REQUEST FOR PROPOSALS
COMMUNITY IMPACT GRANTS
FUNDING YEAR 2012-2013

Deadlines:

Stewardship Packet
Monday, September 19, 2011 – 4:00 pm
(both hard copy and electronic copy via e-CImpact)

Community Impact Grant Proposals
Electronic copy via e-CImpact: **Monday, November 7, 2011 – 4:00 p.m.**
Hardcopies to UWMD: **No later than Friday, November 11, 2011 – 4:00 p.m.**

Each agency applying for grants must submit a Stewardship packet.

Contents

INTRODUCTION

ABOUT UNITED WAY OF METROPOLITAN DALLAS

Mission: To improve lives in our communities.
Vision: To be the trusted leader in mobilizing resources for transformational community impact in Education, Income, and Health.

The United Way vision is of a strong and thriving community – one that provides opportunities for people to realize their potential by having the Building Blocks of a Good Life: a quality Education that leads to a stable job, enough Income to support a family through retirement and good Health. And yet these basic ingredients are increasingly beyond reach for more and more hardworking families. This is why the United Way community impact agenda is based on these three, interrelated impact areas.

Education is essential to getting and keeping a job with a livable wage and health benefits. An income adequate to pay for today's necessities and save for the future provides financial stability. Access to quality health care and a commitment to healthy behaviors keep children on track in school and adults productive at work. Removing any one of these building blocks jeopardizes the stability of the other two.

PURPOSE OF THIS REQUEST FOR PROPOSALS

The United Way of Metropolitan Dallas (UWMD) is a nonprofit organization seeking to improve the quality of life of the surrounding community by showing measurable and sustainable progress on our ten-year community goals in the areas of Education, Income and Health – the Building Blocks for a Good Life.

Throughout this RFP the terms Agency, Organization and Service Provider all refer to the non-profit applicant.

ELIGIBILITY

The following requirements must be met in order to be eligible to receive funding from the Community Impact Grants Process:

- The program for which United Way funds are requested should concentrate its efforts and services within the United Way of Metropolitan Dallas service area (Dallas, Collin, Southern Denton[1] and Rockwall counties).
- The program must align with one of the United 2020 Goals, Strategies and Community Metrics (pages 6-8) or fall under the Basic Needs category.
- Financial Criteria (To see a complete list of stewardship documents see page 64 Stewardship Documentation Checklist)
    - The Organization submitting the proposal must have a complete annual audit.
    - The Organization submitting the proposal must have an annual tax return (990/990EZ).
    - The Organization submitting the proposal must have an active Board of Directors.
    - The Organization submitting the proposal must have an IRS Determination Letter verifying non-profit status.

UNITED 2020

All proposals must achieve measurable impact in Education, Income or Health in our community. UWMD wants to show measurable and sustainable progress on our ten-year community goals in the areas of Education, Income and Health – the Building Blocks for a Good Life. These community goals and strategies will enable our region to grow

[1] Lewisville, Flower Mound, The Colony, Highland Village, Double Oak & Copper Canyon

and prosper, while allowing the UWMD to steadily measure progress and help orchestrate actions to achieve them. For a proposal to be considered for funding, it must align with at least one of the Goals, Strategies and Metrics laid out in the tables that follow over pages 6-8 or it must align under the Basic Needs Area.

Volunteer Grant Panels will receive information and training regarding the United 2020 Goals, Strategies and Metrics. Agencies should relate their proposals to the information provided, as well as to any other community assessments and Organization research that provide information relevant to the particular strategy which the proposal addresses. All research provided should be less than ten years old and cited.

Education Impact Goal	Strategy	Community Metric	Examples of Possible Measurements (Not an Exhaustive List)
EDUCATION **Prepare 50% more students to succeed in education after high school.**	**Parents and Mentors:** Students have support and encouragement for educational success from parents/ advocates, and mentors.	Increase the number of Individuals in family engagement programs.	• Attendance roster coupled with outcome tool tracking change in adults and/or youth as a result of program
		Increase the number of youth in mentoring programs.	• Attendance roster coupled with outcome tool tracking change in youth as a result of program
	Early Childhood: Pre-school children access high quality, early learning programs.	Increase the number of children in high quality early childhood learning programs.	• Attendance roster coupled with outcome tool tracking change in youth as a result of program
		Increase the number of children ages 0-5 making positive developmental progress	• Progress as measured by LAP-D[2] or TPRI[3]
	English Learning: Students access developmentally appropriate English Language Learning programs.	Increase the number of students enrolled in Limited English Proficiency programs.	• Attendance roster coupled with outcome tool tracking change in youth as a result of program • Progress as measured by the TELPAS[4]
	Afterschool & Summer: Students access high quality, enriching out of school programs which are aligned with school day curriculum.	Increase the number of students served by out of school programs aligned with school day curriculum.	• Attendance roster coupled with outcome tool tracking change in youth as a result of program
	Math and Science: Students access age-appropriate math and science education.	Increase the percentage of students that are successful in Math and Science.	• Students scoring "commended level[5]" on Science and/or Math TAKS[6]. • Increase in students' grades in Math and/or Science as indicated on report card
	College and Career Preparation: Students access age appropriate college and career preparation.	Increase the percentage of college ready high school graduates.	• Graduates identified as "college ready[7]" by TEA[8].

[2] Learning Accomplishment Profile – Diagnostic Edition
[3] Texas Primary Reading Inventory
[4] Texas English Language Proficiency Assessment
[5] High academic achievement; considerably above state passing standard; thorough understanding of the math and science TEKS curriculum
[6] Texas Assessment of Knowledge and Skills
[7] Percent of graduates who scored at or above the criterion score on both the TAKS exit-level, SAT, or ACT ELA and mathematics tests
[8] Texas Education Agency

Income Impact Goal	Strategy	Community Metric	Examples of Possible Measurements (Not an Exhaustive List)
INCOME **To move 250,000 more individuals out of poverty permanently.**	**Access to Jobs:** Collaborate and leverage relationships with employers, public sector Organizations, and the broader business community to help provide low-income individuals access to jobs.	Increase the number of employees on payrolls	• Outcome tool tracking the number of clients who find employment supported by follow-up survey to determine whether or not clients remain employed
		Increase the number of small businesses (1-19 employees)	• Outcome tool tracking the number of clients who start and maintain small businesses
		Increase the number of higher paying "blue collar"/ technical jobs	• Outcome tool tracking the number of clients who find employment in higher paying job sectors supported by follow-up survey to determine whether or not clients remain employed
	Job Skills Training: Individuals have the skills to be hired.	Increase the number of individuals completing work training programs	• Attendance roster coupled with outcome tool tracking the number of clients who receive certification at the conclusion of the work training program
	Financial Education: Low-to-moderate income individuals participate in financial education programs to achieve increased assets and decreased liabilities.	Increase the number of EITC[9] filers served by VITA[10] sites	• Outcome tool tracking the number of clients utilizing VITA services to receive EITCs
		Increase the number of people served through IDAs[11] and other organized savings programs	• Enrollment roster coupled with outcome tool tracking the number of clients meeting pre-determined savings targets
		Increase the number of individuals completing financial education programs	• Attendance roster coupled with pre/post test demonstrating gains in knowledge • Attendance roster coupled with outcome tool tracking changes in client spending/saving as a result of the financial education program

[9] Earned Income Tax Credit
[10] Volunteer Income Tax Assistance
[11] Individual Development Accounts

Health Impact Goal	Strategy		Community Metric	Examples of Possible Measurements (Not an Exhaustive List)
HEALTH **To improve health and quality of life across the UWMD region.**	**Expanded Access:** Expand Access to Care		Increase the number of individuals and children insured	• Increase the number of children and individuals enrolled and re-enrolled in CHIP[12] & Medicaid
			Increase access to physical, mental, vision, dental, and non-emergency care	• Attendance roster coupled with outcome tool tracking establishment of a medical home and improvement of target health indicators
	Preventive Care: Focus on Prevention and Early Intervention through Screening and Monitoring		Increase the percentage of children that have well-child visits in their 1st 6 years of life	• Increase the number of children who are up to date with the CDC[13] and DHHS[14] recommended screenings and vaccinations
			Increase the percentage of mothers that receive prenatal and perinatal care	• Reduce the number of infants with low birth weight and very low birth weight
	Healthy Behaviors: Promote Healthy Lifestyles through Health information, education and programming.	**Obesity:** Focus on Prevention and Early Intervention of adult and childhood obesity	Decrease the percentage of individuals that are overweight and medically obese	• Decrease BMI[15] for those who have BMI greater than 25 (overweight and obese)
		Substance Abuse: Decrease the use of illicit drugs and alcohol by adults and children	Decrease the percentage of individuals that have used illicit drugs and alcohol within the past month	• Consistent abstinence from substances during the past 30 days by those in a treatment program, as measured by periodic urinalysis testing
		Family Violence, Child & Elder Abuse: Decrease the incidents of family violence, child abuse and elder abuse	Decrease the incidents of family violence, child abuse and elder abuse	• An increase in knowledge about the signs and symptoms of abuse as measured by a pre/post-test • Decrease the number of substantiated cases of child abuse and neglect

[12] Children's Health Insurance Plan
[13] Center for Disease Control
[14] Department of Health and Human Services
[15] Body Mass Index

BASIC NEEDS AREA

For this funding year, UWMD reserved 8% of the Community Fund[16] for the Basic Needs Area. Programs applying for funding in the Basic Needs Area must offer services that align with at least one of the following categories:

1. **Disaster Response**: Programs that help individuals prepare for, protect against, respond to, and recover from natural disasters such as hurricanes, earthquakes, tornados, floods, fires, hazardous spills, acts of nature and acts of terrorism (http://www.fema.gov/about).
2. **Emergency Assistance**: Programs that help individuals experiencing a financial crisis keep utilities connected and avoid eviction/homelessness.
3. **Food**: Programs that help individuals access nutritious food and avoid hunger.
4. **Housing/Shelter**: Programs that provide safe shelter and/or housing opportunities for homeless individuals.
5. **Emergency Information & Referral**: Programs that help connect individuals with social service Organizations during times of crisis.

The Basic Needs Area is separate from the core United 2020 Impact Areas of Education, Income, and Health. As a result, the strategies and metrics associated with the Impact Areas of Education, Income, and Health will not be associated with programs submitted in the Basic Needs Area.

Successful programs in the Basic Needs Area will:

- Demonstrate a clear connection to at least one of the five Basic Needs categories.
- Offer services that do not fit within the core United 2020 Impact Areas of Education, Income and Health.
- Clearly track client progress and measure the effectiveness of services.
- Collaborate with other programs and service providers to help clients become self-sufficient.
- Combine to serve the entire UWMD service area (Dallas, Collin, Rockwall, Southern Denton counties)

ADVOCACY

UWMD believes that advocacy is a tool for achieving measurable results in the areas of Education, Income and Health. Stand-alone proposals for advocacy, public policy or public awareness efforts or programs are encouraged; or advocacy activities could be added as supplemental efforts to direct-service program proposals.

It is strongly encouraged that those Organizations interested in submitting an advocacy proposal make an appointment with the appropriate grant specialist and utilize the draft review option. In addition, the Annie E Casey Foundation's "A Guide to Measuring Advocacy and Policy" is an excellent resource for developing objectives and evaluation plans and it is strongly encouraged that this resource be used as part of the proposal writing process.

For advocacy proposals, Organizations need to include the following information in applicable sections and logic model:

- History of your program's advocacy efforts - successes and lessons learned.
- Objectives - what you want to change, who will make the change, by how much and in what time frame?
- Strategies - lobbying, social marketing, community organizing, or other tactics.
- Activities and efforts to engage various audiences: advocates, elected officials, formal and informal coalitions, media, online networks, etc.
- Message to each audience group - content/idea, the messenger, format, etc.
- Goals – getting an issue included in interim charges, obtaining co-sponsors for a bill, adding allies to a coalition, obtaining letters/stories from grassroots supporters, recruiting a certain number of advocates, etc.
- Describe and differentiate the roles and activities for both program staff and volunteers/advocates.
- Explain the value this policy change would generate.

[16] The Basic Needs Area received $1,719,858 during the most recent (2011-2012) grants cycle.

PERCENTAGES OF FUNDING AVAILABLE BY IMPACT AREA AND STRATEGY

United Way has set the percentages for each of the Strategy Panels; however the dollar amounts available by Strategy Panel are based on last year's Community Fund and may actually be higher or lower than those awarded in this year's grant cycle.

Impact Areas and Categories	2012-2013 Percentage of Community Fund	2012-2013 Dollar Amount
Total Community Fund	100%	$21,498,231
Basic Needs Category	**8%**	$1,719,858
Remaining Community Fund	92%	$19,778,373
Education	**34%**	$6,724,647
Parents & Mentors	19%	$1,277,683
Early Childhood	22%	$1,479,422
English Learning	10%	$672,465
After School & Summer	23%	$1,546,669
Math & Science	9%	$605,218
College & Career Preparation	17%	$1,143,190
Total	**100%**	$6,724,647
Health	**35.5%**	$7,021,322
Expanded Access	40%	$2,808,529
Family Violence, Child & Elder Abuse	16%	$1,123,412
Substance Abuse	13%	$912,772
Obesity	11%	$772,345
Preventive Care	20%	$1,404,264
Total	**100%**	$7,021,322
Income	**30.5%**	$6,032,404
Access to Jobs	30%	$1,809,721
Job Skill Training	45%	$2,714,582
Financial Education	25%	$1,508,101
Total	**100%**	$6,032,404

COMMUNITY IMPACT GRANTS PROCESS

OVERVIEW OF PROCESS

United Way will distribute its funds through a competitive grant process among applicants. Within this process, United Way is seeking to identify and fund the highest quality programs that address our United2020 Goals, Strategies and Metrics (see pages 6-8) and provide significant outcomes.

United Way Staff will review proposals submitted and determine that all basic eligibility requirements have been met. **Proposals/Stewardship Packets that are incomplete, late, or do not meet minimum eligibility requirements will be removed from the grant process.** Community Volunteers will then evaluate remaining proposals, discuss them, and decide which proposals will receive a Site Visit. Proposals not receiving a Site Visit will no longer be considered for funding.

During the Site Visit, the Organization will make a presentation that will provide a clear program description and answer questions from the volunteer panel. At final deliberations, the panels determine which proposals to recommend for funding using the written information provided and information presented at the Site Visit. Two additional volunteer committees will review the panel's funding recommendation before final approval by the United Way of Metropolitan Dallas Executive Committee. **All funding decisions are final and there is no process for appeals.**

Review Process

The process of reviewing and funding proposals submitted to the Community Impact Grants Process is a six step process:

1. Stewardship Review;
2. Proposal Compliance Review;
3. Vetting Committee Review;
4. Panel Proposal Evaluation;
5. Site Visit Evaluation;
6. Overall Score and Funding Recommendation.

Stewardship Review

The Stewardship Review has been moved up to occur before the grant application is due. This is to ensure that all Stewardship decisions will be finalized and communicated before the grant application deadline. A review of the stewardship documents will be completed by UWMD staff in order to ensure the Organization's financial health. Please see the Stewardship Staff Review Form (page 61), for a complete list of items to be reviewed during this process. Please note that if any of the non-shaded areas of the review form are marked "no", your Organization will be removed from the application process and sent notification in October, with details. If one of the shaded areas is marked "no", your stewardship documents will be moved to a volunteer panel of Certified Public Accountants (CPAs) for further review. The volunteer CPAs will then review your entire Stewardship Packet and decide if your Organization passes the stewardship process.

If your Organization does not pass the Stewardship Review, you will be notified of this decision via email correspondence in October and your agency will not be eligible to submit grant applications for that funding year.

Please note that the Stewardship packet now has a separate due date from the grant application.
The **Stewardship packet is due: Monday, September 19th, 2011 by 4:00 pm.**
Please see the Stewardship Checklist (page 64), for a complete list of required documents.

Program Proposal Compliance Review

The yes/no questions listed below will be completed by UWMD staff in order to ensure proposal compliance. If a proposal receives a "no" to any of these questions, it will be removed from the review process and no longer considered for funding, no exceptions will be made. The Organization will be notified of this decision via email correspondence in December.

1. Was the Organization application packet submitted on time?
2. Did the Organization submit their annual UWMD report on time? (if previously funded, must have been submitted via e-CImpact by July 25th, 2011, contact Gene Putnam (see page 68) with questions)
3. Was the program proposal complete (including all required sections and attachments)?
4. Did the Organization pass Stewardship Review?

Vetting Committee Review of Program Proposal

Once passing the Compliance Review, proposals will go through the Vetting Committee Review by UWMD Community Impact Staff and Grant Volunteers. Using the Proposal Evaluation Tool (page 57), UWMD Grant Specialists will review each proposal and give each a proposal evaluation score. Proposals with scores of 69% (score of 48) or lower will be sent to the Vetting Committee. The Vetting Committee will then review and discuss each of the low scoring proposals and make a decision on whether to remove it from the funding process or let it continue on to the volunteer panels for further consideration for funding. The Vetting Committee is made up of the Chair and Vice Chair of each Strategy Panel within the Impact Area, the Chair of the Community Impact Committee and the area Grant Specialist. The decision to remove a proposal must be a unanimous decision by the Chair, Vice Chair and Grant Specialist that reviewed the proposal. Once the Vetting Committee has decided to remove a proposal, the Organization will be notified and it will no longer be considered for funding, and there will be no appeals process. The Organization will be notified of this decision via email correspondence in January.

Volunteer Panel Program Proposal Evaluation and Initial Panel Meeting

Throughout the Review Process, Grant Volunteers will use the Best Investment Criteria to make their decisions. When comparing programs in a particular Strategy Panel, best investment refers to the programs that most clearly demonstrate:

- **ALIGNMENT**: Connection between program goals, UWMD strategy panel metric(s), and United 2020 Impact Area goal
- **IMPACT**: Effectiveness of programming as reflected by evaluation efforts and outcomes
- **RESOURCES**: Access to the resources (staff, experience, financial, etc.) to successfully implement the program

Volunteers will also be required to evaluate and score each proposal in their panel using the Proposal Evaluation Tool (page 57). These scores help determine the ranking of proposals during the Initial Panel Meeting. This ranking, along with a discussion on best investment, then helps volunteers decide whether they will award a Site Visit or choose to not Site Visit the program. Once the panel has decided to not Site Visit a program it will no longer be considered for funding, and there will be no appeals process. The Organization will be notified of this decision via email correspondence in late February to early March and will also receive detailed feedback explaining why a Site Visit was not awarded.

Program Site Visits

Those programs awarded a Site Visit (determined at the Initial Panel Meeting) will be contacted by UWMD Staff via email and/or phone following the Initial Panel Meeting. UWMD Staff will then coordinate with Organization staff to make arrangements for that Site Visit (schedule/location/directions).

The Site Visit schedule has already been set for each panel. The Site Visits will occur on different schedules for different panels. The Grant Panel Site Visit Schedule is listed on page 54 for each panel. Receiving this schedule now will allow agencies to make the necessary arrangements to be able to present on the dates listed. Please mark each date on your calendar now to ensure that you will be available on the date chosen for your program Site Visit. Morning Site Visits will be scheduled between 8:30 a.m. – 12:30 p.m. and afternoon Site Visits will be scheduled between 1:00 p.m. – 5:00 p.m.

Organizations have two opportunities to notify UWMD if they have a time conflict with a given Site Visit date:

1. Organizations can indicate the time conflict in their e-CImpact Online Program Proposal in the question that asks "From Site Visit Schedule, Days/Times UNAVAILABLE for Site Visit" (page 35). Please also indicate in this section which other panels you have applied to so that staff can coordinate Site Visits.
2. Or, after the Submission Deadline, Organizations have until January 1, 2012 to notify Rosemary Grougnet (rgrougnet@unitedwaydallas.org) if there are dates/times that are unavailable to a Panel for a Site Visit.

After the January 1, 2012 deadline, if the time conflict has not been disclosed to UWMD, the Organization must accept the Site Visit that has been scheduled by UWMD Staff. For the full Site Visit Schedule, reference the "Grant Panel Site Visit Schedule" (page 54).

Organizations need to indicate where they will host their Site Visit on the Program Request Summary page of the e-CImpact Online Grant Application. Please use the question that states "Preferred Location of Site Visit" (page 34) to provide UWMD with the name of the site where you will hold your Site Visit, the full address, emergency contact person, as well as (and most importantly) any special directions or landmarks to assist volunteers in finding your location.

Organizations have the option of presenting their Site Visit at their program location or the United Way of Metropolitan Dallas office at 1800 N. Lamar. If an Organization chooses to have their Site Visit at the UWMD Office, please contact Rosemary Grougnet (rgrougnet@unitedwaydallas.org) to coordinate the room reservation and audio/visual resources needed (if necessary).

The proposals that receive a Site Visit are encouraged to address the following items during their Site Visit:

- Organization as a whole;
- how the program fits into the Organization;
- program details/experience;
- outcomes;
- and questions from volunteers.

The total Site Visit is not to exceed 45 minutes. The Organization will have the first 25 minutes to give their presentation. The remaining 20 minutes are reserved for volunteer questions. In the event that the Panel does not use the full 20 minutes for Q&A, the Panel Chair will give that time back to the Organization to use at their discretion.

The intent of the Site Visit is for the Organization to present further program information and clarify the proposal for the Panel. Organization board members are welcome at the Site Visit but are not required to be present or be part of the presentation. It is recommended and highly encouraged that the following Organization staff be present to help answer any questions the panel volunteers may have: President, Program Staff, Grant Writer and Finance Staff.

Volunteer Attendance at Site Visit

At least half of the Volunteers on the Grant Panel are required to attend the program's Site Visit. If fewer than 50% attend the scheduled Site Visit, Panel Leadership and UWMD Staff will ask the Organization if they are interested in rescheduling the Site Visit. Rescheduling is not required and is at the Organization's discretion. If there is low attendance at the Site Visit, the Organization will be asked to sign the Opt Out Form (see page 55) that acknowledges their choice to either proceed with the Site Visit or reschedule.

During the Site Visits, Volunteers and UWMD Staff will complete a Site Visit Evaluation Tool (page 60). The score from this tool, combined with the score from the Proposal Evaluation Tool, form the Program's Overall Score (Program Proposal Evaluation Tools and Process, see below, for more information).

Final Deliberations

The panel will meet to discuss each proposal and evaluate them taking into consideration both the written proposal and the program presentation at the Site Visit. Decisions will be made regarding which proposals to fund and at what level based on the Best Investment Criteria (page 12) as well as the ranking of proposals from their Overall Score (page 16).

Funding Approval Process – Volunteer Leadership Reviews

The recommendations of the Panels will be reviewed and ratified by the UWMD Impact Councils, and the Community Impact Committee (CIC), and then approved by the UWMD Board of Directors. The decision of the Board is final. Funding decisions cannot be appealed.

Communication of Funding

The United Way Board will approve final funding amounts on May 15, 2012. Funding decisions will be promptly communicated to each Organization via e-mail. Detailed feedback explaining the funding decision will be communicated via e-mail at a later date.

Changes In Reported Information

If reported information changes during the Community Impact Grants Process (after submission of the application but before funding has been awarded), the Organization must submit written (preferably via email) notification to United Way immediately after the Organization becomes aware of the change: what the change has been, why the change was made, and what are the effects of the change on the program/proposal. Making such changes to the reported information could result in removal of the application from the Community Impact Grants Process. Please direct such communication to the appropriate UWMD Community Impact Staff person (see staff contact list on page 23).

If reported information changes after the proposal has been funded (after the grant has been awarded and Organization has started to receive funding), the Organization must submit notification to United Way within 30 days after the Organization becomes aware of the change: what the change has been, why the change was made, and what are the effects of the change on the program. Making such changes to the reported information could result in an adjustment or loss of funding for the program. Please direct such communication to Susan Hoff, shoff@unitedwaydallas.org.

Unrestricted Funding

UWMD allows 10% of the total program award amount to be used as unrestricted funding throughout the Organization. For instance, if an Organization was awarded $100,000; then $10,000 can be used for unrestricted funding and $90,000 must be used for program costs as detailed in the proposal. This will be allowed on each award received.

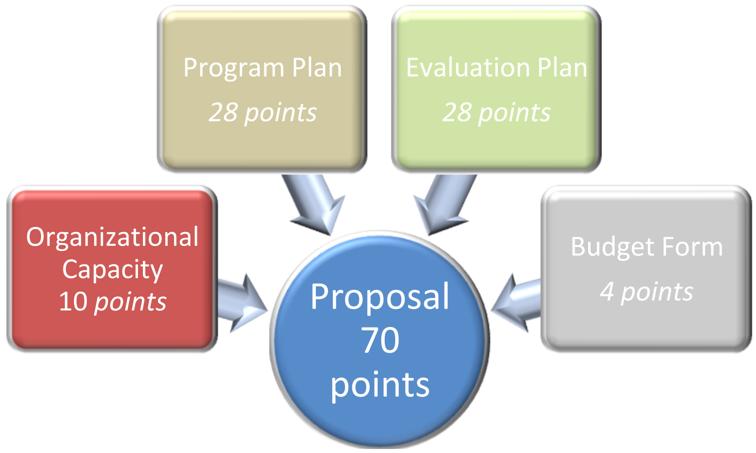
PROGRAM PROPOSAL EVALUATION TOOLS & PROCESS

Volunteers and UWMD Staff will use two evaluation tools during the review process. Both the Proposal Evaluation Tool and the Site Visit Evaluation Tool are included in this RFP for your review (see pages 57-60). Below is some high level information about the tools and evaluation process.

Proposal Evaluation (Vetting Committee Review and Initial Panel Ranking Score)

- Each Program Proposal can receive a maximum score of 70 points.
- Each Program Proposal is initially reviewed and scored by the appropriate UWMD Grants Specialist. Proposals scoring lower than 69% will require Vetting Committee Review (see page 12).
- Program Proposals that pass the Vetting Committee Review are reviewed and scored by all remaining volunteer panel members as well as the UWMD Community Impact Grant Liaison assigned to panel.
- The Initial Panel Ranking Score is based on the average of all the scores the program proposal receives from the volunteer panel members and UWMD Staff.
- The score is comprised of four scored sections of the proposal as noted in Figure 1 below:

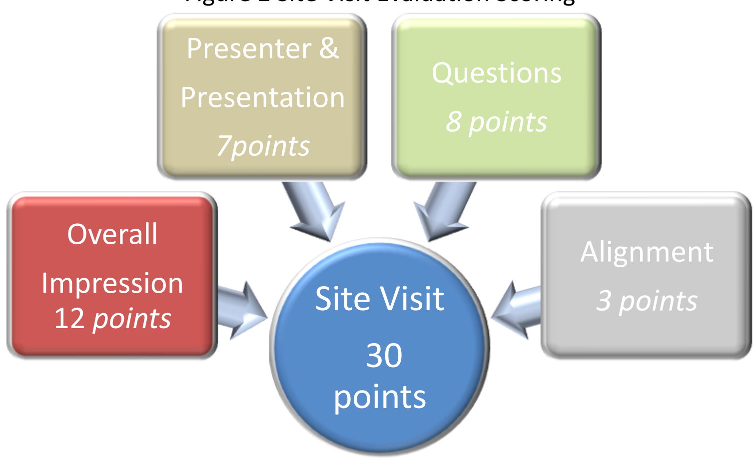
Figure 1 Program Proposal Evaluation Scoring



Site Visit Evaluation

- Site Visit is worth 30 points
- Site Visit is evaluated and scored by all panel members and the UWMD Staff person in attendance at the Site Visit.
- Site Visit score is comprised of four scored sections of the Site Visit as noted in Figure 2 below:

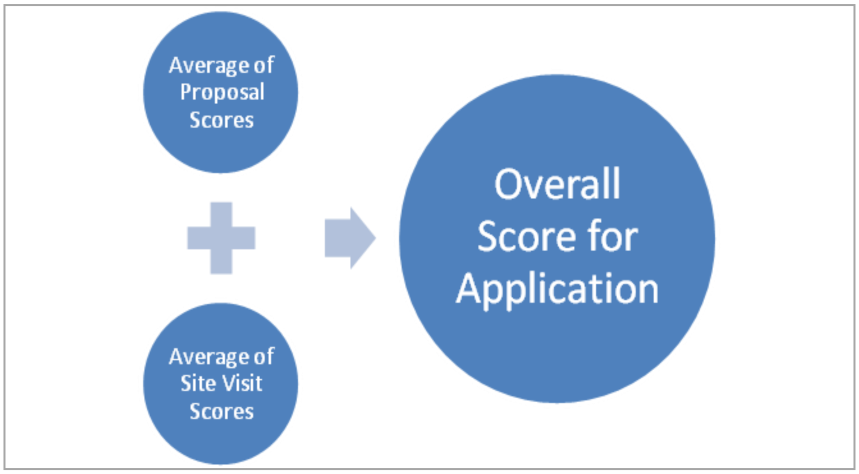
Figure 2 Site Visit Evaluation Scoring



Overall Score (Final Deliberations Ranking Score)

- Overall score is based on 100 points (70 proposal + 30 Site Visit)
- Steps to obtain overall score to use in ranking:
    - Average all proposal scores (if volunteer or UWMD staff person did not submit a score, then he/she will not be included in the average).
    - All Site Visit scores will be averaged together (if volunteer or UWMD staff person did not attend Site Visit, then he/she will not submit a score and they will not be included in the average).
    - Average proposal score and average Site Visit score are summed together for overall score out of 100 points.
- Staff will present Funding Recommendations based on overall score during final deliberations meeting. Volunteers then will discuss, adjust and approve funding amounts.

Figure 3 Overall Scoring Breakdown



e-CImpact ONLINE APPLICATION SYSTEM

Community Impact Grant Organization Applications, Program Proposals and Stewardship Packets will be submitted through e-CImpact, an online grant application system. Organizations new to the United Way system will register online, and create an e-CImpact account. Current United Way Service Providers can simply login to their existing e-CImpact website.

If there is a discrepancy in language between this RFP and e-CImpact, default to the language used in this RFP.

Logging into e-CImpact

Service Providers new to the United Way system can create an e-CImpact account from the United Way of Metropolitan Dallas webpage:

- Go to http://www.unitedwaydallas.org or you may use this direct link to the Service Provider login screen: https://agency.e-C Impact.com/login.aspx?org=46217F

  - Select the "Agency Tools" tab near the bottom left of the webpage
  - Under "e-CImpact", select "Service Provider Login"
  - Select "Create a New e-CImpact Account"

Organizations that are already United Way Service Providers can simply login to their existing e-CImpact webpage. Link to Service Provider login screen: https://agency.e-C Impact.com/login.aspx?org=46217F

Submitting an Organization Application

1. Login to your e-CImpact website (using your username and password).

2. Submit your 2011 Stewardship Packet (complete Stewardship forms, attach Stewardship documents, and submit the Stewardship form packet).

3. Complete and submit Community Impact Grant program proposal(s) for the assigned programs (complete grant forms & attachments, and submit the application).

More detailed e-CImpact instructions are provided in this RFP (page 49) and will be provided at the scheduled RFP Training (page 18 for more details). We have also included on page 52 of this RFP, a list of Frequently Asked Questions about e-CImpact. If, after reviewing both of these documents, you still have questions regarding how to navigate e-CImpact, contact Gene Putnam, 214-978-0028 or gputnam@unitedwaydallas.org. Also, always check the Resource Center on the e-CImpact website for more information.

TIMELINE

RFP RELEASE

Monday, August 22, 2011

STEWARDSHIP TRAINING

Stewardship Training is optional but highly encouraged. Space is limited and RSVP is required to attend. Please RSVP online at http://my.unitedwaydallas.org/page/s/stewardship-and-rfp-training no later than 2 business days prior to the session. You will be required to RSVP for each person attending. These dates will close when seating is full, so please RSVP as soon as possible. Please bring your own copy of the Stewardship documents to the meeting. **Copies will not be provided.**

Wednesday, August 31, 2011
9:00 a.m. – 10:00 a.m.
United Way Metropolitan Dallas
Citigroup Board Room
1800 N. Lamar Street
Dallas, TX 75202

Wednesday, August 31, 2011
3:00 p.m. – 4:00 p.m.
United Way Metropolitan Dallas
Citigroup Board Room
1800 N. Lamar Street
Dallas, TX 75202

STEWARDSHIP DRAFT REVIEW

If you are interested in having your stewardship documents reviewed for compliance before submission, you must have them turned into Jessica Orsino (see staff contact list on page 23) by **Friday, September 9th, 2011 at 12:00 pm.** Draft reviews will be done on a first come, first served basis and do not guarantee the Organization will pass. Any drafts received after this date will be reviewed if time allows.

STEWARDSHIP DEADLINE

Complete Stewardship packets (via hardcopies to UWMD and online e-CImpact submission) must be submitted to UWMD by **4:00 pm on Monday, September 19, 2011.** Late submissions will not be accepted.

RFP TRAINING

RFP Training is optional but highly encouraged. Space is limited and RSVP is required to attend. Please RSVP online at http://my.unitedwaydallas.org/page/s/stewardship-and-rfp-training no later than 2 business days prior to the session. You will be required to RSVP for each person attending. These dates will close when seating is full, so please RSVP as soon as possible. Please bring your own copy of the RFP to the meeting. **Copies will not be provided.**

Wednesday, September 7, 2011
(morning session)
8:30 am – 11:30 am
United Way Metropolitan Dallas
Citigroup Board Room
1800 N. Lamar Street
Dallas, TX 75202

Wednesday, September 7, 2011
(afternoon session)
1:00 pm – 4:00 pm
United Way Metropolitan Dallas
Citigroup Board Room
1800 N. Lamar Street
Dallas, TX 75202

Thursday, September 8, 2011
(morning session)
8:30 am – 11:30 am
United Way Metropolitan Dallas
Citigroup Board Room
1800 N. Lamar Street
Dallas, TX 75202

Thursday, September 8, 2011
(afternoon session)
1:00 pm – 4:00 pm
United Way Metropolitan Dallas
Citigroup Board Room
1800 N. Lamar Street
Dallas, TX 75202

APPLICATION WORKSHOPS

Small, specific workshops will be held at UWMD to coach applicants on Outcome Measurement, Logic Model Development and the Site Visit Process. Space is limited and RSVP is required to attend. The RSVP option will be made available online after September 9, 2011. Please refer to our main website www.unitedwaydallas.org for information on registering for these workshops. You will be required to RSVP for each person attending. These dates will close when seating is full, so please RSVP as soon as possible after September 9th. Please bring your own copy of the RFP to the meeting. **Copies will not be provided.**

September 22, 2010 (morning session)
8:30 am – 11:30 am
United Way Metropolitan Dallas
1800 N. Lamar St., Dallas, TX 75202
Citigroup Board Room

September 22, 2010 (afternoon session)
1:00 pm – 4:00 pm
United Way Metropolitan Dallas
1800 N. Lamar St., Dallas, TX 75202
Citigroup Board Room

APPLICATION DRAFT REVIEW

If you are interested in having a UWMD Grant Specialist (see staff contact list on page 23) read and review your draft application, you must have it turned in to the appropriate Grant Specialist by **October 3, 2011 at 4:00 pm**. Reviewing drafts will be done on a first come, first served basis by the UWMD Grant Specialists and does not guarantee funding. Any drafts received after this date will be reviewed if time allows.

PROPOSAL SUBMISSION DEADLINES

Complete application packets (online via e-CImpact) must be submitted to UWMD by **4:00 pm on Monday, November 7, 2011.** Late submissions will not be accepted.

Complete application packets (hard copies -3 per proposal) must be submitted to UWMD by **4:00 pm on Friday, November 11, 2011**. Late submissions will not be accepted.

VOLUNTEER PANEL PROCESS

Volunteer Grant Panels begin Initial Panel Meetings in February. Site Visits will be held at various times from February through April. Volunteer Grant Panels will begin Final Deliberation meetings in April and the approval process will continue throughout April and into May. Final Approval will occur on May 15, 2012.

FUNDING APPROVALS

Approval of funding amounts goes through two volunteer governance committees (Impact Councils and Community Impact Committee) and occurs throughout the month of May with the UWMD Board of Directors giving final approval on May 15, 2012. **Funding decisions are final and there is no appeals process.**

FUNDING PERIOD

July 1, 2012 – June 30, 2013

SUBMISSION

COMPLIANCE REQUIREMENTS

Failure to comply fully with these two requirements will result in the proposal being removed from consideration:
1) On-Time
2) Complete

ON TIME

Stewardship Packet
The deadline for receipt of electronic (via e-CImpact) and paper hardcopies (to UWMD) of Stewardship Packets is **4:00 p.m., Monday, September 19, 2011**. All submissions are time stamped by the e-CImpact Online Application System. **Late or incomplete submissions will not be accepted.** Organizations have the option of hand delivering or mailing a hardcopy of the Stewardship Packet to:

Jessica Orsino
United Way of Metropolitan Dallas
1800 N. Lamar Street
Dallas, TX 75202

If you mail your Stewardship Packet to us, we must **receive** your materials by Monday, 4:00 p.m., September 19, 2011 in order for your Complete Application Packet to be submitted on time.

Community Impact Grant
The deadline for receipt of electronic submission (via e-CImpact) of Complete Organization Application Packets is **4:00 p.m., Monday, November 7, 2011**. All submissions are time stamped by the e-CImpact Online Application System. **Late or incomplete submissions will not be accepted.**

Organizations have the option of hand delivering or mailing hardcopies of Complete Application Packets to:

Ashley Brundage
United Way of Metropolitan Dallas
1800 N. Lamar Street
Dallas, TX 75202

Whether you mail or deliver your Complete Organization Application Packet to us in person, we must **receive** your hardcopy materials no later than, **4:00 p.m., Friday, November 11, 2011** in order for your Complete Application Packet to be submitted on time. **Late or incomplete submissions will not be accepted.**

COMPLETE

A complete **STEWARDSHIP PACKET** (page 64) will contain ONE (1) copy of the following elements (Remember all attachments must be printed separately, see page 49-51 for e-CImpact Printing Instructions):
1) Completed documentation checklist (will need to print completed checklist from e-CImpact, see page 49-51 for e-CImpact Printing Instructions)
2) Audit
3) Management Letter (optional, only if one was received)
4) IRS Form 990/990 EZ
5) Organization Operating Budget
6) Board Roster
7) Board Calendar
8) Unaudited Financials
9) Patriot Act Compliance (will need to print completed form from e-CImpact, see page 49-51 for e-CImpact Printing Instructions)

10) Disclosure Form (will need to print completed form from e-CImpact, see page 49-51 for e-CImpact Printing Instructions)

Required only if new applicant to 2011, did not pass Stewardship in 2010, or had changes in the documents listed below since 11/8/10.

11) Conflict of Interest Policy
12) Whistleblower's Policy
13) IRS Determination Letter
14) Anti-discrimination Statement

A complete **ORGANIZATION APPLICATION PACKET** will contain the following elements:

1) ONE (1) Copy of the Approval & e-Signature Form;
2) THREE (3) Copies of each Program Proposal (see below for order) being submitted for funding (i.e. If you submit 5 programs for funding you will turn in 15 hardcopies total, three for each program)
3) TWO (2) Copies of the Organization Application Packet Submission Receipt (see page 56, also available to download in resource center of e-CImpact)
4) Please BINDER CLIP together each complete Program Proposal together so that you have THREE (3) separate and complete packets ready for submission.
5) All hardcopies must be THREE HOLE PUNCHED.
6) While not required, UWMD highly encourages you to print your application packets DOUBLED SIDED in order to save on printing costs and paper.
7) All hardcopies must be printed in LARGE FONT PDF from e-CImpact.

A complete **PROGRAM PROPOSAL** will contain the following elements:

1) Organization Information & Capacity Form (make sure to submit one copy with each copy of each program proposal, this has to be done manually, see page 49-51 for e-CImpact Printing Instructions)
2) Board Demographics Chart (make sure to submit one copy with each copy of each program proposal, this has to be done manually, see page 49-51 for e-CImpact Printing Instructions);
3) Staff Demographics Chart (make sure to submit one copy with each copy of each program proposal, this has to be done manually, see page 49-51 for e-CImpact Printing Instructions);
4) Program Request Summary Form;
5) Program Narrative Form;
6) Number of Unduplicated Clients Chart;
7) Evaluation Narrative Form;
8) Logic Model Diagram: printed in diagram, landscape form (make sure to submit one copy with each copy of each program proposal, this has to be done manually, see page 49-51 for e-CImpact Printing Instructions);
9) Outcome Tool(s): make sure a copy of each tool, and scoring key (if applicable), is attached to each copy of the program proposal (make sure to submit one copy with each copy of each program proposal, this has to be done manually, see page 49-51 for e-CImpact Printing Instructions);
10) Program Budget Form;
11) Program Budget Narrative.

UWMD encourages you to save each of your Organization Applications for your records. Please print out the exact versions of the documents that you submitted/uploaded through the e-CImpact System when you turn in or mail your hardcopies of the Organization Application Packet. Please make sure the hardcopies of all materials you submit match the electronic versions to avoid any discrepancies. If there is a discrepancy, the electronic copy will govern.

ORGANIZATION APPLICATION PACKET SUBMISSION RECEIPT

The Organization Application Packet Submission Receipt (available on page 56) is intended to document your application submissions to United Way. This form will be available for download from the Resource Center in e-

CImpact. Complete TWO (2) copies of this form and bring them with you when you submit your Organization Application Packet to United Way.

ALLOCATION ACCEPTANCE

If the proposal is selected for United Way Allocations – either partially or fully, the Service Provider will receive the following documents:

- Allocation Letter
- Grant Report
- Service Provider Contract

By executing the Service Provider Contract, the Service Provider accepts all United Way Allocations as awarded in the United Way Allocation Letter. In order for the Service Provider to receive the awarded funds, the Service Provider must agree to all United Way requirements for the accepted United Way funding as outlined in the Service Provider Contract and the Contract must be signed and dated by the Service Provider's President/CEO and Board Chair.

In the following situations, a letter must be submitted to United Way outlining the reasons for changes or declined funding:

1) If any program requires material changes as a result of the level of funding awarded. Changes to the program and continued funding of the program are subject to the approval of the UWMD Impact Council and Community Impact Committee.
2) If the Service Provider elects to decline funding for a program.

Letters communicating material changes or declined funding should be addressed to:

Susan Hoff
United Way of Metropolitan Dallas
1800 N. Lamar St.
Dallas, TX 75202

STAFF CONTACT LISTS BY IMPACT AREA

Funds Allocation Staff Contact List

Please call, email or set up an appointment to meet with one of the Community Impact Funds Team Members listed below in order to discuss your application, ask questions about Stewardship, discuss any issues or concerns, have your draft application or Stewardship documents reviewed, or answer any questions you might have.

Title	Staff Person	Phone	Email
Education Grants Specialist	Mark Mullaney	214.978.0073	mmullaney@unitedwaydallas.org
Income & Basic Needs Grants Specialist	Galen Smith	214.978.0098	gsmith@unitedwaydallas.org
Health Grants Specialist	Sarah Kaushik	214.978.2009	skaushik@unitedwaydallas.org
Director of Funds Allocations (Community Impact Grants)	Ashley Brundage	214.978.0023	abrundage@unitedwaydallas.org
Director of Service Provider Resources (Stewardship)	Jessica Orsino	214.978.0095	jorsino@unitedwaydallas.org
Senior Director of CI Funding	Jill Scigliano	214.978-0061	jscigliano@unitedwaydallas.org

United Way Grant Liaison Contact List by Panel 2012-2013

United Way Grant Liaisons will be responsible for reviewing and scoring proposals, scheduling and attending Site Visits, and taking notes during the panel meetings. The following is contact information for United Way Grant Liaisons by Panel Assignment:

Impact Area	Panel	Staff Liaison	Phone	Email
Health	Expanded Access	Jessica Orsino	214.978.0095	jorsino@unitedwaydallas.org
Health	Preventive Care	Gene Putnam	214.978.0028	gputnam@unitedwaydallas.org
Health	Obesity	Jessica Galleshaw	214.978.2015	jgalleshaw@unitedwaydallas.org
Health	Family Violence, Child & Elder Abuse	Talia Brinkman	214.978.0039	tbrinkman@unitedwaydallas.org
Health	Substance Abuse	Jessica Galleshaw	214.978.2015	jgalleshaw@unitedwaydallas.org
Income	Access to Jobs	Stephanie Werner	214.978.0034	swerner@unitedwaydallas.og
Income	Job Skills training	Karen Liu Pang	214.978.0030	kliu@unitedwaydallas.org
Income	Financial Education	Gala Trigg	214.978.0069	gtrigg@unitedwaydallas.org
Education	Parents & Mentors	Karen Liu Pang	214.978.0030	kliu@unitedwaydallas.org
Education	Early Childhood	Danielle Mazzeo	214.978.0026	dmazzeo@unitedwaydallas.org
Education	English Language	Stephanie Werner	214.978.0034	swerner@unitedwaydallas.org
Education	Math & Science	Talia Brinkman	214.978.0039	tbrinkman@unitedwaydallas.org
Education	Afterschool & Summer	Joel Durbin	214.978.2006	jdurbin@unitedwaydallas.org
Education	College & Career Preparation	Gaby Perez	214.978.2019	gperez@unitedwaydallas.org
Basic Needs	Basic Needs	Jill Scigliano	214.978.0061	jscigliano@unitedwaydallas.org

COMMUNITY IMPACT GRANT APPLICATION

Below are directions on how to complete each section of the application. This cannot be submitted as your official grant application. You must submit your Grant Application via e-CImpact and hardcopy.

NOTE: Microsoft Word character counts do not equal e-CImpact character counts. Please do all your typing in e-CImpact to avoid confusion.

APPROVAL & e-SIGNATURE FORM: COMMUNITY IMPACT GRANTS 2012-2013

An e-signature is required from the Service Provider President/CEO and Board Chair verifying that they have reviewed and approved the entire Organization Application Packet, including all program proposals, before submission to United Way.

This form only needs to be submitted once per Organization Application Packet.

1. President/CEO

This Organization Application Packet, including all program proposals, has been reviewed and approved by the President/CEO.

By typing your name here, you, the President/CEO, are e-signing a contract verifying that you have reviewed and approved the entire Organization Application Packet.

Review & approval date: Click here to enter a date.

President/CEO name (150 Characters): _____

2. Board Chair

This Organization Application Packet, including all program proposals, has been reviewed and approved by the Board Chair.

By typing your name here, you, the Board Chair, are e-signing a contract verifying that you have reviewed and approved the entire Organization Application Packet.

Review & approval date: Click here to enter a date.

Board Chair name (150 Characters): _____

ORGANIZATION INFORMATION & CAPACITY 2012-2013

This form will only need to be completed once per Organization. Remember that this form will need to be manually attached to all program proposal hardcopies submitted for funding. All blanks must be filled in. Do not answer with "not applicable" unless question specifies "if applicable." If a question is not applicable to your Organization, please explain why.

Each of the following questions are allotted 150 Characters unless otherwise indicated.

1. **Organization Contact Information**

   Legal Name of Organization: _____

   Doing Business As (if applicable): _____

   Mailing Address _____

   City _____

   State _____

   Zip _____

   Phone _____

   Fax Number _____

   EIN _____

   Organization Website: _____

2. **CEO or President Contact Information**

   This person cannot be the same as the Board Chair.

   Salutation: _____ (Mr./Ms./Mrs./Dr.)

   First: _____

   Last: _____

   Phone: _____

   Email: _____

3. **Board Chair Contact Information**

   Please enter contact information for the Board Chair as of **MAY 2012**. This person cannot be the same as the CEO/President or the Application Contact.

   Salutation: _____ (Mr./Ms./Mrs./Dr.)

Title: _____

First Name: _____

Last Name: _____

Phone: _____

Email: _____

Address: _____

City: _____

State: _____

4. Organizational Mission

Type of Organization: ______

Please indicate what type of Organization this is (i.e. human service provider, chamber of commerce, university, church, etc.)

Organizational Mission Statement (300 Characters): _____

5. Organizational Capacity

a. **Describe the Organizational history and give a brief overview of the Organization (4,000 Characters):** _____

Please discuss, with reference to the Organization, the:

- History;
- Mission;
- Services of the Organization;
- Year of incorporation, year established;
- Hallmark accomplishments and/or awards received;
- What differentiates the Organization from other Organizations, and what makes the Organization unique.

It is not necessary for Organizations with long histories to cover all of the intervening years. Major milestones or significant changes in the Organization's approach to its mission should be included only if such information will add to an understanding of current circumstances. If the Organization has had a troubled past, describe how those difficulties were overcome or are currently being addressed. Candor is appreciated and respected.

Rationale: By offering a solid description of the Organization, its history, as well as how the Organization may have changed over time, the Organization provides context for understanding their current reality.

b. **Describe the Organization's overall approach to evaluation (2,000 Characters).** _____

Discuss the Organization's evaluation efforts. This response should discuss:

- How the Organization incorporates findings from its evaluation efforts or its experiences to inform its future direction and improve its programming
- How often staff and/or the board and/or program participants engage in evaluation-related activities
- How the Organization ensures that programming is current, meets industry standards, and is informed by best practices.
- The relationship the Organization has to formal research or evaluation efforts, linkages with colleges, universities, and/or evaluators.

c. **Describe how the Organization strives to be inclusive in its programs, staff, board, and volunteers, and the progress to date (2,000 Characters).**

Inclusiveness may look different in each Organization, depending on the length of time the Organization has been working on inclusiveness, the Organization's community or constituents, the geographic location, and the Organization's unique goals and resources.

Inclusiveness may include such aspects as the diversity of staff, board and clients as well as diversity of programming provided by the Organization.

In answering this question, it is important to identify the Organization's inclusiveness goals. Striving to become a more inclusive Organization is an ongoing process, and involves identifying areas of opportunity and concern, determining strategies, and measuring progress toward identified goals.

Given the varying resources available within nonprofit Organizations, choosing to focus on inclusiveness can start with a small project, like incorporating those served into decision-making processes, or it can be a top-to-bottom, Organization-wide effort. One fundamental question related to inclusiveness: Are the people the Organization serves also involved in staff or leadership roles within the Organization? And if not, please explain why.

The response to the inclusiveness question should describe the Organization's intention and action with regard to diversity and inclusiveness.

Organizations must also complete the table of all board members that describes their ethnicity, gender, profession, county of residence and a table of all staff members that describes their ethnicity and gender.

Rationale: Being inclusive helps Organizations be more responsive to those it seeks to serve and more effective at creating and delivering relevant and successful programs. Inclusiveness also leads to a broader and richer pool of board, staff, and volunteers.

d. **Provide the percentage of the board that contributes financially to the Organization (500 Characters):**

Rationale: A financial contribution from board members (can include "give or get"), in an amount meaningful to each person, indicates their commitment to the Organization. It is also a tangible endorsement of the Organization and can provide reassurance to other potential donors that the Organization is worthy of their support as well.

BOARD DEMOGRAPHICS CHART

This form will only need to be completed once per Organization. Remember that this form will need to be manually attached to all program proposal hardcopies submitted for funding.

Fill out the Board Demographics Chart in e-CImpact according to the diversity of your current Board Volunteers. Please do not count a board member in more than one category. Indicate the one that is most representative of the board member. The percent column will automatically calculate.

The section totals must balance (i.e. totals race-ethnicity, gender, county of residence, and profession must be the same).

1. Race/Ethnicity		
	Number	**Percent**
African American		
Asian		
Caucasian		
Hispanic		
Native American		
Other		
Unknown		
Total		
2. Gender		
	Number	**Percent**
Male		
Female		
Unknown		
Total		
3. County of Residence		
	Number	**Percent**
Collin		
Dallas		
Southern Denton (see page 4)		
Rockwall		
Other		
Total		

4. Profession		
	Number	**Percent**
Community or Social Services Occupations		
Community Volunteer		
Construction and Extraction Industries		
Education, Training, Library, and Museum Industries		
Financial, Accounting, Auditing Occupations		
Former Client		
Health Diagnosing and Treating Practitioners		
Human Resources, Training, and Labor Relations Managers and Specialists		
Installation, Maintenance and Repair Occupations		
IT and Computer Related Industries		
Legal Occupations		
Media and Communications-Related Occupations		
Office and Administrative Support Occupations		
Production Industry		
Property, Real Estate, and Community Association Managers		
Sales and Related Occupations		
Transportation and Material Moving Industry		
Other		
Total		

STAFF DEMOGRAPHICS CHART

This form will only need to be completed once per Organization. Remember that this form will need to be manually attached to all program proposal hardcopies submitted for funding.

Fill out the Staff Demographics Chart in e-CImpact according to the diversity of your entire Organizational Staff. Please do not count a staff member in more than one category. Indicate the one that is most representative of the staff member. The percent column will automatically calculate.

The section totals must balance (i.e. totals race-ethnicity and gender must be the same).

1. Race/Ethnicity		
	Number	**Percent**
African American		
Asian		
Caucasian		
Hispanic		
Native American		
Other		
Unknown		
Total		
2. Gender		
	Number	**Percent**
Male		
Female		
Unknown		
Total		

PROGRAM REQUEST SUMMARY FORM

Complete this form with reference to the proposed program being submitted for funding only. This form will need to be completed for each program being submitted for funding. All blanks must be filled in. Do not answer with "not applicable" unless question specifies "if applicable." If a question is not applicable to the proposed program, please explain why.

Each of the following questions are allotted 150 Characters unless otherwise indicated.

1. Application Contact Information

Please indicate the best person to talk to regarding questions about this application. This person cannot be the same as the Board Chair.

Salutation: _____ (Mr./Ms./Mrs./Dr.)

First Name: _____

Last Name: _____

Title: _____

Phone: _____

Email: _____

2. Program Request Summary

a. **Program Name:**

Please indicate the name of the proposed program being submitted for funding.

b. **Number of years the proposed program has been in operation:** ______

c. **Impact Area:** Choose an item.

Check one impact area (see pages 6-8) which the proposed program is being submitted under and will be addressing a strategy within. If applying under Basic Needs, simply select Basic Needs.

d. **Strategy Area:** Choose One from Drop Down Menu

Refer to pages 6-8 for strategies, choose the one strategy the proposed program is addressing. If applying under Basic Needs, simply select Basic Needs.

e. **Metric(s) Addressing (600 Characters):** ______

Refer to pages 6-8 for metrics. Please list which metric(s) you will be addressing with this program, choose one or more related to the strategy you're addressing. If applying under Basic Needs, simply state Basic Needs.

f. **Request Amount:** ______

Please indicate the dollar amount being requested to fund the proposed program. There is no minimum or maximum request amount. Please round to the nearest whole dollar.

g. Brief Summary of Program including Goal Statement (300 Characters): ______

Please indicate the purpose of the proposed program, key activities that occur in the proposed program, and a couple of sentences on how the proposed program is addressing United 2020 goals (see pages 6-8).

h. How will UWMD requested funds be used, specifically? How will UWMD requested funds impact the program overall? (600 Characters): ______

Please detail exactly how the proposed program plans to use the funding amount requested (i.e. expansion of program, additional staff, more locations, etc.).

i. **Has this particular program been awarded UWMD funds during the last five years?**
Yes **No**

j. **If this particular program has been awarded UWMD funds over the last five years, please provide a funding summary (500 Characters):**

A funding summary should briefly list the numerical dollar amount awarded to this particular program by UWMD as well what percentage of the total request was funded for each of the last five years.

Rationale: This question provides the opportunity to briefly illustrate the extent to which UWMD has supported the particular program over the previous five years

k. What is the Geographic Area Served?(300 Characters): ______

Please indicate the geographic area served specific to the proposed program. Include all locations where the program will be available/offered.

l. **What is the Target Population? (300 Characters):** ______

Please provide a brief summary of the target population specific to the proposed program.

m. Preferred location of Site Visit (300 Characters): ______

Please provide the name of the location, full address, parking instructions and any special directions or landmarks.

n. From Site Visit Schedule, Days/Times UNAVAILABLE for Site Visit (300 Characters): _____

Please refer to the Site Visit Schedule located on page 54 and indicate here which dates/times you are *unavailable* for a Site Visit. It will be assumed that, unless otherwise indicated here, you are available for a Site Visit on all dates and times listed for the Strategy Area the proposed program is being submitted to. If you have submitted an application to more than one Strategy Area, be sure to indicate that here as well.

o. Name and phone number of person to contact DURING the site visit in case of emergency: _____

This person should be someone that will be at the Site Visit with a cell phone OR able to reach someone at the Site Visit with a cell phone. This is in case the panel is running late, lost or had some sort of emergency arise. Please include name and phone number.

PROGRAM NARRATIVE FORM

Complete this form with reference to the proposed program being submitted for funding. This form will need to be completed per program being submitted for funding. All blanks must be filled in. Do not answer with "not applicable" unless question specifies "if applicable." If a question is not applicable to the proposed program, please explain why.

1. Key Leadership & Program Staff

a. Describe the Organization's Leadership Staff, Volunteers, and Key Program Staff and Volunteers (3,000 Characters): _____

Include all employees and volunteers that serve in senior leadership roles within the Organization and those key staff and volunteers that implement the proposed program on a day-to-day basis. Include name, title and experience. If you plan to hire any additional staff, please describe the qualifications required.

Rationale: One of the indicators of a successful program is having qualified staff administering it. Highlighting the background, education and experience of staff, as well as any volunteers who serve in a leadership role, helps illustrate the capacity of an Organization to provide high quality programming that is relevant, current with industry best practices and able to adapt as new information is available.

2. Program Plan

Provide the plan for the proposed program. Please address all bullet points when answering. Bullet points do not need to be addressed in order presented, just be sure to provide a response to each one. Bullet points are listed in e-CImpact by clicking on the question mark icon (?) to the left of question a.

? **a. Provide the plan for the proposed program (4,000 Characters). ______**

b. Additional space provided to continue answering Question 2a. Program Plan (4,000 Characters). ______

Rationale: This question provides the opportunity to present a thorough description of the specific program for which funding is being requested. Being able to answer all of the topics outlined in the question demonstrates a well-conceived program that addresses a clearly defined issue.

- **Strategy & Metric Addressed** - Which Strategy and Metric will your program be addressing? For example: Our program will increase access to care by increasing the number of eligible youth enrolled in CHIP. Refer to pages 6-8 for assistance.
- **Description of the Target Population** – Who exactly is the program serving? This question should be answered in reference to the proposed program being submitted for

funding only. Be specific in reference to the demographics, geography, and size of the target population.

- **Goals and Outcomes of the Program** – Goals convey the general direction or overall purpose of the program. Outcomes are the measureable changes that you expect will result from operation of the program. Outcomes help to determine whether the Organization is on the right path to achieving its goals.
- **Detailed Description of Primary Program Activities** – Primary Program Activities refer to the essential tasks or projects that need to take place to accomplish the goals and outcomes. Explain the program in such a way that a reader who knows nothing about how the program is implemented will be able to visualize it. If applicable, include how many days and hours or units of service are delivered by the program.
- **Brief Description of Secondary Program Activities** – Secondary Program Activities refer to the tasks that occur within the program or in support of the program in order to provide comprehensive services. They may not relate directly to the goals, outcomes, or metrics of this strategy area, but are still important to the success of the clients in the program.
- **Timeline** –Provide key dates or chronology associated with the program such as enrollment dates, when program is offered, start/completion dates, design phase, pilot project dates, volunteer recruitment/training, advocacy activities, etc.
- **Explain why the Organization is approaching the issue in this way** - Highlight the research-based strategy or best-practice approach that your program is based upon. If the program is not based on a specific best-practice or model program, explain why the Organization chooses to address the issues in the way it does. Highlight the uniqueness of the Organization's approach and perhaps why the approach seems promising. If approach is based on evaluation results, refer to those. Research should be less than ten years old and always cite your source.
- **Description of Volunteer Activity with the program.** Activities refer to the tasks or projects that volunteers participate in related to the proposed program. If applicable, include how many days and/or hours of time are accomplished by volunteers.

3. Client Income

a. Does this program serve the low to moderate-income population? ☐ **Yes** ☐ **No**

b. If yes, what percent of clients served by this program are low to moderate-income (10 Characters)? _____

Low- and moderate-income person means a member of a family having an income equal to or less than the Section 8 low-income limit established by HUD. Unrelated individuals will be considered as one-person families for this purpose (source: http://www.hud.gov/offices/cpd/library/glossary/l/index.cfm#lowperson).

Low- and moderate-income household means a household having an income equal to or less than the Section 8 low-income limit established by HUD (source: http://www.hud.gov/offices/cpd/library/glossary/l/index.cfm#lowperson). Use this HUD link (http://www.huduser.org/portal/datasets/il/il2010/select_Geography.odn) to see the income definitions by county.

4. Collaborative Efforts & Other Similar Programs

a. Describe the Organization's collaborative efforts with respect to the proposed program. (2,000 Characters): ______

Rationale: The effectiveness of nonprofit Organizations often depends on successful relationships with others in the community. Regardless of form – partnerships, collaboration, cooperation, or coordination – these relationships, or strategic alliances, can serve a variety of purposes, including resource sharing, policy influence, and improved operational efficiency.

b. How is your proposed program different or unique from other similar programs (600 Characters)? ______

Rationale: Being knowledgeable about similar and/or different programs in the UWMD service area reflects the Organization's desire to be resourceful and not duplicate efforts. UWMD encourages collaboration among agencies and strives to address gaps in service provision and resources by funding diverse programs to reach community goals.

NUMBER OF UNDUPLICATED CLIENTS 2012-13

Complete this form with reference to the proposed program being submitted for funding only. This form will need to be completed for each program being submitted for funding.

In e-CImpact fill out the Unduplicated Client Chart with reference to the proposed program being submitted for funding.

Include **all program clients**, not just those funded by UWMD. If you are not collecting the information asked for, please fill in numbers as unknown. Each total column for each year should be equal (For instance: The gender total for 2010-2011 will equal the age total for 2010-2011, and so on.). A client is the actual person being served by the program (i.e. the child in the afterschool program or child care program, not the parents). Be sure numbers are of individual clients and are not duplicative.

Category		Actual (FY2010-2011)	Estimated (FY2011-2012)	Proposed (FY2012-2013)
1. Gender	Male			
	Female			
	Gender Unknown			
	Total Gender			
2. Ages of Clients	Ages Birth-5:			
	Ages 6-12			
	Ages 13-18			
	Ages 19-21			
	Ages 22-44			
	Ages 45-59			
	Ages 60-64			
	Ages 65+			
	Age Unknown			
	Total Age			
3. Race/Ethnicity	African American/Black			
	Asian/Pacific American			
	Caucasian			
	Hispanic/Latino			
	Native American			
	Other			
	Race/Ethnicity Unknown			
	Total Race/Ethnicity			

4. County of Residence	Collin County			
	Dallas County			
	Rockwall County			
	Southern Denton County (see page 4)			
	Other			
	Unknown Residence			
	Total			
5. Household Income Level	Under $20,750			
	$20,751-$34,550			
	$34,551-$55,300			
	Over $55,300			
	Income Unknown			
	Total Income			

EVALUATION NARRATIVE FORM

Complete this form with reference to the proposed program being submitted for funding. This form will need to be completed for each program being submitted for funding. All blanks must be filled in. Do not answer with "not applicable" unless question specifies "if applicable." If a question is not applicable to the proposed program, please explain why.

1. Evaluation

a. **Describe how the Organization measures impact for the proposed program (3,000 Characters). _____**

- For each outcome that will be reported on at the end of the funding year (marked with an asterisk), describe the methods (e.g. client feedback, pre/post tests, focus groups, surveys, sampling method, etc.) for measuring progress toward achieving outcomes and the names of specific tools that the Organization uses to measure outcomes. Include what the Organization is measuring, how often each tool is used, and why a particular tool or method was selected. If the tool has evidence based research to support its use, please provide the citation and supporting research. Upload your measurement tool(s) to e-CImpact and label clearly.

Please note the following:

- Make sure that the tools or methods used will be able to measure the achievement of the outcomes that are described in your response to Question 1 in the Program Narrative.
- Be sure the Logic Model and the answer to this question relate to one another, also remember to indicate the outcome(s) you will report on at the end of the funding year.
- If the Organization does not attempt to measure impact in any way, provide an explanation as to why not.

b. **Summarize key evaluation results or findings that demonstrate the program's impact. Indicate the time frame for the results or findings (3,000 Characters). _____**

- Summarize the evaluation results for the program for which the Organization is requesting funds. Be sure to include the time frame covered by the evaluation results.
- For a brand new program, the answer to this question should incorporate any justification or model program for beginning the program.
- Do not be afraid to share disappointing results. The key is what the Organization learns from experience and how it adjusts its practices in light of the results. Many nonprofits are addressing very complex social issues, and therefore, it is a real sign of strength to have uncovered an area of opportunity to improve the Organization's approach. Deliberately working to address those flaws can lead to improved outcomes in the future.

Rationale: The strongest nonprofits evaluate their work, analyze and understand the results, and implement modifications to improve programming. UWMD wants to work with the best *programs that make the most impact in order to improve lives in our communities. In order to do this, UWMD must fund programs that achieve measureable impact in our strategy and goal areas.*

2. Target

a. What is/are the reportable outcome(s) for the proposed program (1,000 Characters)?

______

Please state the percent and number of clients that will improve/change/modify their behavior by what percentage. These should be the same as what was stated in your program narrative and in your logic model.

Most outcomes will be stated in this format: X% (number) of clients will improve by X% in a specific time frame.

Example: 70% (175) of students will show a 10-point increase in at least one core subject area between the first semester report card and the final school year report card.

Example: 80% (300) of clients will improve their financial literacy score by 30% or more when comparing the pre-test to post-test results at the end of the financial education program.

LOGIC MODEL

Complete this form with reference to the proposed program being submitted for funding. This form will need to be completed for each program being submitted for funding. All blanks must be filled in. Do not answer with "not applicable" unless question specifies "if applicable." If a question is not applicable to the proposed program, please explain why.

Complete the Logic Model form in e-CImpact. See pages 66-67 for sample Logic Model and definition of terms.

Logic Models must be submitted for all programs, including those submitted to the Basic Needs Category. When completing the logic model, be sure to include short, mid, and long term outcomes for the program being submitted for funding. Each outcome listed must be measurable (include a target percentage and number of clients that will be impacted). The Organization can self-define the length of time used for short, mid and long term outcomes. All outcomes must have targets listed in the format given in question two (above) and at least one outcome must be reported back to UWMD within the funding year. Depending on your program services and evaluation design, you may report on short, mid and long term outcomes in the first year. Please indicate the outcome(s) you plan to report on at the end of the funding year by marking with an asterisk (*) and stating this in your answer to Question 1a in the Evaluation Form (above).

Basic Needs (see page 9) programs will need to fill in the term 'Basic Needs' when asked about metric, strategy and community impact goal, as UWMD does not define these areas. All other programs need to use the language provided in the RFP (Pages 6-8) when completing the metrics, strategies and impact goal part of the logic model.

United Way understands programs applying under the Basic Needs Area (see page 9) have widely varying levels of interaction with the populations they serve. To accommodate this in the creation of the required Logic Models, applicants must submit a **minimum** of one short-term outcome for each program. However, United Way strongly encourages the inclusion of measurable mid and long-term outcomes in all Basic Needs proposals whenever possible in programs having ongoing client contact. Inclusion of longer range outcomes will help volunteers see the true impact of programs and assist the panel when seeking to allocate funding based on Best Investment Criteria.

e-CImpact Logic Model Overview

a. Select the **Impact Area Goal** from the drop down box under which the proposed program is applying (Basic Needs, Education, Income or Health).

b. Create New Section – Select **Resources** from the drop down box.

    i. On next screen under Add New Resources: List the resources needed In order to accomplish your activities. These include the human, financial, Organizational and community resources a program has available to direct toward doing the work. Also referred to as "inputs".

c. Create New Section – Select **Activities** from the drop down box.

   i. On next screen under Add New Activities: Activities are what happens in the program (i.e. classes, case management sessions, field trips, etc.) the List the activities the proposed program will provide in order to address the stated Community Strategy.

d. Create New Section – Select **Outputs** from the drop down box.

   i. On next screen under Add New Outputs: Outputs are the direct products of the program activities (i.e. number of class attended, number of hours of instruction received, number of pamphlets distributed). List the outputs (evidence of service delivery) expected once the stated activities have been provided.

e. Create New Section – Select **Short Term Outcomes** from the drop down box.

   i. On next screen under Add New Short Term Outcomes: Short Term Outcomes are the specific changes in participant's behavior, knowledge, skills, etc. If the proposed program accomplishes the stated activities, the following changes will be evident in the clients within the 2012-2013 funding cycle. Remember to mark with an asterisk (*) which outcomes will be reported on at the end of the 2012-2013 funding cycle. All proposed programs must state a minimum of one reportable short term outcome.

f. Create New Section – Select **Mid Term Outcomes** from the drop down box.

   i. On next screen under Add Mid Term Outcomes: Mid Term Outcomes are the specific changes in participant's behavior, knowledge, skills, etc. If the proposed program accomplishes the stated activities, the following changes will be evident in the clients typically within one to three funding cycles (may vary based on program model). Remember to mark with an asterisk (*) which outcomes will be reported on at the end of the 2012-2013 funding cycle.

g. Create New Section – Select **Long Term Outcomes** from the drop down box.

   i. On next screen under Add Long Term Outcomes: Long Term Outcomes are the specific changes in participant's behavior, knowledge, skills, etc. If the proposed program accomplishes the stated activities, the following changes will be evident in the clients typically within one to five funding cycles (may vary based on program model). Remember to mark with an asterisk (*) which outcomes will be reported on at the end of the 2012-2013 funding cycle.

h. Create New Section – Select **Community Strategy and Metrics** from the drop down box.

  i. On next screen: select the Strategy under which the proposed program is applying.

  ii. Check the appropriate metric(s) for the proposed program (check all that apply).

i. Create New Section – Select **Impact Area Goals** from the drop down box.

  i. On next screen: select the Impact Area under which the proposed program is applying.

PROGRAM BUDGET FORM

Complete this form with reference to the proposed program being submitted for funding. This form will need to be completed for each program being submitted for funding.

Complete Program Budget Form in e-CImpact.
Be sure to include for the proposed funding year, current year and prior year your program revenue & expenses, other funding sources, and total program cost. Shaded areas will be automatically calculated. UWMD will allow 10% of the total program award amount to be used as unrestricted funding (see page 14) throughout the Organization. For instance, if requested $150,000, and you are awarded $100,000; then $10,000 of that amount can be used for unrestricted funding and $90,000 must be used for program costs as outlined in the proposal. This will be allowed on each award received.

1. United Way Request as a Percent of Total Expenses	**Amount Requested from UWMD**	**Total Program Expense**	**Percent**
Budget Amounts			

2. Program Revenue	**Actual (FY2010-2011)**	**Estimated (FY2011-2012)**	**Projected (FY2012-2013)**
Government Grants			
Foundations			
Corporations			
United Way of Metropolitan Dallas			
Individual Contributions			
Fundraising events or products			
Government Contracts			
Fee for Service/Earned Income			
Other*			
Total			

* In order to enter data into "other" in e-CImpact, click on the word Other, this will open up a new page in which you can itemize your "other" category. Click on Add New Item, if more than two lines are needed. Be sure to label what the "other" category is.

3. Program Expenses	Actual (FY2010-2011)	Estimated (FY2011-2012)	Projected (FY2012-2013)	UW Request (FY2012-2013)
Salary and Wages				
Benefits and Payroll Taxes				
Consultant/Professional Fees				
Office Supplies/Materials				
Rent/Occupancy				
Utilities				
Marketing				
Other*				
Total				

Number Served (from unduplicated client chart)			
Cost per Client			

Percent of UWMD Request to Total Program Cost	

* In order to enter data into "other" in e-CImpact, click on the word Other, this will open up a new page in which you can itemize your "other" category. Click on Add New Item, if more than two lines are needed. Be sure to label what the "other" category is.

PROGRAM BUDGET NARRATIVE

Complete this form with reference to the proposed program being submitted for funding. This form will need to be completed for each program being submitted for funding. All blanks must be filled in. Do not answer with "not applicable" unless question specifies "if applicable." If a question is not applicable to the proposed program, please explain why.

j. **Program Budget Narrative (2,000 Characters):** ______

Please explain any significant budget variances as well as areas of the budget that may require additional explanation. The response must also indicate if UWMD funds will be used as a match grant.

Rationale: Nonprofits have an obligation to act as responsible stewards in managing their financial resources. Developing a budget is a key step in managing a program. It reflects active decision making in regards to how resources will be allocated to accomplish the program's goals and objectives.

e-CIMPACT ONLINE APPLICATION INSTRUCTIONS

NOTE: The e-CImpact screens feature "help icons" that are links to additional information: ?

A. Access

Go to Community Impact Systems (e-CImpact) section under "Agency Tools" at the bottom left of the main UWMD web page at www.unitedwaydallas.org. Under "e-CImpact" select "Service Provider Login", or enter the following web address into your internet browser: https://agency.e-CImpact.com/login.aspx?org=46217F

B. Login

Supply your e-CImpact Username and Password or Create an account.

C. Home Page

Look to the menu on the left hand side of the screen for key access points in e-CImpact.
Note: Please make sure you go into your **Profile** on the top left of your Home Page and update your Organization's contact information.

D. Stewardship Review

Below are instructions for submitting the Stewardship form packet:

1. Locate the Stewardship Review section on your e-CImpact home page
2. Click Stewardship 2011
3. Open the link to the Stewardship form packet
4. Complete the following Stewardship forms
    a. The Stewardship Checklist
    b. The Patriot Act Compliance form
    c. The Disclosure & Approval form
5. "Save & Verify" the Stewardship Forms
6. Use the "Browse" button to upload the required Stewardship documents (Packet Attachments)
7. Be sure to "Save/Upload" each attachment
8. After the Stewardship Forms are "Saved & Verified", and all required packet attachments are uploaded, you will see a "Submit" button
9. Submit the Stewardship packet

You can visit the Stewardship section of the Resource Center on your e-CImpact home page to view the sample forms and documents listed below (The Resource Center is located at the bottom left of your home page.):

1. Stewardship Staff Review Form
2. Board calendar
3. Conflict of interest policy
4. Whistleblower's policy
5. Anti-discrimination statement

E. Assigning Programs to the Community Impact Grant Process

1. To assign a program to the 2012-13 Community Impact Grant process, click on "Assign Program to Investment Process". This will allow you to assign an existing program to the Grant Process, or to "Add a New Program" if you need to. (Previous Service Providers: please do not "add a new program" if the program is already in the system. We want to avoid creating duplicate programs.)

2. Click the checkbox next to the Grant Process.
3. Then click on “Save and Assign Program to Investment Process”.

F. Filling out and Submitting Program Proposals via e-CImpact

1. Locate “Community Impact Grant Process” in the left hand menu.
2. Locate “Funding Year 2012 – 2013” – Make sure you are in the correct funding year since you may have access to past funding years in your home page.
3. Select “Community Impact Grant Application”
4. Select the form packet you want to work with and click “edit”
5. Select a form to work on and click “edit”

   NOTES:

   a. When entering responses, e-CImpact will show you if you are over the character and space limit for each response. You will not be able to save a Form until the over limit response has been corrected.
   b. e-CImpact will also let you know if you have input an unacceptable response (for example: inputting “.57” when only whole numbers are possible). You will not be able to save a Form until the unacceptable response has been corrected.
   c. Always Save your work before leaving/closing each Form. If you do not Save before closing out each Form, you will lose the data you input.
6. Complete and <u>verify</u> each required form for submission. The System will not allow an application to be submitted until each individual, required form has been Verified.
7. Upload required attachments for each application per on-line instructions. The system only allows the following types of attachments with the following size restriction: pdf, doc, ppt, xls, gif, jpg, jpeg, bmp, tif, rtf, and txt. The maximum file size is 8 MB (or 5,120,000 bytes)
8. When all forms are verified select “Submit” to transfer completed applications to UWMD. (You may have to click on “Submit” twice to verify your intent to submit.) Once submitted, you cannot modify the application or the attachments. The Status column will change from “Verified” to “Submitted” when this step is completed. Do not forget to print copies in order to submit your hardcopies to UWMD.

   NOTE: Do not press “Submit” for each of your Program Proposals until your entire proposal is finalized and all additional attachments are uploaded. Once submitted, you cannot modify the proposal or the attachments. If changes have to be made after submission, contact your United Way staff member.

G. Changing a Program Name

If you need to change a program name, select “Program Profiles” from the home page. From this screen, you can edit the program name. Rename your program and hit “Save & Update”. Make sure your program name matches what will be on the proposals you submit to UWMD.

H. Adding a new Program to e-CImpact

Select the link on the e-CImpact home page that says “Assign Program to Investment Process”. That link will allow you to add an existing program to the Community Impact Grant process, or to add a new program.

I. Printing the Organization Application Packet

In the application overview screen, use the “Edit” button to open the agency packet, and print by selecting the link that says “Export This Packet to Adobe PDF (Large Font)”. (This link exports the agency forms packet to a separate PDF file.)

J. Printing the Program Proposals

In the application overview screen, use the “Edit” button to open each Form Packet, and print each Form Packet separately by selecting the link that says “Export This Packet to Adobe PDF (Large Font)”. (This link exports each Program Proposal to a separate PDF file.) The export includes the forms only, and does not include attachments. Attachments have to be printed separately.

Note: Please **DO NOT** select the link that says “Export Entire Application to Adobe PDF (Large Font)” on the Application Overview screen. (This link exports all of the Form Packets to a single large PDF.)

K. Instructions for printing the Logic Model diagram:

In the application overview screen, use the “Edit” button to open each Form Packet, then open the Logic Model form using the “Edit” button. Select “View Diagram” (upper right corner of the Logic Model screen). Print the diagram using <u>Landscape</u> orientation:

a. From the print menu select “Preferences”
b. Open the “Printing Shortcuts” tab, and select “Landscape” orientation (click “OK”)
c. Print the diagram (landscape orientation)

L. Printing the Stewardship Packet

In the application overview screen, use the “Edit” button to open the agency packet, and print by selecting the link that says “Export This Packet to Adobe PDF (Large Font)”. (This link exports the agency forms packet to a separate PDF file.) The export includes the forms only, and does not include attachments. Attachments have to be printed separately.

M. Resource Center

The resource center in e-CImpact provides Organizations with valuable documents to help you through the process. Please refer to this spot on your home page to find information that will help you with the Grants Process, Stewardship, Spell Check, and more.

e-CImpact Frequently Asked Questions

Q: e-CImpact asked me for the Organization Code. What is it?

A: If you are prompted for the Organization Code, UWMD's Organization Code is: 46217F

Q: My password for accessing the e-CImpact website isn't working. What should I do?

A: If your password is alphanumeric (contains BOTH letters and numbers), fulfills the following the criteria:

Must be between 6 and 15 characters in length and contain at least 1 character from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain the following characters: ", or %" or contain any white-space.

Password Examples:

- abcdefg2 (valid, contains letters and numbers)
- pa$$word (valid, contains letters and numbers)
- 1234567# (valid, contains letters and numbers)
- abcdefgh (invalid, contains only letters)
- abc23 (invalid, less than 6 characters)

If you continue to experience difficulties, please contact Gene Putnam at gputnam@unitedwaydallas.org and he will help you troubleshoot.

NOTE: Logins and passwords ARE case sensitive.

Q: Do spaces and hard returns count in the character/space limit?

A: Yes, spaces and hard returns are counted in the character/space limit. Hard returns are counted as 2 spaces.

Q: The online system will not allow me to upload my Outcome Measurement Tool. Why isn't it working?

A: If you have your Outcome Measurement Tool open on your desktop, close it and then try uploading the document again.

The system only allows the following types of attachments with the following size restriction:

- ** Accepted file types: pdf, doc, ppt, xls, gif, jpg, jpeg, bmp, tif, rtf, and txt. The maximum file size is 8 MB (or 5,120,000 bytes)
- Usually converting your document to a PDF file reduces the size of the document below the 8 MB requirement. If you do not have the software to convert your document to a PDF file, please contact your appropriate Grant Specialist and they can assist you.

Q: I input data into a Form last time I logged in and now the information is missing. What happened?

A: You should ALWAYS click Save after closing a Form; otherwise, you will lose the information/data you just entered.

Q: I'm trying to save a form, but it won't allow me to. Why is this occurring?

A: Scroll through your entire form and see if there are any error messages in red letters. If there are, make sure those are corrected and then try saving again. If you are over the character limit or place letters in numeric fields, the system will not allow you to save and leave a form.

Q: The name of my program has changed since last year. How can I change the name of my program in the online application?

A. On the top left of your Agency Home Page, click on Programs. Find the program you need to update and then click on Edit to the right of that program name. Then type in the updated Program Name and click Save/Update. When you return to your Home Page, your Grant Application will be renamed.

Q: I have a new program and need a blank grant application to fill out but I have no additional applications to use in e-CImpact. How can I obtain one?

A: Select the link on the e-CImpact home page that says "Assign Program to Investment Process". That link will allow you to add an existing program to the Community Impact Grant process, or to add a new program.

Q: The data I entered has changed since the last time I logged on. How did this happen?

A: If more than one staff person at your Organization has access to the online application system, it's likely that another Organization staff person has modified the grant application. If you are working with another Organization staff to complete a specific application, please make each other aware when you have accessed an application and made revisions.

Q: I'm ready to submit my application, but I'm not seeing the "Submit Application" option, but I've completed all my forms. Why is the option not appearing?

A: All required forms for an application must be *Saved and Verified* before the system will allow you to submit your application. If the Status for each of your forms is Verified and you still do not see the option to submit your application, please contact Gene Putnam gputnam@unitedwaydallas.org or 214-978-0028 for assistance.

Q: When I print out my PDF document, there are some letters that print out like code instead of the letters. Why is this occurring?

A: This is most likely because you do not have Adobe Reader 6.0 or above. Please check to see which version of Adobe Reader you have. If the version is not 6.0 or above, simply go to http://www.adobe.com/products/acrobat/readstep2.html to download the most recent version of Adobe Reader. If your PDF document continues to print out in code, contact Gene Putnam, gputnam@unitedwaydallas.org, (214) 978-0028, and he can help you troubleshoot to determine what may be causing the issue.

Q: We only have a hard copy version of our Outcome Measurement Tool. How do we provide that to United Way through the e-CImpact system?

A: Please send an email to Rosemary Grougnet rgrounet@unitedwaydallas.org notifying her that you will be faxing your Outcome Measurement Tool to fax # (214) 922-9683. She will scan your Outcome Measurement Tool into a PDF document and then she will email it back to you. Then you can give it the proper file name (Organization Name_Program Name_Outcome Measurement Tool) and upload it to the online system.

Q: The character/space count feature in e-CImpact is not counting down as I type or when I copy and paste info from a Word document. Why isn't this feature working?

A: The character/space counting feature is a fairly advanced feature that requires Microsoft Internet Explorer 6.0 or above. Check the version of the browser you have, if it is not Microsoft Internet Explorer 6.0 or above, then simply update your browser and the character/space count feature will work.

GRANT PANEL SITE VISIT SCHEDULES

Below is the schedule of Site Visits for each panel. Receiving this schedule now will allow agencies to make the necessary arrangements to be able to present on the dates listed.

Morning Site Visits will be scheduled from 8:30 a.m. – 12:30 p.m.
Afternoon Site Visits will be scheduled from 1:00 p.m. – 5:00 p.m.

EDUCATION

After School And Summer: Monday Afternoons: February 20, 27, March 5, 12, 19, and 26

Early Childhood: Tuesday Mornings: February 21, 28, March 6, 13, 20, and 27

College and Career Preparation: Wednesday Mornings: February 22, 29, March 7, 14, 21, and 28

Math and Science: Thursday Mornings: March 1, 8, 15, 22, 29, and April 5

Parents and Mentors: Tuesday Afternoons: February 28, March 6, 13, 20, 27, and April 3

English Language: Thursday Afternoons: February 23, March 1, 8, 15, 22, and 29

HEALTH

Obesity: Monday Afternoons: February 27, March 5, 12, 19, 26 and April 2

Family Violence: Tuesday Mornings: February 28, March 6, 13, 20, 27, and April 3

Substance Abuse: Wednesday Mornings: February 29, March 7, 14, 21, 28, and April 4

Expanded Access: Thursday Afternoons: March 1, 8, 15, 22, 29, and April 5

Preventative Care: Friday Mornings: February 24, March 2, 9, 16, 23, and 30

INCOME

Access To Jobs: Tuesday Afternoons: February 21, 28, March 6, 13, 20, and 27

Jobs Skill Training: Monday Afternoons: February 20, 27, March 5, 12, 19, and 26

Financial Education: Thursday Mornings: February 23, March 1, 8, 15, 22, and 29

BASIC NEEDS

Basic Needs: Wednesday Afternoons: February 29, March 7, 14, 21, 28, and April 4

SITE VISIT OPT OUT OF RESCHEDULE FORM

UWMD staff will have this form available at all Site Visits in case an Organization chooses not to reschedule their Site Visit due to less than 50% attendance. Organization staff must sign this if they decide to opt out of the reschedule option.

Agency Name: ______________________________ Date: ______________

Program Name: ______________________________ Panel Name: ______________

Location of Site Visit: ______________________________

Attendees: ______________________________

____

____

____

____

At least half of the Volunteers on the Grant Panel must attend the program's Site Visit. If fewer than 50% attend the scheduled Site Visit, Panel Leadership and UWMD Staff will ask the Agency if they are interested in rescheduling the Site Visit. Rescheduling is not required and is at the agency's discretion.

☐ Our agency chooses not to reschedule our Site Visit.

Signature ______________________________ Date ______________

Printed Name ______________________________

ORGANIZATION APPLICATION PACKET SUBMISSION RECEIPT

Download this form from the Resource Center of e-CImpact and bring **TWO COPIES** of this completed form with you upon turning in your Complete Organization Application Packet.

Organization: _____

Please fill out the first three columns of the table below with your program application information.

Program Name	Strategy Panel	Date Proposal submitted through e-CImpact	Hardcopies of Program Grant Application Received <u>TO BE COMPLETED BY UW STAFF</u>

Date: ___________________________________ Time: ____

Signature of UW Staff: ____

Signature of Organization Staff: ____

Note: These signatures **DO NOT** denote receipt of the e-CImpact Online Submission or the Complete Organization Application Packet. UW Staff only check for the following items upon receipt of the Organization Application Packet (we will not check to make sure each document required has been submitted):

- THREE (3) hardcopies of each Program Proposal were turned in by November 11, 2011 at 4pm.

Comments:

PROPOSAL EVALUATION TOOL

Organizational Capacity (10 points)			
Questions	**Value**	**Score**	**Comments**
In reference to 4a) Does the applicant clearly describe: • The Organization's history, mission, services, year of incorporation, years of experience with proposed program, uniqueness, and accomplishments/awards? • How the mission and experience of the Organization is consistent with the proposed program? (0 - Not at all, 1 – To Some Extent, 2 – To a Good Extent, 3 - Completely)	3		
In reference to 4b) Does the applicant clearly describe the Organization's overall approach to evaluation, including: • How evaluation efforts and experience are used to improve programming? • The extent of staff, board, and client participation in evaluation-related activities? • Efforts to ensure that programming is current, meets industry standards, and is informed by best practices? • Relationships with formal research or evaluation efforts, colleges, universities, and/or evaluators? (0 - Not at all, 1 – To Some Extent, 2 - To a Good Extent, 3 - Completely)	3		
In reference to 4c) Does the applicant clearly describe efforts to be inclusive with respect to programs, staff, board, and volunteers, as well as progress to date? **Note**: Please also refer to the Board and Staff demographics charts to see if the charts align with the narrative. (0 - Not at all, 1 – To Some Extent, 2 - Completely)	2		
In reference to 4d) Does a meaningful percentage of the board contribute financially to the Organization? **Note**: Nationally, boards average 74% in member giving and those with 100% Board Giving = 46%. Source: Bohse Tips: Board of Directors Series Non-Profit Board Statistics (0 - Less than 74%, 1 - 74% - 99%, 2 – 100%)	2		
SUBTOTAL	**10**	**0**	

Program Plan (28 points)			
Questions	**Value**	**Score**	**Comments**
In reference to 1h) in the Request Summary, does the applicant clearly explain how funding will be utilized? (0 - Not at all, 1 – To Some Extent, 2 – Completely)	2		
In reference to 1a) in the Program Narrative, does the applicant clearly describe the Organization's leadership and key staff/volunteers and their ability to administer the program? (0 - Not at all, 1 – Not Adequately, 2 – To Some Extent, 3 – To a Good Extent, 4 – Completely)	4		

In reference to 2a & 2b) Does the applicant clearly address the following aspects of their program plan? • United 2020 Strategy and Metric addressed • Description of target population • Goals and Outcomes • Detailed description of primary activities • Brief description of secondary activities • Timeline • Description of volunteer activity (0 - Not at all, 1 – Not Adequately, 3 - To Some Extent, 5 – To a Good Extent, 6 – Completely)	6		
In reference to 2a & 2b) Does the applicant clearly explain: • Whether or not the program approach is evidence-based, a best practice, or model program? • Why the particular approach was selected? (0 - Not at all, 1 - Not Adequately, 3 - To Some Extent, 5 – To a Good Extent, 6 - Completely)	6		
In reference to 4a) Does the applicant clearly describe collaborative efforts with respect to the proposed program? (0 - Not at all, 1 - Not Adequately, 3 - To Some Extent, 5 – To a Good Extent, 6 - Completely)	6		
In reference to 4b) Does the applicant clearly explain how their program is different or unique compared to other similar programs in the UWMD service area? (0 - Not at all, 1 - Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 - Completely)	4		
SUBTOTAL	**28**	**0**	

Evaluation (28 points)			
Questions	**Value**	**Score**	**Comments**
In reference to 1a) Does the applicant clearly: • Describe the chosen evaluation method and measurement tool(s) for measuring progress (client feedback, pre/post tests, focus groups, surveys, sampling method, etc.)? • Explain why the chosen evaluation method and measurement tool(s) were selected (best practice, evidence-based, etc.)? • Explain how and when evaluation is administered? • Indicate who is responsible for overseeing evaluation? (0 - Not at all, 2 – Not Adequately, 5 - To Some Extent, 8 – To a Good Extent, 10 - Completely)	10		

Is the information on the attached logic model consistent with the information presented in the overall proposal? Specifically: • Does the information on the logic model under “Resources” and “Activities” align with information presented in the Program Plan? • Do outputs and outcomes listed on the logic model align with information presented in the Evaluation Narrative? • Is it clear which outcome(s) will be reported to United Way at the end of the 2012-2013 funding cycle? (0 - Not at all, 1 - Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 - Completely)	4		
Regarding the attached measurement tool(s), is it clear: • That the tool(s) are capable of measuring the reportable outcome(s) listed in the Evaluation Narrative? • How results are calculated (answer keys, scoring guides, grading scales)? (0 - Not at all, 1 - Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 - Completely)	4		
In reference to 1b) Does the applicant clearly include and explain historical outcome results? If the program is new, is evidence-based justification for the program presented? Do the results or evidence support an investment in this program? (0 - Not at all, 1 - Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 - Completely)	4		
In reference to 2) Are reportable outcomes: • S.M.A.R.T. (Specific, Measurable, Action-Oriented, Realistic, Timed)? • Presented in the proper format (X% (number) of clients will improve by X)? • Related to the strategy of this panel and the larger United 2020 Impact Area Goal? (0 - Not at all, 1 – Not Adequately, 3 - To Some Extent, 5 – To a Good Extent, 6 - Completely)	6		
SUBTOTAL	**28**	**0**	

Program Budget Form & Narrative (4 points)			
Question	**Value**	**Score**	**Comments**
In terms of the proposed program budget and budget narrative: • Is the budget complete with all arithmetic correct? • Are all figures and line items clearly explained? • Were any variances in revenue and expenses adequately explained? • Did the Organization indicate if UWMD funds will be used as a match? • Does the program appear financially sustainable? (0 - Not at all, 1 - Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 - Completely)	4		
SUBTOTAL	**4**	**0**	

SITE VISIT EVALUATION TOOL

Presenter & Presentation (7 points)			
Questions	**Value**	**Score**	**Comments**
1) How prepared was the Organization? Did the Organization manage their time well? (0 - Not at all, 1 - To Some Extent, 2 - To a Good Extent, 3 – Completely)	3		
2) Was information relevant and presented clearly? Did the agency stay on topic? (0 - Not at all, 1 - Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 - Completely)	4		
SUBTOTAL	**7**	**0**	

Alignment (3 points)			
Question	**Value**	**Score**	**Comments**
1) Did the information presented during the Site Visit align with the information presented in the proposal? (0 - Not at all, 1 - To Some Extent, 2 - To a Good Extent, 3 – Completely)	3		
SUBTOTAL	**3**	**0**	

Site Visit Questions (8 points)			
Question	**Value**	**Score**	**Comments**
1) Were all the panel's questions sufficiently answered? (0 - Not at all, 2 – Not Adequately, 4 - To Some Extent, 6 – To a Good Extent, 8 - Completely)	8		
SUBTOTAL	**8**	**0**	

Overall Impression (12 points)			
Questions	**Value**	**Score**	**Comments**
1) Does the Organization appear to have the infrastructure and staff resources necessary to accomplish what is proposed in the request? (0 – Not at all, 1 – Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 – Completely)	4		
2) After attending the Site Visit, do you feel this program meets best investment criteria? (0 – Not at all, 2 – Not Adequately, 4 - To Some Extent, 6 – To a Good Extent, 8 – Completely)	8		
SUBTOTAL	**12**	**0**	

STEWARDSHIP STAFF REVIEW FORM 2011

Agency Name:	Staff:
Audit Date (mo/day/year):	Date Completed:

Audit	**YES/NO**
1. Did the agency submit an audit?	Yes/No
2. Was the year end covered in the audit within 18 months of review date? (No older than fiscal year end 3/19/10)	Yes/No
3. Is there a management /internal control letter included with the audit?	Document Included?
4. If there is a management letter included, is it absent of any material weaknesses and/or significant deficiencies?	Yes/No
5. If there is a management letter included, was it absent of a "going concern"?	Yes/No
6. If there is a management letter included, was it absent of an adverse opinion and/or a disclaimer opinion?	Yes/No
7. Does the auditor's report indicate that the agency complies with all GAAP (generally accepted accounting principles)?	Yes/No
8. Is the auditor's report an "unqualified" opinion?	Yes/No
9. Liquidity: Does the agency have 20 days of cash or more?	Yes/No
10. Program Expenses: Is the percentage 70% or more?	Yes/No
Comments:	

990	**YES/NO**
1. Did the agency submit a 990 or 990EZ?	Yes/No
2. Was the year end covered in the 990/990EZ within 18 months of review date? (No older than fiscal year ending 3/19/10)	Yes/No
Comments:	

Agency Operating Budget	**YES/NO**
1. Did the agency submit an annual operating budget, with comparison to previous year and current year to date actual revenues and expenditures? (2010 budgeted, 2009 & 2010 actuals)	Yes/No
Comments:	

Board Governance	**YES/NO**
1. Did the agency submit a current Board roster, indicating officers and membership on the Executive committee and on all standing committees?	Yes/No
2. Did the agency submit a board calendar for the Board of Directors and Executive Committee from the previous 12 months, including if quorum was met at each	Yes/No

meeting? In addition, did the calendar include the number of board meetings needed to meet the bylaws criteria?	
3. Has the Board of Directors met at least the number of times specified in their bylaws?	Yes/No
4. Has the Board of Directors or Executive Committee had quorum at least 25% of meetings during the previous 12 months?	Yes/No
Comments:	

Unaudited Financials	**YES/NO**
1. Did the agency submit unaudited financial statements dated within the previous 3 months? No later than June 2011	Yes/No
Comments:	

USA PATRIOT Act Compliance	**YES/NO**
1. Did the agency indicate that they comply with all areas of the Patriot Act?	Yes/No
Comments:	

Disclosures	**YES/NO**
1. Is the agency absent of any disclosures that would negatively impact current financial health?	Yes/No
Comments:	

The following documents are only required if agency is a new applicant to 2011, did not pass Stewardship for 2010, or if the documents listed below have changed since 11/2010.

Conflict of Interest Policy	**YES/NO**
1. Did agency submit a conflict of interest policy that includes board members & employees?	Yes/No
Comments:	

Whistleblower's Policy	**YES/NO**
1. Did agency submit a whistleblower's policy that includes board members & employees?	Yes/No
Comments:	

IRS Determination Letter	**YES/NO**
1. Did the agency submit an IRS determination letter showing a non-profit status?	Yes/No
Comments:	

Anti-Discrimination Statement	YES/NO
1. Did the agency submit an anti-discrimination statement that includes clients & employees?	Yes/No
Comments:	

Agency Score An agency will receive a "fail" if any (other than highlighted areas) areas are checked "no".	**Pass/Fail**
Agency Documents To be Reviewed by CPA	Yes/No

COMMENTS

Note: If any of the highlighted portions (#s 4-10 in audit section & disclosure section), are triggered as a "no" that agency's documents will go to a volunteer auditor for review and determination if agency is allowed to submit grant applications for the current year.

STEWARDSHIP DOCUMENTATION CHECKLIST

Service Provider Name: _____

Please use this form as a reference. You will need to complete and print the checklist in eCIMPACT and return a completed hard-copy along with a copy of all required documents to the United Way Office by 4:00 pm Monday, September 19th. You will also be required to upload these documents into the electronic database, e-CImpact by this date/time.

Please submit these documents in the following order:

Required by all applicants (Items 1-10):

☐ 1. **Checklist-** (submitted/completed electronically on e-CImpact – print completed page & submit)

☐ 2. **Audit -** Most recent audited Financial Statements. Service Providers are expected to obtain an audit of their Financial Statements within six months of the end of their fiscal year. The audit is expected to be done within Generally Accepted Accounting Principles. To qualify, the Audit must have a year-end no older than 18 months before the Stewardship deadline **(year end no older than 3/19/2010).**

☐ 3. **Management Letter –** If the most recent audit had a management letter (also known as internal control deficiency letter) with it, please submit a copy of that management letter and your service provider's formal response. (A management letter is a detailed letter from the auditor that is usually addressed to the board of directors or the audit committee. It presents weaknesses identified during the audit and offers recommendations to address them.)

☐ 4. **Tax Return** - Most recent IRS Form 990 or 990EZ. To qualify, the Tax return must have a year-end no older than 18 months before the Stewardship deadline **(year end no older than 3/19/2010).**

☐ 5. **Budget** - Most current Board-approved budget with comparison to previous year and current year to date actual revenues and expenditures.

☐ 6. **Board Roster** – Most current roster of your Board of Directors indicating those who are officers, members of the Executive Committee and all standing committees.

☐ 7. **Board Calendar** – Please submit a calendar of Board meetings and Executive Committee meetings for the previous 12 months. Please indicate for each of these meetings if a quorum was present. Also, please include what the bylaws state are the minimum number of times your Board of Directors is required to meet on an annual basis. *You can see a sample board calendar in the Resource Center of e-CImpact.*

☐ 8. **Unaudited Financial Statements** – Most recent financial statements, no earlier than June 2011, should include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income Statement).

☐ 9. **Patriot Act Compliance** – (submitted/completed electronically on e-CImpact – print completed page & submit) If the Service Provider receives United Way funds and donations, in compliance with the USA PATRIOT (Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism) Act and other counterterrorism laws, the United Way requires that each Service Provider certify that those United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes and executive orders.

☐ 10. **Disclosures** – (submitted/completed electronically on e-CImpact – print completed page & submit) Please list any major changes and/or circumstances, fraud, litigation, investigation or other related occurrences since your most recent audit that would affect the financial health of your Organization. If there are not any disclosures, please indicate such when completing form online.

The following documents (#11-14) are required <u>only</u> if new applicant, agency did not pass Stewardship in 2010, or agency had changes/edits to these documents since 11/8/10.

☐ 11. **<u>Conflict of Interest</u>** – Conflict of interest policy that covers Board Members, officers and key employees. *You can see a sample of a conflict of interest policy in the Resource Center of e-CImpact.*

☐ 12. **<u>Whistleblower's Policy</u>** – Copy of service provider's whistleblower's policy. A whistleblower protection policy establishes procedures to ensure that your Organization's board members, officers, employees and other key individuals can "blow the whistle" by reporting good faith suspicions of illegal, unethical or other inappropriate activity without fear of retaliation. *You can see a sample of a Whistleblower's policy in the Resource Center of e-CImpact*

☐ 13. **<u>IRS Determination Letter</u>** - Most recent IRS determination letter.

☐ 14. **<u>Anti-discrimination Statement</u>** – Service Provider's policy on anti-discrimination. The anti-discrimination statement certifies that the service provider intends to comply with all applicable laws regarding equal opportunities and non-discrimination for employment practices and services to clients and sets forth procedures for such compliance. *You can see a sample of an anti-discrimination statement in the Resource Center of e-CImpact.*

LOGIC MODEL SAMPLE

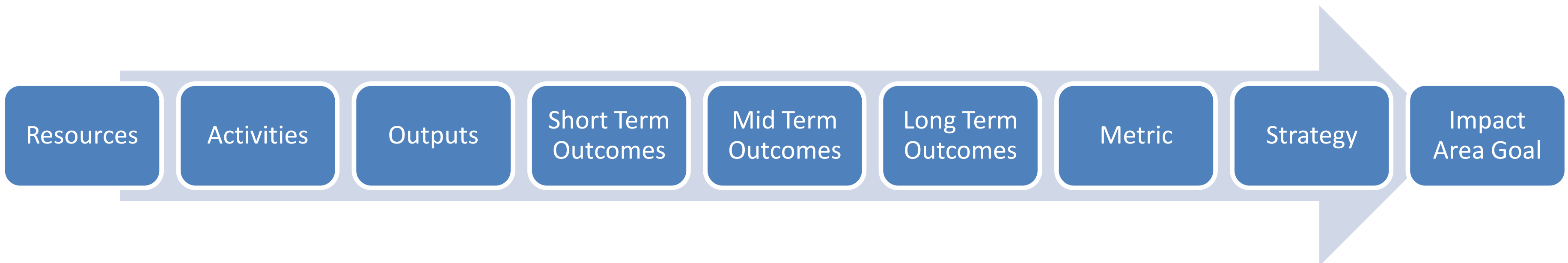
Applicant Agency: Afterschool Achievers
Program Name: Middle School Mentoring Program

Resources	Activities	Outputs	Short Term Outcome	Mid Term Outcome	Long Term Outcome	Metric	Strategy	Impact Area Goal
In order to accomplish our activities we will need the following resources:	In order to address the stated Strategy Objective we will provide the following activities:	Once the stated activities have been provided, we expect the following evidence of service delivery:	If we accomplish our activities, we expect they will lead to the following **short term** change:	If we accomplish our activities, we expect they will lead to the following **mid-term** change:	If we accomplish our activities, we expect they will lead to the following **long term** change:	The Community Metric(s) the program aligns within the United Way RFP	The funding strategy the proposed program aligns within the United Way RFP	If outcomes are successful we expect this long term community change:
•Students in need of mentoring relationships •Community adults seeking opportunities to be mentors •Space to provide programming (school or community center site) •Qualified staff trained to administer and monitor program •Training materials •Funding to cover program costs •Support of school for program	•10 hr training program on building skills needed to mentor a child (offered after work or weekends) •Once match is made, initial meeting of mentor/mentee moderated by program staff to ensure good fit •Mentor/Mentee will meet for 2hrs, one day per week for structured homework and activity time throughout the school year (Sept. – June)	We expect by the end of the school year, 50 students will have been matched with a mentor and have received a minimum of 60 hours of structured mentoring	70% of students will show an increase of at least 20% in school attendance by the mid-point of the school year*	75% of students will show a 10 point increase in at least one subject on the final school year report card*	70% of students will have a B- average in core subject areas on their final school year report card at the end of their second year in the program.	Parent Engagement/ Mentoring Programs Aligned with Goal and Strategies	Students have support and encouragement for educational success from parents/ advocates, and mentors	Prepare 50% more students to succeed in education after high school

WHAT IS A LOGIC MODEL?

A logic model is a systematic and visual way to present a program to a variety of stakeholders. These groups can be both internal (board members, volunteers) and external (funders, potential donors). It allows you to share your understanding of the relationships among the resources you need to operate your program, the activities you plan to conduct, and the changes or results you hope to achieve.

The logic model should flow "logically" though the following process:



Your Planned Work

<u>Resources</u>: include the human, financial, Organizational and community resources a program has available to direct toward doing the work. Also referred to as "inputs"

<u>Activities</u>: the processes, tools, events, technology and actions that are an intentional part of the program implementation. Essentially what the clients "do" in the program

> **NOTE:** Outcomes & Impacts should be **<u>SMART</u>**
>
> (**S**pecific, **M**easurable, **A**ction-Oriented, **R**ealistic & **T**imed)

Your Intended Results

<u>Outputs</u>: the direct products of the program activities (i.e. class attended, number of hours of instruction received, pamphlets distributed)

<u>Outcomes</u>: the specific, measurable, changes in participant's behavior, knowledge, skills, etc. Short-term outcomes should be achievable within a year, with mid and long-term outcomes generally being achievable within 3 years (may vary based on program model). Remember to mark with an asterisk (*) which outcomes will be reported on at funding year end.

<u>Metric & Strategy</u>: The community measurement(s) and corresponding funding strategy the program aligns with (**these come directly from pages 6-8 of the RFP**)

<u>Impact Area Goal</u>: the fundamental intended changes occurring in communities as a result of program activities long term (**this is the *<u>United 2020</u>* <u>Goal</u> and comes directly from pages 6-8 of the RFP**)

COMMUNITY IMPACT STAFF QUICK REFERENCE GUIDE

COMMUNITY IMPACT

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