

United Way of Greater St. Louis  
Safety Net Funding Application | 2021 – 2023 Cycle  
Scoring Rubric and Weighted Formula

SECTION I: ADMINISTRATION – 20%	Rating	Comments
1. The agency's mission, vision, and values are clearly articulated and inform practice.		
2. The agency has clearly defined core competencies and utilizes its strategic plan to inform operations.		
3. Senior leaders intentionally and effectively encourage high performance and a culture of continuous learning.		
4. There are systematic processes in place to measure, assess, and continuously improve performance.		
5. The agency captures voice of the customer data to determine its performance in meeting their needs and requirements.		
6. Processes are in place to evaluate, reward, develop, and engage the workforce including volunteers.		
7. The agency cultivates and prioritizes diversity, equity, and inclusion within the workplace.		
8. The agency has processes in place to document, ensure, and meet legal, ethical, and regulatory requirements.		
9. The agency has electronic systems to collect real-time administrative, financial, and performance data.		
SUB-TOTAL/WEIGHTED SCORE =		

SECTION II: GOVERNANCE – 20%	Rating	Comments
1. There is an effective structure in place for agency governance.		
2. Effective processes exist for recruiting, developing, engaging, and retaining talent to serve on the Board of Directors.		
3. The agency cultivates and prioritizes diversity, equity, and inclusion at the Board level.		
4. By laws, policies, and oversight exist to ensure transparency, stewardship, and accountability to the community.		
5. The agency has an effective process for engaging in succession planning for the Chief Executive, Board Chair, and other key senior leadership roles.		
6. Board members assess themselves individually and collectively at least once a year.		
7. The board reviews the Chief Executive's performance annually and uses this process to determine compensation and goals for the upcoming year.		
SUB-TOTAL/WEIGHTED SCORE =		

SECTION III: PROGRAM – 40%	Rating	Comments
1. The program addresses a critical need(s) identified in the Community Needs Assessment.		
2. There is a systemic and effective process to deliver program activities and interventions.		
3. The program's target population is well-defined.		
4. The agency's theory of change describes how the program model addresses the community need and helps clients achieve intended outcomes including any research, evidence, or experience that supports this.		
5. The agency has successful outcome results including trends and/or benchmarks as it pertains to the program(s) and target population(s) for which it is requesting funding.		
6. There are processes and protocols in place to ensure program fidelity and modifications as needed.		
7. Processes are in place to listen and learn from program participants and obtain actionable information.		
8. The agency demonstrates that their programs, services, and initiatives seek to reduce disparities and advance diversity, equity, and inclusion.		
9. Staff and volunteers possess the necessary qualifications, expertise, training, credentials, and cultural competency to effectively deliver the program.		
10. The agency regularly collaborates, integrates, and aligns services with other service providers.		
SUB-TOTAL/WEIGHTED SCORE =		

SECTION IV: FINANCE – 20%	Rating	Comments
1. The agency describes how the funds will be used to address the community needs and selected outcomes.		
2. The agency has appropriately resourced financial expertise to help assure financial planning, monitoring, and safeguarding.		
3. The agency clearly articulates the impact of not receiving United Way funding.		
4. The agency identifies alternatives funding sources.		
5. The agency has an operating reserve ratio range of 25 - 75%.		
6. The agency has a support services ratio range of 6% - 25%.		
7. The agency demonstrates a diverse sources of revenue types and amounts.		
8. The agency's financial history does not reflect any deficits in the past three years.		
9. The agency has provided a management letter and findings with few or no financial weaknesses.		
10. The agency's budget form figures align with the audited financials' figures, with no inconsistencies in the amounts.		
SUB-TOTAL/WEIGHTED SCORE =		

Weighted Formula	Points	Rating
<b>1. Rubric score</b> Administration 20%; Governance 20%; Program 40%; Finance 20%	100	
<b>2. Depth and breadth of services</b> Number of people served, complexity of services provided, alignment with systems level community initiatives	7	
<b>3. Outcomes and impact</b> Data, trends, internal and external benchmarks demonstrating effectiveness and meaningful results for the people the organization is in existence to serve	7	
<b>4. Alignment with community needs</b> The programs and services the organization provides addresses priorities identified in the Community Needs Assessment	7	
<b>5. Diversity, equity, and inclusion lens</b> The organization's policies, programs, and practices prioritize and advance diversity, equity, and inclusion	7	
<b>TOTAL POSSIBLE POINTS</b>	<b>128</b>	

Rating Key	Points
Fails to provide evidence	0
Somewhat provides evidence	2
Solid evidence provided	5
Exceptional evidence provided	7