



## Numerica Charitable Fund – Appraisal Form

### Scoring Criteria:

#### **IMPACT**

*The Numerica Charitable Fund's focus is on enhancing lives, fulfilling dreams, and building communities by providing proactive and responsive programming that addresses systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education.*

**0** – Does not meet the Numerica Charitable Fund's focus of enhancing lives, fulfilling dreams, and building communities by providing proactive and responsive programming addressing systemic issues such as generational poverty, hunger, homelessness, domestic violence, and access to quality education.

**1** – Partially meets the Numerica Charitable Fund's focus.  
*EX: Educational impact or learning outcome (education) is a byproduct of the project, not direct focus.*

**2** – Meets the Numerica Charitable Fund's focus by addressing one of the named systemic issues, but impact is limited or lacking in impact or sustainability.  
*EX: Activity or output driven project that lacks real/lasting impact; e.g. handout vs. hand up.*

**3** – Meets the Numerica Charitable Fund's focus by providing proactive and responsive programming addressing one of the named systemic issues in a meaningful and/or sustainable way.  
*EX: Assist in accessing ongoing benefits rather than provide a onetime handout.*

**4** – Provides proactive and responsive programming to two of the Numerica Charitable Fund's focus areas.  
*EX: Bundling housing and food assistance to ensure greater stability.*

**5** – Provides proactive and responsive programming to three or more of the Numerica Charitable Fund's focus areas.  
*EX: Provide wraparound services to address employment, housing and food assistance to ensure greater self-sufficiency and stability.*

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#### **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, and/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. Innovation can include developing a promising practice or introducing a best or promising practice not currently used locally.*

- 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 described above by meeting more than one of the above benefits (cost-savings, efficiency, expansion, or use of new technology/tactics).
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### **COLLABORATION**

*Numerica prioritizes the spirit of collaboration when it comes to charitable giving. Collaborative efforts demonstrate a commitment to leveraging resources and increase efficiency by reducing unnecessary redundancy, enhancing efficacy, and ultimately the program’s impact and sustainability.*

- 0** – Funding request does not specifically identify any external partnerships (other agencies, industry partners, or support networks) or describe how critical partnerships support program operations.  
*EX: No partners are listed or they are listed but the relationship is unclear.*
- 1** – Funding request identifies one or more external partner(s) (other agency, industry partner, or support network) that offers direct benefit to the program.  
*EX: One referral partner is listed that prequalifies clients or a list of 11 partners is given but 10 of them seem to just ‘appreciate’ the program rather than collaborate to implement it.*
- 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 have detailed out the funding agreement between said partners.
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### **EVALUATION & ACCOUNTABILITY**

*Ensuring Numerica’s grants – which are funded by member donations – are making a great impact is top priority. Has the organization clearly outlined its indicators for success/impact? Results may include references to number of clients served, sustained success or impact for individual clients, successful implementation of a new project or completion of a new capital project, or the ability to successfully collaborate with key partners.*

- 0** – The application does not reference indicators of success.
- 1** – The application has identified one indicator of success aligned with the program objectives as outlined above.  
*EX: Total clients served; % of clients achieving program goals, etc.*
- 2** – The applicant’s plans for evaluating success include specific references to two or more indicators of success as outlined above.

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### **DIVERSITY, EQUITY & INCLUSION (DEI)**

*DEI awareness and engagement are critical in how an organization/program staffs, engages the community, and serves people. This awareness and engagement can focus on marginalized populations such as BIPOC, LGBTQ+, women, or people with disabilities. People that represent one or more (intersectional) of these communities are disproportionately impacted by the systemic issues the Numerica Charitable Fund works to address. It is important to understand how the applying organization is proactively seeing and serving diverse audiences as referenced above.*

**0** – The organization does not reference or demonstrate culturally relevant/sensitive service to marginalized populations such as BIPOC, LGBTQ+, women, or people with disabilities.

**1** – Marginalized populations make up more than 20% of people they serve but they do not currently have any specific or culturally relevant/sensitive outreach tactics that proactively engage one or more of these audiences.

**2** – The organization provides service to marginalized populations and is currently conducting specific and successful outreach to one or more of these audiences as well as engaging their staff, board, and/or volunteers in ways to help them be more culturally aware, sensitive, and effective. *EX: Bilingual outreach staff/programs, diverse representation of staff, or volunteerism to meet needs of marginalized populations.*

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