

Fund Distribution Scoring Summary

Consideration for Year 3 Funding- (July 1, 2020 to June 30, 2021)

Heart of Illinois
United Way



Funded programs in 2019-20 (Year 2) have completed 6 months of services to clients. Agencies will submit a 2019-20 Mid-Year Performance Report for each program to be considered for continued funding in 2020-21 (Year 3).

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

<u>Scoring Categories</u>	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 3

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
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) projections (Unduplicated Clients and Units of Service)? If behind, is there a reasonable explanation provided and CIP listed?	2 – 2-Concerns that OP/UOS will not be met; no or weak CIPs to address concerns
		5 – Program demonstrates some progress to meet OP/UOS projections; acceptable CIPs
		9 – Slightly behind in OP/UOS but rationale provided; strategy outlined in CIPs
		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)? 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?	2 – Concerns that Outcomes will not be met; no or weak CIPs to address concerns
		6 – Some progress towards meeting Outcomes; acceptable CIPs & measurement tools
		10 – Slightly behind Outcomes but rationale provided; good CIPs and quality tools
		14 – Program is on target to meet/exceed Outcomes with strong measurement tools
		Program Progress: Outcomes Points Available = 14

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Scoring Sections	Question(s)	Ratings – 60 points total
Continuous Improvement Plans (CIPs)	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?	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
Program Staff and Volunteers	Does the agency have appropriate and necessary plans in place to minimize the effect of staff changes on programming? If volunteers are used, are volunteer contributions maximized? If volunteers are NOT used, was reasonable explanation provided? Are staff members fully informed and engaged in service delivery and continuous improvement processes that support program Outputs, Units of Service and Outcomes?	2 – Significant concerns about preparation for staff changes; engagement and use of volunteers
		4 – Minimal concerns about preparation for staff changes; engagement and use of volunteers
		6 – No concerns about preparation for staff changes; engagement and use of volunteers
		Program Staff and Volunteers Points Available = 6

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Scoring Sections	Question(s)	Ratings – 60 points total
Client Feedback	Is there a solid and consistent process in place to collect client feedback? Is the response rate reasonable? Is the collected client feedback representative of clients served?	<p>1 – No process in place with minimal return rate, feedback not representative of clients served.</p> <p>2 – Process in place with a reasonable return rate, and sufficient representation of clients served.</p> <p>4 – Strong process in place, excellent return rate, and significant representation of clients served.</p> <p style="text-align: center;">Client Feedback Points Available = 4</p>
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? Is the diversity of the staff and/or Board reflective of the population being served?	<p>2 – CEO/EL has not observed program; lacking succession plans & diversity efforts</p> <p>4 – Informal CEO/EL program observation; some succession plans & diversity efforts</p> <p>6 – Formal CEO/EL program observation; strong succession plans & diversity efforts</p> <p style="text-align: center;">Internal Communication and Engagement Points Available = 6</p>
Budget and Year-To-Date Actuals AND Program Budget and Fund Diversity	<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>2 – Budget inaccurate; concerns about viability, HOIUW funds use & sustainability</p> <p>4 – Budget surplus/deficit not justified and lacks fund diversity</p> <p>6 – Budget progression satisfactory; efforts made for fund diversity and viability</p> <p>8 – Budget on track; no concerns for fund diversity or use of HOIUW funds</p> <p style="text-align: center;">Program Budget and Year-to-Date Actuals Points Available = 8</p>