



Numerica Charitable Fund – Appraisal Form Scoring Criteria:

IMPACT:

0 – Does not meet fund’s focus of enhancing lives, fulfilling dreams, and building communities by providing proactive and responsive programming that address systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education.

1 – Partially meets fund’s focus of enhancing lives, fulfilling dreams, and building communities by providing proactive and responsive programming that address systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education. Example: Impact (education) is a residual of the project; not directly.

2 – Meets fund’s focus of enhancing lives, fulfilling dreams, and building communities by providing proactive and responsive programming that address systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education; BUT overall impact is limited or lacking in sustainability. Example: Band-Aid project; no real/lasting impact.

3 - Meets fund’s focus of enhancing lives, fulfilling dreams, and building communities by providing proactive and responsive programming that address systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education.

4 - Meets more than one of the fund’s focus areas by providing proactive and responsive programming that address systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education.

5 - Meets more than two of the fund’s focus areas by providing proactive and responsive programming that address systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education.

COVID-19 RESPONSE & IMPACT:

It’s important to understand how the organization has been impacted by COVID-19 and how they’ve navigated those impacts to continue serving their clients. As need for support services has increased, it’s imperative that the organization has navigated COVID-19 related challenges to meet their clients’ need.

0 – The organization has been unable to provide services to their clients due to COVID-19.

1 – The organization has made adjustments to their traditional programming to ensure their clients are receiving support services, regardless of COVID-19 challenges.



INNOVATION:

The Numerica Charitable Fund defines innovation as a program, solution, or project that offers a new or improved concept or approach to serving the mission of the nonprofit and its clients. The new or improved concept should be forward-thinking and support **cost-savings, efficiency, or expansion of the program to reach a broader audience**. The concept may include **new technology or tactics** not widely utilized as a method for increasing success.

0 – Does not fit Numerica’s definition of innovation as described above.

1 – Fits Numerica’s definition of innovation as described above by meeting one of the above benefits (cost-savings, efficiency, expansion, or use of new technology/tactics).

2 – Exceeds Numerica’s definition of innovation as describe above by meeting more than one of the above benefits (cost-savings, efficiency, expansion, or use of new technology/tactics).

COLLABORATION:

Numerica prioritizes the spirit of collaboration when it comes to charitable giving. Collaborative efforts demonstrate a commitment to leveraging resources and reducing overall spending by overcoming redundancy – enhancing efficiency, functionality, and ultimately the program’s impact.

0 – Funding request does not specifically identify any external partnerships (other agencies, industry partners, or support networks).

1 – Funding request identifies one or more external partners (other agency, industry partner, or support network) that offers direct benefit to the program and has detailed out the funding agreement between said partners.

2 – Funding request identifies one or more external partnerships (other agencies, industry partners, or support networks) that are vital to the success of the program. Partners have a shared commitment to meeting the program’s identified goal(s) and has detailed out the funding agreement between said partners.

DIVERSITY, EQUITY AND INCLUSION:

Marginalized populations – such as BIPOC, LGBTQ+ or people with disabilities – are disproportionately impacted by the systemic issues the Numerica Charitable Fund works to address. It's important to understand how the applying organization is proactively serving diverse audiences as referenced above.

0 – The organization does not reference service to marginalized populations such as BIPOC, LGBTQ+, or people with disabilities.

1 – The organization provides service to marginalized populations, such as BIPOC, LGBTQ+, or people with disabilities but does not currently have any specific outreach tactics that proactively engage one or more of these audiences.

2 – The organization provides service to marginalized populations, such as BIPOC, LGBTQ+, or people with disabilities and is currently conducting specific and successful outreach to one or more of these audiences.

EVALUATION:

Ensuring Numerica's grants – funded by member donations – are making a great impact is top priority. Has the organization clearly outlined its indicators for success/impact?

0 – The application does not reference indicators of success.

1 – The application has identified clear indicators of success that are aligned with the program objectives. Example: Total clients served; % of clients achieving program goals etc.