

Fund Distribution Scoring Summary

Year 1 - (July 1, 2018 to June 30, 2019)



The new Community Impact Fund 3-year grant cycle begins with the 2018-19 program year. Applications for the first year are open to all Heart of Illinois United Way (HOIUW) Partner Agencies that submitted a Letter of Intent.

A team of approximately 25 volunteer Grant Reviewers for each Issue Area will evaluate and score each application. These scores will be averaged and will represent 80% of each program's final score. The remaining 20% will be comprised of the Agency Participation Score (10 points) and the Agency Audit Score (10 points). In addition, HOIUW staff will provide Grant Reviewers with supplemental FDCIP information for each currently-funded program, based on Year 2 and Year 3 performance. This information will allow Grant Reviewers to consider previous program performance as they are evaluating returning programs. No point value will be assigned to FDCIP for the Year 1 Application, as FDCIP information cannot be provided for new programs.

A description of the scoring components is listed below:

1. Grant Reviewer Rubric – 80 points

Executive Summary	Description of Need	Program Service Delivery	Program Outcomes, Indicators & Activities	Measurement Tools and Evaluation	Agency Staff and Volunteers	Client Feedback	Internal Communication and Engagement	Budget and Narrative	TOTAL
2 points	12 points	14 points	10 points	12 points	2 points	8 points	8 points	12 points	80 points

See Pages 2 -4 of this summary for the specific Grant Reviewer Scoring Rubric that will be used.

2. Financial Audit Score – 10 points

The HOIUW Agency Audit Committee reviews published audits and 990s to determine the financial health and stability of each agency, including governance and the status of revenue and expenses.

3. Agency Participation Score – 10 points

As outlined in the HOIUW Partner Agency Manual and the executed Memorandum of Agreement, partner agencies are required to run an annual HOIUW employee campaign and participate in HOIUW activities. Agency participation is recorded for campaign presentations/assistance, awards for internal agency campaigns, leadership roles, and volunteer opportunities. HOIUW staff determines the level of participation and assigns a score.

4. Fund Distribution Continuous Improvement Process- FDCIP (HOIUW Staff)

HOIUW staff will provide Grant Reviewers with supplemental FDCIP information for each currently-funded program, based on Year 2 (July 1, 2016 to June 30, 2017) and Year 3 (July 1, 2017 to September 30, 2017) performance. This information will allow Grant Reviewers to consider previous program performance as they are evaluating returning programs. No point value will be assigned to FDCIP for the Year 1 Application, as FDCIP information cannot be provided for new programs. Scoring is as follows:

Outputs/Outcomes		FDCIP Integration		Responsiveness	
Met/Exceeded	5 points	Fully Engaged	5 points	Timely/Accurate Reports and Responsiveness to Requests for Info.	5 points
Nearly Met/ Unusual Circumstances	3 points	Met Expectations	3 points	Occasional Late/Inaccurate Reports and Responsiveness to Requests for Info.	3 points
Not Met	1 point	Minimal Participation	1 point	Consistently Late Reports or Many Needed Corrections. Slow Response.	1 point

13-15 Points = Exceeds Expectations	9-12 Points = Meets Expectations and Minimum Standards	<9 Points = Needs Improvement
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5. Scoring System Comparison

Scoring Categories	Year 1 July 1, 2018 to June 30, 2019	Year 2 July 1, 2019 to June 30, 2020	Year 3 July 1, 2020 to June 30, 2021
Grant Reviewer Score	80%	60%	60%
Financial Audit Score	10%	10%	10%
Agency Participation Score	10%	10%	10%
FDCIP Score	Supplemental Info.	20%	20%

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Grant Reviewer Scoring Rubric for Year 1

Rubric is built within the web based software system that is offered for Year 1 Grant Applications

Scoring Sections	Question(s)	Ratings – 80 points total
Executive Summary	Do you understand the agency's mission, program's purpose and benefit to the community? Does the program align with the agency's mission?	1- Purpose, benefit, and/or services weak; unclear alignment with agency mission
		2- Purpose, benefit and services significant; directly aligns with agency mission
		Executive Summary Points Available = 2
Program Need	Is the need for the program compelling and well-documented? Is there sufficient evidence of need, based on the HOIUW 2017 Community Needs Assessment and other reliable sources? How well does the program address the needs identified? Does the program fill a gap in services?	1- Need not compelling or supported; plans to meet needs are vague
		4- Need compelling but not supported; program may address identified need
		8- Need compelling & supported. Addresses need & fills a service gap
		12- Need compelling & supported by multiple sources. Program is well-developed
		Program Need Points Available = 12
Program Service Delivery	Does the program serve at-risk and/or low-income clients within the HOIUW counties? How well do the program's scope of services, methods of delivery and identified collaborations address client needs? How well do the program services align with the HOIUW Outcomes and Indicators?	1- Minimal at-risk/low-income clients; services weak and not directly aligned
		6- 50% or more at-risk/low-income clients; services average and somewhat aligned
		10- 75% or more at-risk/low-income clients; solid program design and alignment
		14- 90% at-risk/low-income clients; collaborative services and direct alignment
		Program Service Delivery Points Available = 14
Program Outcomes, Indicators and Activities	Will the Activities achieve the desired Outcomes? Are the proposed Clients Served and Units of Service reasonable for the Activities? Do the Measurement Tool(s) collect quality data that support the Indicators and measure client success?	1- Projections unrealistic, poor data quality and client measurement
		4- Projections realistic, mediocre data quality and questionable effectiveness
		7- Quality projections and data collection to measure client success
		10- Exceptional alignment of projections and data collected to support Indicators
		Outcomes, Indicators, and Activities Points Available = 10

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Scoring Sections	Question(s)	Ratings – 80 points total
<p>Program Measurement Tool(s) and Evaluation</p>	<p>Is the rationale for the selected Measurement Tool(s) adequate? Is there a clear connection between the selected Measurement Tool(s) and the Indicator? Is the program monitored at frequent intervals to effectively evaluate its results? Do all staff levels, Board members and clients participate in program evaluation activities? Is the program engaged in continuous improvement practices (CIP) for the purpose of service improvement?</p>	<p>1- Ineffective tools, infrequent/minimal evaluation activities, little to no CIP</p>
		<p>4- Tools may be effective, annual or semi-annual evaluation activities, some CIP</p>
		<p>8- Effective tools, quarterly evaluation activities, good CIP</p>
		<p>12- Superior tools, monthly or more evaluation activities, fully integrated CIP</p>
		<p align="center">Measurement Tools and Evaluation Points Available = 12</p>
<p>Agency Staff and Volunteers</p>	<p>Are staffing levels sufficient to reach required benchmarks? Are staff qualified and do they have longevity with the agency? Are volunteers being used appropriately?</p>	<p>1- Staff experience/qualifications questionable and/or volunteers under-utilized</p>
		<p>2- Staff have experience and longevity; volunteer roles appropriate and maximized</p>
		<p align="center">Agency Staff and Volunteers Points Available = 2</p>
<p>Client Feedback</p>	<p>Is there a solid and consistent process in place to collect client feedback? Is the rate of survey returns reasonable? How is the client feedback being used to improve services? Are there good examples of program improvements that resulted from client feedback?</p>	<p>1- No formal process, minimal return rate, feedback not used, no examples</p>
		<p>3- Infrequent collection, acceptable return rate, examples of changes provided</p>
		<p>6- Collected semi-annually, solid return rate, examples of improvements provided</p>
		<p>8- Collected monthly/quarterly, great return rate, strong improvement examples</p>
		<p align="center">Client Feedback Points Available = 8</p>
<p>Internal Communication and Engagement</p>	<p>Is there evidence of executive leadership (EL) involvement in day-to-day operations, communication with all levels of staff, and establishing/monitoring/contributing toward continuous improvement (CI)? Is there sufficient involvement of executive leadership (EL) and the Board in program review?</p>	<p>1- EL not involved/communicates only with direct reports; minimal program review</p>
		<p>3- EL somewhat engaged with staff/program; regular program review</p>
		<p>6- EL consistently engaged with staff/program and involved with CI</p>
		<p>8- EL fully engaged in program/staff/Board communication; leads CI within agency</p>
		<p align="center">Internal Communication and Engagement Points Available = 8</p>

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Scoring Sections	Question(s)	Ratings – 80 points total
Budget and Narrative	Does the budget support the program? Are there concerns about program costs or viability? Is the amount of HOIUW funds requested and its use clearly stated and reasonable? How thorough is the budget review/monitoring by executive leadership (EL), Board and staff? Are the explanations in the budgetary line item(s) adequate?	1- Budget is weak, unclear use of HOIUW funds, minimal budget monitoring
		4- Budget may be viable, use of HOIUW funds questionable, budget monitored by EL
		8- Budget makes sense, clear use of HOIUW funds, budget monitored by EL and Board
		12- Budget/Use of funds detailed/reasonable, budget monitored by EL/Board/Staff
		Budget and Narrative Points Available = 12
FDCIP	Program FDCIP scores and details are provided by HOIUW staff to summarize past program performance and overall agency compliance. This is supplementary information for grant reviewers to consider when finalizing application scores. Point totals are: 13-15 = Exceeds Expectations; 9-12 = Meets Expectations; and <9 = Needs Improvement.	FDCIP Review Completed
		No Points Assigned