 

# Peer Review Manual

**Cobb County Nonprofit Grant**

**FY 2019 and FY 2020**

### Peer Review Training Dates: April 25 and 26, 2018 Location: The Zone

### 32 Fairground Street

 **Marietta GA 30060**

**Peer Review Manual**

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## OVERVIEW- Timeline

### Cobb County Nonprofit Grant FY 2019 and FY 2020

**Timeline 2018**

January Release Public Notice of RFP Meetings not later than January 27, 2018 February Request for Proposal Meetings

February 27 1-3 South Cobb Community Center

March 1 9-11 The Zone

February Recruit Peer Review Team Members

April 13 Grant Application Deadline – 1 PM

April Peer Review Team Trainings

April 25 10-12 The Zone

April 26 2-4 The Zone

 April - May Score Applications and Conduct Site Visits May 14 Peer Review Teams Scores Due

May Send Scores to Applicants

May Peer review Committee meets to recommend funding

May CC Board of Directors review PEC’s final recommendations for funding May Applicants notified of recommended grant allocations

June Final recommendations are sent to Board of Commissioners July Board of Commissioners approve county budget with funding

October Award notice and grant contracts sent by Cobb County to awardees

## BACKGROUND

Biennially, Cobb County issues a request for proposals and makes grant awards for a variety of human services programs that address important community needs in Cobb County. In an effort to ensure community involvement in the review process, the Cobb County Board of Commissioners empowered the Cobb Collaborative to coordinate a team of community representatives to develop and oversee the nonprofit grant review process. The Board of Commissioners believes that as an organization with representation from a broad range of community agencies and stakeholders, the Collaborative and its membership would provide the forum, expertise and knowledge of our community needs necessary to ensure the best use of County funds in meeting human service needs.

The Cobb Collaborative is an association of local organizations, agencies, businesses and other groups committed to working together to improve the quality of life for residents of Cobb County. The mission of the Cobb Collaborative, Inc. is to convene community stakeholders to facilitate the sharing of ideas, expertise and resources to meet needs and resolve issues in Cobb County. This is accomplished through the coordination of human services and resources. By coordinating their efforts, member organizations identify issues of concern to the community, examine those issues, bring relevant information to an open community forum, and facilitate joint action by interested parties that will improve the lives of Cobb residents. Member organizations share ideas, expertise and resources to improve systems of operation, increase efficiency, develop new services, and improve outcomes for community residents.

The Cobb Collaborative developed and implemented a grant review process for the FY 1998-99 grant period, utilizing "peer" review teams comprised of participants from other member agencies, as well as other interested community organizations. The Board of Commissioners has since allocated funds based, in large part, on the recommendations from the Collaborative peer review process.

## GRANT REVIEW

In February, the Collaborative sent letters to its members to solicit volunteers for the Peer Review Teams. The Peer Review Teams are comprised of Executive Directors, Development Directors, Program Directors, and where possible, volunteers with financial background. The Collaborative is conducting Peer Review Team trainings on April 25 and 26. Volunteers are placed into groups of 3 and will review 1-2 applications. The Peer Review Teams will be given copies of the grant applications to review using the Rating Criteria Forms. Site Visit Evaluations will be required for all applicants. They will complete the Rating Criteria Forms for each of the assigned grant applications and return them to the Cobb Community Collaborative at 995 Roswell Street, Suite 100, Marietta, GA 30060 on or before May 14. ATTN: Karen Carter

## PEER REVIEW PROCESS

1. Teams should identify a Team Captain, review assignments for conflicts of interest and coordinate the logistics of their grant review process. Exchange contact information especially cell phone numbers. Team Captains will be responsible for ensuring the team’s objectives are achieved according to the timeline. Collectively, the team will work together to set a calendar for site visits and review of applications. Team Captain will be main point of contact for communicating with grantees. The Team Captain will communicate scheduled dates with team members and Karen Carter at kcarter@cobbcollaborative.org.
2. Each team member should review the CCNP Instruction Guide and application to ensure and understand what each applicant was asked to submit prior to scoring any applications.
3. Individually, team members should read, review and score each applicant’s proposal prior to the scheduled site visit. Each member will complete the ***Organization and Program/Project Rating Criteria Forms*** on each grantee applicant. On site visits, team members should be prepared to ask clarifying questions to help ensure an understanding of the programs, outcomes and the capability of the organization to achieve stated outcomes.
	1. Remember that each applicant should submit one Part I and Part II: Applicant and Organizational Information but include a Part III: Program Information and Part IV: Budget Information sections for each program the applicants are submitting requests for funding. Each Program Information section will be scored separately.
	2. Each program is eligible for a total of 100 Points: 45 Program/Project Rating Criteria, 25 Points Organization Rating Criteria (scored once and added to each program rating criteria form) and 30 Points Site Evaluation Rating Form (scored once and added to each site evaluation rating criteria form)
	3. Detailed explanations must be provided in writing on the ***Rating Criteria Forms*** for any deductions in points.
	4. Each applicant must identify a priority funding category and select at least one program outcome and indicator in Part III, Q#20 and Q#21.
	5. Utilize the ***Guiding Questions for Finance Related Rating Criteria*** to help determine scores for particular finance related rating criteria
	6. A copy of the rating forms are enclosed as **Appendix A, B, and C.**
4. After scoring the applications, team members will conduct site visits on each of the grantee applicants. Site visits should be designed to gain a clear understanding of the program design and organization’s capacity to fulfill grant requirements and implement the program as described. Using the ***Site Evaluation Rating Form***, the team will score each visit, making notes on the rating form.
	1. A copy of the rating form is enclosed as **Appendix C**.
5. After all forms are completed by all team members, the team will work together to compile the ***Rating Criteria Forms*** averaging the scores of all team members. Each Program requesting funding should have a team version of the rating forms in addition to each team membersoriginal scoring. Please remember that grantees submitting requests for multiple programs should have multiple rating forms.
	1. Each program is eligible for a total of 100 Points: 45 Program/Project Rating Criteria, 25 Points Organization Rating Criteria (scored once and added to each program rating criteria form) and 30 Points Site Evaluation Rating Form (scored once and added to each site evaluation rating criteria form)
6. Team Captains: please have all team members sign the final versions of these forms and submit their original scoring forms. All forms and applications will be due to Karen Carter at the Cobb Community Collaborative on or before **May 14, 2018**. (995 Roswell Street, Suite 100 Marietta, GA 30060)
7. Team members should not copy or keep any rating criteria forms or applications.

## PEER REVIEW BEST PRACTICES

### HOW TO REVIEW A GRANT APPLICATION

Reviewers read applications primarily to determine how closely the applicant's proposed program conforms to the specified evaluation criteria. In other words, you are comparing the application before you with the RFP. Generally, each grant program uses some form of the following criteria for review for each RFP:

1. Objectives of their proposed program and need for Cobb County assistance
2. Results or outcomes expected
3. Approach that the applicant plans to use funds
4. Staff background and organizational experience
5. Budget appropriateness

Under each of those five elements, there will also be a subset of questions that you can follow to help you determine how well the application responds to each criterion. These questions will often be included in the RFP, so that each applicant can see the exact criteria that will be considered in scoring their application. (Please refer to the ***CCNP Instruction Guide***)

To help you even further, the following is a general list of useful questions for you to ask as you review each application:

1. Does the application provide complete responses to the criteria specifically listed in the RFP?
2. Are the applicant's intentions clear and specific rather than obscured by meaningless jargon?
3. Do the presented ideas flow logically?
4. Are the activities outlined in different sections of the application consistent with each other? For example, does the budget match the program's approach?
5. Are the described activities consistent with current, accepted knowledge and ideas in the field?
6. To what extent does the application explain the selected population's need for assistance? Is the target enrollment size identified?
7. Are the project's objectives measurable? If they are, how will success (or failure) be evaluated?
8. How will the skills, experience, and education levels of the key staff help to achieve the program's objectives?
9. To what extent does the applicant demonstrate a solid understanding of the costs of the project?
10. Is the budget reasonable, and are sufficient details provided to allow you to make that judgment?

### TIPS ON HOW TO BE AN EFFECTIVE GRANT REVIEW TEAM MEMBER

Now that you have absorbed the basics, several tips can help you go from being merely an "average" grant reviewer to one who makes the maximum use of his or her knowledge, insight, and influence during the review process.

### HOW TO READ THE RFP

* Read the RFP and all materials sent to you in advance--very carefully. Isolate the various important criteria that the RFP lists. Then focus on finding the information within each application

that relates to each of the criteria listed in the RFP. Does the application include all the information it is supposed to include?

* Use the scoring matrix on the Rating Criteria Forms, assess the criteria for each point value assigned to the question. You can make your own "template" of your ad hoc scoring system and use it for all the applications you have to review. This can help you assign "weight" to the different criteria based on your judgment. It will also help you move through each application much more quickly. Finally, it helps you explain and justify your score to your fellow team members during later discussions of application.

### HOW TO READ APPLICATIONS

* Don't try to memorize.
* Read the entire grant application at least two times. The first time, try to get a good understanding of the proposed services, program, and strategies. The second time, look for the specific elements that the RFP says they are supposed to include. It might help to highlight them with a marker or note in the margins where the required elements appear (if you are allowed to mark on the applications) in case you need to find them again later.
* If you are sent the grant applications in advance, make sure you complete all the reading, scoring, and comment writing before coming to the final team meeting. Some reviewers place themselves at a disadvantage and delay progress of the entire team by not having their work done on time. Your fellow teammates will appreciate it.

### TIPS FOR WRITING EFFECTIVE COMMENTS

For each application you review, you will be asked to provide comments regarding the strengths and weaknesses of that application. These comments may be provided to the applicants following the completion of the review. To be as successful and effective as possible in this effort, you should keep several things in mind.

* Make your comments as specific as possible. General statements such as "This is a good program" are not helpful--there are many good programs.
* Write your comments in complete sentences.
* Don't simply restate what the applicant has written--evaluate what it says.
* Make comments tactful and constructive.
* State why a particular issue is a weakness so that the applicant will know how to improve in that area.
* Differentiate comments based on fact from those based on your professional judgment.
* Make sure your score is supported by your comments. If you give an application a high score, you should have lots of comments in the strengths sections and few or no comments in the weaknesses sections.

**PLEASE NOTE:** This year, it is a requirement of the reviewers to include comments on each scoring form under any section for which an organization and/or program is being deducted points. Rating forms with points deducted and not containing comments will be returned to the Peer Review Team Captain for completion.

### COMMON WEAKNESSES AND ERRORS

It is not unusual for experienced grant reviewers to see common errors and weaknesses in the grants they review. As a new reviewer, you need to know what these errors and weaknesses are and what to do when you find them.

* Ideally, grant applicants should always seek grant opportunities that match their program's goals and objectives. Watch out for applicants who appear to be doing that the other way around. Too often applicants will try to make their "round" program fit into a "square" RFP.
* Note in your comments areas where the applicant has not provided the information specifically asked for in the RFP.
* Note where the applicant proposes to do something outside the scope of the RFP, or in opposition to the letter or spirit of the RFP.
* Evaluate the data cited by the applicant very carefully to make sure the information is not outdated and is relevant to the point the applicant is trying to make. Also make sure that any literature cited by the applicant is not outdated or irrelevant. You will have to base that judgment on your own knowledge of the literature in that field.
* If the applicants include a section on how they plan to evaluate their program, make sure that their plan will give them the kinds of data which is clear to understand. Does it make sense?
* Make sure the applicants' proposed budget includes everything that they are supposed to request. Are the budget items allowable? Are they necessary for the success of the project? Are they reasonable? Does the information in the budget form match the proposed program as described in the narrative?
* Make sure the applicants show evidence that they understand and have worked with the target population they are supposed to serve.
* Think about the sustainability of this program after the funds run out. Have the applicants addressed that issue?
* Don't try to read between the lines of an application. If the applicants haven't made it clear, you can't assume that it's true.

### Best Practices from a Guidebook for Federal Grant Reviewers

**by Karen A. Morrison, modified for the CCNP Peer review Process**

**Appendix A: Organization Rating Criteria Form**

**Organization Rating Criteria Form**

**Cobb County Nonprofit Grant**

**FY 2019 and FY 2020**

*Completed form due May 14, 2018*

Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total Organization Points Awarded: \_\_\_\_\_\_\_\_\_\_\_/25

1. Organization has a plan for continued operations, i.e. strategic plan, program development plan, etc. (Q#11)

[ ]  **5 pts**: Organization has a board approved strategic/program development plan that is regularly reviewed and clearly used by its staff.

[ ]  **3 pts**: Organization has a strategic/program development plan, but it is not regularly reviewed and/or it is not clear how the organization’s staff uses this plan.

[ ]  **0 pts**: Organization does not have a strategic/program development plan.

***Notes*** *(List any observations, explanations for point deductions, etc.)*:

1. Applicant has a Board of Directors that provides financial oversight and meets at least quarterly. (Q#12)

[ ]  **YES** (5 pts): Board of Directors meets at least quarterly and a description of governance and financial oversight is provided.

[ ]  **NO** (0 pts): Board of Directors does not meet at least quarterly and/or oversight is not demonstrated.

***Notes*** *(List any observations, explanations for point deductions, etc.)*:

1. Has the organization received conditions or recommendations in their last two audited financial reports or reviews? (Q#13)

 [ ]  **5 pts**: No conditions or recommendations have been received or all have been addressed.

 [ ]  **3 pts**: Conditions or recommendations have not been addressed, but a plan is in place.

 [ ]  **0 pts**: Conditions or recommendations have not been addressed and no viable plan exists.

***Notes*** *(List any observations, explanations for point deductions, etc.)*

1. Has the organization received funding from other sources within the last two years, (i.e. local, state, federal, foundations, corporations, individuals or other)? (Q#14)

[ ]  **Yes** (5 pts)

[ ]  **No** (0 pts)

***Notes*** *(List any observations, explanations for point deductions, etc.):*

1. Review of Financial Statements and Cobb County Grant Budget, (Part IV: Financial Information).

[ ]  **5 pts**: All requested financial documentation is present with no recommendations or conditions by the auditor.  If any recommendations or conditions are present, they have been addressed.  All budgets are completed accurately and demonstrate accurate financial management including explanations of variances.

[ ]  **3 pts**: All requested financial documentation and budget is present, but organization has not addressed recommendations, conditions or variances within the application; however, recommendations, conditions or variances were addressed during the site visit to the satisfaction of the site team.

 [ ]  **0 pts**: Financial documentation and/or budgets are incomplete or inaccurate.

***Notes*** *(List any observations, explanations for point deductions, etc.):*

Review Team # \_\_\_\_\_\_\_\_\_\_\_\_\_

 Review Team Members Rating Score Certification of complete scoring.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Captain Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Captain Signature Date

**PLEASE WRITE THE TOTAL POINTS AWARDED FOR THE APPLICATION ON THE TOP OF THE FIRST PAGE OF THIS CRITERIA FORM AND COMPLETE SUMMARY.**

**Notes**: Attach any notes or clarifications below or on additional pages, if needed. Rating forms will not be considered complete if points are deducted without a written explanation.

**Appendix B: Program/Project Rating Criteria Form**

**Program/Project Rating Criteria Form**

**Cobb County Nonprofit Grant**

**FY 2019 and FY 2020**

*Completed form due May 14, 2018*

Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total Program/Project Points Awarded: \_\_\_\_\_\_\_\_\_\_\_/45

Priority Areas: (Q#9)

\_\_\_ Homelessness

\_\_\_ Family Stability/Poverty

\_\_\_ Education/Employment

\_\_\_ Health & Wellness

Please be complete in answering all questions and providing requested information. Due to time constraints, we must rate applications on the information that is submitted in the application. We will not be able to request additional information for the rating process. Each Priority Area will involve a separate review form and will be scored independently from any other application by the same organization for a different Priority Area (Q#9).

In regard to scoring, team consensus should be sought; however, if consensus cannot be met, a two of three majority rules.

# THRESHOLD CRITERIA

Check Y or N

[ ] Y [ ] N Will the project meet one of the 4 priority area needs? (Q#9)

[ ] Y [ ] N Will all the requested funds serve individuals in Cobb County? (Q#16)

[ ] Y [ ] N  ***Application is complete with all required attachments? (Will be determined by***

***Cobb County Nonprofit Grant Process Committee.)***

[ ] Y [ ] N Applicant attended the RFP training and submitted an original Certificate of Attendance (Attachment i)

**If the answer to ANY of the above questions is No (“N”), the proposed project is not eligible under the Cobb County’s Nonprofit Grant program and will not be reviewed.**

1. Applicant clearly identifies the need(s) or problem(s) and the target population (beneficiaries) to be addressed with the request for Cobb County funding and the needs to be met with funding. Statistics are provided which include current applicable services; gaps in service with references from data sources, such as U.S. Census, Kids Count etc.; and service area location within the county, current demographics such as age, income, gender, race etc. are included. (Q#16)

***\*\*\* Please note that the points listed below are not a scale, instead points are given for each completed portion of the answer. It is possible for an applicant to have a maximum score of 10 points.***

[ ]  **3 pts.** Applicant **c**learly and completelydescribes their target population (including age, income, special needs, geographic service area and any other special characteristics).

[ ]  **3 pts**. Applicant clearly and completely indicates the needs to be addressed with Cobb County funds.

[ ]  **2 pts**. Applicant provides statistical data on need in Cobb County.

[ ]  **1 pt.** Applicant **i**dentifies other organizations that are working to meet the same need in Cobb County.

[ ]  **1pt.** Applicant identifies remaining service gaps.

***Notes*** *(List any observations, explanations for point deductions, etc.)*:

1. Project Description (Q#17 & Budget Form)
* Detailed description included of the project/program/service to be carried out with Cobb County funds.
* Narrative includes a description of how this effort will address the identified need.
* Narrative states exactly how Cobb County funds will be used.

[ ]  **5 pts**: Describes project in detail, includes how effort will address need from Q#16, and states clearly how Cobb County funds will be used. (Completely answers all 3 bullet points).

[ ]  **3 pts**: Only two of three bullets are addressed.

[ ]  **1 pt**: Only one of three bullets is addressed.

 ***Notes*** *(List any observations, explanations for point deductions, etc.)*:

1. The applicant describes how their organization is uniquely qualified to provide the service. (Q#18)

[ ]  **5 pts**: Detailed description is included that lists:

qualifications,

programs of the organization,

past program results and

number of years the organization has provided the service.

[ ]  **4 pts**: Description included, but only three (3) of four (4) criteria are addressed.

[ ]  **3 pts**: Description included but only two (2) of four (4) criteria are addressed.

[ ]  **0 pts**: No description given and/or only one (or less) of three criteria is included.

 ***Notes*** *(List any observations, explanations for point deductions, etc.):*

4. The proposed activities or services are accessible to (i.e. on a bus line, near shopping, near public agencies such as the Health Department and DFCS offices, etc.) or transportation is provided for the target population and the venue is handicapped accessible, where appropriate). (Q#19)

 [ ]  **1 pt**: Yes

 [ ]  **0 pts**: No

 ***Notes*** *(List any observations, explanations for point deductions, etc.):*

5. Applicant identifies at least one of the mandatory outcomes and indicators by priority area. (Q#20 and Q#21, see Instruction Guide.)

 [ ]  **5 pts**: Yes

 [ ]  **0 pts**: No

 ***Notes*** *(List any observations, explanations for point deductions, etc.):*

6. Applicant lists at least one of the mandatory outcomes described in the Application Guide on pages 13 -15 and no more than three (3) total program specific outcomes they plan to achieve. Outcomes are **a measurable change in a person’s behavior or condition.** *Program Outcome Model* provides measurement structure. (Q#20)

***\*\*\* Please note that the points listed below are not a scale, instead points are given for each completed portion of the answer. It is possible for an applicant to have a maximum score of 10 points.***

[ ]  **2 pt:** Inputs: Description of what resources are needed to make the program work is complete.

[ ]  **2 pt:** Activities: Description of what the program will do with inputs is complete.

**[ ]  2 pt:** Outputs: Description of the direct products of program activities is complete.

**[ ]  4 pts:** Outcomes: Description of the change that has occurred as a result of these activities describes a change in behavior or condition and is specific, measurable, attainable, realistic and time bound.

 ***Notes*** *(List any observations, explanations for point deductions, etc.):*

7. Applicant has an Evaluation Tool that measures the success of their program and aligns with their Program Outcome Model. Outcome Measurement Framework Chart provides specific examples. (Q# 20 & 21)

**\*\*\* Please note that the points listed below are not a scale, instead points are given for each completed portion of the answer. It is possible for an applicant to have a maximum score of 9 points.**

[ ]  **3 pts**: Indicator(s): A clear description of the data the program will collect as evidence that the outcome has been attained is included.

[ ]  **3 pts**: Measurement Instruments: A clear description of where programs will get data; how they will collect it; what instruments will be used for data collection; and the evaluation tool(s) is included in the answer.

[ ]  **3 pts**: Target: A clear description of the goal for each outcome is included. This should be specific and quantifiable and provided in both raw numbers AND percentages.

 ***Notes*** *(List any observations, explanations for point deductions, etc.):*

Review Team # \_\_\_\_\_\_\_\_\_\_\_\_\_

Review Team Members Rating Score Certification of complete scoring.

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Captain Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Captain Signature Date

**PLEASE WRITE THE TOTAL POINTS AWARDED FOR THE APPLICATION ON THE TOP OF THE FIRST PAGE OF THIS CRITERIA FORM AND COMPLETE SUMMARY.**

**Notes**: Attach any notes or clarifications below or on additional pages, if needed. Rating forms will not be considered complete if points are deducted without a written explanation.

**Appendix C: Site Evaluation Rating Form**

**Site Evaluation Rating Form**

**Cobb County Nonprofit Grant**

**FY 2019 and FY 2020**

*Completed form due May 14, 2018*

Date of Visit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Head of Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name(s) of Organization’s Interviewee(s):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Total Site Evaluation Points Awarded: \_\_\_\_\_\_\_/30

Review Team # \_\_\_\_\_\_\_\_\_\_\_\_\_

Review Team Members: Rating Score: Certification that

scoring is complete

(1) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

(2) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

(3) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Captain Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team Captain Signature Date

**Notes**: Attach any notes or clarifications below or on additional pages, if needed. Rating forms will not be considered complete if points are deducted without a written explanation.

1. The organization has demonstrated that there is a physical Cobb County location where they provide services/programs/projects AND/OR that they can provide verification that the clients they serve outside of Cobb County are Cobb County residents.

[ ]  **YES** (5 Points) [ ]  **NO** (0 Points) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Notes*** *(List any observations, explanations for point deductions, etc.)*

1. The organization has demonstrated that the grant funds will only be used to provide services/programs for Cobb County residents.

[ ]  **YES** (5 Points) [ ]  **NO** (0 Points) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Notes*** *(List any observations, explanations for point deductions, etc.)*

1. The organization clearly communicates how they are going to provide services/programs with requested grant funds.

[ ]  **YES** (5 Points) [ ]  **NO** (0 Points) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Notes*** *(List any observations, explanations for point deductions, etc.)*

1. The organization clearly communicates how they are going to track their outcomes/indicators AND the evaluation tool was made available for review.

[ ]  **YES** (5 Points) [ ]  **NO** (0 Points) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Notes*** *(List any observations, explanations for point deductions, etc.)*

1. Does the organization have a policy regarding protection of confidential client information?

[ ]  **YES** (5 Points) [ ]  **NO** (0 Points) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Notes*** *(List any observations, explanations for point deductions, etc.)*

1. Does the Board of Directors routinely receive and review copies of the organization’s financial statements?

[ ]  **YES** (5 Points) [ ]  **NO** (0 Points) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Notes*** *(List any observations, explanations for point deductions, etc.)*

# Subjective Narrative

1. What is the site evaluation team’s overall impression of the facility? (Address issues such as the professionalism of staff-to-staff and staff-to-client interactions, facility appearance and appropriateness for type of services provided, receptiveness to site evaluation team, etc.)
2. Provide two examples of the strengths of the organization’s leaders with specific attention to one or more of the following areas: extensive and varied experience in nonprofit management, innovative thinking, or comprehensive knowledge of the field.

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1. Has the organization experienced or is it anticipating the loss of any key staff or funding support?

How will the organization address these losses?

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1. Additional notes and observations (concerns, impressions, etc.)

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**Appendix D: Guiding Questions for Finance Related Rating Criteria**

**Guiding Questions for Finance Related Rating Criteria**

**Organization Rating Criteria Form – Question #5**

Is the program Budget present and complete?

Do the numbers add up correctly?

Are there additional questions regarding the budget to address?

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**Organization Rating Criteria Form – Question #5**

Are the Audited or Review Financial Statements Present?

Is the Balance Sheet included?

Does the financial statement Include Profit and Loss Statement covering 12 months?

Have there been major changes in the organizations financial picture?

If yes, what questions do we need to ask?

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**Organization Rating Criteria Form – Question #3**

Are there recommendations or conditions present?

If so, what questions do we need to ask?

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**Organization Rating Criteria Form – Question #4**

In reference to the funding table, Q 14, have there been any major changes in the funding mix?

If so, what questions do we need to ask?

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