

**Community Investment Panel Program Review Rubric**

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| **Section 1 – Organization/Agency Narrative** |
| **Level of Performance** | **Strong** | **Good** | **Fair** | **Missing**  |
| Score Amount | 5 | 3 | 2 | 0 Points  |
| **Mission Alignment:** Do the organization’s program and services align with the mission?  | Programs and services clearly align to the organizational mission. | Program and services somewhat align to the organizational mission. | At least one program and services align to the organizational mission. | Programs and services do not align to organizational mission. |
| **Level of Performance** | **Strong** | **Good** | **Fair** | **Missing**  |
| Score Amount | 5 | 3 | 2 | 0 Points  |
| **Diversity, Equity, & Inclusion:** Does the organization incorporate diversity, equity, and inclusion (DEI) strategies into their work & does the organization's staff and board of directors mirror the population that is served? | Data is provided to show that the organization’s staff and board of directors (BOD) mirror the population being served. DEI efforts and strategies are clearly described and intentionally carried out. | Data is provided to show that the organization is working toward having staff and BOD mirror population served. The organization demonstrates progress toward DEI strategies.  | No data given to demonstrate that the organization’s staff and BOD mirror the population served or descriptions of DEI plans or strategies. | No evidence given. |

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| **Section 2 – Program Narrative** |
| **Level of Performance** | **Strong** | **Good** | **Fair** | **Missing**  |
| Score Amount | 5 | 3 | 2 | 0 Points  |
| **Program Description:** The program goal(s) and services are clearly identified and are in a United Way impact area.  | Program description clearly identifies the program goals and services, including the needs being addressed, activities, and program delivery method. | Program description includes goal and may identify additional components requested but may be missing other detailed information. | Program description is a general statement of the work yet does not identify program goals and/or describe program services. | Program description does not identify program goals and services. |
| **Community Priority:** Within the selected impact area, **t**he program clearly serves and addresses a priority issue outlined by the community and United Way stakeholders.  | The program has a direct tie to serving the community in an impact priority outlined by the community and United Way stakeholders. There are clear examples and case studies that support the program’s results. | The program does serve the community in an impact priority outlined by the community and United Way stakeholders. It is clear how this program addresses this area but does not provide examples. | The program somewhat serves the impact priority area but is not clear. | Program does not serve a priority impact area. |
| **United Way Bold Goal:** The program clearly serves the ALICE population in efforts to work towards the United Way Bold Goal. | Program alignment to United Way’s mission to support ALICE is clearly described with examples provided in the narrative. | Program alignment to United Way’s mission to support ALICE is somewhat described but lacks clarity. | Program does not align with United Way’s mission to support ALICE. |
| **Priority Population:** Is the priority population clearly identified?  | Priority population is clearly identified using data, and agency has described why this population is prioritized for this program. | Priority population is identified using data but missing specific information describing why this population is prioritized. | Priority population is generally identified, missing supportive data and/or specific information describing why this population is prioritized. | Priority population is not identified. |
| **Equitable Programing:** Does the program have strategies to ensure that it is accessible and equitable to the population identified?  | Description shows understanding of equitable programming, defines measurement of equitable outreach goal, and shows examples of tactics and strategies used to achieve this. | Description shows understanding of equitable programming and shows examples of tactics and strategies to use this. | Description shows marginal understanding of equitable programming and provides some insight on attempts they have made to develop goals, tactics, and strategies. | Description shows no understanding of equitable programming and has not started developing strategic plans to achieve it. |
| **Partnerships & Collaborations:** Is this program partnering with community organizations and community members to meet the needs of their priority population, to reduce disparities, and duplication? | Program clearly uses partnerships and community feedback to meet the needs of their priority population and reduces disparities and duplication. | Program partnerships and community feedback suggested and/or the potential is demonstrated by clearly describing a process that is currently being established. | Program partnerships and collaboration are suggested but a description of the process is missing. | No program partnerships or community feedback is discussed. |

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| **Section 3 – Data Collection & Results** |
| **Level of Performance** | **Strong** | **Good** | **Fair** | **Missing**  |
| Score Amount | 5 | 3 | 2 | 0 Points  |
| **Demographics:** Program can collect data in different demographic areas.  | Organization is able to report on most demographics without a large percentage of individuals reported in the “unknown” category. | Organization is able to report on some demographics but has a large percentage of individuals reported in the ”unknown” category. | Organization has put a majority of individuals in the “unknown” category for several areas. |
| **Effectiveness:** Program clearly demonstrates progress toward achieving the intended outcomes measured and how it compares to either national or peer averages.  | Participant is able to indicate how effective the program is based off of case studies, examples, and their own achievements. Participant demonstrates expertise of how they compare to national AND peer averages. Participant can articulate reasonable expectations and goals with evidence to support efforts. | Participant is able to indicate how effective the program through examples of their own achievements. Participant can compare to national averages OR peer averages. Participant has set a reasonable goal for their outcomes. | Participant is unable to indicate how effective their program is in comparison to national or peer averages. Participant has set a reasonable goal. | Participant is unable to indicate how effective their program is in comparison to national or peer averages. They have set an unrealistic goal or have not met expectations. |
| **Data Collection:** Are measurement tools are clearly defined and align with the overall outcomes the program intends to measure?  | Participant data is regularly collected/tracked, including instruments and methods, and examples of participant achievement are provided. | Participant data is regularly collected/tracked, but details about instrument, methods, and/or participant achievement may be missing. | Participant data collection plan is not well explained or still being established, little or no details of how evaluation data will be used for future program improvements. | Participant data is not collected or tracked. |
| **Section 4 – Budget** |
| **Level of Performance** | **Strong** | **Good** | **Fair** | **Missing**  |
| Score Amount | 5 | 3 | 2 | 0 Points  |
| **Program Budget:** Is the program budget detailed, complete, and clearly supports the work outlined?  | Budget is complete, balanced, and clearly supports the work outlined. Budget has several sources of financial support.  | Budget is complete, balanced, and seems to support the work outlined. The budget narrative is vague. Budget has a few other sources of financial support. | The program budget is not balanced and is unclear how it supports the work outlined. Budget shows one additional source of financial support. | The program budget is incomplete or missing.  |
| **Financial Review Team:** According to the Financial Review Team, did the organization’s review show no weaknesses or negative findings?  | Agency passed the Financial Review Team’s investigation with no weaknesses or negative findings. | The Financial Review Team did find some weaknesses but feels the organization can resolve any issues they may have found. | Agency showed weakness and several negative findings. It is the Financial Review Team’s opinion that this organization is financially stable. |
| **Level of Performance** | **Good** | **No or Missing** |
| Score Amount | 2 Points Bonus  | 0 Points  |
| **Leverage Dollars:** Does this program utilize leverage funding and match dollars?  | The program utilizes leveraged funding. | The program does not have the ability to utilize leverage funding.  |