

**The proposed agency funding determination process in brief:** More detail is provided in the narrative below.

1. **Application review** (Group scoring submitted, Date December 2021)
2. **Application data entry** (Executive Director, Date December 2021)
3. **Full Board discussion** (BAUW Board ALLOCATION meeting – Date January 2022)
4. **Recommendations of funding provided to City Manager** (Executive Director, Date January 2022)

**City of Brookings funding area priorities as voted on by City Council.** This was used in 2021 application process:

Affordable Housing

Youth Development

Diversity

\*Education & Literacy

\*Environment

Government Stewardship

Health

Safety

Transportation/Transit

\*Arts/Culture

\*Economic Development

\*Preservation/History

The areas \*noted have separate department or special revenue funding identified throughout the budget.

**The proposed agency funding determination process in detail:**

**Application review** (UW Board Review, Date December 2021)

Gather as a group to read/discuss the groups applications. The group should reach out to the agency contacts to clarify any questions in order to fully understand and assess the application.

Rating	Meaning	Rating	Meaning
1	Fails to meet expectations	6	Meets expectations
3	Lacking in expectations	9	Exceeds expectations

The six assessment areas are weighted differently to reflect their relative importance. Community Impact, Community Need, and Fits BAUW Priorities are considered to be twice as important as Fiscal Management and Track Record. Ability & Evaluation is slightly more important than the latter two areas.

Weighting	Assessment area	Weighting	Assessment area
10	Community Impact	6	Ability & Evaluation
10	Community Need	5	Fiscal Management
10	Fits City of Brookings Priorities	5	Track Record

### Definitions of Assessment Areas in Scoring Worksheet:

#### Community Need

The program addresses a recognized health and human services need in our community  
The need is consistent with BAUW mission and funding priorities for the current year  
The problem/situation addressed by the agency is serious  
The agency provides strong data to validate the need for this program

#### Impact

The program clearly demonstrates a meaningful linkage between community needs, program activities and outcomes  
The program provides a meaningful volume of services and/or people served  
United Way funding will make a difference and bring about positive change in people's lives

#### Ability & Evaluation

The Agency has a history of reliability  
There is adequate staffing and resources to conduct this program  
The program plan is sound  
Clear goals and objectives are written  
Measurable outcomes are evident  
The agency/program demonstrates the ability to deliver and measure proposed outcomes

#### Financial Management

Financial information is presented clearly & accurately  
The agency has a balanced budget  
The agency has adequate reserves BAUW policy recommends 3-6 months  
There is diversified funding/other funding is available to support program(s)  
The funds that are requested from BAUW support client services  
Overhead expenses are a reasonable % of total budget

#### Track Record

The agency appeared to have accomplish their goals and objectives from last year  
The agency makes a difference with previous years' UW funding

### Application data entry (Executive Director, Date Dec 2021)

- Ratings for all applications are entered in the application funding worksheet, which computes an application score. Applications are initially categorized as:

Score	Category	Significance
276 to 414	Green	Automatically receives as close to full funding as possible. No committee discussion.
200 to 275	Yellow	Flagged for discussion by committee. May receive up to Green category funding level.
0 to 199	Red	Automatically receives no funding. No committee discussion.

Examples and rationale for the categorization scores:

Weighting	10	10	10	6	5	5		
Agency Name	Community Impact	Community Need	Fits BAUW Priorities	Ability & Evaluation	Fiscal Management	Track Record	Application Score	Score Range
Agency 1	9	9	9	9	9	9	414	Green
Agency 2	6	6	6	6	6	6	276	Green
Agency 3	6	3	9	6	6	6	276	Green
Agency 4	6	6	6	1	3	1	206	Yellow
Agency 5	6	6	6	1	1	1	196	Red
Agency 6	1	9	9	9	9	1	294	Yellow

**Agency 1** receives Exceeds Expectations ratings, resulting in a  $9 \times 10 + 9 \times 10 + 9 \times 10 + 9 \times 6 + 9 \times 5 + 9 \times 5 = 414$  score.

**Agency 2** Meets Expectations in each area, resulting in a score of 276

**Agency 3** is Lacking in Expectations in Community Need, but Exceeds Expectations in Fits BAUW Priorities and Meets Expectations in all other areas, resulting in a score of 276 equivalent to Agency 2

**Agency 4** Meets Expectations in the three most important areas and rises above Failure to Meet Expectations in one other area, resulting in a score greater than 206, above the 200 cutoff

**Agency 5** Meets Expectations in the three most important areas but Fails to Meet Expectations in all other areas, resulting in a score of 196, below the 200 cutoff

**Agency 6** Fails to Meet Expectations in one of the three most important areas, and thus is flagged Yellow for discussion in spite of having a strong score of 294