Case Management Services Evaluation

	CRITERIA/REQUIREMENTS	DESCRIPTION	DETERMINATION
Services to Target Populations & Community Partnerships	Case management supports low/moderate income Evanston residents	Description of population served is clear. Program serves predominantly low/moderate income residents (majority <50% AMI).	
	Case management services reach/support Evanston residents from marginalized AND underserved communities.	Application documents that residents from underserved/ marginalized populations are accessing case management service (BIPOC residents, limitied English Proficiency, people w/disabilities, etc.)	
	Program serves a significant portion of Evanston residents or a substantial number of Evanston residents.	Residents comprise 50% or more of total population served OR a significant number of residents are enrolled in case management services (ex: 250+ people served). Number of residents served is reasonable based on total population served.	
	City funding would expand capacity to serve new Evanston participants OR a loss of funding would significantly reduce the number of Evanston residents enrolled in case management services.	Program enrolls (anticipates enrolling) new residents; application includes projections of residents to receive services, the number of residents served in prior year, and waitlist numbers, and additional staff capacity as needed.	
	Program provides outreach to Evanston residents AND accepts referrals from community partners.	Program provides outreach to targeted Evanston populations AND accepts referrals from community partners working with target populations.	
	Program provides services in ways that demonstrate cultural humility.	Application describes cultural competency practices/training opportunities; staff demographics reflect population served, bilingual staff or language translation services available/offered, front-line staff influence or impact service provision, etc.	
	Case management services provide measurable support that help Evanston residents become self-sufficient	***Case management services provided have a history of helping Evanston residents reach self-sufficiency goals***	
		TOTAL	**70**
Best Practices - Case Management	Case managers follow best practices.	Best practices, including reasonable caseloads, staff training, and use of client-centered methodology (use of trauma informed care, strengths-based assessment, etc.), are defined, documented, and followed.	
	Service Plans are client-centered and have specific goals/measures/assessments; Service Plans are updated regularly.	Policies/procedures for creating & tracking outcomes. Case managers meet regularly/consistantly with participants	
	Service Plans document participant engagement and referral/benefits enrollment process.	Application describes method of tracking participant engagement and referrals. Program is able to report number of successful referrals provided to residents in prior years. Sample/redacted Service Plan and intake forms provided.	
	Case management services **measurably reduce poverty** by making appropriate referrals and successfully connecting residents to/enrolling residents in resources.	Application documents poverty reduction through successful community connections and benefits enrollment. Referral process is described and typical referrals are listed. Case Managers are able to connect residents to services that measurably reduce poverty (ex. SNAP, Medicaid, LIHEAP, SSI/SSDI, HeadStart/Early HeadStart, Dist 65/202 services, housing support, etc.).	
	Program works collaboratively with community partners to benefit Evanston residents.	Program accepts referrals from other agencies, successfully enrolls residents in services with other agencies as needed, and has documented MOUs	
	Program has a system for receiving participant feedback and/or incorporates the knowledge, perspective, and experiences of people who have used or benefited from services.	Program surveys participants to get feedback, regularly receives information from people with lived experience, has a representative advisory board, and a grievance policy.	
	Services are easily accessible to Evanston residents.	Agency is located close to public transportation OR case management services are provided at identified community locations or some other way that is accessible to Evanston residents.	
		TOTAL	**70**
Cost Reasonableness & Budget	Award request is reasonable based on **program** budget.	**Program** budget is complete, costs are reasonable based on the number of residents served/industry standards.	
	Allocation of City funding is clear and allowable; enrollment of Evanston residents proportionate to request based on program budget and total population served.	Expenses/Funding based on Chart of Accounts; request and existing program resources proportionate to number of residents served	
	Financial Sustainability: services will be provided if funded at less than the full request.	Other sources of funds identified/secured or there is reasonable likelihood they will be secured AND proof that other funds have been earmarked for program and secured in past years.	
		TOTAL	**30**
			170

Administrative Review

Reporting system robust enough to document outcomes (digitized, searchable, secured)		
Program staff have the capacity and expertise to provide case management services: required org information and policies have been provided or are on file		
Intake procedures described/documented		
Any monitoring and/or audit findings or concerns have been addressed/corrected.		
Program demonstrates ability to document participants' outcomes - service plans provided		
Award request is reasonable based on numbers of residents served (based on projected allocation of award, program budget, award request, and standard fees for service/total population served)		
If funded in prior years, services/programs have been implemented substantially as proposed and goals and outcomes achieved. OR, application able to demonstrate consistency of services and that residents are in need of services.		
If funded in prior years, reports and documentation have been provided in a timely manner. OR reporting system described sufficiently by new applicants		
Evanston residents met indicators and achieved outcomes		
Organization has the experience and knowledge to manage federal/public funds based on proof of past experience whether with Evanston or some other grant		
Program budget is accurate based on chart of accounts		
Agency/Program is financial sound, audit/financial information provided. Any monitoring and or audit findings/concerns have been addressed/corrected		
Scoring method		
Full points	Requirement fully met and well tracked and documented	
Half points	Requirement partially met and/or partially documented	
no points	Requirement not sufficiently met	