



## REVIEWERS' INSTRUCTION PACKET

The United Way of Mid-Maine (UWMM) Community Investment Process is designed to fund vital, community-level programs that have the potential to strengthen our community while improving outcomes in health, education, and financial stability for all Mid-Mainers.

### SUMMARY OF REVIEW PROCESS

Committee members can access all applications and completed review forms on the reviewer dashboard.

1. **Assignments:** Staff will assign applications to reviewers, with attention to conflicts of interest.
2. **Individual Reviews:** For their assigned programs, committee members will read the applications using the online system, call applicants to discuss their applications and address questions, and complete an online review.
3. **Committee Review:** In preparation for the Decision Meeting, each committee member will:
  - read all submitted reviews
  - add their own comments and questions to the online form
  - leave their own recommendation based on the program summary
4. **Decision:** The committee meets to discuss each application in the pool and determine which applications should be funded. Both the quality of the applications and the amount of funding available will determine the number and size of awards the committee makes.

### WHAT UWMM SUPPORTS

The Community Investment Process funds programs, provided by our Partner Agencies, that are focused on Health, Education, and Financial Stability. Following are UWMM's Desired Community Results and how programs can align with each focus area.

#### Health

**Desired Community Result:** All individuals in Mid-Maine are in safe and healthy environments with access to health supports and services.

Programs align if they:

- Provide physical or mental health services, including but not limited to:
  - Medical
  - Dental
  - Nutritional
  - substance use treatment
  - counseling, physical activity
  - et cetera
- Provide basic needs, including but not limited to:
  - Food
  - Shelter
  - Companionship
  - Et cetera
- Increase access/removes barriers to programs or services as defined above.
- Increase capacity/resources for programs or services as defined above.
- Advocate for (and/or educates on) any programs or services as defined above.
- Collaborate with programs as defined above.

### **Education**

**Desired Community Result:** All Mid-Maine children grow up in a stable environment—safe, healthy, and ready to learn.

Programs align if they:

- Provide actual education/development services or sessions to children under 18, including in early learning and out-of-school settings.
- Provide any type of counseling or mentorship to promote the well-being of children under 18.
- Increase access/removes barriers to programs or services as defined above.
- Increase capacity/resources for programs or services as defined above.
- Advocate for (and/or educates on) any programs or services as defined above.
- Collaborate with programs as defined above.

### **Financial Stability**

**Desired Community Result:** All Mid-Mainers have access to resources and training to secure opportunities to be financially stable.

Programs align if they:

- Provide services to increase disposable income, earning potential, and/or value of assets, including but not limited to:
  - financial literacy

- employment training
- saving/investing services
- cost-reducing services
- resource navigation
- et cetera
- Provide services preparing/supporting clients for independent living, including but not limited to:
  - teaching life skills
  - transportation
  - household management support
  - et cetera
- Increase access/removes barriers to programs or services as defined above.
- Increase capacity/resources for programs or services as defined above.
- Advocate for (and/or educates on) any programs or services as defined above.
- Collaborate with programs as defined above.

## **ADDITIONAL CRITERIA**

In addition to whether the programs align with the above focus areas and results, consider whether the programs:

1. Have well-defined goals/outcomes that have the potential to increase the effectiveness, efficiency, or scope of the program.
2. Will make the organization more sustainable over time.
3. Are cost efficient (i.e., the value of the outcome equals or exceeds the cost of doing the program).

## **DETAILED REVIEWER DIRECTIONS**

### **Read the application**

Use the online reviewer portal to review the application(s) assigned to you. Make note of any questions you might have.

### **Call the applicant**

Reach out to the **Program Contact** (listed on the application) to hear the applicant's description of the program and to address any questions you have after reading the application. This is an especially important step because it provides a more complete description of the program. It also helps us to review the quality of the program and not the writing skill of the applicant.

Some reviewers prefer to schedule the call to the applicant in advance via email while others prefer to just call spontaneously. We'll leave this step to your discretion.

### **During the call:**

- Introduce yourself as a Community Impact Team member for UWMM.
- Identify the program application that you are reviewing, reminding the contact of the general topic and amount requested.
- Explain that phone calls such as this one are a new but now standard part of the review for UWMM's Community Investment Process.
- Help the contact warm up by asking them to tell you in their own words what the program is about and what it is intended to do.
- Follow up with any questions you may have.
- Arrange a site visit.

**NOTE:** While most applicants will appreciate the chance to talk about their programs, they are likely to be nervous about receiving a call from a potential funder. Try to make this a pleasant conversation, even if you have serious doubts about the application. This should not feel like a cross examination, but rather a chat about their work.

### **Close the call:**

- Confirm the details for the site visit.
- Always thank the contact for their time.
- Let the contact know that all the grant decisions are made by a committee not just you. The committee will meet to discuss applications in May and letters to applicants notifying them of the committee's decision will be mailed by June 10.
- Encourage the applicant to contact Elizabeth at 873-0686 or via email at [ebarron@uwmm.org](mailto:ebarron@uwmm.org) if they have any additional questions about the process.

### **Write a Summary and Recommendation**

Once you have spoken with the program contact, complete the online summary form. Your review should include:

- A brief synopsis of what the program does and how they are doing
- Any other notable information from their application
- Whether the program demonstrates alignment within one of UWMM's focus areas
- Whether the program meets the Additional Criteria stated above
- A brief summary of what was discussed on your call and at the site visit
- Your impressions from the site visit
- Any outstanding concerns not addressed by your call to the program contact or the site visit
- Strengths and weaknesses of the program

Based on your review, indicate your recommendation, rated as follows:

**Definitely Fund** = No question, UWMM should fund this program.

**Maybe Fund** = I think UWMM should fund this program, but I have outstanding questions.

**Maybe Don't Fund** = I don't think UWMM should fund this program, because I have outstanding concerns.

**Don't Fund** = UWMM should not fund this program.

In addition, you will recommend the amount of funding.

**All summaries are due by 4:30 on Tuesday, April 16.**

### **Before the Decision Meeting**

On Wednesday, April 24, after all the program summaries have been submitted, you will be able to access the full list of program summaries. You will need to review each summary and comment on each one, providing your name and your funding recommendation (as rated above).

There is a comment box where you can note any of your questions or concerns about each program. Making note of them here helps UWMM staff know where there are concerns and can help us better prepare for the decision meeting in May.

**All of the evaluations should be completed by Wednesday, May 1.**

### **Decision Meeting**

Our goal is to keep this meeting as brief as possible while addressing as many concerns as possible and finalizing our funding recommendations.

To achieve this, the decision meeting will unfold as follows:

- Any programs with an average rating of **Don't Fund** will not be considered for funding and will therefore not be discussed.
- Any programs with an average rating of **Definitely Fund** will be set aside until the funding portion of the discussion.
- All programs with an average rating of **Maybe Fund/Maybe Don't Fund** will be addressed first. We will discuss outstanding questions and concerns and come to a consensus on whether they should or should not be funded.
- Finally, we will determine the amounts of funding for the programs that we have determined met UWMM's criteria and are worthy of funding.

**IMPORTANT NOTES:**

1. Please bring any notes you may have that you have not already submitted via your review or evaluations.
2. We encourage committees to fully fund a smaller number of applications rather than make a larger number of grants that partially fund requested amounts. **Partial awards can require organizations to cut back the scope of work for the program or delay implementation until additional funds can be raised.**
3. There are usually many more proposals than we can fund. It is fine to simply recommend no funding for programs that do not clearly meet all criteria. Organizations can reapply with a better-written proposal or with a program that better matches our funding priorities in the next Community Investment Process.



<p><b>WRITE A SUMMARY AND RECOMMENDATION</b></p>	<ol style="list-style-type: none"> <li>1. Complete the Summary Form online.</li> <li>2. Write a brief summary of the application so other reviewers will have a general understanding of the program: <ul style="list-style-type: none"> <li>• A brief synopsis of what the program does and how they are doing</li> <li>• Any other notable information from their application</li> <li>• Whether the program demonstrates alignment within one of UWMM’s focus areas</li> <li>• Whether the program meets the Additional Criteria stated above</li> <li>• A brief summary of what was discussed on your call and at the site visit</li> <li>• Your impressions from the site visit</li> <li>• Any outstanding concerns not addressed by your call to the program contact or the site visit</li> <li>• Strengths and weaknesses of the program</li> </ul> </li> <li>3. Rank the application <b>Definitely Fund, Maybe Fund, Maybe Don’t Fund, or Do Not Fund.</b></li> <li>4. Recommend funding amount. Considering your review and the amount requested by the program, suggest the amount you feel UWMM should grant to this program. <b>Whenever possible, we fully fund good programs.</b> Partial funding is best used when a program is good but there are aspects of the budget that are not eligible, reasonable, or good investments of grant dollars.</li> </ol>
<p><b>SUBMIT YOUR REVIEW SUMMARY</b></p>	<p>Complete your summary by Tuesday, April 16.</p>
<p><b>REVIEW THE SUMMARIES</b></p>	<p>Starting Wednesday, April 17, read <b>all</b> the summaries online before the grant decision making meeting to have a sense of the full pool of applicants.</p> <p>Provide your recommendation by submitting your name, funding recommendation, and any questions or comments you may have for each program.</p>
<p><b>SUBMIT YOUR REVIEWS</b></p>	<p>All summary evaluations are due by Wednesday, May 1.</p>



**GRANT DECISION  
MEETING**

- Come to the meeting with any questions or notes that you have not already submitted via your review or your evaluations.
- Be prepared to discuss any programs with outstanding questions/concerns.

*IMPORTANT: You have been assigned to REVIEW applicants - you don't have to advocate for them. Be prepared that the committee may not agree with your original assessment of the application, and following the group's discussion, it could be possible that you no longer agree with your original assessment of the application.*

## Summary Form for Funding Applications Questions

**Program Name**

**Organization Name**

**Program Summary**

Include:

- A brief synopsis of what the program does and how they are doing
- Any other notable information from their application
- Whether the program demonstrates alignment within one of UWMM's focus areas
- Whether the program meets the Additional Criteria stated above

**Site Visit/Phone Conversation Notes**

Include:

- A summary of what was discussed on your call and at the site visit
- Your impressions from the site visit
- Any outstanding concerns not addressed by your call to the program contact or the site visit

**Program Strengths (one per field. Click "Add" to add more.)**

**Program Weaknesses (one per field. Click "Add" to add more.)**

**Does this program align with the focus area indicated on the application?**

**If yes, indicate which focus area the program chose.**

**If no, indicate which focus area the program would better align with.**

**Recommendation/Rating**

**Definitely Fund** = No question, UWMM should fund this program.

**Maybe Fund** = I think UWMM should fund this program, but I have outstanding questions.

**Maybe Don't Fund** = I don't think UWMM should fund this program, because I have outstanding concerns.

**Don't Fund** = UWMM should not fund this program.

**Amount Requested by Program**

**Your Recommended Funding Amount**

If you rated this program **Do Not Fund**, enter 0.

**Your Name**

## Community Investments Grant Requests Review Schedule 2019

<b>APPLICATION REVIEW PROCESS</b>		
ACTIVITY	DATE	DESCRIPTION
<b>Reviewer Orientation (in person)</b>	March 12 8:00-9:30	Overview of process; identify potential conflicts.
<b>Program Assignments</b>	April 3	Assignments will be announced before the review process opens to allow time to schedule site visits.
<b>Application Review Period</b>	April 10- April 16	Volunteers review assigned applications, call applicants and complete online Summary Forms.
<b>Summaries Due</b>	April 16 4:30 PM	Final due date for all Summary Forms to be completed online.
<b>Summary Evaluations</b>	April 17– May 1	Volunteers read all summaries online. Complete applications also available for review (optional).
<b>Evaluations Due</b>	May 1 4:30 PM	Final due date for all evaluations to be completed online.
<b>Decision Meeting (in person)</b>	May 7 Noon-4:00 PM Best Western Plus	Staff and Volunteer committee discuss all programs with outstanding concerns and determine funding.
<b>Decision Process Completed</b>	June 10	UWMM staff have processed and mailed all Community Investment decisions letters to grantees.
<b>First Quarter Distributions</b>	July 1	First Quarter Distribution checks are sent to grantees.