



Affiliate Compatibility Evaluation

The attributes below represent the criteria for evaluating compatibility of a potential clinic to become an Obria Affiliate.

The attributes are rated on a scale of 1-5:

1 – Little to No Presence to 5 – Abundantly Present

This evaluation is a tool that helps us get a feel for what Obria Medical Model would be the best fit for you. It also helps Obria come alongside you and assist your center in meeting a larger patient demographic.

This document serves as a starting point in the engagement process.

Qualification	Score (1-5)
Core	
1. How well is your center’s mission aligned with Obria’s?	
a. Does your center teach education classes in your local school system?	
b. Does your center encourage abstinence?	
c. Does your center provide or refer for abortion?	
d. Does your center provide, prescribe or refer for contraception?	
e. Does your center provide, prescribe or recommend contraception?	
f. Does your center provide classes to your clients to promote healthier lifestyles?	
g. Does your center provide material resources for your clients?	

Qualification	Score (1-5)
h. Your center's Mission Statement: _____ _____ _____	
2. How well is your center's vision aligned with Obria's?	
a. Is your center focused on strategic growth?	
b. Does your center have a 3-5 year strategic plan?	
3. How well aligned is your center's religious affiliation to Obria's?	
a. Is your center faith based?	
b. Is your center solely supported by one specific faith? (e.g., Catholic, Protestant, etc.)	
4. Are your center' core values aligned with Obria? <ul style="list-style-type: none"> • Caring is a minute by minute decision • Keep every commitment – implied or made • Exemplary is standard practice • Knowledge depends on learning • Progress depends on truth • Agency's Core Values: _____ _____ 	
5. Is your center non-judgmental in their approach towards patients and providing services in a manner that is caring, compassionate and life affirming?	
a. Is the staff taught to be welcoming to all faiths?	
b. Is the staff taught to value each patient, regardless of their societal status?	
c. Is the staff taught to be accepting of patients even if they have had an abortion or chose to have one after their visit?	
d. Is the staff taught to provide a Christ-like approach to meeting the reproductive health needs of sexually active and at-risk clients?	
e. Is the staff taught not to force religious beliefs or practices on patients?	
f. Is the staff taught that each patient and their situation is unique, and that they are there to serve the patient's immediate needs, presenting Christ to the patient at the right time, if the right time presents itself?	

Qualification	Score (1-5)
6. Is your center aware of the local abortion providers, Planned Parenthood, and/or similar in their area?	
a. Is your center aware of local abortion services offered in or around your area?	
b. Is your center aware of the abortion rate in their area?	
c. Is your center aware of the teen pregnancy rate in their area?	
7. How strategic is your center in their plans for growth?	
a. Does your center have plans to advance/evolve medical services?	
b. Does the agency plan to implement/advance education programs?	
c. Does your center currently make patient marketing a priority?	
8. Does your center have an active Board of Directors?	
a. Are the board members engaged in the center and recognize what your current needs are?	
b. Does each board member have a specific area of expertise (development, fundraising, finance)?	
c. Are board members required to make a financial commitment in order to be on the board?	
9. How closely does your center's aesthetics compare with an Obria medical clinic?	
a. Is the clinic clean, organized and uncluttered?	
b. Is your clinic signage clear, visible and up to date?	
c. Is the atmosphere welcoming to everyone? (e.g., no display of crosses, bibles, etc.)	
d. Does the clinic have photos/posters of babies or aborted babies in patient areas?	
e. Does the clinic feel similar to a doctor's office or medical clinic?	
f. Is your center located near a high school, college, or abortion provider?	
Governance	
10. Is your center organized and operated adequately as a functional non-profit, adhering to state and federal guidelines?	

Qualification	Score (1-5)
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a. Is your center registered as a 501(c)(3) non-profit organization with the IRS?	
b. Are yearly 990's filed and posted with IRS?	

Finances	
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11. Does your center have a board approved, sustainable fiscal operating budget with room for growth?	
a. Does your center have at least 3 months reserve in the bank?	
b. Does your center have the resources, or ability to obtain the resources, to cover the cost of converting to an Obria medical clinic?	
12. Does your center have written financial policies and internal controls in place?	
a. Does your center reconcile bank accounts and financials monthly?	
b. Does your center use GAAP Accounting (Generally Accepted Accounting Principles) to prepare financial statements?	
c. Is there a finance overview committee at the board level?	
d. Are monthly financials presented to the board for review and approval?	
13. Does your center have a process in place for accounts payable and accounts receivable?	
14. Does your center have policies and procedures in place for the processing of all donations?	
a. Is there a policy for accountability on protecting donated funds to avoid fraudulent activity?	
b. Are yearly audits conducted?	
15. Does your center allocate at least 70% of its total expenses to its program services?	

Fundraising / Donor Relations	
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16. Does your center have a strong knowledge of implementing successful fundraising practices?	
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Qualification	Score (1-5)
a. Does your center have a strategic fundraising plan in place? (e.g., annual events, newsletter, eBlasts, etc.)	
b. Does your center have a plan for engaging/cultivating existing donors and leveraging new donors?	
c. If plans are not in place, does your center recognize the need to develop such a plan?	
17. Does your center have an established donor base that can be leveraged for additional support during a conversion to an Obria medical clinic?	
a. Does your center utilize donor tracking software?	
b. Does your center have a donor website in addition to the clinic website?	
18. Does your center have strong relationships with any of the churches or other community outreach groups in their area that they can help leverage or gain support and awareness in their community?	
a. Does your center have a designated staff person responsible for church and/or community outreach?	
b. Does your center have a program in place for gaining church or community support?	
Marketing	
19. Does your center have a patient marketing plan?	
a. Does your center have a designated marketing budget?	
b. Does your center utilize SEO (search engine optimization) and/or SEM (search engine marketing)?	
a. Does your center use pay-per-click advertising (PPC)?	
b. Does your center have a social media presence?	
20. Does your center represent itself with integrity in all marketing and advertising?	
a. Does your center use any misleading advertising tactics that may deceive patients into thinking they provide services that they actually do not? (e.g., abortion, morning after pill, RU486, contraception)	
Direct Services / Clinic Operations	

Qualification	Score (1-5)
21. Is your center operating under the active supervision of a medical director?	
22. Is your center offering reproductive health services that are the same with those that are being offered at Obria clinics?	
a. Does your center provide pregnancy testing administered by a licensed and trained medical professional?	
b. Does your center provide ultrasounds conducted by a licensed and trained medical professional?	
c. Does your center provide STD testing and treatment administered by a licensed and trained medical professional?	
d. Does your center provide prenatal care provided by a licensed and trained medical professional?	
e. Does your center provide well woman care provided by a licensed medical professional?	
23. Is your center interested in expanding its current medical practices?	
24. Is your center interested in AAAHC accreditation?	
25. Is your center currently using a patient database system?	
26. Has your center adopted a system for Electronic Medical Records (EMR) or Electronic Health Records (EHR)?	
a. If not, is your center planning to adopt an EMR or EHR system?	
b. Does your center use Practice Management to extend the capability of the EHR to allow for direct billing, enhance the appointment scheduling feature of the EHR and generate billing/appointment specific reports?	
27. If your center is running as a medical clinic, is the agency adhering to relevant state law?	
a. Is your center operating under a state licensure?	
b. Is your center HIPAA compliant?	
c. Does your center follow OSHA safety and risk management guidelines?	
d. Is your center in a facility that meets ADA requirements (inside/outside)?	

Qualification	Score (1-5)
e. Does your center have a CLIA waiver or CLIA certification from the state?	
28. Is the counseling approach that your center uses aligned with Obria's method of counseling?	
a. Does your center believe in the importance of educating the patients concerning their sexual behavior and how those behaviors affect their mental, physical, and emotional health?	
b. Does your center educate their patients with medically sourced information?	
29. Does your center offer any patient educational programs to further enhance/extend the patient's care that would enable the patient to make life changes?	
a. Does your center offer onsite parenting classes or a referral to a pre-approved local program?	
b. Does your center offer an onsite fatherhood program or a referral to a pre-approved local program?	
c. Does your center offer post abortion care and recovery or a referral to a pre-approved program?	
30. Is your center aware of your patient numbers and have a tracking system in place to record number and type of patients seen?	
31. Does your center have any collaborative partnerships with primary care clinics, hospitals or physicians in their community?	
32. Does your center have the necessary reliable staff and/or a consistent volunteer base in order to successfully implement the transition to an Obria medical clinic?	
a. Does your center have an Executive Director?	
b. Does your center have a Client Services administrator?	
c. Does your center have a Nurse on staff?	
d. Does your center have adequate administrative staff?	
33. Has your center already implemented a written training program for all staff and volunteers, complete with policies and procedures?	

Qualification	Score (1-5)
a. Do all staff and volunteers read and sign-off on the agency's approved Policies & Procedures annually?	
b. Do all staff and volunteers go through an orientation process?	
c. Are all staff and volunteers provided a training manual to assist in job effectiveness?	
34. Does your center have a recruitment and management plan for volunteers?	
a. Does your center have an approved application process to screen volunteers, which includes a background check?	
b. Has your center developed a plan for recruiting qualified volunteers?	
c. Do volunteers undergo a performance evaluation annually?	
Business Practices	
35. Does your center have a board approved Employee Handbook/Personnel Manual listing mutual expectations between the employee and the agency?	
a. Does your center list the agency's policy on attendance, benefits and leave?	
b. Does your center's handbook list the agency's policy on use of equipment as well as rights to Intellectual Property?	
c. Does your center's handbook list other agency policies such as discrimination, harassment, disability, etc.?	
d. Does your center provide a copy to all staff and require them to read and sign-off on them?	
e. Does your center have employee compensation, hiring and termination policies in place?	
f. Does your center have approved standard staff forms and releases for all employees?	
g. Does your center offer training for staff to develop or enhance their skill set, as well as to stay up to date with changing industry standards?	
36. Is your center compliant with state and federal employment regulations?	

Qualification	Score (1-5)
37. Does your center have a professional business method or payroll service company (e.g., ADP, Paychex) for payroll administration and management?	
38. Is your center's insurance business practices in line with Obria's?	
a. Does your center carry D&O (Directors and Officers) insurance?	
b. Does your center carry EPL (Employee Practices Liability) insurance?	
c. Does your center carry Workers Comp insurance?	
d. Does your center carry Accident Coverage insurance?	
e. Does your center carry General Liability insurance?	
f. Does your center carry medical malpractice insurance?	