



FY 2018-2020 Community Impact Partner Fund RFP Training

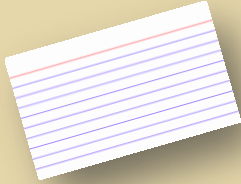
November 8, 2016



AGENDA

1. RFP Framework
2. Question Review
 - Continuation Grant
 - Enhancement Grant
3. Data and Measurement
4. Impact Strategy Budget and Funding Justification
5. Attachments
6. Submission Requirements

ADDRESSING QUESTIONS

- What other definitions or clarifications are needed?
 - Use 3x5 cards  for questions or clarifications
- Will post responses on-line

<http://www.uweci.org/get-involved/nonprofit/funding-opportunities/>

LOI STATISTICS

- **53** LOI's were submitted
 - **37** Agencies
 - **\$8,192,424**
- **16** New Strategies not currently funded
 - **\$1,322,010**
- **Majority applying for Enhancement Grant**

GOALS

What do you want to leave with today?

Frequently Asked Questions from Registration:

- Overall process overview
- Continuation -vs- Enhancement
- Scoring, metrics, and measurements

Community Goals



Education

By 2020, increase the number of children in our five county area who are developmentally and academically on track by 4th grade by 30%.



Financial Stability

By 2020, increase the number of financially stable households by 15%.



Health

By 2020, improve social connectedness and mental health function of low-income adults by 10%.

RFP: FRAMEWORK

Sets the context for:

- Integrated approach
- Target population(s)
- Types of strategies in which UWECI is likely to invest
- Outcome measurement
- Provide community condition updates

COVER PAGE

Alignment with Community Impact Focus Area

- Select the one Focus Area for which the application is requesting United Way funding.
- To be completed per proposal/strategy
- Ensure updated contacts for the application
 - Executive Director
 - Staff Contact for RFP
 - Staff Contact for Data Reporting





Agency and Contact Information

Name of Organization:		
Employer Identification Number (EIN):		
Street Address:		
City, State, Zip Code:		
*Name of Executive Director:		
Phone Number:		Email:
*Name of contact person regarding this application:		
Title of contact person regarding this application:	Phone Number:	Email:
*Name of data contact person:	Phone Number:	Email:

*If staffing changes occur during the grant cycle United Way must be updated of the contact changes.

Alignment with Community Impact Focus Area

Please select the one Focus Area for which this application is requesting United Way funding.

<input type="checkbox"/>	Education
<input type="checkbox"/>	Financial Stability
<input type="checkbox"/>	Health

Proposal/Strategy Name

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Funding and Fiscal Information

Amount of funding being requested for the proposed strategy in FY2018:	\$
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List all <u>other</u> strategies requesting CIPF funding	Focus Area (using the list above)	Amount requested for FY2018

Agency Fiscal Year	Begins: ____/____/____	Ends: ____/____/____
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Certification

I certify that all statements and information contained in the Request for Funding Proposal are true and complete to the best of my knowledge.

Signature of Executive Director _____ Date _____

Signature of the Chair of the Board _____ Date _____

- List all other strategies requesting CIPF
- Focus area
- Amount requested in FY2018

Ensure completion of all fields for each Impact Focus Area and Strategy RFP

QUESTIONS OR CLARIFICATIONS?



SCORING TOOL

Use this tool to help you answer the questions!

Agency Name:

Impact Strategy Name:

Continuation Grant Questions

Please select the score for each question based on the criteria described below:

Q X	Question - including requirements needed (Note: volunteers only score 0,1,3, or 5. There is no 2 or 4)
0	Agency is missing large sections of required information / does not answer the question given
1	Agency has not met the full requirements of the question listed above / there are issues with the answer.
3	Agency has met all requirements of the question asked.
5	Agency has met all requirements of the question asked and response is qualitatively superior
Q 1	What problem area do you intend to address and why is this needed locally?
0	Agency does not provide evidence of the problem.
1	Agency lists some local data and loosely ties this data with the problem they intend to address
3	Agency lists some local data, possibly including geography, that describes broadly a need that can be connected to their work (with some logical jumps)
5	Problem is clearly defined. Data supports the need and identifies the priority population. Issue clearly aligns with mission and priorities of agency and United Way goals and priorities.

TIPS FOR ANSWERING RFP QUESTIONS

- Follow the Scoring Tool as a guide for best answers
- Show, don't tell!
 - Use data and evidence whenever possible to support your claims
 - The use of charts and graphs are useful for volunteers when reviewing your application
- Be concise!
 - Answer in as few words as possible
 - It is easier for Volunteers to review applications that are to the point and answer the questions

SECTION A: NARRATIVE QUESTIONS (45 POINTS)

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A1. CONTINUATION NARRATIVE QUESTIONS

What problem area do you intend to address and why is this needed locally?

- What are the critical obstacles that your target population faces?
- How will your strategy address removing the identified critical obstacles?

A2. CONTINUATION NARRATIVE QUESTIONS

Who are your target clients and how do you reach them?

Or

Who are your clients and how do you engage them in your services?

A2. CONTINUATION NARRATIVE QUESTIONS

- How do people get connected to your services?
- What outreach techniques does your agency use to engage new clients?
- How do you determine client eligibility for your service(s)?
- How often are client needs assessed?
- What is the frequency, duration, & intensity of your services?



A2. CONTINUATION NARRATIVE QUESTIONS

- How do you determine when clients need additional or different services?
- What criteria determines level of needs?
- How are clients connected to additional resources?
- What agencies are part of your referral network?
- How do you follow up on referrals to other supports?
- Describe the process for following up with
after services have been received?



A3. CONTINUATION NARRATIVE QUESTIONS

What is/are the services you will deliver and what result will you achieve

- Describe the service sequence (or decision points)
- Description should be clear how the activities relate to the result your organization is working to achieve.



A4. CONTINUATION NARRATIVE QUESTIONS

What evidence exists or do you have that shows your approach will work to solve your clients' problem or need?

- *Provide context for the obstacles that your population of clients face and how your services help remove the obstacles to address underlying issues*

A5. CONTINUATION NARRATIVE QUESTIONS

Describe how you will determine that participants experience better outcomes by participating in your program, compared to people who are not in your program

- What is the difference being made?
- Why should we continue to fund this work?
(looking specifically at impact and outcomes)

A6. CONTINUATION NARRATIVE QUESTIONS

Is there anyone else doing what you are doing?

A7. CONTINUATION NARRATIVE QUESTIONS

What other organizations help you achieve desired outcomes for clients?

A8: CONTINUATION NARRATIVE QUESTIONS

What's changed in your environment that's impacted the service and how have you coped with those changes?

A9: CONTINUATION NARRATIVE QUESTIONS

Describe any risks you face that may impact your ability to deliver forecasted outcomes/ results (staff turnover, available talent, policy change, or other funder changes)

- How would you address them?

QUESTIONS OR CLARIFICATIONS?



ENHANCEMENT NARRATIVE QUESTIONS (15 POINTS)

*NOTE: Applicants MUST also
answer Continuation
Questions 1-9*

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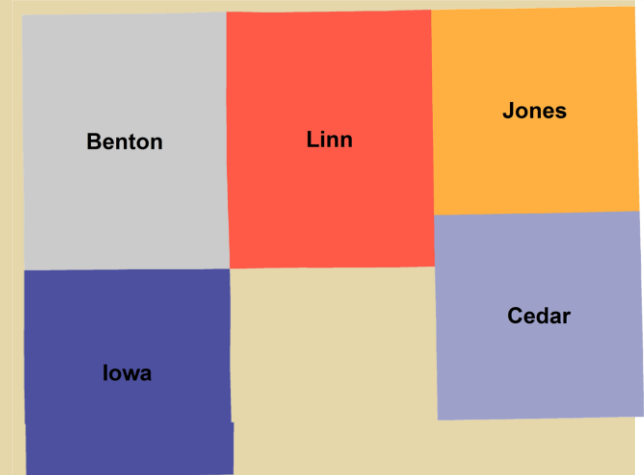


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A1: ENHANCEMENT NARRATIVE QUESTIONS

Describe how you will expand the impact of your program/service.

- To be considered, the enhancement should include one or more of the following:
 - 1) *expanded geography;*
 - 2) *expanded populations;*
 - 3) *dramatically expanded services*



A2: ENHANCEMENT NARRATIVE QUESTIONS

What changes or trends led to the need for this enhancement?

A3: ENHANCEMENT NARRATIVE QUESTIONS

What is your staffing plan to address this shift?

QUESTIONS OR CLARIFICATIONS?



SECTION B: DATA AND MEASUREMENT

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B1: DATA AND MEASUREMENT

Describe the measurement tool you are using including the source of the tool and the method for choosing this tool.

Provide any reliability and validity information you have on the measurement you will be using to collect your data.

DATA AND MEASUREMENT

Source of the tool you are using

- Where did the tool you chose come from?

Method of choosing this tool

- Why did you chose this tool?
- Evidence Based
- Best Practice
- Developed in House

DEFINITION: EVIDENCE BASED

Evidence-based:

1. Best available researched evidence
2. Practitioner expertise
3. Characteristics, needs, values, and preferences of those who will be affected by the intervention
4. Replicable
5. Has been scientifically evaluated and **proven** to work

DEFINITION: BEST PRACTICE

Best Practice programs are generally accepted, informally-standardized, are replicable, and produce desired results. Tools have *proven themselves overtime* however they lack the evaluation process

DEFINITION: DEVELOPED WITHIN AGENCY

A tool that was develop in house is okay so long as:

- Nationally recognized tools do not exist
- Recognized tools exist, but do not make sense for the work you are doing
 - *If this is the case, you will need to explain why!*

DATA AND MEASUREMENT

- **Reliability and Validity**

- This is important to make sure that you can continue to report on the indicators you have chosen with consistency over the grant cycle.

DEFINITION: RELIABILITY

The degree to which an assessment tool produces stable and consistent results.

- Importance: To ensure that each client taking the survey is taking it the same way and giving results consistent with all other clients.

DEFINITION: VALIDITY

How well the test measures what it proposes to measure

- Importance: To ensure that the questions on the survey confidently lead to the outcomes you wish to cause in the client.

IS MY TOOL RELIABLE AND VALID?

B2: DATA AND MEASUREMENT

Please clearly describe your methodology for calculating indicator measurements including timing and frequency of measurement

B3: DATA AND MEASUREMENT

Complete your logic model and include this information

QUESTIONS OR CLARIFICATIONS?



SECTION C: IMPACT STRATEGY & REQUEST JUSTIFICATION BUDGETS

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C1: IMPACT STRATEGY BUDGET FORM

- Complete Impact Strategy Budget using Excel form on UWECI website.
- UWECI should not be the only source of income reflected on the impact strategy budget.
 - Impact Strategy Budget should show all sources of income
 - Detail related expenses to implement proposed strategy

C1: IMPACT STRATEGY BUDGET FORM

- Budget figures must coincide with the grant cycle.
 - July 1-June 30 fiscal year
- Funding requested from UWECI should not exceed 70% of the total strategy budget or 20% of the agency budget.
- Do not change any titles to line items in the budget form.

Screen shot of Impact Strategy Budget

Impact Strategy Name				Agency Name
REVENUE	FY2016 Actuals (7/1/15- 6/30/16)	FY2017 Current Budget (7/1/16-6/30/17)	FY2018 Proposed Budget (7/1/17-6/30/18)	% Change Proposed Budget vs. Current Year
1 UWECI Partner Funding				#DIV/0!
2 Other UWECI Funding				#DIV/0!
3 Funding from other United Ways				#DIV/0!
4 Contributions & Events				#DIV/0!
5 Foundation Grants				#DIV/0!
6 Government Grants				#DIV/0!
7 Program Service Revenue				#DIV/0!
8 Other Revenue (Schedule E)				#DIV/0!
9 TOTAL IMPACT STRATEGY REVENUE	\$0	\$0	\$0	#DIV/0!
EXPENSES				
10 Salaries				#DIV/0!
11 Benefits and Payroll Taxes				#DIV/0!
12 Fees for services (non-employees)				#DIV/0!
13 Advertising/Promotion				#DIV/0!
14 Office expenses				#DIV/0!
15 Occupancy/Utilities				#DIV/0!
16 Travel/Meetings				#DIV/0!
17 Assistance to Individ. Houshlds				#DIV/0!
18 Dues				#DIV/0!
19 Insurance				#DIV/0!
20 Other Expenses (Schedule F)				#DIV/0!
21 TOTAL IMPACT STRATEGY EXPENSE	\$0	\$0	\$0	#DIV/0!
22 Total Revenue Less Expense	\$0	\$0	\$0	#DIV/0!
Narrative:				

C1: IMPACT STRATEGY BUDGET:

- Complete the schedules as appropriate
 - Other Income – Schedule E
 - Miscellaneous Expenses – Schedule F
 - Non-cash contributions – Schedule G

C1: IMPACT STRATEGY BUDGET- NARRATIVE

Use the “Narrative” space in the Excel form to explain Impact Strategy Budget line items that you feel are needed.

Please reference the line item(s) and provide an explanation.

- For example: *Line item 10 - Salaries: The variance is a result of a 1 FTE staff position that was not filled for five months.*

C2. FUNDING REQUEST JUSTIFICATION FORM

Purpose: Primary tool to set context for the amount of funding requested.

- Use Excel form on the UWECEI website.
- If the proposal is requesting funding to support activities that align with two or more intermediate outcomes, please complete a “Funding Request Justification Form” **for each** Intermediate Outcome.
- Insert rows if additional activities are needed to cover the funding requests and activities in a given outcome.

C2: FUNDING REQUEST JUSTIFICATION FORM - EXAMPLE

Attachment I2: Funding Request Justification Form

Intermediate Outcome:

Describe each activity that funds are being requested to support.	Indicate the amount of UWECI funding requested to support each activity listed.	Please outline how funding requested for each activity will be spent. Please categorize explanations by direct and indirect expenses.	Describe/define a unit of service for each or a combination of activities identified.	Provide the estimated cost for each unit of service identified.	Please rank each activity in order of priority for funding with 1 being your highest priority.
Activity 1:					
Activity 2:					
Activity 3:					
Activity 4:					
Total Funding Requested					
Total Strategy Budget (Revenue)					
% of UWECI funding requested to Total Strategy Budget					

C2: FUNDING REQUEST JUSTIFICATION - NARRATIVE

Narrative's Importance:

- Set context for funding request
- Explain data in the Funding Justification Form

How to:

- Attach a word document with your narrative after the Funding Request Justification Form(s)

QUESTIONS OR CLARIFICATIONS?



SUBMISSION REQUIREMENTS & ATTACHMENTS

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ATTACHMENTS

Existing Partners

1. Impact Strategy Budget
2. Funding Justification Form
3. Process Map
4. Logic Model
5. Board of Directors Roster
6. Affidavit of Non-Discrimination
7. Counterterrorism Compliance

New Applicants

Also submit:

1. 501©(3) Designation Letter
2. Current Bylaws
3. Audit or Independent Financial Review
4. IRS Form 990
5. Board Approved annual budget with accompanying narrative

PROCESS MAPPING

It is important for volunteers to make funding decisions

HOW TO MAKE A PROCESS MAP!

Paula Land will walk through the process map for Catherine McAuley

QUESTIONS OR CLARIFICATIONS?



SUBMISSION REQUIREMENTS

The RFP **MUST** be submitted:

- By January 13th, 2017 at 12:00 noon
 - *Applications submitted after this time WILL NOT be accepted.*
- By email to the Community Building email address at: communitybuilding@uweci.org
- As one collated document in correct order
 1. Cover Page
 2. Continuation Narrative Responses
 3. *(if applicable)* Enhancement Narrative Responses
 4. Impact Strategy Budget
 5. Funding Justification Form
 6. Process Map
 7. Logic Model
 8. Board of Directors Roster
 9. Affidavit of Non-Discrimination
 10. Counterterrorism Compliance

SUBMISSION REQUIREMENTS

Formatting

- **Paper Size:** 8 ½ x 11 inches
- **Font:** Arial or Calibri
- **Size:** 11 pt
- **Spacing:** 1.5 Spaced
- **Margins:** 1 inch, all four sides
- **Page Limit:** No fewer than 5, no more than 15
- **Pagination:** Page number in bottom right corner

**NOTE: The total page count does not include requested attachments.*

Do not include any attachments not specifically requested in the RFP.

SUBMISSION REQUIREMENTS

Table of Contents Must be Included

Organize and label the sections of your proposal using the outline format provided in the RFP.

➤ Example:

A. Narrative Questions

Continuation Grant Questions

- A. 1.** What problem area do you intend to address and why is this needed locally?
- A. 2.** Who are your target clients and how do you reach them? Or Who are you clients and how do you engage them in your services?
- A. 3.** What is/are the services you will deliver and what result will you achieve?
- A. 4.** What evidence exists or do you have that shows your approach will work to solve your clients' problem or need?

Enhancement Grant Questions

- A. 1.** Please describe how you will expand the impact of your program/service. To be considered the enhancement should include one or more of the following: expanded geography, expanded populations, or dramatically expanded services.

QUESTIONS OR CLARIFICATIONS?



REVIEW PROCESS & FEEDBACK TIMELINE

December

- Staff available for ANY RFP questions until 12/22/16

January

- 1/13/17 RFP DUE by 12:00pm

February

- Volunteer Review
- Agency Questions

March

- Agency Presentation

April

- Volunteer Review

May

- Funding Recommendations to UWECE Executive Committee & Board of Directors for vote
- Announce Awards

Education- Karen Lewis

karen.lewis@uweci.org

or

(319)398-5372

(Ext.828)

Financial Stability - Ashley Zitzner

ashley.zitzner@uweci.org

(Ext. 825)

Health- Ana Clymer

ana.clymer@uweci.org

(Ext. 833)

Community Building/ Accountability Review

Leslie Wright - leslie.wright@uweci.org

(Ext. 815)

Meredith Hershner- meredith.hershner@uweci.org

(Ext. 824)

<http://www.uweci.org/get-involved/nonprofit/funding-opportunities/>

Thank you!

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