



United Way of East Central Iowa Agency Profile

The agency profile will NOT be used in the scoring of the Request for Proposal. It will be used to introduce or reintroduce Solution Team members to each agency and what they do. The agency profile is due by 11:59pm October 1, 2016 and needs to be sent to communitybuilding@uweci.org.

Agency Profile

Name:

Acronym:

Address:

Website:

EIN#:

Number of paid employees:

Volunteers:

Associations:

Certifications:

Licensure:

Agency Background and Overview (some of this could come from 990):

Founder:

Year founded:

Agency history
(optional):

Mission:

Vision:

Strategic Priorities from current strategic plan (bullet points) areas of work:

Key programs:

Priority populations:

Governance and Administration

Risk Assessment

Are agency's most current by-laws on file at UWECI?	Yes	No
Date of last amendment?		
Does the agency have a board approved policy on ethics?	Yes	No
Date of last board review		
Does the agency have Directors and Officers Liability Insurance?	Yes	No
Does the agency have liability insurance?	Yes	No
Does the board review the agency's insurance coverage?	Yes	No
Date of last review?		
Legal Regulations: Is the agency aware of any issues of noncompliance with any applicable legal, local, state, and federal regulations?	Yes	No
Licensure/Accreditation: The organization and applicable programs meet all local, state, and federal applicable licensure/accreditation requirements.	Yes	No
Is the agency aware of current/pending litigation that may interfere with its ability to provide services?	Yes	No
What is the agency's board meeting schedule?		
Does the agency keep board minutes on file?	Yes	No
How often does the board review and approve financials?		
How often does the board conduct a formal evaluation of the CEO's performance?		
Does the board evaluate itself?	Yes	No
How often?		
Does the agency have a business continuity plan?	Yes	No
Does the agency have a strategic plan?	Yes	No
When was it completed?		
What years does it cover?		
How often do you update the plan?		

Do all board members receive oral and written instruction regarding the organization's governing documents, finances, program activities, and governing policies and practices?	Yes	No
When and how often?		
Does the agency have cash reserves?	Yes	No
Does the agency have a goal for the amount of reserves it will maintain?	Yes	No
Does the agency have a cash reserve policy?	Yes	No
The following three questions are only required to be completed by agencies that file a 990 EZ:		
Does the board have a conflict of interest and policy enforce it?	Yes	No
Does the board have a compensation review practice in place for the agency's CEO?	Yes	No
Does the board have a separate audit committee?	Yes	No

Please check the appropriate box for the diversity and inclusion questions below for your agency. Remember: this section is NOT worth any points. We are looking at how we are doing as a community in relation to best practices within this area of work.

Your agency has diversity and inclusion policy(ies) in place.	Yes	Working on	No
Your agency has goals and targets in place for diversity and inclusion and tracks your progress in achieving those goals and targets.	Yes	Working on	No
What are those goals and targets?			
How often does leadership within your agency provide diversity and inclusion trainings?			
Please list the diversity and inclusion trainings provided to your staff.			
Your agency actively recruits a diverse pool of applicants for open positions including, but not limited to: underrepresented groups, people who are differently abled, gender, and sexual orientation, religion, race, ethnicity.	Yes	Working on	No
Diversity of staff meaningfully reflects diversity of the community and clients.	Yes	Working on	No
Please list the demographics of your staff.			

The questions above on diversity and inclusion were adapted from: http://www.omaraassoc.com/pdf/GDIB_2014_Standard_A4_Version.pdf

Please respond to the following Trauma-Informed Approach questions for your agency. Remember: This section is NOT worth any points. We are looking at how we are doing as a community in relation to best practices within this area of work.

Trauma-Informed Approach, according to SAMHSA is a program, organization, or system that is trauma-informed. Does your agency consistently demonstrate the following skills?	
<ul style="list-style-type: none"> • Realizes the widespread impact of trauma and understands potential paths for recovery; 	Yes
<ul style="list-style-type: none"> • Recognizes the signs and symptoms of trauma in clients, families, staff, and other involved with the system; 	Working on
<ul style="list-style-type: none"> • Responds by fully integrating knowledge about trauma into policies, procedures, and practices; and 	No
<ul style="list-style-type: none"> • Seeks to actively resist re-traumatization. 	
A trauma-informed approach reflects adherence to six key principles rather than a prescribed set of practices or procedures. Have you integrated these practices into your program?	
<ul style="list-style-type: none"> • Safety - Staff and the people they serve feel physically and psychologically safe. • Trustworthiness and transparency - Organizational operations and decisions are conducted with transparency and with the goal of building and maintaining trust among all. • Peer support and mutual self-help - These are integral to the organizational and service delivery approach and are understood as a key vehicle for building trust, establishing safety, and empowerment. • Collaboration and mutuality - There is true partnering and leveling of power differences between staff and clients and among organizational staff from direct care staff to administrators. There is recognition that healing happens in relationships and in the meaningful sharing of power and decision-making. The organization recognizes that everyone has a role to play in a trauma-informed approach. One does not have to be a therapist to be therapeutic. • Empowerment, voice, and choice - Individuals' strengths are recognized, built on, and validated and new skills developed as necessary. The organization aims to strengthen everyone's experience of choice and recognize that every person's experience is unique and requires an individualized approach. This includes a belief in resilience and building on what clients, staff, and communities have to offer, rather than responding to perceived deficits. • Cultural, historical, and gender issues - The organization actively moves past cultural stereotypes and biases (e.g., based on race, ethnicity, sexual orientation, age, geography), leverages the healing value of traditional cultural connections, and recognizes and addresses historical trauma. 	<p>Yes = all 6 principles</p> <p>Working on = 3-5 principles</p> <p>Just starting = 1-2 principles</p> <p>No = 0 principles</p>

Trauma-specific interventions recognize the following criteria. Have these criteria been integrated into your programs? If not why not?	
The need of the survivor throughout their recovery to be respected, informed, connected, and hopeful	Yes
Understanding the interrelation between trauma and symptoms of trauma such as substance abuse, eating disorders, depression, and anxiety	Working on
Working collaboratively with survivors, family and friends or the survivor to empower both survivors and consumers	No
If you have not integrated the criteria above please explain why not:	
Please list the trauma-specific intervention(s) you use:	
Please list the tool(s) and training(s) you use:	

The questions on Traum-informed practice above were created using information from <http://www.samhsa.gov/>

Please check the appropriate box for the volunteer engagement questions below for your agency. Remember: This section is NOT worth any points. We are looking at how we are doing as a community in relation to best practices within this area of work.

Your agency utilizes volunteers to deliver the mission of your organization.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>
Your agency leadership demonstrates a commitment to engaging volunteers.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>
Your agency has a designated volunteer coordinator/manager. • If yes please list the name, phone number, and email for that person	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>
Your agency connects your volunteer coordinator and staff that supervise volunteers with trainings and resources to help them better support volunteers in their roles.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>

Your agency has a strategy in place for mission driven volunteer engagement.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>
Your agency allocates resources (time, money, and tools) to effectively utilize volunteers.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>
Your agency tracks additional items outside of volunteer hours and number of volunteers.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>
Your agency matches volunteers to appropriate roles and provides onboarding and training.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>
Your agency engages in ongoing outreach to recruit volunteers.	Yes <input type="checkbox"/>	Working on <input type="checkbox"/>	No <input type="checkbox"/>

Attachments for all applicants to submit:

- Board list
- Organizational chart
- Demographic information of clients served for your agency (using the link from the Funding Opportunities page <http://www.uweci.org/get-involved/nonprofit/funding-opportunities/>)