

# Fund Distribution Scoring Summary

Consideration for Year 2 Funding- (July 1, 2019 to June 30, 2020)



Funded programs in 2018-19 (Year 1) have completed 6 months of services to clients. Agencies will submit a 2018-19 Mid-Year Performance Report for each program to be considered for continued funding in 2019-20 (Year 2).

A team of approximately 25 volunteer Grant Reviewers for each Issue Area will evaluate and score each Mid-Year Performance Report. These scores will be averaged and will represent 60% (60 points) of each program’s final score. The remaining 40% will be comprised of the Agency Participation Score (10 points), the Agency Audit Score (10 points), and HOIUW Staff FDCIP Score (20 points). A description of the scoring components is listed below:

## 1. Grant Reviewer Rubric – 60 points

Program Summary	Program Progress: Outputs/Units of Service	Program Progress: Outcomes	Continuous Improvement Process (CIPs)	Program Staff & Volunteers	Client Feedback	Executive Leadership Engagement	Budget, YTD Actuals AND Fund Diversity	TOTAL
2 points	12 points	14 points	8 points	6 points	4 points	6 points	8 points	60 points

See Pages 2 -5 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) – 20 points

HOIUW staff will provide a score that reflects the program’s progress toward projected outputs and outcomes, the results of an administrative review that includes a sample of client files, and integration of the FDCIP process into the program.

## 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 2

*\*Rubric is built within the web based software system that is offered for Mid-Year Performance Reports\**

Scoring Sections	Question(s)	Ratings – 60 points total
<b>Program Summary</b>	Is the program summary clear and concise? Do the Output and Unit of Service projections match the Revised Annual amounts listed in the Indicators (HOIUW Benchmarks) and Activities sections? If the program has a fixed capacity, is it explained clearly?	<b>1</b> – Answers not clear or incomplete.
		<b>2</b> – Answers are clear, complete and concise.
		<b>Program Summary Points Available = 2</b>
<b>Program Progress: Outputs and Units of Service</b>	Is the program on target to meet Output (OP) projections (Unduplicated Clients and Units of Service)? If behind, is there a reasonable explanation provided and/or CIP listed?	<b>2</b> – Strong concerns about ability of program to meet OP/UOS projections by end of program year; no CIPs to address OP/UOS or CIPs are weak.
		<b>5</b> – Program demonstrates some progress to meet OP/UOS projections; acceptable CIPs.
		<b>9</b> – Program is slightly behind in OP/UOS but reasonable explanations provided; good strategy to meet projections is illustrated in CIPs.
		<b>12</b> – Program is on target to meet/exceed OP/UOS projections.
		<b>Program Progress: Outputs and Units of Service Points Available = 12</b>
<b>Program Progress: Outcomes</b>	Is the program on target to meet Outcome benchmarks for client success based on the Indicators (HOIUW Benchmarks)?  If a measurement is not on target, has an adequate explanation been provided accompanied by strong CIPs to meet annual projections?  Do the measurement tools used provide documentation of client progression and/or milestones toward annual outcomes?	<b>2</b> – Strong concerns about ability of program to meet OC projections by end of program year; no CIPs to address OC or CIPs are weak.
		<b>6</b> – Program demonstrates some progress to meet OC projections; acceptable CIPs and measurement tools.
		<b>10</b> – Program is slightly behind OC progression but reasonable explanations provided; good CIPs included and quality measurement tools.
		<b>14</b> – Program is on target to meet/exceed OC projections with strong measurement tools.
		<b>Program Progress: Outcomes Points Available = 14</b>

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Scoring Sections	Question(s)	Ratings – 60 points total
<b>Continuous Improvement Plans (CIPs)</b>	Does the program have specific, measurable, attainable, relevant and time bound (S.M.A.R.T. goal) CIPs that are driving change and improvement in the program?	<b>2</b> – CIPs are weak and do not support change and improvement.
		<b>4</b> – CIPs are acceptable and demonstrate progress toward improvement.
		<b>8</b> – CIPs are strong and valuable. It is clear that the FDCIP process is fully integrated.
		<b>Continuous Improvement Plans (CIPs) Points Available = 8</b>
<b>Program Staff and Volunteers</b>	Are there significant staffing issues that are having a negative effect on programming? Are they being handled appropriately and adequately?  If volunteers are used, are volunteer contributions maximized?  Are staff members fully informed and engaged in service delivery and continuous improvement processes that support program Outputs, Units of Service and Outcomes? Is communication adequate at all staff levels?	<b>2</b> – Significant concerns about staff retention and/or program engagement; little communication between levels of staff; volunteers not used OR appear underutilized;
		<b>4</b> – Staff issues are minimal; staff is still learning OP/OC/CIPs; good communication at all staff levels; some volunteer involvement (if appropriate for program).
		<b>6</b> – Staff and volunteers are fully engaged in OP/OC/CIPs; effective communication; volunteer roles are maximized (if appropriate for program).
		<b>Program Staff and Volunteers Points Available = 6</b>

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<b>Client Feedback</b>	Is there a solid and consistent process in place to collect client feedback? Is the rate of survey returns reasonable? How is client feedback being used to improve services? Are there good examples of program improvements that resulted from client feedback?	<p><b>1</b> – No formal process and/or minimal return rate, no evidence of feedback being used for improvement.</p> <p><b>2</b> – Formal process with periodic collection, reasonable return rate, and examples of changes provided.</p> <p><b>4</b> – Formal process with regular collection, excellent return rate and strong improvement examples.</p> <p style="text-align: center;"><b>Client Feedback Points Available = 4</b></p>
<b>Executive Leadership Engagement</b>	Has the CEO/Executive Leadership (EL) observed programming? If yes, is there evidence of a formalized process for observations that includes CEO/EL feedback and coaching? Is there evidence of Executive Leadership (EL) succession planning and/or cross-training? Is the diversity of the staff and/or Board reflective of the population being served?	<p><b>2</b> – CEO/ EL has not observed programming; no evidence of succession planning; staff and Board not reflective of population being served.</p> <p><b>4</b> – CEO/EL has observed programming; informal process and feedback minimal; some succession planning; staff and Board diversity is being addressed.</p> <p><b>6</b> – CEO/EL has formal program observation process; strong succession plans are in place; staff and Board reflective of population being served.</p> <p style="text-align: center;"><b>Internal Communication and Engagement Points Available = 6</b></p>
<b>Budget and Year-To-Date Actuals</b>  <b>AND</b>  <b>Program Budget and Fund Diversity</b>	<p>Are Year-To-Date (YTD) Actual Revenue and Expense line items proportionally received/spent? If a significant surplus or deficit exists, is there justification?</p> <p>Are HOIUW funds and applicable matching dollars used appropriately?</p> <p>Does the agency diversify funding to sustain the program?</p>	<p><b>2</b> – Budget line items appear inaccurate; strong concerns about budget viability and use of HOIUW funds; lack of fund diversity.</p> <p><b>4</b> – Line items are over or under-spent without justification; concerns with budget viability and use of HOIUW funds; limited fund diversity.</p> <p><b>6</b> – Most line items are proportionally justified; minimal concerns about budget viability, progress toward fund diversity, use of HOIUW funds is appropriate.</p> <p><b>8</b> – Budget is on track; no concerns about budget viability; funds are diverse and reliable; use of HOIUW funds is appropriate.</p> <p style="text-align: center;"><b>Program Budget and Year-to-Date Actuals Points Available = 8</b></p>