

Fund Distribution Scoring Summary

Consideration for Year 3 Funding- (July 1, 2023 to June 30, 2024)



Funded programs in 2022-23 (Year 2) have completed 6 months of services to clients. Agencies will submit a 2022-23 Mid-Year Performance Report for each program to be considered for continued funding in 2023-24 (Year 3).

A team of approximately 25 volunteer Grant Reviewers for each Impact Area will evaluate and score each Mid-Year Performance Report. These scores will be averaged and will represent 70% (70 points) of each program’s final score. The remaining 30% will be comprised of the Agency Participation Score (10 points), the Agency Audit Score (10 points), and HOIUW Staff FDCIP Score (10 points). A description of the scoring components is listed below:

1. Grant Reviewer Rubric – 70 points

Program Summary	Program Progress: Outputs and Units of Service	Program Progress: Outcomes	Program Progress: Measurement Tool(s)	Continuous Improvement Process (CIPs)	Budget, YTD Actuals, and Fund Diversity	Program Staff	Program Volunteers	Client Feedback	Executive Leadership Engagement	Diversity and Inclusion Efforts	TOTAL
2 points	12 points	12 points	8 points	8 points	8 points	4 points	4 points	4 points	4 points	4 points	70 pts

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) – 10 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, 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%	70%	70%
Financial Audit Score	10%	10%	10%
Agency Participation Score	10%	10%	10%
FDCIP Score	Supplemental Info.	10%	10%

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United Way



Grant Reviewer Scoring Rubric for Year 3

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

Scoring Sections	Question(s)	Ratings – 70 points total
Program Summary	Is the program summary clear and concise? If the program has a fixed capacity, is it explained clearly?	1 – Answers not clear or incomplete.
		2 – Answers are clear, complete, and concise.
		Program Summary Points Available = 2
Program Progress: Outputs and Units of Service	Is the program on target to meet Output (OP) and Units of Service (UOS) projections (Unduplicated Clients and Units of Service)?	2 – Concerns that OP/UOS will not be met
		5 – Program demonstrates some progress to meet OP/UOS projections
		9 – Slightly behind in OP/UOS but rationale provided
		12 – Program is on target to meet/exceed OP/UOS projections
		Program Progress: Outputs and Units of Service Points Available = 12
Program Progress: Outcomes	Is the program on target to meet Outcome benchmarks for client success based on the Indicators (HOIUW Benchmarks)?	2 – Concerns that Outcomes will not be met
		5 – Slightly behind some Outcomes but rationale provided
		9 – Progress towards meeting all Outcomes
		12 – Program is on target to all meet Outcomes
		Program Progress: Outcomes Points Available = 12

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Scoring Sections	Question(s)	Ratings – 70 points total
Program Progress: Measurement Tools	Is the Measurement Tool(s) developed from a credible source? Is the Measurement Tool(s) specifically designed to measure program outcome(s)?	2 – Significant concerns about measurement tools & process
	Is the data quality accurate, complete, consistent, valid, unique, and timely? Is the process for administering the Measurement Tool(s) documented and well described? Is the data collected and reported in an organized manner?	6 – Minimal concerns about measurement tools & process
		8 – No concerns about measurement tools & process
		Program Progress: Measurement Tools Points Available = 8
Continuous Improvement Plans (CIPs)	Of the 5 CIPs listed, are they all specific, measurable, attainable, relevant and time bound (S.M.A.R.T. goal) CIPs that are driving change and improvement in the program?	0 – Not all 5 CIPs were provided for reviewers to score
	When reviewing, consider the progression of Outputs, Units of Service and Outcomes for the program.	2 – CIPs are weak and do not support change and improvement
		4 – CIPs are acceptable and demonstrate progress toward improvement
		8 – CIPs are strong and valuable. Clear that the FDCIP process is fully integrated
		Continuous Improvement Plans (CIPs) Points Available = 8

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Scoring Sections	Question(s)	Ratings – 70 points total
Budget and Year-To-Date Actuals AND Program Budget and Fund Diversity	Are Year-To-Date (YTD) Actual Revenue and Expense line items proportionally received/spent? If a significant surplus or deficit exists, is there justification?	2 – Significant concerns about program budget
		4 – Minimal concerns about program budget
	Are HOIUW funds and applicable matching dollars used appropriately?	8 – No concerns about program budget
	Does the agency diversify funding to sustain the program?	Program Budget and Year-to-Date Actuals Points Available = 8
Program Staff	Does the agency have appropriate and necessary plans in place to minimize the effect of staff changes and vacancies on programming?	1 – Significant concerns about program staff
		2 – Minimal concerns about program staff
	Are staff members fully informed and engaged in service delivery and continuous improvement processes that support program Outputs, Units of Service and Outcomes?	4 – No concerns about program staff
		Program Staff Points Available = 4
Program Volunteers	If volunteers are used, are volunteer contributions maximized?	1 – Lacks integration of volunteers or no explanation as to why volunteers are not used
	If volunteers are NOT used, was reasonable explanation provided?	
		4 – Maximum engagement and use of volunteers or rationale provided for why volunteers are not used
Client Feedback	Is there a solid and consistent process in place to collect client feedback?	1 – Missing client feedback for programming
	Is the response rate reasonable? Is the collected client feedback statistically relevant to the number of clients served? Are examples	2 – Minimal client feedback for programming
	shared of how client feedback is reviewed and incorporated into the program?	4 – Meaningful client feedback that is used in programming
		Client Feedback Points Available = 4

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Scoring Sections	Question(s)	Ratings – 70 points total
Executive Leadership Engagement	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?	1 – Significant concerns about Executive Leadership
		2 – Minimal concerns about Executive Leadership
		4 – No concerns about Executive Leadership
		<p style="text-align: center;">Executive Leadership Engagement Points Available = 4</p>
Diversity and Inclusion Efforts	Have considerations been made in the hiring process of staff to be reflective of the client population being served? Have efforts been made to recruit Board members to be reflective of the client population being served and/or agency’s mission? Have efforts been made to promote inclusion within the agency for its staff, Board members, and others?	1 – Lacks integration of efforts within the agency & program
		2 – Efforts are being made but not fully implemented
		4 – Diversity & inclusion efforts are evident within the agency & program
		<p style="text-align: center;">Diversity and Inclusion Efforts Points Available = 4</p>