

Fund Distribution Scoring Summary

Year 1 - (July 1, 2021 to June 30, 2022)



The new Community Impact Fund 3-year grant cycle begins with the 2021-22 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 Impact 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	Program Need	Program Clientele	Program Service Delivery	Program Measurement Tool(s) and Evaluation	Program Staff and Volunteers	Client Feedback	Executive Leadership Engagement	Budget and Narrative	TOTAL
2 points	14 points	12 points	14 points	12 points	4 points	4 points	6 points	12 points	80 points

See Pages 2-3 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, 2019 to June 30, 2020) and Year 3 (July 1, 2020 to December 31, 2020) 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, 2021 to June 30, 2022	Year 2 July 1, 2022 to June 30, 2023	Year 3 July 1, 2023 to June 30, 2024
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 (2021-22)

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 2020 Community Needs Assessment and other reliable sources? How well does the program address the needs identified? Does the program fill a gap in services?	2- Need not compelling or supported; plans to meet needs are vague
		6- Need compelling but not supported; program may address identified need
		10- Somewhat correlates. Need compelling & supported. Addresses need & fills a service gap
		14- Directly addresses CNA. Need compelling & supported by multiple sources. Program is well-developed
		Program Need Points Available = 14
Program Clientele	Of the total program clients to be served, what percentage will be considered low-income? Were notable characteristics provided to define client population to be served?	2- Minimal low-income clients & target clientele unclear
		5- 50% or less of low-income clients & target clientele too general
		9- 75% or more low-income clients & target clientele somewhat defined
		12- 90% or more low-income clients & detailed/well define clientele
		Program Clientele Points Available = 12
Program Service Delivery	How well do the program 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?	2- Services weak & not directly aligned
		6- Services average & somewhat aligned
		10- Solid program design & alignment
		14- Collaborative services & direct alignment
		Program Service Delivery Points Available = 14
Program Measurement Tool(s) and Evaluation	Do the Measurement Tool(s) collect quality data and have a clear connection to the Indicators for measurement of client success? Is the Measurement Tool(s) validated (evidence based and/or 3 rd party accredited)? Does the program have evaluation and monitoring practices in place for service improvement?	2- Ineffective tools & infrequent/minimal evaluation activities
		5- Questionable effectiveness & annual or semi-annual evaluation activities
		9- Effective tools & quarterly evaluation activities
		12- Exceptional alignment of tools to support indicators & monthly or more evaluation
		Measurement Tools and Evaluation Points Available = 12

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Scoring Sections	Question(s)	Ratings – 80 points total
Program Staff and Volunteers	Are staffing levels sufficient to reach required benchmarks? Are staff qualified and do they have longevity with the agency? If volunteers are used, are volunteer contributions maximized? If volunteers are NOT used, was reasonable explanation provided?	2- Staff experience/qualifications questionable and/or volunteers under-utilized
		4- Staff have experience & longevity; volunteer roles appropriate & maximized
		Program Staff and Volunteers Points Available = 4
Client Feedback	Is there a solid and consistent process in place to collect client feedback? Is the response rate reasonable? Are there strong examples of program improvements that resulted from client feedback?	1- No formal process, minimal return rate, & no examples of feedback used
		2- Process in place with a reasonable return rate & examples of changes provided
		4- Strong process in place, excellent return rate & program improvements documented
		Client Feedback Points Available = 4
Executive Leadership Engagement	Is there evidence of executive leadership (EL) involvement in day-to-day operations and communication with all levels of staff? Is there sufficient involvement of the Board in program review? 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?	2- EL limited communication & lacking program review, succession plans, & diversity efforts
		4- EL somewhat engaged with staff/program, some succession plans, & diversity efforts
		6- EL fully engaged in program/staff/Board, strong succession plans, & diversity efforts
		Executive Leadership Engagement Points Available = 6
Budget and Narrative	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 inaccurate; concerns about viability, HOIUW funds use & sustainability
		4- Budget is weak, use of HOIUW funds questionable, limited budget monitoring & fund diversity
		8- Budget is satisfactory, efforts made for fund diversity, viability, & monitoring
		12- Budget detailed/reasonable, no concerns for fund diversity, viability, monitoring or use of HOIUW funds
		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