

# 2023 - 2025 CIC / Panel Reviewer Scorecard



United Way of the Lowcountry, Inc.

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| <b>2</b>  | <b>Prequalification Section OR Updated Documents Section: Strategic</b>   |   |
| <b>3</b>  | Did the applicant have documents that were required to be updated?  | 1) Yes<br>2) No   |
| <b>4</b>  | If the applicant was required to update documents, please take the time to review the reason why and which documents they uploaded to this section. This might change where in the application you find the most accurate documents.  |   |
| <b>5</b>  | <b>Upload: Strategic Plan:</b> Has the organization outlined its goals in a written strategic plan within the last three years?   | 1) Yes<br>2) No   |
| <b>6</b>  | <b>Please rate the below question using the following ratings:</b> 0-3 There is information absent, or the Strategic Plan is clearly deficient; 4-6 Adequate response, the Strategic Plan is complete and accurate; 7-10 The Strategic Plan is high quality. The information is insightful, concise and reflects a high degree of quality.  |   |
| <b>7</b>  | <b>Upload: Strategic Plan:</b> On a scale of 0-10 found above, the organization's strategic plan is clearly summarized, and the organization was able to provide goals and strategies to support the strategic plan they have in place:   |   |
| <b>8</b>  | <b>Upload: Strategic Plan:</b> Comments, questions, or suggestions, in reference to the Strategic Plan submitted:   |   |
| <b>9</b>  | <b>Organization Information Section: Non-Discrimination / Racial Equity Section</b>   |   |
| <b>10</b> | <b>Overall Organization Information Section: Non-discrimination/ Racial Equity</b> - Do you feel the policy they provided:  | 1) Is a standard non-discrimination policy<br>2) Organization went a step further and implemented internal policies on racial equity<br>3) The quality of the policy is making it difficult to determine  |
| <b>11</b> | <b>Overall Organization Section: Application: Non-Discrimination / Racial Equity Policy</b> - You now have the ability to rate the quality of their non-discrimination / racial equity policy based on the scale below:<br>0-6 Policy is clearly deficient, and it is recommended the Board of Directors review and update<br>7-14 The policy is adequate<br>15-20 The policy demonstrates diversity, inclusion, and equity.                                    |   |
| <b>12</b> | <b>Organization Information Section: Volunteers section</b>   |   |
| <b>13</b> | <b>Overall Organization Section: Application: Volunteers-</b> After reading their description, do you now have an understanding of how this organization utilizes volunteers?   | 1) Somewhat<br>2) Yes<br>3) No  |
| <b>14</b> | <b>Overall Organization Section: Application: Volunteers-</b> This program:   | 1) Does not utilize vols. at all<br>2) Does not utilize vols. BUT has a legitimate reason why<br>3) Adequately uses volunteer hours to reduce program costs<br>4) Has an outstanding volunteer program and is extremely successful at utilizing vols. To reduce program costs |
| <b>15</b> | <b>Overall Organization Information: Collaboratives/Coalitions Section</b>  |   |
| <b>16</b> | <b>Collaboratives:</b> Is this application submitting a funding request on behalf of a collaborative or coalition, as evidenced by attaching signed Memorandums of Agreement? <i>If the applicant didn't attach any Memorandums of Agreement or Understanding OR if they only attached letters of support, then the reviewer should answer this question with then the reviewer should answer this question with "selected yes but did not attach MOA/MOU".</i> | 1) Didn't submit as a collaborative<br>2) Yes<br>3) Selected yes but did not attach MOA/MOU   |
| <b>17</b> | <b>Collaboratives:</b> Do you feel sufficient research has been done to ensure this collaborative is not a duplication of work already underway in the community:   | 1) Didn't submit as a collaborative<br>2) Yes, I think they are doing things differently<br>3) No, I think they are duplicating efforts "reinventing the wheel". They should reach out to ongoing community efforts   |

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| 18       | <b>Collaboratives:</b> Do you feel this collaborative is addressing current gaps in services that have been identified:  | 1) Didn't submit as a collaborative<br>2) Yes, I think this collaborative <b>IS</b> addressing identified gaps in services<br>3) No, I think this collaborative is <b>NOT</b> addressing identified gaps in services |
| 19       | <b>Please rate the below question using the following ratings:</b> 0-3 Information about the Collaborative/Coalition is absent, inaccurate, or deficient; 4-6 Adequate response (The information provided for the Collaborative / Coalition is complete and accurate); 7-8 Information provided is insightful, concise and provides for a very thorough understanding of the Collaborative / Coalition   |  |
| 20       | <b>Collaboratives:</b> On a scale of 0-8 found above, were they able to clearly describe the partnership in detail, including expected participants, their roles, and the goals of the partnership?  | 1) Didn't submit as a collaborative  |
| 21       | Comments, questions, or suggestions, in reference to the Non-Discrimination / Racial Equity, Volunteers portion, or collaborative portion of this application:   |  |
| 22<br>23 | Organizational Finances - Due to feedback received by past reviewers, most of the financial components of the application (Audit/Review or Report; 990; Balance Sheet, and Statement of Financial Activity) have already been evaluated or are currently being evaluated and scored by United Way's Finance Committee. However, it is still included for your review IF you have a financial background, but you will NOT find any questions on the scorecard pertaining to these documents.<br><br>We do still ask that you read, evaluate, and score the Organization's overhead percentage and questions pertaining to the operational budgets, as we feel these give you a thorough understanding of their program by speaking directly to their efficiency and effectiveness. |  |
| 24       | <b>Overhead Percentage:</b> Please click on the range of this applicant's overhead percentage they provided in the application:<br><br><i>(Please know that United Way staff have already verified the organization's overhead percentage on the Secretary of State's website).</i>  | 1) 0-15%<br>2) 16-24%<br>3) 25-30%<br>4) 31% + (Their overhead % puts them outside of minimum criteria for United Way' funding   |
| 25       | <b>Financial Report, Review, or Audit:</b> <i>The Financial Reviewers are currently reviewing the financial documents at the same time that you are reviewing the Programmatic portion. As the Chair, you will be provided a complete copy of your agency's financial reviews. Those will be provided as soon as the site visit schedules are set. However, you have access to all financial documents for information and review.</i>   |  |
| 26       | <b>Application Question: Unusual or Distinctive Budgeting Practices</b> – We asked that applicants utilize this question to put their budget into context for you, the reviewers and suggested they use this box to explain any variances (either + or -) greater than 10%.<br><br>If provided, was the explanation helpful in putting their Organizational budget into context?   | 1) Did not need an explanation since the budget was self explanatory<br>2) Yes, the explanation was helpful<br>3) No, the explanation was not helpful<br>4) Needed an explanation, but they did not provide one      |
| 27       | <b>Organizational Information: Upload: Organizational Budget</b> - Please provide your overall rating of the Organizational Budget uploaded, using the following ratings: 0-2 Information is absent, inaccurate or clearly deficient; 3-4 Adequate response (The information is complete and accurate); 5 High quality budget submission (diverse revenue streams/low expenses)  |  |
| 28       | Please provide your rating of the overall Organization's budget on a scale of 0-5:   |  |
| 29       | <b>Please rate the below question using the following ratings:</b> 0-2 Information absent or extremely reliant / one to two funding streams. With a loss to one, it appears the program would not be sustainable; 3-4 Varied funding streams, could withstand an unexpected loss in funding; 5 They are very diversified in their funding streams;   |  |
| 30       | <b>Upload: Organizational Budget: Revenue (Lines 1-12 on budget)</b> - The Organization is diversified in its revenue streams providing the Organization with the ability to withstand funding losses:   |  |
| 31       | <b>Upload: Organizational Budget: Special Events Revenue:</b> This Organization is actively engaged in fundraising efforts to support the organization as indicated by special events revenue: line item 4.  | 1) Yes<br>2) No  |

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| 32 | <b>Upload: Organizational Budget: Grant Revenue: (Lines 5-6 on budget)</b> – This Organization appears to apply for a variety of other revenue streams available through local and state/federal grants.  | 1) Yes<br>2) No  |
| 33 | <b>Upload: Organizational Budget: Expenses: (Lines 14-29 on budget)</b> - All expenses provided are listed/detailed as requested on the application and are clearly defined:  | 1) Yes<br>2) No  |
| 34 | <b>Upload: Organizational Budget: Expenses: (Lines 14-29)</b> – All proposed expenses seem reasonable and are in line with current budgeting expenses:  | 1) Yes<br>2) No  |
| 35 | <b>Organization Information: Org Finances: Org. Budget: Application</b> - After reading their response, on a scale of 0-10 what would you rate them, to the following question:<br><i>How will budget surpluses / shortfalls be handled and what impact will it have on your program for which you are requesting funding?</i><br>0-3 If their 1st response is to cut services or number receiving them or if they provide no detail such as "we will add a fundraising event or we will re-invest in reserves"<br>4-7 Adequate response; they provided some detail, and it was adequate<br>8-10 They had well thought out plans for both situations and were able to articulate them concisely |  |
| 36 | <b>Organizational Information: Special Events/Fundraising Report</b>  |  |
| 37 | <b>Organization Information: Financials: Balance Sheets:</b> The Financial Reviewers are currently reviewing the financial documents at the same time that you are reviewing the Programmatic portion. As the Chair, you will be provided a complete copy of your agency's financial reviews. Those will be provided as soon as the site visit schedules are set. However, you have access to all financial documents in this application for information and review.   |  |
| 38 | <b>Organization Information: Financials: Statement of Financial Activity:</b> The Financial Reviewers are currently reviewing the financial documents at the same time that you are reviewing the Programmatic portion. As the Chair, you will be provided a complete copy of your agency's financial reviews. Those will be provided as soon as the site visit schedules are set. However, you have access to all financial documents in this application for information and review.  |  |
| 39 | <b>Organizational Information: Reserve Account</b>  |  |
| 40 | <b>Reserve Account:</b> Does this organization have a reserve account established?  | 1) Yes<br>2) No  |
| 41 | <b>Application Question: Reserve Account:</b> On the application we ask applicants if they do not have a reserve account, why and if they have plans to establish one in the future. Do they have a plan:   | 1) Yes<br>2) No  |
| 42 | <b>Application Question: Reserve Account:</b> On the application we ask applicants how much is currently being held in reserves. Do you feel the amount they have is:<br><br><i>Note: Best practice is to have at least three months' operating expenses in a reserve account.</i>  | 1) Applicant currently does not have a reserve account established<br>2) Insufficient – less than 3 months<br>3) The agency is working towards having adequate reserves for their size<br>4) Adequate<br>5) Best practices |
| 43 | Overall Comments, questions, or suggestions, in reference to the Organizational Budgeting portion of this application:  |  |
| 44 | <b>Program Information: Sustainability</b>  |  |
| 45 | <i>Please note: In order for a program to request more than 30% of the overall program budget, they MUST attach a sustainability plan for your review. If a sustainability plan is not attached, the amount of investment being considered will be adjusted accordingly.</i>  |  |
| 46 | <b>Grant Amount Requested:</b> Does the investment request exceed 30% of the program budget?  | 1) Yes<br>2) No  |

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| 47 | <b>Sustainability Plan:</b> If the request exceeds 30% of the program budget, did they upload the program sustainability plan?   | 1) Request didn't exceed 30% of the program budget so no sustainability plan is required<br>2) The request is more than 30% and they <b>DID</b> upload a sustainability plan<br>3) The request is more than 30% and they <b>DID NOT</b> upload a sustainability plan              |
| 48 | <b>Upload: Sustainability Plan:</b> If the request exceeds 30% of the program budget, do you feel the sustainability plan is:  | 1) Request didn't exceed 30% of the program budget<br>2) Request DID exceed 30% of the program budget but they did not upload a sustainability plan<br>3) Insufficient<br>4) Adequate<br>5) Exceptional   |
| 49 | <b>Program Information: Program Description</b>  |   |
| 50 | <b>Upload: Partial Funding:</b> Will this program accept partial funding?  | 1) Yes, they can accept partial funding<br>2) No, they cannot accept partial funding the whole grant amount is required   |
| 51 | <b>Please rate the below question using the following ratings:</b> 0-3 They were not able to provide qualitative and quantitative data to support the need to implement their program. They did not include local data to support the need HERE 4-7 Adequate response (The information is complete and accurate) 8-10 They were able to provide BOTH qualitative and quantitative data AND they were able to include local data to support the need for them to implement the program HERE |   |
| 52 | <b>Program Information: Program Overview:</b><br><b>Statement of Need:</b> Has qualitative & quantitative data been provided that clearly supports the need for the program and the services they are proposing to deliver? (The data provided should be specific to Beaufort and Jasper Counties):  |   |
| 53 | <b>Statement of Need:</b> Does the application demonstrates an understanding and alignment of the program with gaps in services or local unmet needs?  | 1) Yes<br>2) No   |
| 54 | <b>Please rate the below question using the following ratings:</b> 0-3 Information from the program description was absent, inaccurate or clearly deficient; 4-7 The Program description response was adequate (The information is complete and accurate); 8-10 The program description response was extremely helpful (information was insightful, concise and reflects a high quality)   |   |
| 55 | <b>Program Description:</b> A clear program description is given, allowing you to understand how the program operates and what services are being offered:   |   |
| 56 | <b>Please rate the below question using the following ratings:</b> 0-3 Target population information absent, inaccurate, deficient or does NOT serve those negatively affected by racial disparities. 4-7 Adequate response provided for target population (The information is complete and accurate); 8-10 Target population information is insightful, concise and focuses on at-risk, underserved, or those negatively affected by racial disparities                                   |   |
| 57 | <b>Program Participants/ Who the program serves:</b> A clear and concise description of the program's primary target population is provided AND the program being submitted largely services at-risk or under-served populations, OR those negatively affected by racial disparities:  |   |
| 58 | <b>Please rate the below question using the following ratings:</b> 0-3 Information absent, inaccurate or clearly deficient; 4-7 They demonstrate active participation; 8-10 Information provided demonstrates active participation and collaboration in mutually beneficial activities.  |   |
| 59 | <b>Key Stakeholders and/or Collaborators:</b> Information is clearly provided about key stakeholders supporting the program and information is provided that demonstrates active participation in mutually beneficial collaborations:  |   |
| 60 | <b>Qualitative Program Data:</b> The applicant was able to detail how their program improves the lives of our community and its members:   | 1) Yes<br>2) No   |
| 61 | <b>Program Information: Program Impact</b>   |   |
| 62 | <b>Program Impact:</b> Given the services provided, and the overall program budget identified at the beginning of this section, please rate the total number of people projected to be impacted by this program (proposed):  | 1) This program will have limited impact<br>2) This program has moderate impact and seems reasonable<br>3) This program has significant impact on program participants and the community<br>4) Cannot determine the impact of the program given the information that was provided |

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| 63 | <b>Program Impact:</b> Given the current and proposed program budgets provided for your review, does the difference between current and proposed number of people impacted seem reasonable:  | 1) Yes<br>2) No  |
| 64 | <b>Program Information: Efficiency</b>   |  |
| 65 | <b>Program Efficiency:</b> A per unit cost is accurately provided (the unit being measured is reasonable and the overall program budget was used):   | 1) Yes<br>2) No  |
| 66 | <b>Program Efficiency:</b> The program efficiency is reasonable based on the type of service being rendered and unit being used:   | 1) Yes, I think the widget they are offering to provide is worth what it costs them to produce<br>2) No, I DO NOT think the widget they are offering to provide is worth what it costs them to produce it<br>3) Not only do I not think the widget they are offering to provide is worth what it costs them to produce it I think others are doing it cheaper  |
| 67 | <b>Program Information: Budgeting: Match Funding</b><br>Some federal and state grants provide a portion of the total funds necessary to operate a project and require recipients to match the federal or state share of funding with local support (matching funds).   |  |
| 68 | <b>Match funding:</b> Will United Way funding be used to “draw down” federal or state dollars?   | 1) Yes<br>2) No  |
| 69 | <b>Match funding:</b> If they are able to demonstrate a significant capacity to secure large cash matches, you have the ability to provide up to 8 additional points:  |  |
| 70 | <b>Program Information: Budgeting</b>  |  |
| 71 | <b>Application question: Unusual or Distinctive Budgeting Practices:</b> We asked that applicants utilize this question to put their budget into context for you, the reviewers and suggested they use this box to explain any variances (either + or -) greater than 10%. If provided, was the explanation helpful in putting their Organizational budget into context? | 1) Did not need an explanation since the budget was self explanatory<br>2) Yes, the explanation was helpful<br>3) No, the explanation was not helpful<br>4) Needed an explanation, but they did not provide one  |
| 72 | <b>Upload: Program Budget: Revenue (Lines 1-12 on budget)</b> - All revenue is listed/detailed as requested on the application and is clearly defined:   | 1) Yes<br>2) No  |
| 73 | <b>Please rate the below question using the following ratings:</b> 0 - Information absent; 1-3 Extremely reliant/ only one to two funding streams. With a loss of one, it appears the program would not be sustainable; 4-7 Varied funding streams, could withstand an unexpected loss in funding; 8-10 They are very diversified in their funding streams;              |  |
| 74 | <b>Upload: Program Budget: Revenue (Lines 1-12 on budget)</b> – Program is diversified in its revenue streams providing the program with the ability to withstand funding losses:  |  |
| 75 | <b>Upload: Program Budget: Special Events Revenue (Line 4 on budget)</b> - Program is actively engaged in OR supported by fundraising efforts of the organization as indicated by the amount of Special Events revenue dedicated to this program   | 1) This program does not appear to be supported by fundraising activities of the organization<br>2) This program does not appear to be supported by fundraising activities of the organization BUT provided a justified reason on the application under "Please explain any unusual budgeting practices"<br>3) This program does receive moderate support through fundraising activities of the organization<br>4) This program is very well supported by the fundraising activities of the organization |
| 76 | <b>Upload: Program Budget: Grant Revenue (Lines 5-6 on budget)</b> – This program appears to be a priority of the organization, as evidenced by the amount of support being provided from the Organization's overall grant revenue.  | 1) Yes<br>2) No  |
| 77 | <b>Upload: Program Budget: Expenses (Lines 14-29)</b> - All expenses provided are listed/detailed as requested on the application and are clearly defined:   | 1) Yes<br>2) No  |

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| 78 | <b>Upload: Program Budget: Expenses (Lines 14-29)</b> – All proposed expenses seem reasonable and are in line with current budgeting expenses:   | 1) Yes<br>2) No  |
| 79 | <b>Please rate the overall program budget using the following ratings:</b> 0-2 Information absent; or you feel they are extremely reliant on one to two funding streams. With a loss to one, it appears the program would not be sustainable; 3-6 Varied funding streams, could withstand an unexpected loss in funding; 7-10 The program budget seems very diversified in their funding streams, is sustainable |  |
| 80 | <b>Upload: Overall Program Budget</b> - Please provide your overall rating of the program's budget on a scale of 0-10:   |  |
| 81 | <b>Please rate the below question using the following ratings:</b> 0 - Information absent; 1-2 Answer provided was extremely general (surplus will be "banked"/ deficits will be covered through more fundraising or applying to more grants); 3-4 Sufficient answer / specific explanation; 5 - Provided a detailed plan as to what will be done in either event  |  |
| 82 | <b>Budget Surplus or Deficit</b> – Does the specific explanation they provided in reference to how any surplus will be utilized or deficit will be offset seem practical and reasonable?   |  |
| 83 | <b>Program Budgeting: Staff Salaries / FTE Form</b>  |  |
| 84 | <b>Upload: Program Staff Salaries / FTE Form</b> – Did the applicant provide FTE's and salaries according to the examples provided by UWLC in the template:  | 1) Yes<br>2) No  |
| 85 | <b>Please rate the below question using the following ratings:</b> 0 - Information absent, inaccurate, or clearly deficient; 1-2 Salary amounts, # of staff, or time allocations do not seem appropriate; 3-4 Satisfactory (The information is complete and accurate); 5 - Outstanding (Information provided reflects a high quality and how to calculate a FTE)   |  |
| 86 | <b>Upload: Staff Salaries / FTE Form</b> – Salaries represented in the table, as well as the number of paid staff, seem appropriate for the services provided:   |  |
| 87 | Comments, questions, or suggestions, in reference to the Program Overview, Program Budgeting, or Program Staff Salaries portion of this application:   |  |
| 88 | <b>Program Goals, Outcomes and Key Performance Indicators:</b>   |  |
| 89 | <b>Please rate the below Data Collection question using the following ratings:</b> 0-3 Tool used/provided does not appear to capture all necessary information; 4-7 Adequate. Tool seems to capture the necessary information; 8-10 Exceptional. Information is insightful, concise, and captures all pertinent information required to report back on impact of the program.                                    |  |
| 90 | <b>Upload: Data Collection Tool(s)</b> – Please rate the quality of the uploaded data collection tool using the scale above. In your opinion, will it allow the program to capture the necessary quantitative information required as it relates to the selected outcomes and key performance indicators they selected?  |  |
| 91 | <b>Upload: Data Collection tool(s)</b> – If this program received anything lower than a 7 in the previous question, please explain what data is not being captured or what changes should be made to improve the data collection tool?   |  |
| 92 | <b>Data Measurement Process</b> - Do you feel the process the program plans to use in order to track key performance indicators is:  | 1) Insufficient<br>2) Adequate<br>3) Exceptional   |
| 93 | <b>Data Measurement Process</b> - If you provided anything but "Exceptional", please explain or provide feedback that could improve the quality of their data measurement process in the future:   |  |
| 94 | <b>Upload: Goals</b> - After reviewing the excel spreadsheet provided, how confident are you that this program will be able to address the goal for which they are applying?   | 1) Not confident at all. It appears that the overall goals of the program do not correlate with the goal they are applying for<br>2) Somewhat confident. It appears that the overall goals of the program are a good match with the goal they are applying for<br>3) Extremely confident. It appears that the overall goals of the program are exactly aligned with the goal they are applying for |

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| 95  | <b>Upload: Outcomes</b> - After reviewing the projected outcomes this program selected, do you feel:   | <p>1) This program selected the minimum number even though it seems they have the ability to track additional key performance indicators</p> <p>2) This program seems to have a thorough understanding of the relevant key performance indicators</p> <p>3) This program selected the maximum number even though it does not seem they will have the ability to track all key performance indicators</p>            |
| 96  | <b>Upload: Projected KPI's</b> - After reviewing the projected outputs (The how many) please rate the projected impact of this program:  | <p>1) This program seems to have a minimum projected impact, with low numbers being provided on the spreadsheet</p> <p>2) This program seems to have a realistic understanding of the projected impact of this program's service provision, with adequate numbers being provided in the spreadsheet</p> <p>3) This program seems to have an inflated projected impact that might not be able to be accomplished</p> |
| 97  | <b>Upload: Overall Data</b> - After reviewing this section focused on data and the last section focused on overall program information, do you feel this program:  | <p>1) Provides support services for individuals and families that improve lives of program participants (pulling people from the river)</p> <p>2) Creates lasting change in the community condition (going upstream addressing root causes)</p> <p>3) Both</p> <p>4) Neither</p>  |
| 98  | <b>Success Stories:</b>  |   |
| 99  | <b>Please rate the below two Success Story questions using the following ratings:</b> 0-3 Information provided did little to help tell the "So What Question" or explain how their services improved the lives of program participants/families; 4-6 Adequate response (The information is complete and accurate); 7-10 Story was moving and really helped tell the "SO What Question" or explain how their services improved the lives of program participants/families |   |
| 100 | <b>Success Story #1</b> - The applicant provided a clear and concise story that helped explain how their program improved the lives of their participants. The story focused on the goals and outcomes they selected to track in the next section:   |   |
| 101 | <b>Success Story #2</b> - The applicant provided a clear and concise story that helped explain how their program improved the lives of their participants. The story focused on the goals and outcomes they selected to track in the next section:   |   |
| 102 | <b>Subjectivity points</b> - As a reviewer, we value your keen insights and the individual lenses each of you look through when evaluating these applications. You now have the ability to provide up to 10 points to enhance this applicant's score. If subjectivity points are provided, please include the reason in the below comment box:   |   |
| 103 | Overall Scoring Comments:  |   |
| 104 | <p><b>END OF SCORECARD</b></p> <p><b>THANK YOU!</b></p> <p>for lending your passion, your time, and your talent!!</p> <p>On behalf of United Way, the agencies, and all of the residents of Beaufort and Jasper counties receiving these much-needed services, Thank You!</p> <p>You truly represent what it means to</p> <p><b>LIVE UNITED!</b></p>   |   |

