

FY18 UWCI Investment Process - Program Assessment Elements



Accountability (9% of total points)

1	Agency attended quarterly Agency Director's Meetings
2	Program data was submitted on time

Program Description (18% of total points)

What We Do - Program description under "What We Do" includes:	
3	Brief description of the agency, specific to Central Iowa if part of a larger entity
4	Provide a clear and concise description of how the UWCI funded program operates
5	Specific information about how UWCI funds are used in program (what services UWCI supports)
6	Description of how services are delivered, emphasizing best practices to meet the clients' needs
Who We Serve - Program description under "Who We Serve" includes:	
7	Description of the population, including underserved (low income, special needs, refugees & immigrants, ex-offender, etc.) served by the UWCI funded program, including eligibility criteria and geographic location (county, high risk neighborhoods, etc.)
How We Impact* - Program description under "How We Impact" includes:	
8	Description of how program is contributing to meeting the Community Goals in Education, Income or Health
9	Description of how program is impacting the UWCI strategy through which the program is funded
Success Story	
10	Success Story related to UWCI investments is provided (see Components of a Success Story handout)
11	UWCI Release Form is provided for the Success Story

Results Accountability/Program Performance (73% of total points)

Performance Measures* - Based on review of the data in the Scorecard snapshot and trend lines reviewed:	
12	The Target Measure(s) is/are maintaining or trending in the right direction, from the baseline
13	The Target Measure(s) appears to be on track towards meeting benchmark for 2020
Story Behind the Curve	
14	Description of the trend(s) that help tell the story, including explanation of variances in numbers and causative factors
15	Description of what the program is currently doing to have successful outcomes for the clients served
16	Description of how benchmarking process has stretched the capacity of the UWCI funded program
17	Description of research and/or best practices that is <i>currently used</i> to guide the structure and delivery of the UWCI funded program
Partners	
18	Description of partners and/or collaborations that are helping, or can help, in turning the curve, including existing and potential partnerships
19	Description of partners and the role they play in turning the curve or meeting benchmarks
20	Description of leveraged resources for the funded program, including volunteer hours, match dollars and/or other funding sources
What Works (what you've learned and what enhancements you could make)	
21	Description of research/best practice that if applied in the future, could help the program get better results, faster, for clients served
22	Description of program strategies/activities that could work to turn the curve faster on the targeted measure(s), including those identified through the benchmark process
23	Description of volunteer and advocacy efforts (local or national) that could help enhance the work the program is doing in the community, including how UWCI can assist
Action Plan*	
24	From actions described under 'What Works', describe specific, data driven actions and/or program improvements the program will take within the next year (short-term) to reach successful outcomes for clients
25	From actions described under 'What Works', describe specific, data driven actions and/or program improvements the program will take within the next 3-5 years (long-term) to reach successful outcomes for clients
26	From the Action Plan, identify and describe low cost or no cost solutions that could be utilized to fulfill the action plan
27	If additional resources are required to fulfill the Action Plan, describe what steps the program will take to acquire these resources

* Considered key and are weighted to reflect this level of importance.

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Tips for Success



7 Success Story Components:

- 1- Describe the person who this story about, including personal attributes
- 2- Describe what happened to this person in their life stages, living/working/school environment, etc.
- 3- Describe what happened that makes this person set a goal or begin to change their circumstance, behavior or attitude
- 4- Explain what barriers were encountered while they were working towards the goal or change that may have caused a struggle to overcome
- 5- Describe how they overcame the obstacles, including organizations, programs and people who made a difference as they worked toward the goal or change
- 6- Describe what happened/outcome when the goal or change was achieved or lessons learned along the way
- 7- Describe what will happen next, give credit for assistance given or lessons learned, and project how the story will make in our community

Putting Your Best Foot Forward During United Way of Central Iowa Investment Meetings:

Community volunteers and United Way of Central Iowa staff want you to feel comfortable and be successful during your investment meetings. Here are some tips on how to present most effectively.

Come on time and keep the allotted time in mind; other groups may be waiting to present.

Come prepared. Everyone representing your organization should be familiar with your data and the contents of your Scorecard. You may want to meet prior to the investment meeting to review your information.

- 1- Bring the people with you who are most familiar with your agency so you can answer questions effectively. Consider a board member and a client.
- 2- Answer questions honestly; we are all learning and growing.
- 3- Be positive! We all want to continue to improve, and volunteers do not expect perfection.
- 4- Do not bring piles of materials with you. Volunteers are more interested in listening to what you have to say than thumbing through multiple documents.
- 5- If you don't know the answer to a question, you can respond that you will find out and get back to the group.
- 6- Share a picture and a story! Leave the volunteers with something to remember.
- 7- Identify who will answer the questions first, so it is clear for your team.
- 8- Ask questions so you leave feeling that you are informed and ready for the next year.

Study Hall

Come to ask any questions regarding the investment process, Scorecard, and Andar / Community Builder

Thursday, January 5th	3:00-5:00
Monday, January 9th	1:00-3:00
Wednesday, January 11th	8:00-10:00

All sessions will be located at UWCI, Room 4