

United Way of Lane County Strategic Investments LOI Scoring Form - INCOME

Organization Name _____

Proposed Service Name _____

Annual and Total Amount Requested: \$ _____

Criteria		Description	Possible Score	Rating
1	Mission	Does the proposed service fit within the organization's mission statement?	NA	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	Goal Alignment	The proposed service aligns with or supports the United Way Income Goal Comments: _____	NA	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	Outcomes	Which outcomes does the proposed service address? <input type="checkbox"/> Increase high school graduation rates and/or career training certifications among high-risk youth <input type="checkbox"/> Increased Income <input type="checkbox"/> Increased savings and assets <input type="checkbox"/> Increased financial management knowledge and skills Comments: _____	NA	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	Impact on Goal, Outcome, Target Population	Which strategies does the proposed service address? <input type="checkbox"/> Enroll and retain youth <input type="checkbox"/> Youth pregnancy prevention <input type="checkbox"/> Use of free tax sites <input type="checkbox"/> Develop a career or training path <input type="checkbox"/> Enroll in affordable financial products such as IDAs <input type="checkbox"/> Increased bank accounts or asset building opportunities for tax site users <input type="checkbox"/> Financial literacy classes, workshops, or coaching <input type="checkbox"/> Enroll in affordable financial services The strategies and services as described will make a meaningful difference in the goal, community outcomes, and/or for the target population. The amount requested is reasonable based on the scope of the proposed service. Comments: _____	50	
5	Need Target Population	The need is compelling as described. The proposed service reaches our intended target population and is appropriate to the need. <input type="checkbox"/> Youth at high risk for poverty <input type="checkbox"/> Families or individuals between 100%-250% of the FPL Comments: _____	25	
6	Collaboration/Innovation	The service model attracts additional resources and/or partners to the work. It suggests an innovative approach to the need and/or target population. It complements and magnifies existing community efforts and momentum. Comments: _____	25	
Total Points			100	
Should UWLC invite the submitter to complete a full application? Comments: _____				<input type="checkbox"/> Yes <input type="checkbox"/> No
If no, should we explore future partnerships with the submitter?				<input type="checkbox"/> Yes <input type="checkbox"/> No

Reviewer Signature/Date _____