PARTNERING FOR RESULTS FY 2018-2019
REVIEW PANEL APPLICATION EVALUATION TOOL

Draft tool. Subject to minor revisions prior to finalization and Review Panel Meeting.

Agency Name:_____

Date Proposal Completed**: _____**

Program Name: _____

Reviewer: _____   Date Review Completed _____

Amount of Request:$_____

Priority Area: ☐ Elderly ☐ Children & Youth   ☐ Emergency Needs ☐ Supportive Services

Target Populations   ☐ Adult   ☐ Children

Unit Description:_____

Total Unit Rate: $_____   Unit Rate funded by **Lee County**: $_____

Total # of Units:_____   # of Units purchased by **Lee County**:_____

Each member will score each section in terms of both strengths and weaknesses utilizing the answers provided from the agency's entire proposal packet (which includes all supporting documentation). The score for each section should be based on the information provided in the proposal templates and supporting documentation that has been provided. It is not unusual for a response to be very strong and have no weaknesses and therefore be scored the highest available. Likewise, committee members may elect to give the lowest score possible when no strengths are mentioned and significant weaknesses are documented in the proposal or there is lack of documentation to substantiate statement/section of proposal.

The items listed under the "Resources to Utilize to Score this section" are examples only. Application information contained in other areas of the proposal packet may also be utilized to assist in scoring each section.

Please include an explanation in the comments section with the rationale for your score.

  1). Program Design (20 possible points) – evaluates how well the proposal explains and defines the need for the services in the community; how the proposed services meet those needs; explains the target population and how the target population will be served by the proposed program. Specific attention should be given to data, needs assessments, goals and objectives that are provided.

Resources to Utilize to Score this section
   1. **Narrative Template: Program Design section**
   2. **Logic Model Template**
   3. **Evaluation Plan Template**
   4. **Program Staffing Plan Template**
   5. **Monitoring Reports**

Questions to consider when scoring this section:
1. Are the hours and days that program is available clearly defined?
2. Is the program goal(s) clearly identified and is the goal(s) consistent with agency's mission statement?
3. Does the program description include enough information to clearly explain what the program will accomplish, and how it will be done?
4. Are client fees, if applicable described?
5. Is a valid target population defined clearly?
6. Is participant eligibility clearly defined?
7. Are specific selection criteria for clients to be served explained?
8. Are proposed services described clearly and thoroughly?
9. Are activities to be provided identified in a clear and concise manner?
10. Is the number of participants to be served identified in proposal?
11. Is the number of unduplicated participants to be served accurately defined?
12. Does the proposal clearly identify capacity?
13. Is the formula for calculating capacity logical and reasonable?
14. Is the ratio of staff to participants clearly listed and defined?
15. Was the location of services described clearly?
16. Were outreach methods clearly explained and appropriate?
17. Does the outcome statement reflect how a client will benefit and is statement measurable, achievable and realistic?
18. Does the proposal identify if program is based on evidence-based, research based or best practices model? Questions 17a-17d of the proposal template must be completed for programs applying under the "Activities for Children & Youth" and any training/educational program.
19. Is the research design for evidence based programs clearly defined and explained?
20. Based on the information provided, do you understand the scope and goals of the program, and how the proposed services will be provided?

The score of this section should be based on how well the proposal as a whole, (which includes all proposal templates and supporting documents), explains and defines the need for the services that are being proposed, details the design of the program and provides justification for the proposed services. The better the explanation and justification (more positive answers to questions) the higher the score.

Total Number of Points for the <u>Program Design</u> section (20 points possible) _____

COMMENTS:_____

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2). Knowledge of and Experience with Target Population (10 possible points) – demonstrates the agency's involvement and understanding of the needs of the target population

<u>Resources to Utilize to Evaluate the Agency's Knowledge of and Experience with Target Population as submitted in the proposal</u>:
   1. **Narrative Template: Knowledge of the Needs with Target Population Monitoring Reports**

Questions to consider when scoring this section:

1. Does the proposal provide sound documentation (i..e data, needs, assessments, goals and objectives) that this Program meets an identified need in the community?
2. Is the target population clearly identified?
3. Is the selection of the target population reasonable and logical?
4. How well does the proposal describe the continuum of needed services, and explain how the program fits into and enhances the continuum?
5. Does proposal clearly define same or similar programs within a 1 mile area and explain coordination and non-duplication of efforts between the programs?
6. Are program partners and the ability to link with other providers clearly explained, formally established and documented?
7. How well is the program accessible to the target population?
8. Are the program's services offered at times which are appropriate and convenient for the target population?
9. Does the agency have previous successful experience in serving the identified target population?
10. Does the agency demonstrate collaborations and work in partnership with other organizations to maximize community resources?

The score of this section should be based on how well the proposal as a whole, (which includes all proposal templates and supporting documents), explains and defines the agency experience and knowledge of the target population that is being proposed to be served; how well the proposal explains how the target population will be served and how well the proposal exhibits the ability to collaborate with other agencies providing similar services. The better the explanation and justification (more positive answers to questions) the higher the score.

Total Number of Points for the <u>Knowledge of and Experience with Target Population</u> section (10 possible points) _____

COMMENTS:_____
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3.) Performance Evaluation System (10 possible points) – evaluates how the program will demonstrate that the services to be provided will benefit the target population

Resources to Utilize to Evaluate the Performance Evaluation System as presented in the proposal:
1. **Narrative Template: Performance Evaluation & Program Design sections**
2. **Logic Model Template**
3. **Evaluation Plan Template**
4. **Monitoring Reports**

Questions to consider when scoring this section:

1. Does the proposal have a complete program outcome measurement plan that is clearly stated, meaningful, and reasonable? (includes: outcomes, indicators, targets, data source and tool, and frequency)
2. Are the proposed results/impacts clearly defined and measurable?
3. Are program outcomes consistent with the agency mission?
4. Do the outcome statements identify the type of client that will be served?

5. Does the outcome statement(s) identify the type of change to be measured?
6. Are outcome statements measurable within contract period?
7. Does the outcome statement(s) clearly identify how clients will benefit from the program?
8. Does the outcome statement(s) identify the percent of clients that will achieve change?
9. Does agency involve program participants in defining outcomes?
10. Does the proposal clearly describe a methodology to evaluate customer satisfaction?

The score of this section should be based on how well the proposal as a whole, (which includes all proposal templates and supporting documents), explains and defines how the proposed services will benefit clients and clearly establishes that each objective is specific, measurable, achievable, relevant and time-framed. The better the explanation and justification (more positive answers to questions) the higher the score.

Total Number of Points for <u>Performance Evaluation System</u> section (10 possible points) _____

COMMENTS:_____
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4.) Program Budget (15 possible points) - Unit Rate, Budget, and Cost Effectiveness – assess the financial viability of the proposed services by overall program revenue, unit rate, expenses, cost effectiveness, and revenue to be generated including non-county sources.

<u>Resources to Utilize to Evaluate the Unit Rate, Budget, & Cost Effectiveness as presented in the proposal:</u>
1. **Narrative Template: Program Budget Narrative**
2. **Budget Template**
3. **Revenue Template**

Questions to consider when scoring this section:
1. Is the unit of service clearly stated?
2. Is there a clear, understandable methodology to determine the total number units to be provided?
3. Is there a clear, understandable methodology of how the unit rate requested from Lee County was determined?
4. Is there a clear, understandable methodology of how the number of units requested from Lee County was determined?
5. Does the amount requested from Lee County equal (=) the unit rate multiplied by the number of units requested?
6. Does the unit rate narrative clearly describe other funding sources?
7. Is the budget in the proposal complete and comprehensive?
8. Does the budget realistically reflect the expectations expressed by the program, such as enhancements, expansions, etc.?
9. Is the budget reasonable and consistent with the activities outlined in the narrative section (appropriateness of expenses)?
10. Does the program budget clearly show:
    a. Revenue from multiple non-county sources (documented)?
    b. The amount of cash revenue from non-county sources is 60% or more of cash expenses?
    c. Utilization of in-kind resources?
    d. List all revenues and expenses (i.e., does it include Lee County revenue?)
    e. Revenue is adequate to cover expenses?

      f.   The amount of the request is equal to or less than 40% of cash expenses?
11. Will program remain viable without county funding?
12. Did the agency identify that all of last year's allotment was spent?
13. Does the agency expect to spend this year's allotment?
14. Does the proposal plainly describe the adverse effects to the target population if County Funding is not received for the program?
15. Does question 45 of the proposal include a clear and concise explanation that PFR funds will be used to satisfy a match requirement of a federal/state funding source thus maximizing local dollars and is the amount and percent of State/Federal dollars that will be secured included?

The score of this section should be based on how well the proposal as a whole, (which includes all proposal templates and supporting documents) outlines the proposed budget (expenses and revenue) for the program and exhibits that the agency has a comprehensive understanding and ability to competently manage awarded funds. The better the explanation and justification (more positive answers to questions) the higher the score.

    Total Number of Points for the <u>Program Budget</u> section (15 possible points) _____

COMMENTS:_____
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5.) **Administrative and Fiscal Capacity (15 possible points)** – evaluates the agency administrative capacity and demonstrates the effectiveness and degree of involvement of the Board of Directors.

    <u>**Resources to Utilize to Evaluate Board of Directors Involvement:**</u>
      1. Narrative Template: Administrative & Fiscal Capacity
      2. Board Minutes
      3. Board Roster
      4. Agency By-Laws with Revisions

    Questions to consider when scoring this section:
    1. Is there sufficient explanation to identify if the agency is currently providing the same or similar services that are being proposed?
    2. Is there a clear, concise explanation regarding the agency's experience in providing the proposed services and does it demonstrate an ability to provide the services that will meet the target population's demand or need?
    3. Are the agency's credentials, accreditations, and licenses current and appropriate for the programs being proposed?
    4. Did the agency provide the most current set of by-laws?
    5. Does the Board meet on a regular basis?
    6. Has there been a quorum during the majority of board meetings?
    7. Is the Board's racial and ethnic composition reflective of the diversity of the participants served by the agency or is there documentation of efforts to address Board composition?
    8. Does the proposal adequately describe the Board's role in the agency's long range planning?
    9. Does the Board actively participate in a decision-making role in establishing agency policy?
    10. Does the Board actively participate in monitoring operations and service quality?
    11. Does the Board actively participate in approving, and overseeing the agency's budget?
    12. Does the Board review financial statements on a regular basis?

13. Was an updated Board roster provided?
14. Was 12 months worth of Board meeting minutes included in the packet?
15. Are the minutes in sufficient detail to gain an adequate insight of the proceedings that occur during the meetings and an understanding of the role that the Board provides?

The score of this section should be based on how well the proposal as a whole, (which includes all proposal templates and supporting documents) provides documentation so that a comprehensive evaluation of the agency administrative capacity and the Board of Directors involvement and oversight capabilities can be determined. The better the explanation and justification (more positive answers to questions) the higher the score.

Total Number of Points for the <u>Administrative and Fiscal Capacity</u> section (15 possible points) section = _____

COMMENTS:_____
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6.) Management and Staff Experience (5 possible points) – evaluates the ability of the agency's management and staff to fulfill the agency mission and implement services consistent with current or best practices for the target population to be served.

<u>Resources to Utilize to Evaluate Staff Education and Background:</u>
1. **Narrative Template: Management & Staff**
2. **Staffing Plan Template**
3. **Monitoring reports**

Questions to consider when scoring this section:
1. Is the Executive Director's background and experience well-suited to represent and effectively carry out the agency's mission and consistent with the responsibilities of the position?
2. Is the agency's proposed staffing plan, including supervisor to staff ratio sufficient to operate the program?
3. Is the proposed staff/client ratio reasonable?
4. Are the minimum job requirements (education, training, and experience) of program staff appropriate for their responsibilities?
5. Is the agency's staff culturally diverse, and possess the linguistic skill to assist the population served?

The score of this section should be based on how well the proposal as a whole, (which includes all proposal templates and supporting documents) provides documentation so that a comprehensive evaluation of the agency ability to provide the proposed services based upon the capability and experience of management and staff. The better the explanation and justification (more positive answers to questions) the higher the score.

Total Number of Points for the <u>Management and Staff Experience</u> section (5 possible points) ____

COMMENTS:_____
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7.) TEMPLATE REVIEW (7 possible points)

Questions to consider when scoring the Templates:
1. Logic Model Template – Are Inputs, Activities, Outputs and Outcomes comprehensive, realistic and adequate for proposed program?
2. Evaluation Plan Template – Are the outcomes clearly written, measurable, attainable and show the benefit to clients?
3. Staffing Plan Template – Is it understandable, comprehensive and include reasonable staff to adequately provide proposed services?
4. Demographic Template – Is it complete and do the category totals match?
5. Performance Outcome Template - Is template complete and was the Outcome met and/or include an explanation if not achieved?
6. Budget Template - Is budget complete, accurate and correspond to information presented in the Program Budget narrative section of the Program Design Template? (Questions 33-40B)?
7. Revenue Template – Is adequate revenue to cover the program expenses included; is all required information complete and does the information correspond to that provided in the Program Budget narrative section of the Program Design Template? (question 40A)

The score of this section should be based on how well the templates are completed; if information corresponds to that provided in the Program Design Template (Narrative) and if the supporting documentation substantiates the information provided in the templates. The better the explanation and justification (more positive answers to questions) the higher the score.

8.) SUPPORTING DOCUMENTS REVIEW (13 possible points)

Monitoring Reports – review agency's monitoring reports from Lee County Human Services and other agencies if applicable. These reports are detailed documents for any findings or concerns that were identified during monitoring visits.

Questions to consider when scoring this section:
1. Were Monitoring Reports from Lee County included in proposal packet?
2. Were there any findings in the Lee County monitoring report that warrants concern that future funding could be affected?
3. Were there any concerns in Lee County monitoring reports that identify weaknesses in programmatic operations that could affect the agency's ability to successfully and efficiently provide the proposed services?
4. Were there repeated findings or concerns from prior years that appear to have not been adequately addressed?
5. Were additional monitoring reports provided from other agencies that provide grants or funds?
6. Were there any findings in the other monitoring report that warrants concern that future funding could be affected?
7. Were there any concerns in other monitoring reports that identify weaknesses in programmatic operations that could affect the agency's ability to successfully and efficiently provide the proposed services?
8. Were there repeated findings or concerns from prior years that appear to have not been adequately addressed?

COMMENTS:_____
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Financial Documents – evaluates agency's financial/accounting system.
An independent audit of the most recent or immediate prior fiscal year should be included in agency's supporting documentation including a management letter and written response, if applicable. If there were no issues identified, a management letter may not be issued, however it should be explained in the audit.

Audits are usually completed within 6 months after end of fiscal year, so depending on the agency's fiscal year; the most recent audit may be from a prior calendar year. For instance, if end of fiscal year is December 31, the audit is not due until June 30 so the audit you have to review may actually be dated in June (or earlier) 2017.

Resources to Utilize to Evaluate Fiscal/Accounting System:
1. **Independent Audit and Management Letter**
2. **Agency's internal financial reports**

Questions to consider when scoring this section:
1. Are monthly financial statements current (within 60 days)?
2. Does financial system show a strong financial history that indicates potential for future stability?
3. Does independent audit present a clean audit with no material weakness?
4. Does management letter indicate minor or no issues?
5. Is current Form 990 present?

Total Points for the SUPPORTING DOCUMENTS REVIEW section (13 possible points) _____

COMMENTS:_____
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9.) Overall Proposal Presentation (5 possible points) – assesses the overall appearance and responsiveness of the proposal packet as a whole.

Resources to Utilize to Evaluate Agency's Overall Proposal:
       Proposal and documentation as a whole.

Questions to consider when scoring this section:
1. Overall, is proposal clearly written and easy to comprehend?
2. Is proposal packet complete and provides necessary documentation?
3. Were the instructions for completing the proposal followed properly?
4. Overall, does proposal packet provide sufficient detail to present an adequate understanding of the intended program outcomes?

Total Points for the Overall Proposal Presentation section (5 possible points) _____

COMMENTS:_____
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OVERALL SECTION SCORES

SECTION	POSSIBLE POINTS	AWARDED SCORE
Section #1 Program Design	**20**	
Section #2 Knowledge of Needs & Experience Target Population	**10**	
Section #3 Performance Evaluation System	**10**	
Section #4 Program Budget	**15**	
Section #5 Administrative & Fiscal Capacity	**15**	
Section #6 Management & Staff Experience	**5**	
Section #7 Template Review	**7**	
Section #8 Supporting Documents Review	**13**	
Section #9 Proposal Presentation	**5**	
TOTAL	**100**	

FINAL COMMENTS:
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