



**FY 2012-2014  
Community Impact Partner Fund  
RFP Training**

**November 5, 2010**



# Session Overview

- Community Impact Overview
- RFP Structure and Timeline
- Submission Requirements and Examples
- Database Updates and Training

# UWECI Priorities



# Community Goals

## **Early Childhood Development and Care**

Increase the number of kindergarteners from economically disadvantaged households who are ready for school by 50%

## **Positive Youth Development**

Increase the number of youth from economically disadvantaged households with 21<sup>st</sup> century skills by 25%

## **Financial Stability**

Increase the number of financially stable households by 15%.

## **Health**

Increase healthy choices by 10%.

## **Independence**

Increase the number of older adults who are able to meet their daily needs by 25%.

# UWECI Staff Contacts

## **Early Childhood Development and Care RFP**

Caroline Stout at [cstout@uweci.org](mailto:cstout@uweci.org) or (319) 398-5372 Ext. 28

## **Positive Youth Development RFP**

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## **Financial Stability RFP**

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## **Health RFP**

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## **Accountability Review/Other**

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# RFP Process Timeline

January 7, 2011	Last date to obtain technical assistance from staff
January 13, 2011 (noon)	Proposals and due diligence documents due
January-May 1, 2011	Solutions teams review proposals
March 2011	Site visits
May 2011	Announce awards

# Solutions Team Review

- Smaller groups of volunteers will be formed around types of strategies proposed.
- The scoring tool will be utilized by all volunteers to ensure consistency of review.
- Solutions teams will recommend award amounts and type of funding.

# Types of Funding To Be Awarded

## Outcome Funding

- ❑ > \$20,000 per fiscal year
- ❑ Demonstrated outcomes that align with intermediate outcomes and community goals
- ❑ Partners submit logic models and mid-year and year-end reports

## Community Basics Funding

- ❑ Renewable contracts for strategies that meet one or more of the following criteria:
  - ❑ Award less than \$20,000 per fiscal year and/or
  - ❑ Activities are critical services that are short-term and transactional
- ❑ Partners provide regular reporting of activities, #'s served and expenditures

# Checkpoint

**Questions?**

# Section A: Organization Information (0 points)

## **A1. Agency Mission Statement**

- Do not include vision statement, goals or historical information

## **A2. General Overview of agency's primary services and purpose.**

- No points awarded for this section
- Set context for how the strategy aligns with the agency's mission

## A2. Agency's Primary Services and Purpose Example

- **Prevention Outreach Services**

Description: Staff network with other social service agencies and churches to identify clients who may be at risk of becoming homeless. Provide case management services to these individuals and families.

Purpose: Engage individuals and families at risk of becoming homeless with services that prevent entrance into an emergency shelter.

- **Shelter Services**

Description: Provide shelter, bedding, sanitary supplies, emergency food, case management (motivational interviewing) to set goals, educational sessions, and referrals to resources to address barriers.

Purpose: Address individuals/families immediate shelter need and connect residents to needed resources.

- **Access to Support Services**

Description: Clients are provided referrals to basic supports (clothing, meal sites) and other referrals based on obstacles and goals identified in counseling; assisted with finding permanent housing and rental support; offered mentorship from clients who have successfully completed the program and/or skilled volunteers; provided extended case management (wrap around services) to residents who have successfully completed the shelter-based program (up to 6 months) and individuals/families who have accessed prevention services (up to 3 months).

Purpose: Provide extended services and wrap around supports to individuals/families to assist them in securing and maintaining permanent housing.

# Section B: Impact Strategy Overview (20 points)

## B1. Name of the Proposed Strategy

- Brief description of the strategy
- Unique
- Examples:
  - Adult Basic Education
  - Volunteer Transportation
  - Achievement Beyond the Classroom (ABC)
- Goal is to avoid similar strategy names:
  - Quality in Early Care and Education
  - Quality Programming-Early Child Development
  - Quality Care and Education

# Section B: Impact Strategy Overview (20 points)

## B2. Brief Description of Proposed Strategy

- Limited to 25 words
- Sets context
- Used to create a proposal profile for volunteers

### **Example: HACAP Rural Senior Services**

Provides home and community based care and caregiver supports including: home delivered meals, center based dining, chore, and medical equipment loans.

# RFP: Focus Area Framework

Sets the context for:

- Community goal
- Target population(s)
- Types of strategies in which UWECI is likely to invest

Provides community data and sources

# Section B: Impact Strategy Overview (20 points)

## B3. Community Need Addressed Through the Strategy

- What is the community need(s) the strategy is responding to?
- How does the strategy directly influence the community need(s)?
  - Population
  - Activities

# Section B: Impact Strategy Overview (20 points)

## B4. Client Centered and Cultural Competence- What is it?

### Client Centered

- Services are responsive to the condition of the client. May not necessarily be individualized in all aspects.

### Cultural Competence

- Process by which individuals and systems respond respectfully and effectively to people of all cultures, languages, classes, races, ethnic backgrounds, religion and within cultures.
- Source for Reference: “Indicators for the Achievement of the NASW Standards for Cultural Competence in Social Work Practice”.

<http://www.naswdc.org/practice/standards/NASWCulturalStandardsIndicators2006.pdf>

# Section B: Impact Strategy Overview (20 points)

## B4. Client Centered and Cultural Competence

- How are the breadth of services responsive to the condition of the client?
- What policies or procedures are in place that support client centered and cultural competence practices?
- What type of training is provided to staff to support client centered services and cultural competence practices and how often?

# Section B: Impact Strategy Overview (20 points)

## B4. Client Centered and Cultural Competence

### Example: Catherine McAuley Center: Adult Basic Education

#### Responsive Services-

- Tutoring to clients from 49 different countries
- Case management
- Solicit culturally diverse foods for food pantry

#### Procedures-

- Volunteer application and matching with students

#### Training-

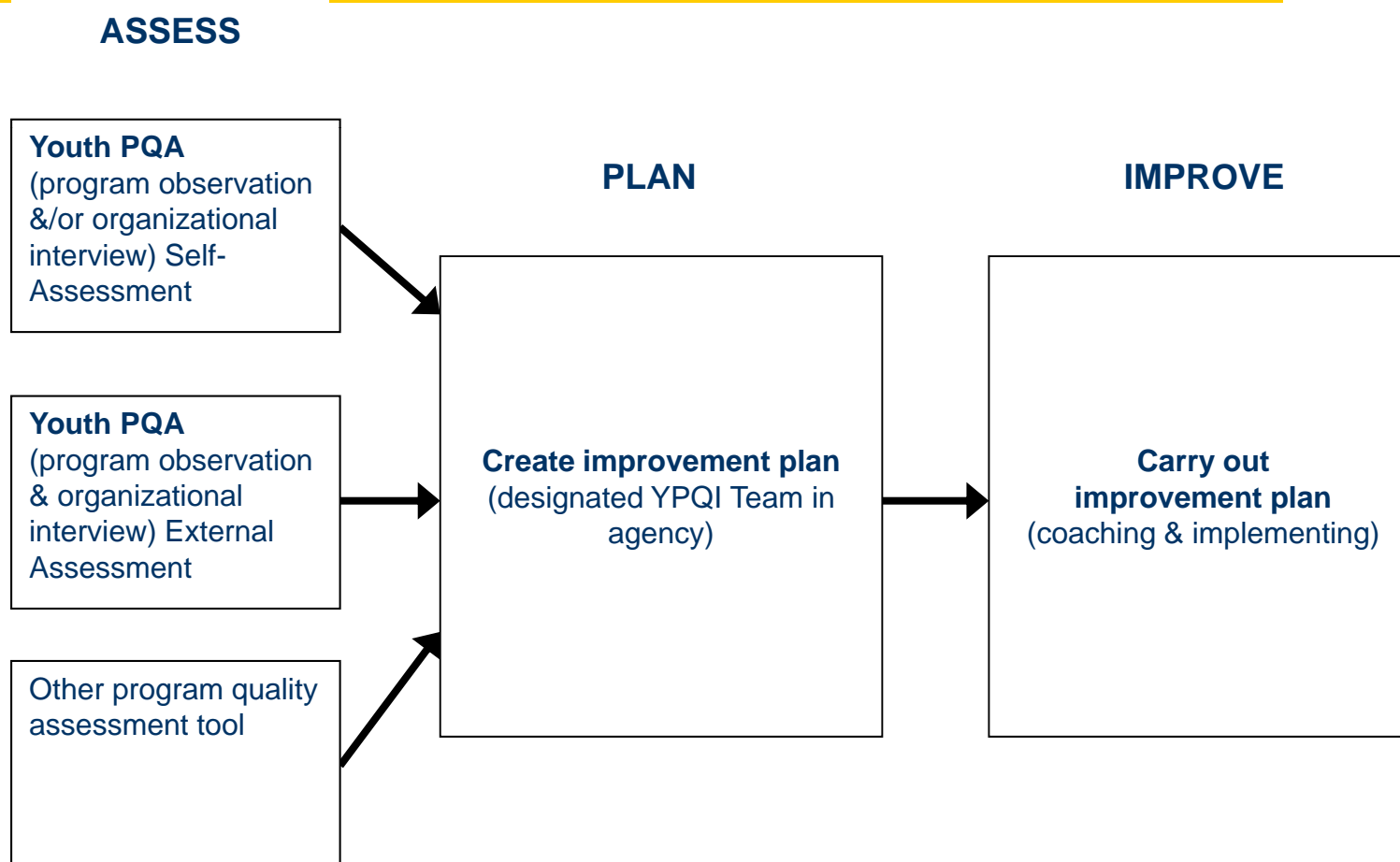
- Agency would want to detail training staff engage in and how often.

## Section B: Impact Strategy Overview (20 points)

### B5. Program Quality Assurances

- What steps does your organization take to assess and improve the quality of its programs? What are the components of your improvement plan? What procedures do you use to implement your plan?
  
- What is the schedule for assessing program quality? How often does this occur?
  - Formal assessments, Credentialing, Accreditation, Licensing
  - Formal program evaluation
  
- Examples:
  - Certified Addiction Counselor through the Iowa Board of Certification
  - CARF (Commission on Accreditation of Rehabilitation Facilities)
  - Iowa Family Support Credential

## B5. Program Quality Assurances Example: Youth Program Quality Improvement Process



# Section B: Impact Strategy Overview (20 points)

## B6. Intermediate Outcome Alignment

Using the options listed in the RFP, please list the intermediate outcome(s) your strategy aligns with.

- Limit of 2 intermediate outcomes for all RFP's except for the "Youth Development" RFP.
- Youth Development RFP limit- 3 intermediate outcomes

### **Example:**

- Basic Needs: Low income families utilize a safety net of services that support their basic essential needs.



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# Checkpoint

Questions?

# Section C: Client Identification and Engagement (20 points)

## C1. Target Population

- Does the target population you describe align with the target population outlined in the focus area framework?
  - Demographics (male, female, race, age, household makeup, etc)
  - Geographic reach (Benton, Cedar, Iowa, Jones, Linn, Washington counties)
  - Income – Federal Poverty Guideline (FPL)
  - Trends
  - Needs
  - # of individuals you propose to serve in FY2012 (July 1, 2011-June 30, 2012)
  - # of individuals on a waiting list (if applicable)
  
- Provide as much quantitative description of each item as possible

# Section C: Client Identification and Engagement (20 points)

## C1. Target Population Example: YMCA

Propose to serve **23,000 unduplicated individuals** with this strategy in FY2012; 32% (7,427) of which will receive YMCA financial assistance.

- 10,900 youth ages 1-17  
28% (3,052) will receive financial assistance
- 10,250 people ages 18-54  
38% (3,895) will receive financial assistance
- 1,850 people ages 55+  
26% (481) will receive financial assistance

# Section C: Client Identification and Engagement (20 points)

## C2. Organization Experience

- Clarify the length of time the agency has been providing the types of services within the proposed strategy.

### Example: Willis Dady

#### **Prevention Outreach- 1 year plus**

- Rental assistance (STRAP) implemented in late 2009
- Outreach to persons/households at risk of becoming homeless (“Walk-ins” while temporarily re-located to 1<sup>st</sup> Avenue during summer of 2010)

#### **Shelter Services- 33 years**

#### **Access to Support Services (case management)- 5 years**

# Section C: Client Identification and Engagement (20 points)

## C3. Outreach Techniques

- How does the strategy connect with the target population identified?
  - Intentional Reach
  - Referral Networks

### **Example: Foundation 2 Transitional Living Program**

Background- Provides outreach to youth ages 16-21 that are homeless and lacking safe, stable living situations.

- Outreach staff regularly visit areas that attract young people such as the public library, parks, and coffee shops.
- Presentations to community providers
- Orientation at Metro High School and area High Schools
- Referrals to the Transitional Living Program (TLP) from:
  - Other F2 programs
  - Community providers

# Section C: Client Identification and Engagement (20 points)

## C4. Criteria and/or Eligibility Guidelines

- Who is eligible to receive your services?
  - Gender
  - Household type/ Family Makeup
  - Income level
  
- Describe assessment procedures. What process does the strategy use to determine:
  - if a client/household is eligible for services
  - client's individual needs

# Section C: Client Identification and Engagement (20 points)

## C4. Criteria and/or Eligibility Guidelines

Example of Assessment Procedures: Horizons Mental Health Counseling

Client's individual needs are predominately identified through self-report, collateral sources, and diagnostic assessment tools.

- Intake Paperwork
- Diagnostic interview  
covering the presenting problem, symptoms, medical history, family history, available support systems, other service providers, stressors such as financial, legal, basic needs struggles, a client's strengths and liabilities and risk factors.
- For adults a depression, anxiety and stress assessments are completed.
- When working with children counselors also obtain developmental and educational histories.



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# Checkpoint

Questions?

# Section D: Strategy Design (30 points)

- **Important Note-**

Answer questions in Section D and E for each Intermediate Outcome to which your strategy aligns.

This applies to all proposals that are articulating specific services/activities that align with more than one intermediate outcome.

# Section D: Strategy Design (30 points)

## Youth Development RFP Example

**Intermediate Outcome: Leading- Youth are able to work collaboratively with others toward a common goal.**

- D1.- D7. Label and respond to each question
- E1.- E3. Label and respond to each question

**Intermediate Outcome: Thriving- Youth are able to act in ways that best ensure current and future physical health for self and others.**

- D1.- D7. Label and respond to each question
- E1.- E3. Label and respond to each question

# Section D: Strategy Design (30 points)

## D1. Describe Services and Activities

Clearly connect population needs described in Section C with the services and activities provided through the strategy.

- Need
- Services and activities that address community need

If serving more than one population, do unique populations receive different services?

# Section D: Strategy Design (30 points)

## D1. Describe Services and Activities Example

- In-home visitation ...
- Weekly group meetings

Bright Futures provides weekly group meetings that include education and support for young adults who are pregnant or parenting a young child. Each meeting provides a light meal, on-site childcare with age-appropriate learning activities, parent/child activity time, and parenting discussion groups. Transportation is provided as needed. Providing a meal, childcare, and transportation reduces some of the barriers that would otherwise prevent participants from attending group. The parent/child activity times allow the opportunity for parents to implement parenting skills they learn, while under the guidance of YPN staff and volunteers. Discussion groups include research-based and best practice information on a wide variety of parenting topics, thus providing education to parents as well as an informal support structure for friendship and learning from peers...

# Section D: Strategy Design (30 points)

## D2. How Does the Strategy Operate?

- Breadth- variety of activities in which clients participate within and across programs
- Duration- length of participation over time
- Intensity- amount of time a client attends during a give period (e.g. hours per day, days per week, sessions per month, etc.)
- Location- the place that services are provided (e.g. in clients home, designated community sites, etc. )

# Section D: Strategy Design (30 points)

## D3. Collaboration and Coordination

### Relevant to this strategy....

- Do clients receive services from other parts of your organization?
- Do clients receive services from another organization?

### Other questions to consider....

- How are client services coordinated with other providers (if applicable)?
- What referral networks are in place to support this strategy?



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# Section D: Strategy Design (30 points)

## D4. Staffing

- # of FTE's that support the entire strategy.  
(This is not limited to # of FTE's that agency may be requesting funds to support)
- Roles of FTE that will support the strategy
- Qualifications of staff

# Section D: Strategy Design (30 points)

## D5. Volunteer Engagement

- What role do volunteers have in the strategy?
- How many volunteers contribute to the strategy?
- How regularly do they participate?

### Example: Cedar County Volunteer Transportation

Background: Provide personalized transportation for frail adults in Cedar County who need rides to medical appointments within the county and to hospitals and clinics in Iowa City, Cedar Rapids, and Davenport.

- Role of volunteers- transport elderly to destination, provide physical assistance with wheelchair etc, help rider navigate medical facilities, etc.
- Number of volunteers- 53 volunteers
- Participation- varies by volunteer interest and availability. Some volunteers transport daily and others transport once a month.



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# Section D: Strategy Design (30 points)

## D6. Other Resources Utilized

- Outside of staffing and volunteers, What resources is the strategy dependent upon, other than staff and volunteers?
- Examples: equipment, space, in-kind, etc.

# Section D: Strategy Design (30 points)

## D7. Research Used to Develop the Strategy

Reference research literature, models and/or best practices that advised:

- Selection of services provided
- Hours that services are offered/available
- Curriculum that is utilized
- How the strategy is staffed

# Checkpoint

**Questions?**

# Section E: Evaluation (25 points)

## E1. Measurement Plan

- Who will be evaluated?
  - All clients served? A sample?
  
- What is your methodology for calculating your base?
  - If a sample, describe how many out of the total.
  - What method will you use to determine who is evaluated?
  
- When will you measure?
  
- How often will you measure?

# Section E: Evaluation (25 points)

## E2. Measurement Tool(s)

- Identify the measurement tool(s) that will be used and note the source
  - Published tool
  - Created by the agency
- Why was the tool chosen?
- How do you derive your indicator measurements from the tool(s)?
  - Identify specific questions (site question number(s)) that inform your indicator results.
- Upload a copy of each tool in the database

# Section E: Evaluation (25 points)

## E3. Determining Success

- How will you know that your services are successful?
- How will you evaluate:
  - the amount you accomplished?
  - how well you achieved your results?
  - if your clients are better off?
- How do you incorporate client input into your evaluation?
- Describe your efforts to use objective measures?

# Section E: Evaluation (25 points)

## E3. Determining Success Examples

- Methods to gain client input
  - written or verbal feedback at end of session
  - client surveys
  - Interviews
  - representation on advisory or other boards

# Community Impact Database

- Instructions for completing Community Impact Database reporting available on UWECEI Website
  - Mid-Year FY2011
  - Proposed FY2012
- November 9<sup>th</sup> Database Training scheduled for 10:00 AM at the United Way Office for new agency staff

# Community Impact Database

## Key Changes

- Outcome Descriptions should match Intermediate Outcome language.
- Indicator Descriptions should match common indicator language.
- Submission Report now available to show which pieces of information are still needing to be submitted.

# Checkpoint

**Questions?**

# Section F: Financial: Budgets and Request Justification (30 points)

## F1. Impact Strategy Budget

- **Attachment F1: Impact Strategy Budget Form**
  - Reflect all sources of income and related expenses.
  - UWECI should not be the only source of income.
  - Budget figures should coincide with the CIPF grant cycle (July 1-June 30).
  - Schedules E, F, and G
  - Funding requested should not exceed 70% of the total strategy budget.

# Section F: Financial: Budgets and Request Justification (30 points)

## F1. Impact Strategy Budget

### ➤ Narrative

Provide an explanation that gives additional information about the Strategy Budget line items that you feel are needed, including:

- Line item variances > \$10,000 or > 10%
- Schedules E,F and G
- Budget deficits of any size- explanation and anticipated resolution
- Financial opportunities and threats

# Section F: Financial: Budgets and Request Justification (30 points)

## F2. Funding Request Justification Form

### Attachment F2: Funding Request Justification Form

- Complete 1 form for each Intermediate Outcome the application is proposing alignment with.
  
- Purpose: Primary tool to set context for the amount of funding requested.
  - **Component s specific to UWECI funding requested**
    - Activities
    - Amount of funding requested to support each activity
    - Outline how funding requested for each activity will be spent
  
  - **Components relative to the collective strategy/total cost**
    - Describe/define a unit of service
    - Provide estimated cost for each unit of service
  
- May modify form to suit needs, however all information requested must be addressed.

# **Section F: Financial: Budgets and Request Justification (30 points)**

## **F2. Funding Request Justification Form**

**Attachment F2: Funding Request Justification Form Example**

**Willis Dady Emergency Shelter: Tim Wilson  
Reference Handout**

# Section F: Financial: Budgets and Request Justification (30 points)

## F2. Funding Request Justification From

### Funding Request Narrative

- Goal- set context for the funding requested
  - Administrative rate
  - Revenue streams that support the strategy and funding restrictions they may impose

# Section F: Financial: Budgets and Request Justification (30 points)

## F3. Leveraged or Matching Funds

- Sources and amount of dollars that you do or would be able to leverage
- or
- funds you would be eligible to receive if you are awarded UWECEI funding.

# Checkpoint

**Questions?**

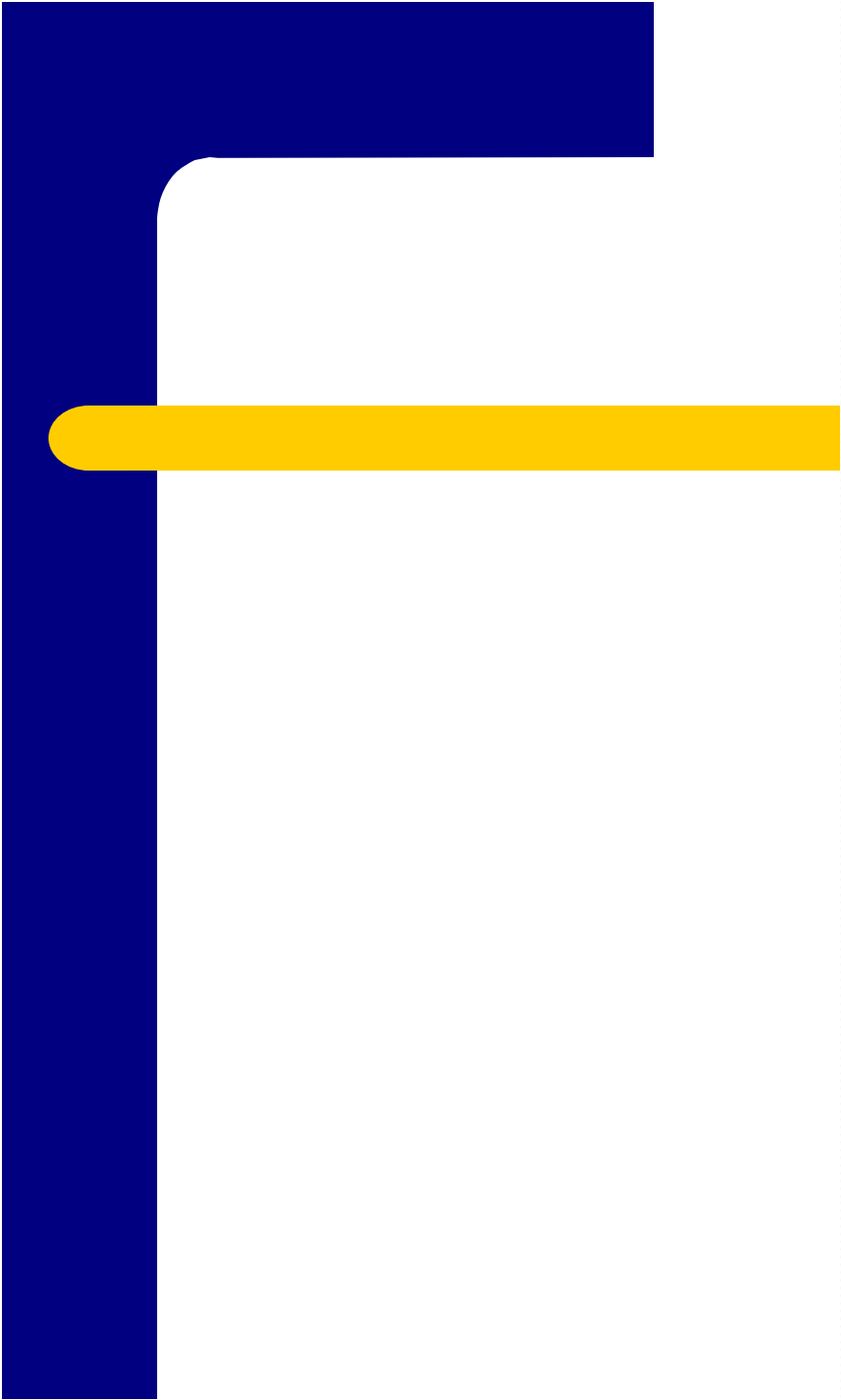
# Cover Page

- **Alignment with Community Impact Focus Area**
  - Select the one Focus Area for which the application is requesting United Way funding.
- **Funding and Fiscal Information**
  - List all other strategies requesting CIPF
  - Focus area
  - Amount received in FY2011
  - Amount requested in FY2012

# Guidelines for Narrative

## Formatting:

- Create a Table of Contents that clearly identifies the sections and attachments
- Organize and label the sections of your proposal using the outline format provided in the RFP. For example:
  - A. Organization Information
    - A1. Agency Mission
    - A2. Primary Services and Purpose
  - B. Impact Strategy
    - B1. Strategy Name
    - B2. Strategy Description



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Attachment A	Logic Model
Attachment B	Outcomes and Performance Measures
Attachment C	Program Implementation Diagram
Attachment D	Program Outcomes
Attachment E	Key Personnel Bios
Attachment F	Board of Directors
Appendix I	Agency Budget
Appendix II	Program Budget
Appendix III	Program Demographics

# Guidelines for Narrative

## Page Count:

- The total length of sections A through F should not exceed twenty (20) pages
- The total page count does not include requested attachments.
- Do not include any attachments not specifically requested in the RFP.

# Guidelines for Narrative

## Content:

- Can use graphs, tables, and bullets to help clarify content
- Specificity is desired—whenever possible provide quantitative information
- With every question, make sure you are providing detail on Who, What, Where, When, Why, and How Many as is appropriate to the question

# Submission Requirements

- Double-spaced text
- One-inch margins
- 12-point font
- 8.5 x 11 inch paper
- Numbered pages
- Collate your document before scanning or saving electronically
- If submitting proposal in more than one document, clearly label and number your documents so they can be assembled appropriately.



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**Check Point**

**Questions?**

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**Community Impact Partner Fund  
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