

## United Way Partner Agency Application Scoring Framework

This Framework includes:

- I. POLICY LEVEL FRAMEWORK** (Overall Scoring Philosophy)
- II. STRATEGIC WEIGHTING STRUCTURE** (Conceptual Model)
- III. SCORING CALIBRATION AND CONSISTENCY GUIDE** (Reviewer Training)
- IV. DETAILED SCORING ANCHORS** (Reviewer Guide)
- V. REVIEWER SCORE SHEET** (Reviewer Tracking Tool)
- VI. TIERED PARTNERSHIP MODEL** (Benefit and Engagement Profiles)
- VII. PARTNERSHIP LEVEL RECOMMENDATION** (For Committee and Council Decision Making)

### [2026 Partnership Enrollment Guidelines and Narrative Questions](#)

#### **PART I: POLICY LEVEL FRAMEWORK** (Overall Scoring Philosophy)

##### **Purpose**

The United Way Partner Agency review process is designed to ensure that organizations:

- Align with the 2025 Community Needs Assessment
- Deliver measurable impact
- Demonstrate strong governance and fiscal stewardship
- Ensure equitable access
- Contribute meaningfully to the broader United Way network

Partner Agency status signals organizational quality and alignment. It does not guarantee funding.

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**PART II: STRATEGIC WEIGHTING STRUCTURE (Conceptual Model)**

This reflects how United Way prioritizes review considerations.

<b>Category</b>	<b>Strategic Weight</b>	<b>Rationale</b>
Organizational Overview & Community Context	15%	Ensures responsiveness and avoids duplication of services.
Alignment with Community Goals and UWJWC Priorities	25%	Core strategic driver of UW partnership and funding decisions.
Equitable Access & Populations Served	10%	Signals strong commitment to inclusive, culturally responsive service delivery.
Program Impact & Outcomes	20%	Demonstrates measurable improvement in community well-being.
Organizational & Financial Stability	23%	Ensures accountability and operational integrity, and protects donor dollars and long-term stability.
Partnership & Community Engagement	7%	Assesses strategic alignment with United Way, collaborative engagement with the network, and reflects UW's identity as a mobilizer of community volunteers.

**PART III: SCORING CALIBRATION AND CONSISTENCY GUIDE (Reviewer Training)**

<b>Score</b>	<b>Description</b>
<b>5</b>	<b>Exemplary – Strong evidence, clear alignment, highly effective</b>
<b>4</b>	<b>Strong – Solid alignment and performance</b>
<b>3</b>	<b>Adequate – Meets expectations, some gaps</b>
<b>2</b>	<b>Emerging – Significant improvement needed</b>
<b>1</b>	<b>Limited – Major gaps or not demonstrated</b>

**Before review begins:**

1. Review a sample application together.
2. Have all members score independently.
3. Compare scores section by section.
4. Discuss large discrepancies (difference of 5+ points).
5. Clarify interpretation of anchors.

**Reminders:**

- A “3” is not negative — it means adequate.
- A “5” should reflect excellence, not “I like this organization.”
- Score the application, not the relationship.

**PART IV: DETAILED SCORING ANCHORS (Reviewer Guide)**

Section	Questions, Forms, or Documents	Score / Description
<b>1. Organizational Overview &amp; Community Context</b>	Q1-6	<p><b>5:</b> Clearly identifies local community needs with evidence; articulates service gaps; demonstrates collaboration and differentiation.</p> <p><b>4:</b> Need and collaboration described; some evidence/examples provided.</p> <p><b>3:</b> General description; limited evidence.</p> <p><b>2:</b> Vague description; minimal evidence of understanding or collaboration.</p> <p><b>1:</b> No meaningful identification of needs or gaps.</p>
<b>2. 2025 CNA Alignment</b>	Q7-10	<p><b>5:</b> Services clearly advance CNA focus area goals; outcomes or logic explicitly linked; examples or evidence provided.</p> <p><b>4:</b> Alignment clear; some evidence provided.</p> <p><b>3:</b> General alignment; limited examples.</p> <p><b>2:</b> Weak alignment; vague or conceptual.</p> <p><b>1:</b> No connection to CNA priorities.</p>
<b>3. Equitable Access &amp; Populations Served</b>	Q11-12 + Demographics Form	<p><b>5:</b> Priority populations clearly identified; equity and access strategies comprehensive; narrative context aligns with demographic form data; evidence of barrier reduction or culturally responsive strategies.</p> <p><b>4:</b> Populations and strategies described; minor gaps; demographic context partially explained.</p> <p><b>3:</b> Populations listed; equity/access strategies limited; limited connection to demographic data.</p> <p><b>2:</b> Minimal discussion of populations or strategies; weak connection to demographics.</p> <p><b>1:</b> No meaningful description of populations or equity practices; no use of demographic data.</p>

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<b>Section</b>	<b>Questions, Forms, or Documents</b>	<b>Score / Description</b>
<b>4. Program Impact &amp; Outcomes</b>	Q13–15 + Outcomes / Services Form	<b>5:</b> Clear, meaningful outcomes across the organization; aligns with CNA priorities; provides context for trends or service data; demonstrates tangible community impact and organizational learning. <b>4:</b> Outcomes clearly described; some alignment with CNA priorities; partial context provided; community impact evident. <b>3:</b> General description of outcomes; limited context; some evidence of impact. <b>2:</b> Minimal description of outcomes; weak evidence of impact or context. <b>1:</b> No meaningful description of outcomes or impact.
<b>5. Financial Health &amp; Sustainability</b>	Q16 + Financial Documents (budget, salaries, audit/review, IRS letter, fiscal policies, insurance)	<b>5:</b> Financial oversight and sustainability planning strong; diversified funding, reserves, risk mitigation, and succession planning described; all required documents provided and complete. <b>4:</b> Reasonable sustainability planning; minor gaps; most documents provided. <b>3:</b> Planning mentioned; some documents missing or limited detail. <b>2:</b> Vague planning; incomplete documentation; weak financial management. <b>1:</b> No meaningful sustainability planning or financial oversight; missing required documents.
<b>6. Governance &amp; Capacity</b>	Q17 + Board Materials (current officers list, Letter of Intent, bylaws, policies, personnel docs)	<b>5:</b> Board active and engaged; clear oversight and leadership; evidence of operational stability; all required governance documents submitted. <b>4:</b> Governance described; minor gaps; documentation mostly complete. <b>3:</b> Governance present; limited evidence of engagement or oversight; documentation partially complete. <b>2:</b> Weak governance; limited capacity or board engagement; missing key documents. <b>1:</b> Serious gaps in governance, oversight, or organizational capacity; missing required documents.

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Section	Questions, Forms, or Documents	Score / Description
<b>7. Partnership Fit &amp; Commitment</b>	Q18	<b>5:</b> Strong alignment with United Way mission and priorities; clear evidence of collaboration and commitment. <b>4:</b> Reasonable alignment; some evidence of commitment. <b>3:</b> General alignment; limited evidence. <b>2:</b> Weak alignment; minimal evidence. <b>1:</b> No evidence of fit or commitment.
<b>8. Volunteer Engagement</b>	Q19	<b>5:</b> Volunteers fully integrated with defined roles, recruitment, training, and support; narrative shows impact on mission and community. <b>4:</b> Roles described; minor gaps. <b>3:</b> Limited engagement; minimal evidence of impact. <b>2:</b> Minimal or unclear volunteer engagement. <b>1:</b> No meaningful volunteer involvement.

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**PART V: REVIEWER SCORE SHEET (Reviewer Tracking Tool)**

Agency Name: \_\_\_\_\_

Reviewer Name: \_\_\_\_\_

Section	1	2	3	4	5	Score	Multiplier	Weighted Score
1. Organizational Overview & Community Context	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×3	_____/15
2. 2025 CNA Alignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×5	_____/25
3. Equitable Access & Populations Served	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×2	_____/10
4. Program Impact & Outcomes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×4	_____/20
5. Financial Health & Sustainability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×3	_____/15
6. Governance & Capacity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×1.6	_____/8
7. Partnership Fit & Commitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×0.8	_____/4
8. Volunteer Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	×0.6	_____/3

**Total Score:** \_\_\_\_\_

**Reviewer Confidence:** How confident are you in your assessment? (1–5): \_\_\_\_\_

**Reviewer Comments**

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## Part VI: TIERED PARTNERSHIP MODEL (Benefit and Engagement Profiles)

### Tier 1: Funded Strategic Partners

(former “Partner Agencies” or “Funded Partners”)

#### Who they are:

Organizations that:

- Represent high accountability and high alignment with United Way values and goals
- Successfully complete full application review
- Meet alignment + governance + impact standards
- Eligible to receive United Way funding

#### Benefits:

- UW logo use - Full Partner Seal
  - Bi-annual Funding eligibility
  - Communications amplification
  - Partner Agency meetings
  - All benefits associated with Tiers 2 & 3
- 

### Tier 2: Recognized Community Partners

#### Who they are:

- Vetted Community Partners that align with UW mission and community goals
- Successfully complete full application review
- Meet governance and eligibility standards
- May or may not receive funding

#### Benefits:

- Limited logo usage - “Recognized Partner” badge, not full funding seal
  - Communications inclusion
  - Core participation or leadership in collaborations and initiatives
  - Eligible for collaborative grant initiatives or focus area funding
  - Invitation to partner convenings
  - All benefits associated with Tier 3
-

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### Tier 3: Network & Volunteer Partners

#### Who they are:

Organizations that:

- **Are not required to submit full partnership application.** A simplified application may be developed at a later date for Network and Volunteer Partners.
- Participate in initiatives, programs, or collaborative efforts
- Meet basic United Way commitment to community well-being and/or fair access and opportunity:
  - United Way fights for the health, education and financial stability of every person in every community. We recognize that disparities and inequities—past and present—have impacted access to opportunity and well-being for many individuals and families in our region. United Way is committed to fostering equitable communities by engaging diverse voices, building collaborative partnerships, and co creating solutions that ensure everyone has the resources, supports, and opportunities they need to thrive.

#### Benefits:

- Coalition participation
- Volunteer Center access
- Community Needs Assessment & COAD collaboration
- Occasional training invitations VAN & peer groups
- United Way Initiative Partners: Ready Set School, Adopt a Family, Literacy & Learning Kits
- Inclusion in community wide communications or communications relevant to organizations' mission and activities.
- No seal or formal strategic alignment claim.

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**Part VII: PARTNERSHIP LEVEL RECOMMENDATION** (For Committee and Council Decision Making)

<b>Score Range</b>	<b>Typical Recommendation</b>
90–100	Strong candidate for Funded Strategic Partner
75–89	Funded or Recognized Community Partner
74 and Under	Network & Volunteer Partner

**In addition to scoring, final decisions will consider:**

- Availability of United Way resources
- Distribution of scores across all applicants
- Service duplication
- Strategic balance across focus areas