

Okaloosa Arts Alliance, Inc.
Grant Panel Review
SCORING GUIDELINES
Nov 2016

"To give away money is an easy matter and in any man's power. But to decide to whom to give it and how large and for what purpose and how is neither in every man's power - nor an easy matter. Hence it is that such excellence is rare, praiseworthy, and noble."

Aristotle

Welcome to the grants review panel process, and thank you for agreeing to serve as a panel member. Your participation on a review panel will give you the opportunity to meet arts professionals, to discuss issues or aesthetics and current arts trends, and to gain a firsthand perspective on arts and culture. Though there are difficult decisions to be made, we are certain that you will find your experiences both educational and rewarding.

The peer panel review process is probably the most important step in the award of cultural grants. Review panels are at the heart of the decision-making process, and your expertise and knowledge are vital components in building responsible, professional panels.

The public dollars that fund our programs are limited, and it is the responsibility of the panel to select the proposals that evidence the highest quality programs for the benefit of all members of the local community.

DETERMINING ELIGIBILITY OF APPLICATION

Eligibility

The following situations existing AFTER the grant submission deadline will render a grant ineligible.

- (1) missing signatures
- (2) incomplete application
- (3) application copies missing
- (4) documentation missing that shows the organization has been incorporated or operational (Not applicable to schools)
- (5) Proposal Budget detail of expenses (Form E) was not provided
- (6) Proposal Budget detail of anticipated income (Form I) was not provided
- (7) Incomplete or missing financial statements of last completed fiscal year

The Project Budget (Items 5 and 6 above)

Project Budget, is the budget for the GRANT PERIOD. This budget must balance. A mathematical error or mistake in the proposal budget should be seen as indicative of the organization's lack of administrative ability and attention to detail, and subject the applicant to a lower score.

You should strongly question those applicants who appear to have inflated their project budget and who have no breakdown of actual expenses. **Grant awards for the 2016-17 cycle have been set as a School Grant (up to \$1,000) and 1 Organization Grants (up to \$1,000 each). Monies not awarded will be returned to the grant pool.**

***PLEASE CONSULT THE ENCLOSED COPY OF THE GRANT GUIDELINES FOR A MORE DETAILED LISTING OF WHAT **MUST BE INCLUDED** AND WHAT **CAN NOT** BE FUNDED.

If an application is deemed ineligible for further consideration, please so indicate the reason(s) on the evaluation sheet. Not further evaluation of this grant is required at this time. This decision will be reviewed by the whole committee in phase 2.

SCORING ORGANIZATION APPLICATIONS

Application scoring is a process that involves two basic steps.

- (1) Panelists award Quality Points this will be accomplished individually by each panel member;
- (2) Members will meet for one session of the entire committee to discuss ratings obtained. Funding will be based on the average panel scores applied to the Funding Formula. A representative of OAA will be on hand at this meeting to explain the funding formula.

AWARDING QUALITY POINTS

(1) Quality Points

There are three areas of evaluation which will be utilized in reviewing organizational grant applications; each area carries a maximum number of possible points and these will be assigned by each panel member. Please assign scores using whole numbers, no fractions. No score of "0" will be accepted for any part of the evaluation.

The Scoring Criteria and their maximum point values are: Program Excellence (40 points), Public Impact (30 points), and Program Management (30 points) for a total possible number of 100 quality points. All applicants expect to be evaluated on these criteria.

An average quality point score of 75.0 of a possible 100 points must be achieved for the application to be eligible receive funding. Each panelist must keep this in mind when awarding the quality points. Although scores will be averaged, individual scores of 75.0 and above support possible funding of the application.

NOTE: Subpoints in the following items are EXAMPLES of support documentation that develop the area of evaluation. An application NEED NOT contain all of these subpoints in order to receive the maximum points.

1. Program Excellence (Maximum Points = 40)

Achievement of high professional standards may be demonstrated by:

- a. the proposal summary
- b. resumes and reputation of professional personnel involved
- c. reviews and other printed support materials
- d. exhibition of high level of quality, creativity, and diversity.
- e. program design adheres to and furthers mission of organization

2. Public Impact, (Maximum points = 30)

Public Impact may be demonstrated by:

- a. geographic impact of organization or program
- b. demonstrated need for organization or program
- c. cultural diversity (constituency served, audience, and programming)
- d. educational component to foster future audiences
- e. marketing and audience development efforts

3. Program Management (Maximum Points = 30)

Program Management is based upon the organization's ability to plan and execute the proposal. Some items to consider may be:

- a. strength of program planning and evaluation
- b. ability to implement proposal;
- c. accuracy and feasibility of grant proposal budget;
- d. proven record or demonstration of capacity to develop and effectively manage resources, including fiscal stability/responsibility
- e. completeness of application; inclusion of requested support materials

PHASE II – FUNDING OF GRANT AWARDS

Once the applications to be considered for funding have been identified, funding for each grant will be determined using preset formula that directly corresponds to the application scores. The formula converts total quality points (grand total) awarded to a fraction of the maximum possible points. This fraction, or percentage, is used to reduce all amounts requested until "total awards" is less than or equal to "available funds."

The following formula will be utilized in funding grants based upon average Quality Point scores. This procedure will be undertaken as an effort of the entire committee in session. Information is included here for informational purposes only.

Formulas for Distribution of Grant Funds

After all grant reviews are completed and each application is scored:

1. Separate the School grant requests from the Organization requests. For each group (School vs Organization) follow these steps: Determine the **Total Average Quality Points Percentage (TAQPP)** for each applicant by adding the **Quality Points** received from each panelist and then dividing that total by the number of panelists actually reviewing the grant application. Convert this score to a percentage by dividing by 100.
Example: 5 panelists give an application the following scores:
91, 87, 72, 90 and 85.
Average Quality Point Score = $91+87+72+90+85 = 425$ divided
by 5 (no. of panelists)
TAQPP = $85.0 / 100 = .85$ or 85%

Note: If some panelists have to recuse themselves from evaluating a particular grant or grants, the Average Quality Point Score is determined by the number of **participating panelists** for that grant review, NOT by the total number of panelists.
2. Rank all Applications in descending order from highest of TAQPP to lowest. To the highest scored grant, add the number of BONUS POINTS necessary to bring its TAQPP to 100%. This same Bonus Amount is then added to each of the remaining grants.
3. Applications with a TAQPP (including the Bonus Points) of **less than 75** are **not eligible for funding** and will not be included in any distribution formula.
4. a) If available funds are sufficient, all eligible grants will receive funding equal to **Requested Amount**.

b) If available funds are NOT SUFFICIENT to fully fund the grant requests in 4a (above), the following formula is to be used in determining the amounts of the grant awards: Using the Ranking obtained in #2 above, fully fund the grants ranked 100%. Deduct that amount from the total available funds as established by the Board of Directors. For all remaining eligible grants, in descending order of TAQPPs, multiply the TAQPP by the amount requested. This will be the amount awarded. Subtract the award amount from the remaining available funds and continue this process until available funds are not sufficient to cover an award. **No further grants will be awarded** once available funds are less than the eligible amount for a grant.

5. No grant application will receive funding for MORE than the requested amount or the maximum amount specified in the guidelines, whichever is LESS.
6. All non-awarded funds from one grant cycle will be returned to the Grant Fund for use in the next grant cycle.

Example 2:

\$6,000 is available in Organization grant money for a cycle.

Seven grants are reviewed and receive the following TAQPPs:

GRANT #	REQUESTED	TAQPP	BONUS	TOTAL TAQPP
#1	\$2,000	96%	+4	100%
#2	\$ 750	95%	+4	99%
#3	\$2,000	94%	+4	98%
#4	\$1,500	93%	+4	97%
#5	\$2,000	87%	+4	91%
#6	\$1,000	74%	+4	78%
#7	\$1,000	62%	+4	66%

Grant #7 is not eligible for consideration for any funding per **Rule 3** above.

Grants 1-6 are eligible for funding of their requests if the total of all eligible requests does not exceed the available grant money. (**Rule 4a**)

Grant requests #1 - #6 total \$9,250. This is more than the grant fund contains; therefore, **Rule 4b** applies.

Grant funding for eligible grants would be:

GRANT	REQUESTED	TAQPP	FUNDING	AVAILABLE
				6,000
#1	\$2,000	100%	\$2,000	4,000
#2	\$ 750	99%	\$ 743 (rounded up)	3,257
#3	\$2,000	98%	\$1,960	1,297
#4	\$1,500	97%	Not Funded	
#5	\$2,000	91%	Not Funded	
#6	\$1,000	78%	Not Funded	
Total Awarded			\$4,703	

The \$1,297 non-awarded funds during this grant cycle would be returned to the grant fund for use in the next cycle of grants.

GRANT REVIEW SCORE SHEET

Applicant: _____

Project Name: _____

Determination of Eligibility

Does application meet eligibility requirements? **YES** **NO**

If "NO" is determined, please state reason(s):

Quality Points (Use whole numbers ONLY – no fractions or percentages)

NOTE: Subpoints in the following items are EXAMPLES of support documentation that develop the area of evaluation. An application NEED NOT contain all of these subpoints in order to receive the maximum points.

1. Program Excellence (Maximum Points = 40)

Achievement of high professional standards may be demonstrated by:

- a. the proposal summary
- b. resumes and reputation of professional personnel involved
- c. reviews and other printed support materials
- d. exhibition of high level of quality, creativity and diversity
- e. program adheres to and furthers mission of organization

Total Points (Must be 40 or less) _____

2. Public Impact, (Maximum points = 30)

Public Impact may be demonstrated by:

- a. geographic impact of organization or program
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- e. marketing and audience development efforts

Total Points (Must be 30 or less) _____

(Score sheet continues on back)

3. Program Management (Maximum Points = 30) _____

- a. strength of program planning and evaluation
- b. ability to implement proposal
- c. accuracy and feasibility of grant proposal budget
- d.. demonstration of capacity to develop and manage resources
- e.. completeness of application

Total Points (Must be 30 or less) _____

Finalizing the Quality Points

Total Points Received for Program Excellence (#1 above) _____

Total Points Received for Public Impact (#2 above) _____

Total Points Received for Program Management (#3 above) _____

Total Quality Points Rewarded (Must be 100 or less) _____

Comments & Suggestions from the Panel
