to year; targets largely unknown or ignored by staff</p>	<p>Realistic targets exist in some key areas, and are mostly aligned with aspirations and strategy; may lack aggressiveness, or be short-term, lack milestones, or mostly focused on "inputs" (things to do right), or often renegotiated; staff may or may not know and adopt targets</p>	<p>Quantified, aggressive targets in most areas; linked to aspirations and strategy; mainly focused on "outputs/outcomes" (results of doing things right) with some "inputs"; typically multiyear targets, though may lack milestones; targets are known and adopted by most staff who usually use them to broadly guide work</p>	<p>Limited set of quantified, genuinely demanding performance targets in all areas; targets are tightly linked to aspirations and strategy, output/outcome-focused (i.e., results of doing things right as opposed to inputs, things to do right), have annual milestones, and are long-term nature, staff consistently adopts targets and works diligently to achieve them</p>
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PERFORMANCE MANAGEMENT

<p>26. How would you rank your organization's performance management?</p>	<p>Very limited measurement and tracking of performance; all or most evaluation based on anecdotal evidence; organization collects some data or project activities and outputs (e.g., number of individuals served) but has no social impact measurement (measurement of social outcomes, e.g., job unemployment rate lowered)</p>	<p>Performance partially measured and progress partially tracked; organization regularly collects solid data on project activities and outputs (e.g., number of individuals served) but lacks data-driven externally validated social impact measurement</p>	<p>Performance measured and progress tracked in multiple ways, several times a year, considering social, financial, and organizational impact of project and activities; multiplicity of performance indicators; social impact measured; but long-term or third-party nature of evaluation is missing</p>	<p>Well-developed comprehensive integrated system (e.g., balanced scorecard) used for measuring organization's performance and progress on continual basis, including social, financial, and organizational impact of project and activities; small number of clear, measurable, and meaningful key performance indicators; social impact measured based on longitudinal studies, and performed or supervised by third-party experts</p>
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SYSTEMS AND INFRA-STRUCTURE

<p>27. How would you rank your organization's strategic planning systems?</p>	<p>Planning happens on an ad hoc basis only and is not supported by systematically collected data</p>	<p>Planning done regularly and uses some systematically collected data</p>	<p>Regular planning complemented by ad hoc planning when needed; some data collected and used systematically to support planning effort and improve it</p>	<p>Regular planning complemented by ad hoc planning when needed; clear, formal systems for data collection in all relevant areas; data collection in all relevant areas; data used systematically to support planning effort and improve it</p>
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28. How would you rank your organization's financial operations management?

Gifts and grants deposited and acknowledged, bills paid, supporting documentation collected/retained

Financial activities transparent, clearly and consistently recorded and documented, include appropriate checks and balances, and tracked to approve budget

Formal internal controls governing all financial operations; fully tracked, supported and reported, annually audited fund flows well managed; attention is paid to cash flow management

Robust systems and controls in place governing all financial operations and their integration with organizational objectives/strategic goals, decision making, and budgeting; cash flow actively managed

CLOSING -- FINAL DATA VERIFICATION

For data quality, all data must be verified by the grantee project manager and/or principal investigator to ensure that all information is accurate and complete.

Who has verified that the data submitted in this JOLI questionnaire is accurate and verified by the JOLI program?

Click all that apply

Program Manager

Text box: type in name of person

Principal investigator

Text box: type in name of person

Other:

Text box: type in name and title of person

Thank you.