



United Way of York County, SC

## UWYC Allocations Timeline 2021-2022

<b>December 3, 2020</b>	Meeting with Collective Impact Committee for Approval
<b>January 14, 2021</b>	Plan approved by UWYC Board
<b>January 20, 2021</b>	Announcement to currently funded partners
<b>January 29, 2021</b>	Collective Impact Committee Meets to Approve Materials
<b>February 1, 2021</b>	Announcement on Website
<b>February 2 or 4, 2021</b>	Training for Root Cause Taskforce and other Review Volunteers
<b>February 15, 2021</b>	Agency Eligibility, Scorecard and Required Materials are finalized and made available to review teams and agencies.
<b>April 5, 2021</b>	Application available.
<b>April 15, 2021</b>	Quarter 3 Reports are Due. Agencies who are applying for continued funding must have all materials to UWYC Staff by this date.
<b>Week of April 26, 2021</b>	Materials are sent to Review Committees.
<b>Week of May 3-7, 2021</b>	Root Cause Taskforce Reviews Quarterly Reports, meets with agencies, and makes recommendations to staff.
<b>May 10, 2021</b>	Staff gives recommendation to Collective Impact Committee
<b>May 13, 2021</b>	Board Meeting for Approval of Allocations and MOA.
<b>May 27, 2021</b>	Award notifications are sent to agencies.
<b>July 1, 2021</b>	Funding Cycle Begins.

## 2021-2022 AGENCY EVALUATION FORM

### Financial Stability Partner Grants

<b>AGENCY:</b>		<p><b><u>RATING SCALE:</u></b></p> <p><b>5 – Outstanding:</b> Excels on all of the identified conditions</p> <p><b>4 – Very good:</b> Performs at above average level on two or more of the identified conditions</p> <p><b>3 – Meets expectations:</b> Performs at or above the minimum standard on all conditions. This is what one would expect from an experienced, competent agency.</p> <p><b>2 – Marginal:</b> Performance falls somewhat below a minimum level on one or more of the conditions, though there is potential to improve.</p> <p><b>1 – Does not meet expectations:</b> Performance in this area is well below standard and needs immediate attention.</p>
<b>PROGRAM:</b>		
<b>PRIORITY AREA</b> (check box that applies):	<input type="checkbox"/> Underemployment <input type="checkbox"/> Financial Literacy	

CONTENTS	
Category	Score:
2. Quarterly Reporting	
3. Required Documentation	
4. Evaluation	
<b>Total</b>	

## 1. PREREQUISITE QUESTIONS

<p><b>Alignment with at least one Root Cause:</b> Does this program align with the Bold Goal and Root Causes? <i>Agencies should identify one Impact Area, Goal and Strategy to address from the RFP.</i></p>	<b>YES</b>	<b>NO</b>
<p><b>Financial Capacity:</b> Is this agency fiscally solid and viable enough for investment consideration?</p> <ul style="list-style-type: none"><li>• Does the agency maintain adequate financial records?</li><li>• From a financial perspective, is this agency stable?</li></ul>	<b>YES</b>	<b>NO</b>
<p><b>Financial Stability Funding in 2020?</b> Did the agency receive Financial Stability Funding from UWYC during the 2020-2021 Funding Cycle?</p>	<b>YES</b>	<b>NO</b>

<b>2. Quarterly Reporting</b>	
<b>Question</b>	<b>Score (1-5)</b>
<p>Has the agency provided data for all required indicators (highlighted)?</p> <p><b>5:</b> 100% of indicators <b>4:</b> 80% of indicators <b>3:</b> 60% of indicators <b>2:</b> 40% of indicators <b>1:</b> 20% of indicators or less</p>	
<b>Question</b>	<b>Score (1-5)</b>
<p>Has the agency served a population within our target area?</p> <p><a href="#">You can review the Target Population Guidelines here.</a></p> <p>Note: Look at Number of clients who are low income, number of clients who earn less than \$25,000 per year, and number of clients who are unemployed or underemployed.</p>	
<b>Question</b>	<b>Score (1-5)</b>
<p>Are the agency's numbers served in line with their projections?</p> <p>NOTE: Take into consideration extenuating circumstances as discussed by the agency in their application.</p> <p><b>5:</b> Served 50% of yearly projection <b>4:</b> Served 40% of yearly projection <b>3:</b> Served 30% of yearly projection <b>2:</b> Served 20% of yearly projection <b>1:</b> Served 10% of yearly projection or less.</p>	
<b>Question</b>	<b>Score (1-5)</b>
<p>Did the agency provide data for all demographics?</p> <p><b>5:</b> 100% of demographics <b>4:</b> 80% of demographics <b>3:</b> 60% of demographics <b>2:</b> 40% of demographics <b>1:</b> 20% of demographics or less</p>	

<b>3. Required Documentation</b>	
<b>Question</b>	<b>Score (1-5)</b>
<p>Did the agency provide all required documentation? Is their record keeping accurate and up to date?</p>	

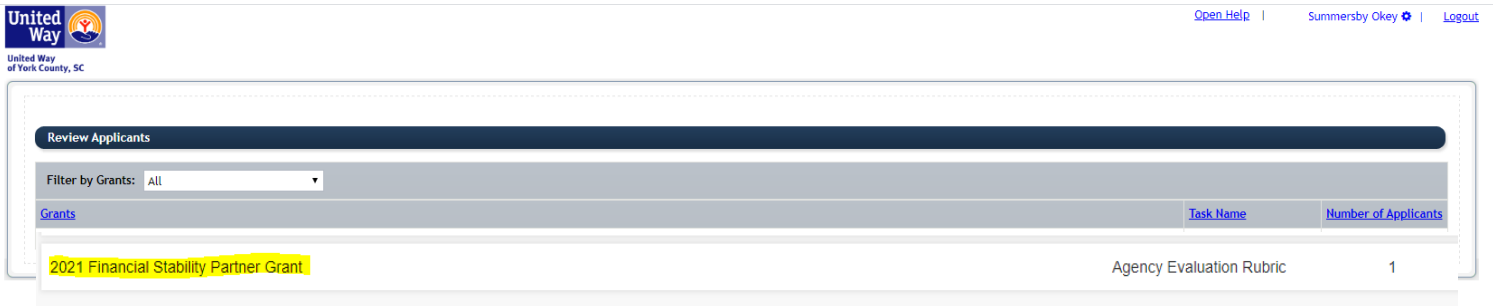
<b>4. EVALUATION</b>	
<b>Question</b>	<b>Score (1-5)</b>
Is there any indication that the agency reviewed outcome data and made an attempt to improve services as a result of the information gained?	
<b>Question</b>	<b>Score (1-5)</b>
<p>Does the agency allocate adequate funds or resources to evaluation or measurement?</p> <p><b>5:</b> Allocated 10-15% of fund for appropriate use. <b>4:</b> Allocated appropriate funds, but have not used them <b>3:</b> Allocated 5% of funding <b>2:</b> Allocated some funds, but it was less than 5% <b>1:</b> Did not allocate any funds for evaluation or measurement</p>	

<b>5. Comments</b>
<b>If your agency's service delivery was affected by COVID-19, how did this influence their score. Would you still recommend their continued funding despite this setback?</b>

<b>TOTAL SCORE:</b>	<b>/35</b>
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## Community Force Guide for Root Cause Taskforce

1. Navigate to [uwyc.communityforce.com](http://uwyc.communityforce.com)
2. Click “Login” in the top right corner
3. Login with your username and password. You should all have an account already.
  - Summersby can send you an email to reset your password, if need be.
4. Once you login, you will see the number of applications assigned to you. They will all be listed under “2021 Financial Stability Partner Grants”.



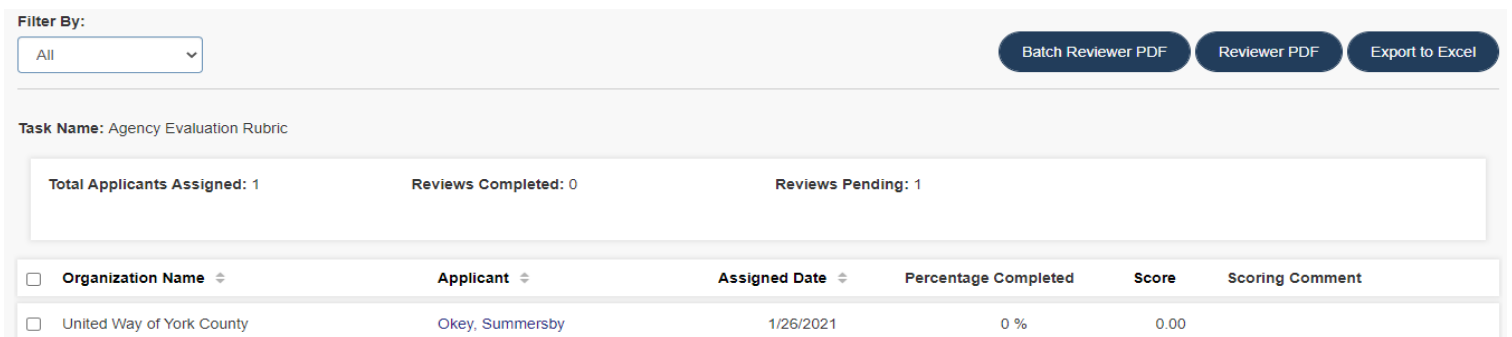
United Way of York County, SC [Open Help](#) | [Summersby Okey](#) | [Logout](#)

Review Applicants

Filter by Grants: All

Grants	Task Name	Number of Applicants
2021 Financial Stability Partner Grant	Agency Evaluation Rubric	1

5. Click on the name of the grant to open your list of assigned applicants.



Filter By: All

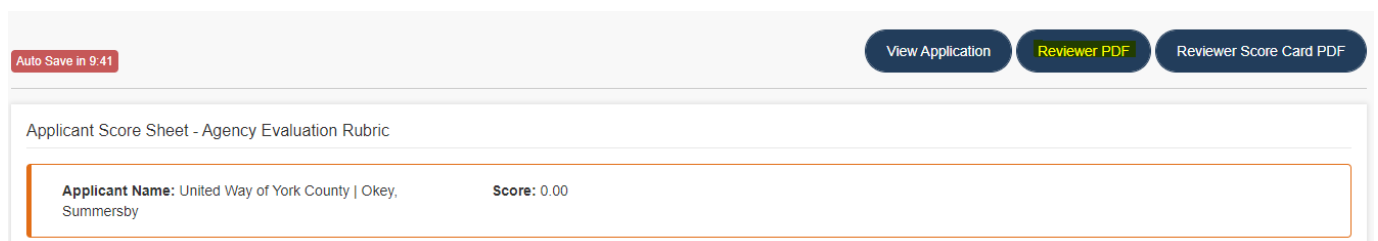
Batch Reviewer PDF Reviewer PDF Export to Excel

Task Name: Agency Evaluation Rubric

Total Applicants Assigned: 1      Reviews Completed: 0      Reviews Pending: 1

Organization Name	Applicant	Assigned Date	Percentage Completed	Score	Scoring Comment
<input type="checkbox"/>	United Way of York County	Okey, Summersby	1/26/2021	0 %	0.00

6. **Click on the applicant's name to open their application.** Ultimately, you are going to be updating the “Score” column for each application. They will receive a score between 0 and 35.
7. Once you open the application, you can clicker “Reviewer PDF” in the top right corner to open a PDF, if you prefer to print it to read. You will primarily be looking at the Quarterly Report.



Auto Save in 9:41

View Application Reviewer PDF Reviewer Score Card PDF

Applicant Score Sheet - Agency Evaluation Rubric

Applicant Name: United Way of York County | Okey, Summersby      Score: 0.00

8. The Agency Evaluation Rubric (also made available to you in hard copy) is in the left hand column of your screen. It is required that you complete an evaluation for all your applications in Community Force. We will not accept hard copies of the evaluation form this year.

**RATING SCALE:**

**5 – Outstanding:** Excels on all of the identified conditions

**4 – Very good:** Performs at above average level on two or more of the identified conditions

**3 – Meets expectations:** Performs at or above the minimum standard on all conditions. This is what one would expect from an experienced, competent agency.

**2 – Marginal:** Performance falls somewhat below a minimum level on one or more of the conditions, though there is potential to improve.

**1 – Does not meet expectations:** Performance in this area is well below standard and needs immediate attention

**1. Prerequisite Questions**

Alignment with at least one Root Cause:

**Application Summary of:** United Way of York County | Okey, Summersby Print

**Agency Information**

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**Agency Information**

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\*Agency Name: Test Agency

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\*Program Name: Test Program

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\*EIN Number: 123456789

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\*DUNS Number: 123456789

- Once you have read the application (either digitally in the right column, or your printed PDF), you will assign a score in Community Force for each evaluation area. You will do this using a drop-down menu.

**Applicant Name:** United Way of York County | Okey, Summersby **Score:** 0.00

**required indicators (highlighted):**

Select v

**Has the agency served a population within our target area as their main client base?**

**Refer to the Target Population Guidelines here.**

Select v

- Select
- 5- Outstanding
- 4 - Very Good
- 3 - Meets Expectations
- 2- Marginal
- 1- Does Not Meet Expectations
- 0 - N/A

**Application Summary of:** United Way of York County | Okey, Summersby

**Agency Information**

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**Agency Information**

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\*Agency Name: Test Agency

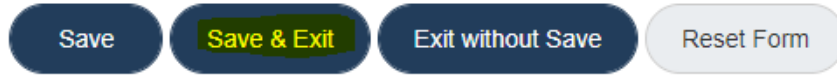
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\*Program Name: Test Program



United Way of York County, SC

- 10. Each question will require either a “yes or no” answer or a “dropdown score” in addition to an explanation or comment. Please add comments as you see necessary.
- 11. Please provide a score for each area. The total possible score is 40 points.
- 12. When you have completed the evaluation, click “Save & Exit” at the bottom of your screen.



- 13. Once you “Save & Exit”, you will return to your dashboard. Your total score for that application now appears in the “Score” column, along with your scoring comment.

Task Name: Agency Evaluation Rubric

Total Applicants Assigned: 1	Reviews Completed: 0	Reviews Pending: 1
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<input type="checkbox"/>	Organization Name	Applicant	Assigned Date	Percentage Completed	Score	Scoring Comment
<input type="checkbox"/>	United Way of York County	Okey, Summersby	1/26/2021	0 %	27.00	

- 14. Repeat these steps for each application assigned.





# Financial Stability

**Bold Goal: 3,000 York County families achieve financial stability by 2030.**

Why We Need This Work	If We Do This	This Will Happen
Families who have financial literacy skills will be able to make wise financial choices.	Link families to financial products, education, and services.	Families have the financial tools and resources to make wise financial choices.
Individuals are working, but do not make enough to support their families.	Connect individuals to a sustainable career path.	Individuals gain employment with a livable wage and/or increase their wages.
Families who are living below the financial stability line do not make enough to make ends meet.	Increase access to supports and resources to reduce their costs and increase their disposable income.	Families will be able to save for emergencies.

## Funding Priority Outcomes and Required Indicators

### Financial Literacy Outcomes:

- Individuals increase knowledge of effective financial practices
- Individuals achieve financial self-sufficiency

### Financial Literacy Indicators:

- # of participants who take advantage of and/or complete financial literacy courses or coaching.
- # of participants who take advantage of the Earned Income Tax Credit.
- # of participants who signed up for income maintenance programs.

### Underemployment Outcomes:

- Individuals learn job hunting and/or soft skills training to gain employment at a livable wage.
- Families are supported along the path to financial stability through programs for dependents.

### Underemployment Indicators:

- # of participants enrolled in job training program(s)
- # of participants enrolled in a G.E.D, vocational degree, certificate, or credential program
- # of individuals who gain employment with a livable wage and/or increased wages
- # of individuals who complete an internship or apprenticeship with a goal of full employment
- # of individuals served who increased their disposable income by accessing supports and/or reducing their costs.



## UWYC Financial Stability Partner Grants Outcomes and Indicators

<b>Impact Area: Underemployment</b>	
Target population for all programs must include at least one of the following: <ul style="list-style-type: none"> <li>• Individuals who are low income (up to 200% FPL) or living in poverty.</li> <li>• Individuals who are unemployed, underemployed, or not earning income at the Self Sufficiency Standard for family size.</li> </ul> <p style="text-align: center;"><i>Please refer to the <a href="#">Target Population Guidelines</a> for further information.</i></p>	
<b>Goal 1: Increase the number of participants enrolled in job training programs</b>	
<b>Strategy 1:</b> Provide job hunting skills and/or soft skills training for individuals to gain employment with a livable wage	<b>Reporting Requirements (at least one required):</b> <ul style="list-style-type: none"> <li>• #/% of participants who are enrolled in and/or complete job training program(s) for jobs available in the local market</li> <li>• #/% enrolled in a G.E.D., vocational degree, certificate, or credential program and/or earn relevant licenses, certificate, degree, or credential</li> <li>• #/% of individuals served who gained employment with a livable wage and/or increased their wages</li> <li>• #/% of individuals who complete an internship or apprenticeship with a goal of full employment</li> </ul>
<b>Strategy 2:</b> Support families along a path to financial stability through programs for dependents	<ul style="list-style-type: none"> <li>• #/% of individuals served who increased their disposable income by accessing supportive services and/or reducing their costs</li> </ul>

<b>Impact Area: Financial Literacy</b>	
Target population for all programs must include at least one of the following: <ul style="list-style-type: none"> <li>• Individuals who are low income (up to 200% FPL) or living in poverty.</li> <li>• Individuals who are unemployed, underemployed, or not earning income at the Self Sufficiency Standard for family size.</li> </ul> <p style="text-align: center;"><i>Please refer to the <a href="#">Target Population Guidelines</a> for further information.</i></p>	
<b>Goal 1: Increase the number of participants who increase their knowledge of financial literacy practices and implement sound financial practices.</b>	
<b>Strategy 1:</b> Increase knowledge of effective financial practices	<b>Reporting Requirements (at least one required):</b> <ul style="list-style-type: none"> <li>• #/% who take advantage of financial literacy courses or coaching</li> <li>• #/% who complete financial literacy courses or coaching programs</li> <li>• #/% who take advantage of the Earned Income Tax Credit</li> <li>• #/% who signed up for income maintenance programs</li> <li>• # of families who grow savings/assets by decreasing debt, increasing asset ownership, improving credit score and/or creating and following a budget.</li> </ul>

UWYC Root Cause Taskforce Contact List

<b>Financial Literacy</b>	
<b>Volunteers</b>	<b>Email Address</b>
Dewayne Alford	dalford@rhha.org
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Stacey Moore	smoore@yorktech.edu

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Corree Carelock	correecarelock@gmail.com
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