2020 SAFETY NET FUNDING APPLICANT GUIDE

UNITED WAY OF GREATER ST. LOUIS

DEADLINE: Tuesday, March 10, 2020 at 5 p.m.

Helping people.

United Way

Greater St. Louis

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Creating an Account

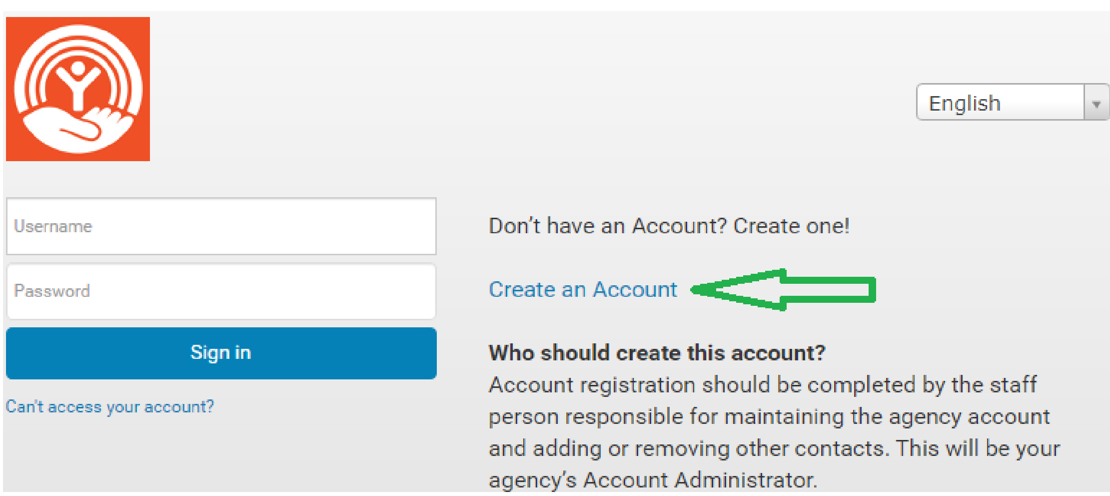
Every agency applying for funding through United Way will need to create an organizational account in Foundation Connect, United Way's new grants management system. Once an organizational account is created, individual accounts can be created for staff members on the organizational account; this can include staff who will be working on and/or reviewing the application.

One agency staff person should be identified as the [Account Administrator](). This person should do the initial setup of the organizational account and will serve as the primary contact for technical issues related to the account. This person will be responsible for maintaining the agency account and adding or removing other staff contacts.

To create an organizational account for your agency on United Way's Foundation Connect system:

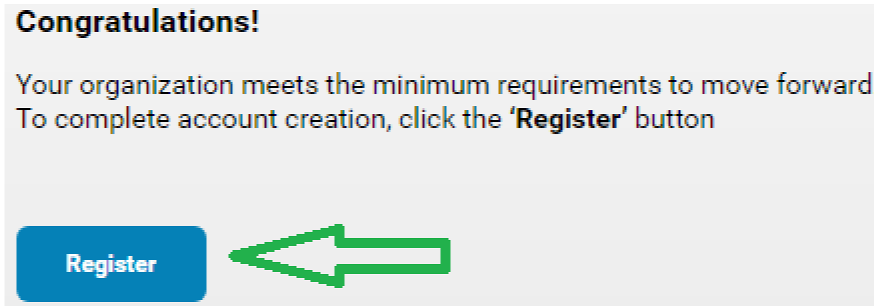
1. Go to the grantee community login page: http://unitedwaystl.force.com/grantee

2. Click on the "Create an Account" link.



3. In order to proceed, you will be asked to answer the following questions to ensure your agency's eligibility to receive funding through United Way:
   - Is your organization a recognized 501(c)(3)?
   - Does your organization currently or will you, as a result of this funding, serve clients that reside in one or more of the following counties? MISSOURI (Franklin, Jefferson, Lincoln, St. Charles, St. Louis City, St. Louis, Warren) or ILLINOIS (Calhoun, Clinton, Greene, Jersey, Macoupin, Madison, Monroe, Randolph, St. Clair)

4. Once you have confirmed eligibility, you will be taken to a landing page where you can click on the “Register” button to create accounts for both the organization and the Account Administrator.



5. To register, you will be prompted to complete Step 1 and enter information for the Account Administrator. (See the FAQ Section to determine who should register as your agency’s Account Administrator.)

6. In Step 2 of the registration process, you will enter the requested information for your organization.

   In this step, you will be asked to select a primary Impact Area under which the majority of your agency’s work could be categorized. While it is not uncommon for an organization’s services to address multiple types of needs, every funded agency will be assigned to a primary Impact Area. Please review the Impact Area descriptions in the table below and select the area that most closely reflects your agency’s mission and primary focus. (It is possible United Way staff may reassign your agency upon further review.)

Basic Needs	Establish Financial Stability	Foster Learning	Improve Health	Strengthen Communities
Supporting people’s most basic needs not only provides immediate support, but also positions them for independence later.	Financial stability ensures that families and individuals have the income and resources needed to address basic needs and thrive in all aspects of their lives.	Providing access to quality education empowers people to reach their full potential.	Health is vital for children to grow and develop and for adults to experience full and productive lives.	A robust and safe community can strengthen and enhance the lives of community members, affording them the necessary tools to thrive.

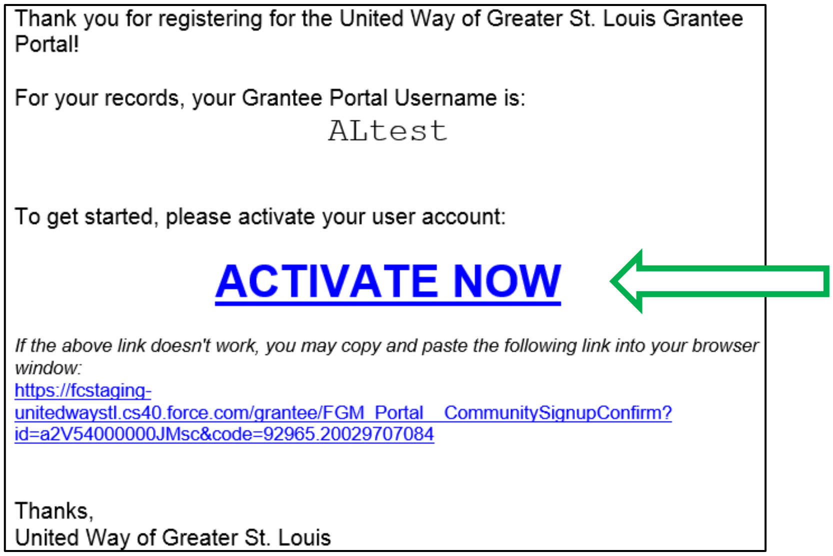
Basic Needs	Establish Financial Stability	Foster Learning	Improve Health	Strengthen Communities
Topics comprising this impact area include: • Crisis Intervention • Food Security • Housing Security • Legal Assistance • Transportation	Topics comprising this impact area include: • Debt • Financial Education • Financial Safety Net • Income • Jobs	Topics comprising this impact area include: • Child Welfare • Early Childhood Education • K-12 Education & Out-of-School Time • Post-Secondary Education	Topics comprising this impact area include: • Access to Healthcare • Aging & Senior Support • Physical Health • Behavioral Health & Substance Abuse • Services for Individuals with Disabilities	Topics comprising this impact area include: • Built Environment • Community Building • Disaster Preparedness & Response • Justice System • Safety

7. In Step 3, set up the Account Administrator login information. The default username will be the portion of the Account Administrator's email address that comes before the @. This can be changed if desired, but the username cannot contain an @.

   The password may be between 8 and 20 characters and must contain a capital letter, lower case letter, number, and special character. **Your password cannot contain or be the same as your username.**

8. Once you have completed all required fields and agreed to the Terms and Conditions, click on the "Register" button. You will be directed to check the Account Administrator's email address to confirm the address and activate the account.

9. Click on the link in the email to active your organization's account.


Thank you for registering for the United Way of Greater St. Louis Grantee Portal!

For your records, your Grantee Portal Username is:
ALtest

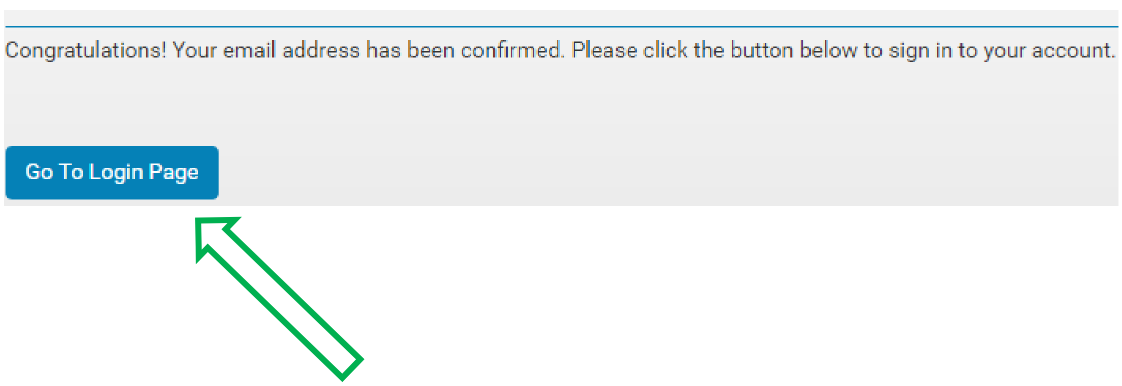
To get started, please activate your user account:

ACTIVATE NOW

If the above link doesn't work, you may copy and paste the following link into your browser window:
https://fcstaging-unitedwaystl.cs40.force.com/grantee/FGM_Portal__CommunitySignupConfirm?id=a2V54000000JMsc&code=92965.20029707084

Thanks,
United Way of Greater St. Louis

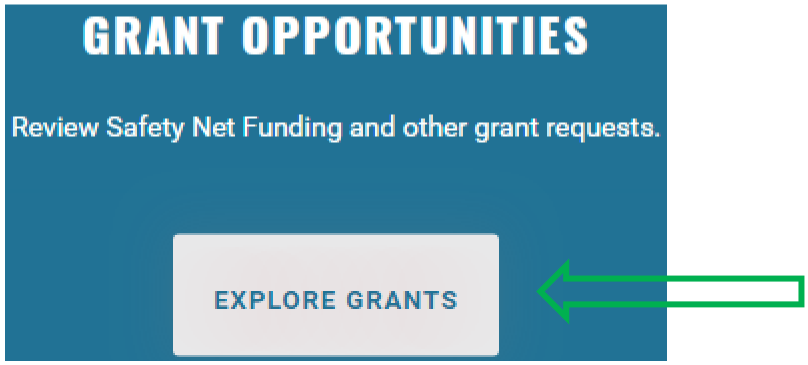
10. This will direct you to a confirmation page with a button that will return you to the login page, where you will be able to log in using the Account Administrator credentials. Upon login, you have successfully created an organizational account for your agency and individual account for your Account Administrator.

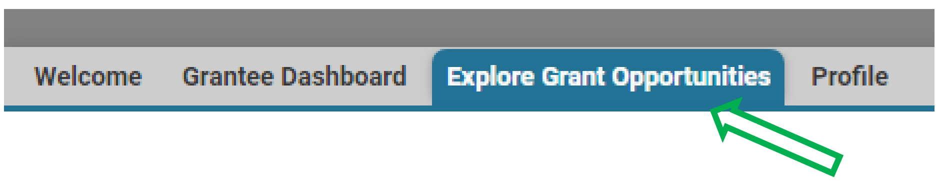


Beginning an Application

Once your organization has [created an account](), you can begin a funding application. To begin an application for funding:

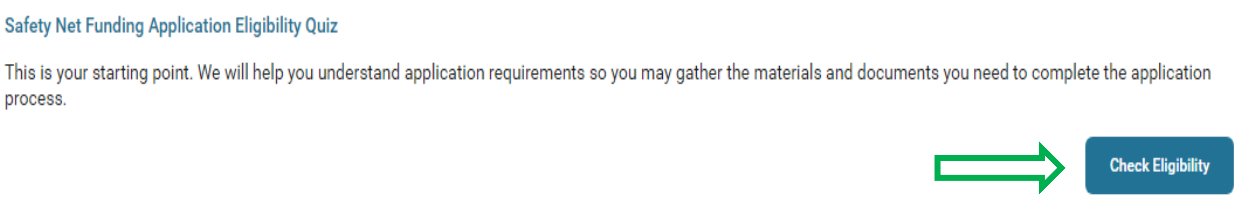
1. Log in to the [unitedwaystl.force.com/grantee]() site. Click on "Explore Grants" from the Welcome Page or go to the "Explore Grant Opportunities" tab at the top of the page:



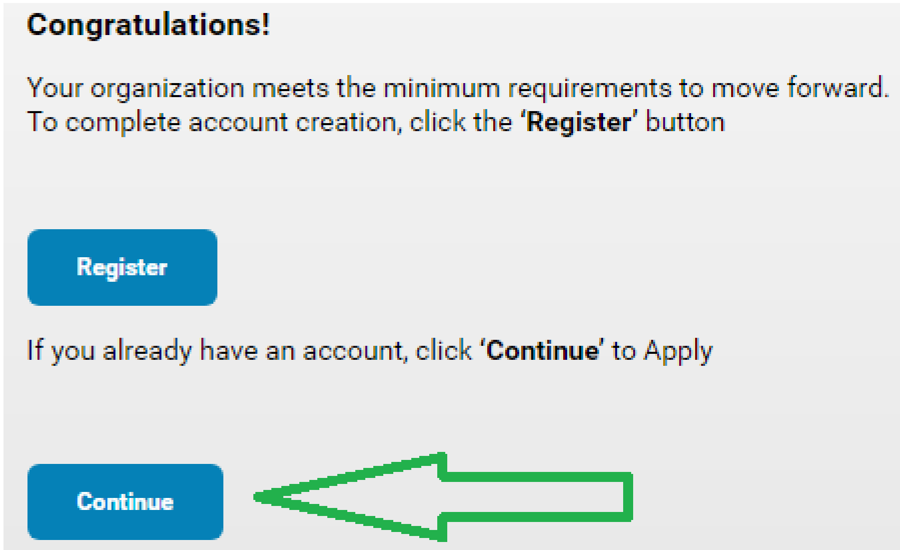


2. Click on the link for the "2020 Safety Net Funding Application".

3. After reading the description and instructions, click on the "Check Eligibility" button on the bottom right of the page to begin a set of eight questions to verify that you have the required documentation to apply or will be able to acquire and submit it by the application deadline.

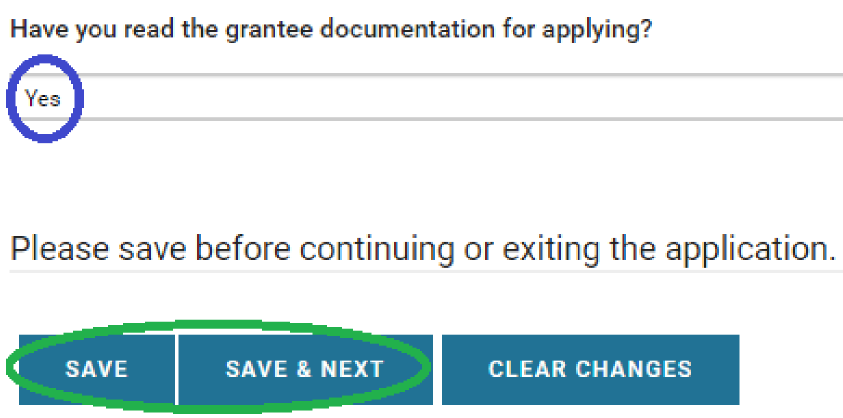


4. Once you indicate that you do or will have the required documentation, click "Continue" on the landing page to begin your application.

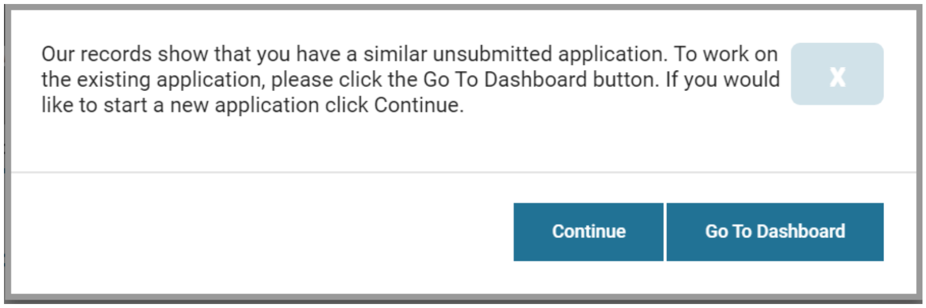


Please note: If you select "Register" rather than "Continue" you will be taken to the Grantee Dashboard where you will need to click "Explore Grant Opportunities" and repeat Steps 2-6 listed above.

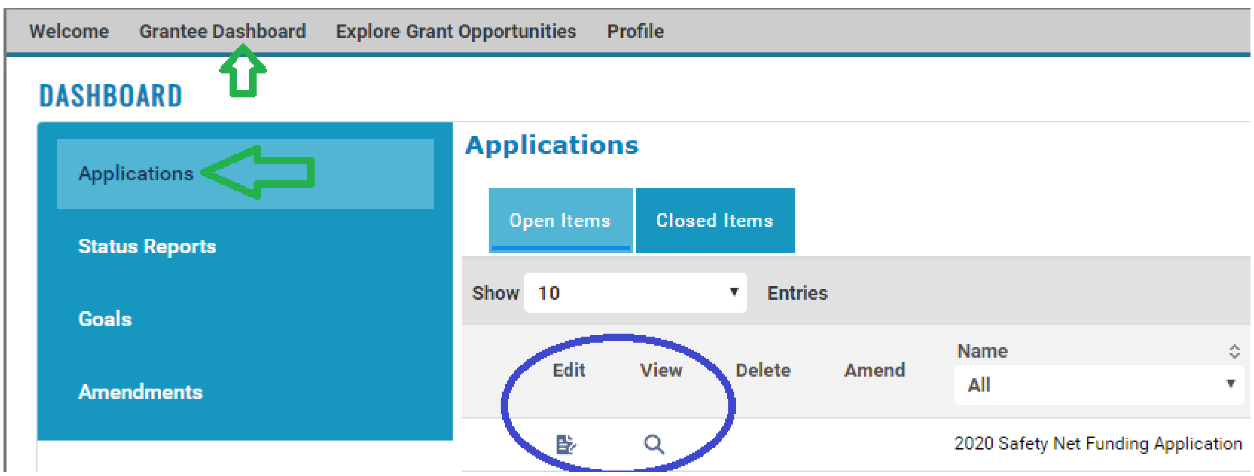
5. The first tab of the application, entitled "Start Here" will ask you to confirm that you have read the RFP and instructions regarding this funding opportunity. Once you have done so, select "Yes" from the drop-down menu and click either the "Save" or "Save & Next" button on the bottom left to save a copy of your new application and move on to the My Team Tab. Choosing one of the save options at this point is what creates your application.



Please note: If you begin an application but someone from your organization has already started one, then you may see the notification below. By clicking "Go To Dashboard" you can work on your agency's current application.



6. You can view and access saved applications through the Grantee Dashboard by clicking on the "Grantee Dashboard" tab at the top of the page and selecting "Applications" from the menu on the left side of the page. This will pull up a list of any open applications. To view an application, click on the magnifying glass in the "View" column. To edit an application, click on the pencil and paper icon in the "Edit" column.



Important Tips

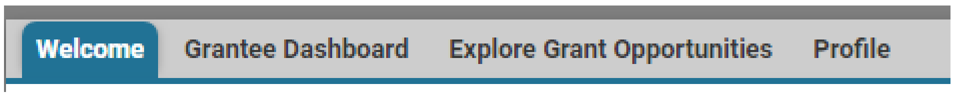
1. For support during the application process, contact: grantsupport@stl.unitedway.org.
2. We recommend saving before you navigate to a new tab or away from the application. Save buttons are located at the bottom of each application tab and form.
3. If you are copying and pasting into question fields and your pasted response exceeds the character limit for the question, your response will be cut off at the character limit. You should be alerted that you have reached the limit by the character counter and the outline of the question box changing color. Please scroll to the bottom of your responses to check that nothing has been lost.
4. If multiple agency staff members are collaborating on an application:
    a. We recommend ensuring that only one person is working in the application at a time to prevent the loss of any changes or progress.
    b. You will not be able to see each other's changes until they are saved by the person making the changes and collaborators refresh their views of the application and/or move between sections.
5. To print a copy of your application at any time, go to the Applications Tab of the Grantee Dashboard and click on the magnifying glass next to the application listing to "View" the application. When viewing the application, you can click on the "Review/Print" button in the upper right corner. This will switch to a print compatible view, and then you can click on the "Print" button in the upper right corner to print the application or save a PDF by selecting your computer's "Print to PDF option".
    a. **Please note** that any program forms and the budget form will not be included in the printed or PDF copy of the application. In order to print or save a PDF of a program or budget form, you must navigate to the form in the application and select "View". Then you can use your browser's print function to either print a copy of the form or save it as a PDF.

Navigating the Site

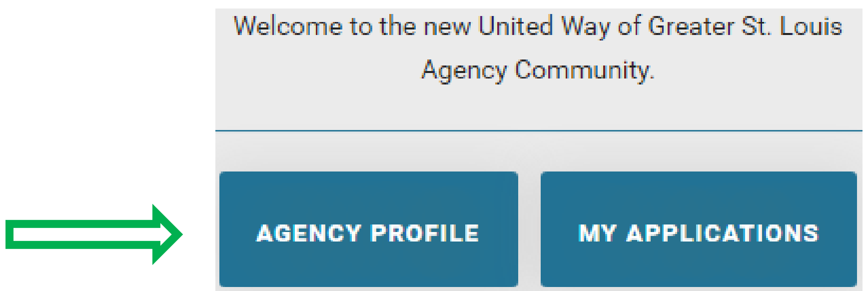
Once you have started your application for United Way funding, a few tips will help you successfully navigate the Foundation Connect site.

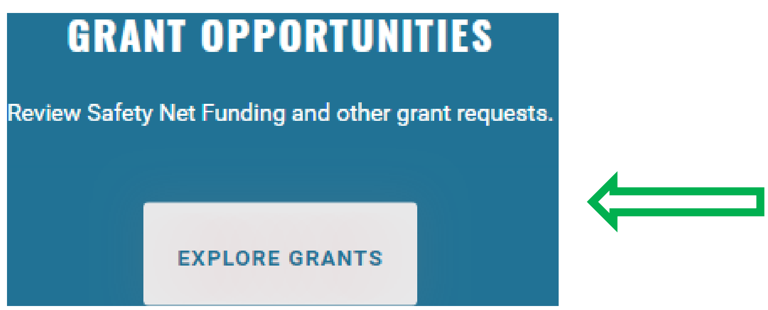
Site Navigation Tabs

Once logged in, you can navigate around the site anytime using the tabs at the top left.

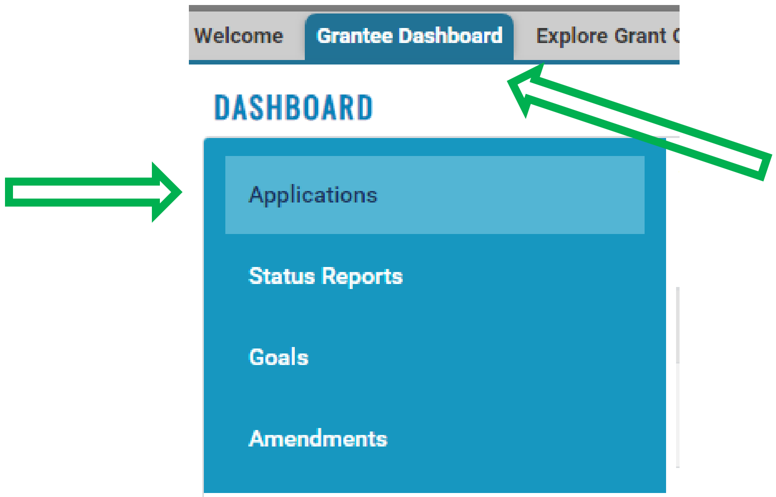


1. Welcome Tab: The Welcome Tab will return you to the Welcome Screen. From the Welcome Screen, you can use buttons to access your agency profile or applications or to view grant opportunities.



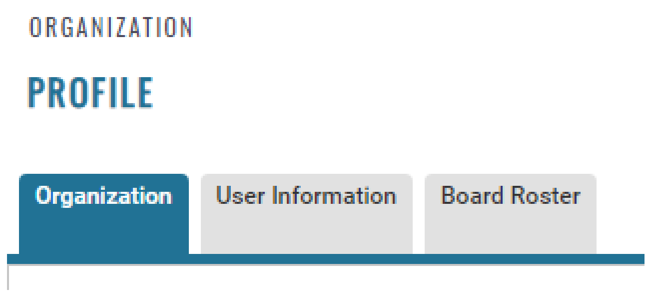


2. Grantee Dashboard Tab: The Grantee Dashboard Tab allows you to view applications and status reports in progress, submitted applications, and other items related to your organization's account using a sub-menu on the left.



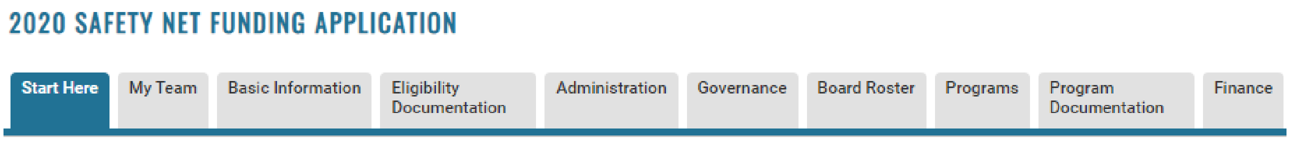
3. Explore Grant Opportunities Tab: From this tab you can find funding opportunities and begin an application.

4. Profile Tab: On the Profile Tab, you can view and make edits to your organization's profile, your user information, or your organization's board roster using corresponding sub-tabs.



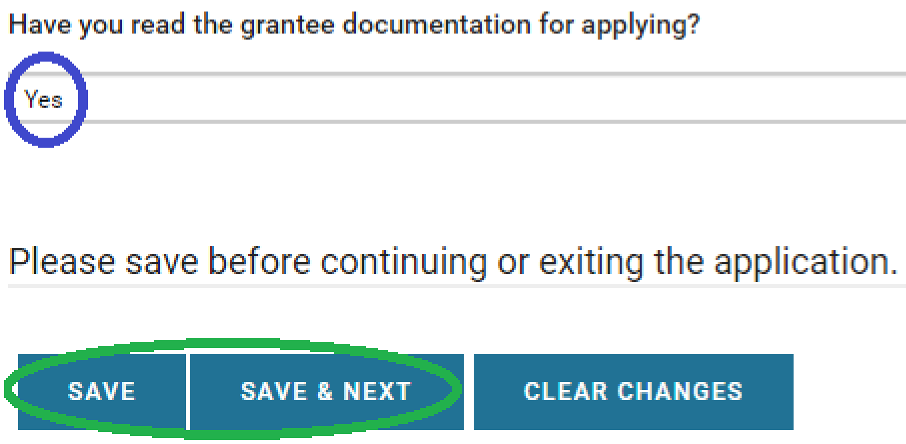
Completing the Application

To navigate between different sections of the application, click on the corresponding tab at the top of the application.



1. "Start Here" Tab

   In this tab, you will create your application. To do so, select "Yes" to indicate you have reviewed the RFP documents, and then hit either the "Save" or "Save & Next" button to create your saved application record.



   After clicking "Save" or "Save & Next", you will be able to view and access the application in progress any time through the Grantee Dashboard by clicking on the "Grantee Dashboard" tab at the top of the page and selecting "Applications" from the menu on the left side of the page.

2. "My Team" Tab

   On this tab, the Account Administrator can invite other organizational staff to collaborate on the application by sending them an email invitation to the application. This allows others to register as staff members on the organization's account in Foundation Connect. Please note that only the Account Administrator can invite new members to join the agency application.

To invite a team member, the Account Administrator can click the "+Invite New Members" button near the top right of the page.

This will open a window where the Account Administator can input the name, email address, and title of the person to be invited. Once the administrator hits "Save", the added team member will receive an email invitation to collaborate on the application with a link that will enable them to complete their Foundation Connect registration and join the application.

Please note that there may be a delay before you are able to see changes made by team members in the application. We do not recommend multiple team members working separately on the application simultaneously, as you may overwrite each other's changes.

3. "Basic Information" Tab

This tab contains basic organizational information. Please take time to review and update each field. You must complete the "Organization Mission" field in order to proceed to other sections of the application. Updates made in this tab will be copied into corresponding portions of your organization's profile and the Administration Tab.

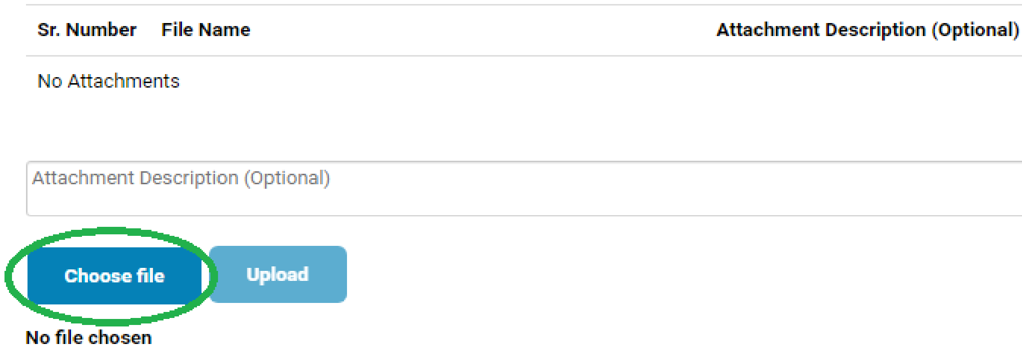
4. "Eligibility Documentation" Tab

On this tab, you will upload your agency's eligibility documentation. This is the same list of documents covered in the eligibility check questions:

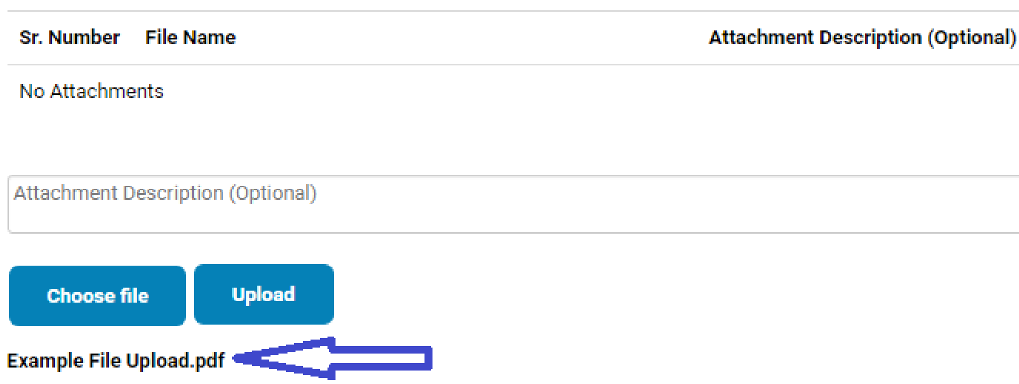
- Federal 501(c)(3) Tax Determination Letter
- Most recent Federal Form 990 Tax Return
- Illinois or Missouri Certificate of Corporate Good Standing
- Agency policy on compliance with USA Patriot Act and other counterterrorism laws
- Agency policy for background checks on staff and/or volunteers (if applicable, include policies on child abuse and neglect screenings)
- Agency policy on non-discrimination in hiring and service delivery
- Agency policy on privacy protection practices
- Most recent Audited Financial Statements prepared by an independent auditor (please include internal control findings, if applicable) or Year-End Financial Statements and an explanation of why your agency does not have an audit
- Most recent Management Letter prepared by an independent auditor or an explanation of why your agency does not have an audit

Attaching the Eligibility Documents:

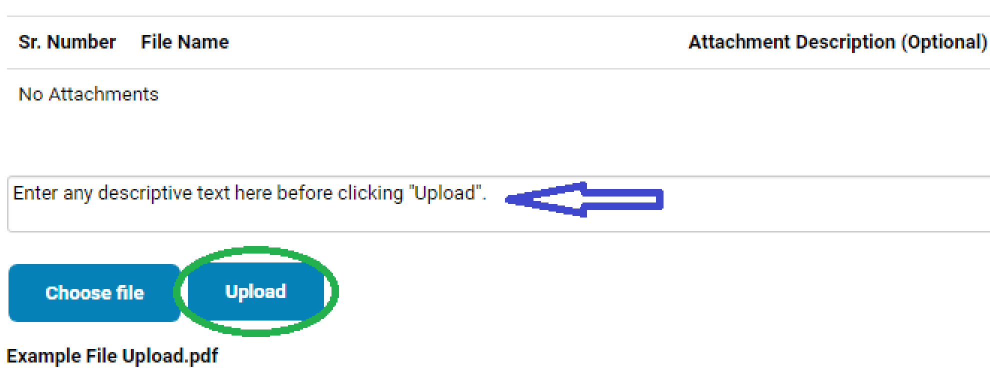
a. Click on the “Choose File” button.



b. Select a file to upload. Once you have chosen a file, the file name should appear in the bottom left of the Upload box.



c. Enter any descriptive information about the upload that you would like to include in the “Attachment Description” box. Then click the “Upload” button to complete the upload.



d. Once the uplaod is complete, you will see a link to the file, the upload date, and an option to delete the file as shown below:

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	20-00020-Agency 501 Determination Letter.pdf--TaxDeterminationLetter		01/28/20	Delete

e. If you wish to upload additional documents for the same question, you can repeat this process for multiple documents.

f. To remove an uploaded document, click on the "Delete" link listed beside the Upload link:

Sr. Number	File Name	Attachment Description (Optional)	Created Date	Action
1	20-00020-Agency 501 Determination Letter.pdf--TaxDeterminationLetter		01/28/20	Delete

5. "Administration" Tab

This tab contains questions about organizational administration. Please complete all required questions and upload required documents at the bottom of the page. The Mission, Vision, and Values Sections (1a. – 1c.) will automatically be copied from your agency's organizational profile if you have completed those profile fields.

> Important: If copying and pasting text from another document, please scroll to the bottom of your responses to ensure nothing was cut off due to application character limits.

The Administration Tab contains the following questions:

1. What are the mission, vision, and values of your agency and how do they inform practice?
   a) Mission:
   b) Vision:
   c) Values:
   d) Explain how your agency's mission, vision, and value's inform practice:

2. What are your agency's core competencies and key steps to your strategic planning process and how is the strategic plan used?
    a) Explain what your agency is good at doing and/or providing. What are your agency's core competencies?
    b) What are the key steps to your strategic planning process?
    c) How is the strategic plan used?

3. How do senior leaders encourage high performance and a culture of continuous learning within your agency?

4. What are your key performance indicators to measure organizational success and how is the data used?
    a) What are your key performance indicators (KPIs) to measure organizational success?
    b) How is key performance indicator data used?

5. Who are your key customers and how do you determine your performance in meeting their needs and requirements?
    a) Who are your key customers?
    b) How do you determine your performance in meeting the needs and requirements of key customers?

6. How does your agency recruit, develop, engage, evaluate, and retain a diverse workforce, including volunteers?
    a) How does your agency recruit, develop, engage, evaluate, and retain a diverse workforce, including your volunteers?
    b) Indicate if you are certified by the United Way Volunteer Center.

7. How well does your workforce reflect the community or population that you serve?
    a) Describe how the agency cultivates and prioritizes diversity, equity, and inclusion within the workplace.
    b) How well does your workforce reflect the community or population that you serve? Please describe your plan to address any major discrepancies.

8. How do you ensure compliance with legal, ethical, safety, and regulatory requirements as it relates to administration, governance, programs, and finance? Please indicate any legal, ethical, safety, and regulatory issues that we should be aware of.
    a) How do you ensure compliance with legal, ethical, safety, and regulatory requirements as it relates to administration, governance, programs, and finance?
    b) Has your agency had any legal, ethical, safety, and regulatory issues that we should be aware of within the last 5 years? If you answered yes, please explain:
    c) Has your agency received any official complaints or grievances from clients or employees within the last 5 years? If you answered yes, please explain:

9. What administrative, financial, customer, and programmatic data is collected and how is technology used to support it?
    a) What administrative data is collected and how is technology used to support the collection of this data?

b) What financial data is collected and how is technology used to support the collection of this data?
c) What customer and programmatic data is collected and how is technology used to support the collection of this data?

10. Please attach the following documents (these documents are required):
    - Strategic plan
    - Organizational chart
    - Organizational performance/operational dashboard

Please note: Instructions about how to upload documents can be found in the FAQ Section.

6. "Governance" Tab

This tab contains questions about organizational governance. Please complete all required questions and upload required documents.

The Governance Tab consists of the following questions:

1. Describe your agency's governance structure, including its key responsibilities, number of board members, committee structure, meeting schedule, etc.
   a) Key responsibilities:
   b) Number of board members:
   c) Committee structure:
   d) Meeting schedule:

2. What is the process for recruiting, developing, engaging, and retaining diverse talent to serve on the Board of Directors?

3. Describe how the agency cultivates and prioritizes diversity, equity, and inclusion at the board level. How well does your board reflect the community or population that you serve?
   a) Describe how the agency cultivates and prioritizes diversity, equity, and inclusion at the board level.
   b) How well does your board reflect the community or population that you serve? Please describe your plan to address any major discrepancies.

4. How does the Board of Directors ensure transparency, stewardship, and accountability to the community?

5. How does your agency engage in succession planning for the following positions:
   a) Executive Director:
   b) Board Chair:
   c) Other key senior leadership roles:

6. Describe the process for how board members assess their effectiveness individually and the board's effectiveness as a whole.

7. Describe the process for evaluating the performance of the Chief Executive and how the performance evaluations are used to determine executive compensation and goals?
   a) Describe the process for evaluating the performance of the Chief Executive, including the frequency of evaluation.
   b) How are the executive's performance evaluations used to determine executive compensation and goals?

8. Please attach the following documents (these documents are required):
   - Bylaws
   - Code of conduct
   - Conflict of interest statement
   - Succession plans (for Executive Director, Board Chair, and other key senior leaders)

Please note: Instructions about how to upload documents can be found in the FAQ Secion of this guide.

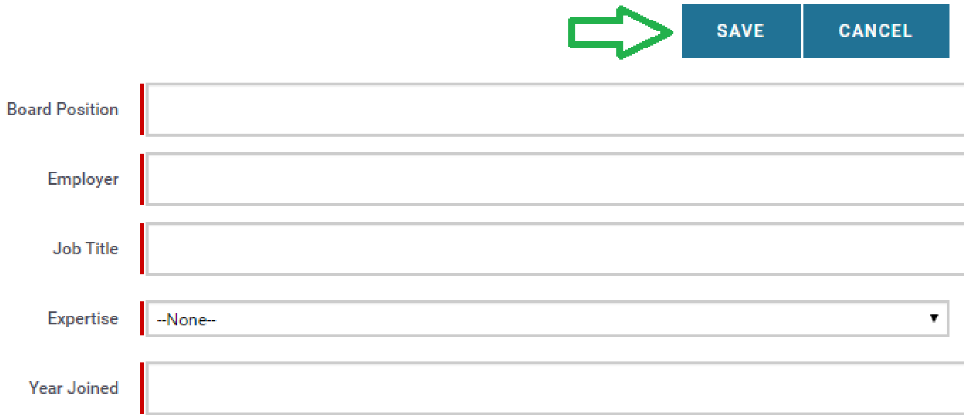
7. "Board Roster" Tab

On this tab you will add each of your agency's board members to a roster list. This list will automatically be copied into your agency's profile and can be updated from the agency profile at any time. This information will be retained for future years and applications, so you will only need to complete the process for all of your board members once. For each board member, you will be asked to provide the following information:

- Name
- Gender
- Race/national origin
- Year of birth (This will be used to calculate age.)
- Board position (if they do not have a specialized role, use "Board Member".)
- Employer
- Job title
- Expertise
- Year joined

To add a board member, click on the "+ New" button on the right side of the page. This will bring up the Board Member fields for you to complete.

When you have completed the fields, hit the "Save" button on the upper right to save that board member to the list.



A Note on Collecting Demographics
United Way asks for board member demographic information in order to understand who comprises the leadership of funded partners and the extent to which their leadership reflects the populations served by the agency, within the agency's area of service and the 16-county St. Louis region as a whole. Demographic information will never be shared at the individual level. The "Decline to Disclose" and "Unknown" options may be used in cases when a board member chooses not to disclose particular information for any reason or when that information is not collected by the agency.

8. "Programs" Tab

On this tab you will add the programs for which you are applying for funding consideration. You must add at least one program to submit an application. While funding awards will be for general operating support, assessment of your agency's ability to address community needs will be based on the programs included in your application. These will also be the programs for which you will be expected to provide annual reporting data if funded. See the FAQ Section for help in determining how many/which programs to include in your agency's application.

To add a program, click on the "+New" button in the upper right-hand corner of the tab. This will take you to a new program form.

For each program added, you will complete a program form. Once you save a program form with at least the "Program Name" field completed, you will be able to view, access, and edit that program form from the list on the "Program" Tab.

Program Forms

On the program form, you will be asked to provide information about the community needs your program addresses in each of the 16 counties within United Way's service area, the program's target population(s), outcomes to be measured, past outcome results, and other elements of the program design and implementation. It is not necessary or expected that a program would address needs in all 16 counties.

> *A Note on Printing*
> Because each program form is a subset of your overall application, the program forms will not be included in the printable applicationPDF. In order to print a program form for your review or records, you must select "View" for the form you wish to print and then use your browser's print function. (This is usually be done by selecting File→Print or hitting the "Ctrl" and "p" buttons at the same time.)

The Program Form on the Programs tab contains the following questions:

- Program Name
- From the list below, select which need(s) this program addresses in Calhoun County, IL. (This question is repeated for each of the 16 counties in United Way's service area. You can select multiple needs for each county.)
- Feel free to provide additional information about how your program strengthens the regional social safety net. As possible, please provide any data, research, and statistics that highlight the prevalence of this issue in your community, lack of resources to address the need, and/or negative outcomes that are likely to occur if the need is not addressed.
- Please select 1-5 outcomes that will be measured and reported on for this program.

1. Program Model
    1. a) Describe your program model, including the activities and interventions that are delivered in this program to address community need and help clients achieve desired outcomes.
    1. b) How much, how often, and how long are activities provided to achieve program goals?
    1. c) What measurement methods or assessment tools will you use to determine if a client achieved the selected outcomes?

2. Target Population
    2. a) Describe the target population intended to participate in this program.
        i) Client Gender:
        ii) Client Race/Ethnicity:
        iii) Client Age:
        iv) Client Annual Household Income:
    2. b) How many people does your agency anticipate this program serving within the first year of this grant funding (2021)?
    2. c) Feel free to share any other condition, status, or descriptor of the population this program hopes to serve.

3. Theory of Change

    Describe your Theory of Change. How does this program model address the community need and help clients achieve intended outcomes? Include any research, evidence, or experience that supports this belief.

4. Outcomes
    4. a) Past Outcomes: (This set of questions will be answered for 1-3 Outcomes.)
        Outcome:
        Population Measured:
        Measurement Method:
        Number of Clients Measured:
        Goal:
        Please explain any reasoning you use to set that goal.
        Number of Clients who Achieved Outcome:
    4. b) Explain how the outcomes above compare to your past program performance and any benchmarks in your field.

5. Fidelity/Modifications/Innovations
    5. a) How do you ensure program implementation aligns with the program model described above (fidelity)?
    5. b) How do you make program modifications and innovate as needed?

6. Participant Voice
    6. a) How do you authentically listen to and learn from your program participants to obtain actionable information?
    6. b) Provide an example of an improvement made to your program based on participant feedback.

7. Diversity/Equity/Inclusion
    7. a) How does this program advance racial diversity, equity, and inclusion and reduce disparities?
    7. b) Which populations/communities/races does this program benefit? Does this program differentially impact racial or ethnic groups? How does this program work to eliminate or reduce disparities between racial or ethnic groups?

8. Competency
    8. a) How do you ensure that key staff possess the qualifications, credentials, training, expertise, and cultural competency to effectively implement the program?

8. b) How do you ensure that volunteers possess the qualifications, credentials, training, expertise and cultural competency to effectively implement the program?

9. Collaboration
   9. a) Describe how your agency will collaborate, integrate, and align services with other service providers.
   9. b) If part of a formal collaborative proposal, indicate the other partners and briefly describe how their activities complement that of your agency. (For more information about submitting a collaborative application, see FAQ.)
   9. c) Select any partnerships your agency participates in related to this program. If your partnership is not listed, please write your partnership name here.

Guidance for Program Form Section 4: Past Outcomes

The questions in this section pertain to the outcomes that you have already measured for this program within the most recently completed program year. This information will be used to understand past program performance and how program success is defined. If you are applying for a new program that has not yet demonstrated impact, see the FAQ Section of this guide.

For each outcome you report, you will be asked to explain:

- Of the entire client population in this program, which specific clients were assessed for this listed outcome?
- The measurement method(s) used to determine achievement of the listed outcome, including assessments/tools used and specific criteria to determine outcome achievement
- The number of clients measured
- The target for clients achieving the outcome in this program and how this target was set
- The number of clients who achieved the outcome according to the measurement method listed above

Some outcomes refer to community rather than individual-level, change (e.g., “the community has increased access to affordable and quality transportation”). For these outcomes (numbers 67, 69, 79, 81, 85, 88, 91, 93, 95, 96, and 97), applicants may find it difficult to report client numbers. For applicants reporting community-level outcomes, the following guidance is offered on how to report on the requested outcome information:

Requested Outcome Information	Community-Level Equivalent to Report
• Of the entire client population in this program, which specific clients were assessed for this listed outcome	• Describe the unit of measure used. (For "The community has increased access to affordable and quality transportation," this could be number of new bus routes, reduction in bus fare costs, additional modes of public transportation introduced, etc.)
• The measurement method(s) used to determine achievement of the listed outcome, including assessments/tools used and specific criteria to determine outcome achievement	• Applicants should report their methods to measure any change in the unit of measure listed above.
• How many clients were measured?	• Applicants can leave blank if reporting on a community-level outcome.
• The target for clients achieving the outcome in this program and how this target was set	• Applicants can list the desired number related to their unit of measure listed earlier. (e.g., if the unit of measure is number of new bus routes, applicants should report the desired number of new bus routes.) Additional explanation can be given in the follow-up question regarding how the goal was set.
• The number of clients who achieved the outcome according to the measurement method listed above	• Applicants should list the actual change related to their unit of measure listed above (e.g., if the unit of measure is number of new bus routes, applicants should report the number of new bus routes.)

9. "Program Documentation" Tab

On this tab you will upload any program documents related to the programs included in your application. You will find sections where you have the option to upload:

a. Theory of Change
b. Logic Model
c. Job Description(s) if funding would be used for new hires
d. Letter of Support from collaborating agencies

Please note that these documents are not required. You may upload more than one document in each section. If you are uploading documents for multiple programs, please be sure to clearly label each document with the name of the program to which it pertains:

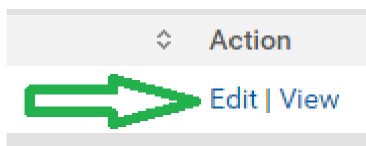
Program Name-Document Type (ex. Project HELPS-Logic Model)

For document upload instructions see the appropriate FAQ Section.

10. "Finance" Tab

In this section, you will access and complete your agency's Budget Form. This will be used to review your agency financial position and to calculate your Maximum Allowable Funding Amount.

When you first visit the tab, you will see that a blank Budget Form has already been created. Click "Edit" on the far right of the form listing to access and complete the form.



Helpful tips when completing the Finance Tab:

- Applicants are strongly encouraged to use the Budget Planning Worksheet to complete the budget line items prior to entering them on the Finance Tab.
- For the purposes of this form, "Local" refers to United Way's 16-county service area.
- Section C of the form contains a number of fields that are automatically calculated after you save your responses to the necessary related fields. For example, **Net Revenue: Local** is automatically caluclated after you save responses to the **Total Revenue: Local** and **Total Expense: Local** fields. The automatically calculated fields are noted on the form.
    - If an agency does operate outside of United Way's 16-county region and therefore does not have "Out of Town" expenses or revenues, those sections can be left as 0.
- In order to see the automatically calculated fields, you must save the form, then return to the Finance Tab and select "View" rather than "Edit" on the form listing.
- If copying and pasting from another document for narrative questions, please scroll to the bottom of your responses to ensure nothing was cut off due to application character limits.
- You can save your progress on the form at any time by clicking on the "Save" button on the bottom left of the form. If you have not yet completed required sections of the

budget form, you may receive an error when you save and need to hit "Cancel" at the bottom in order to navigate away from the form. As long as you save before doing so, your changes should be retained.

- Because the budget form is a subset of your overall application, it will not be included in the printable application PDF. In order to print the budget form for your review or records, you must select "View" from the Finance Tab and then use your browser's print function. (This is usually be done by selecting File→Print or hitting the "Ctrl" and "p" buttons at the same time)

Section A of the Budget Form: Financial Narrative Questions contains the following questions:
In this section, provide text to describe the purpose of funding requested, financial planning, and funding implications:

1. Financial Narrative Justification: Provide a narrative justification for the requested amount, describing specifically how the funds will be used to address the community needs and outcomes selected.

2. Financial Planning and Monitoring: How does your agency ensure appropriate resources are available to help assure financial planning, monitoring, and safeguarding?

3. Funding Implications: Describe the potential implications of not receiving funding from United Way. For example: inability to launch program, eliminate and reduce programs/services, reduction in/elimination of staff, closures).

Section B of the Budget Form: Alternative Funding Sources:
Here you will be asked to list the top 5 alternative sources of funding (other than United Way) for your agency and the annual amount received from those sources in the last complete fiscal year. This may include sources such as:

- Individual donors
- Corporate foundations
- Special events
- Government grants and contracts
- Private grants and contracts
- Program service fee revenue
- Memberships dues and revenue
- Investment income

Section C of the Budget Form: Financial Information Worksheet
This part of the Finance Tab asks for the financial amounts and information noted in the Budget Planning Worksheet (click to access the downloadable excel version). Applicants are

encouraged to complete the optional [Budget Planning Worksheet] before completing Section C of the Finance form. A number of fields in this section are automatically calculated after you save your responses to the necessary related fields.

- For example, **Net Revenue: Local** is automatically caluclated after you save responses to the **Total Revenue: Local** and **Total Expense: Local** fields. The automatically calculated fields are noted on the form.

This section is broken down into the following sub-sections:

1. Revenue and Expenses
2. Line Item Breakdown of Local Expenses
3. Line Item Breakdown of Projected Expenses
4. Funding Request
5. Functional Local Expense (includes the Support Services Ratio calculation)
6. Operating Reserves Calculation
7. Historical Preformance, Net Income/Loss

Fill in the green boxes in the optional [Budget Planning Worksheet] (pictured below) to help in completing Section C of the Finance Tab:

United Way of Greater St. Louis Agency Application - Financial Information

Agency Name :

Agency's Last Audit Fiscal Year-End Date:

REVENUE & EXPENSES PER AUDIT	Local Expenses*	Out of Area **	Total
** Applies to local expenses within United Way 16 county area ** For multi-region agencies allocate both prgm & overhead costs locally & out of area*			
Total Revenue			-
Total Expense			-
Net Revenue	-	-	-
Describe any audit oddities below (merger info, audit periods other than 1 year, opinions other than clean, ...)			

Line Item Breakdown of Expenses Per Last Audit and for Grant Period #1 Budget		
Line Item Expense Categories	**Local Expenses (Per last Audit)**	**Expense Projection (Grant Period Yr #1)**
Wages, Benefits & Taxes		
Professional Fees		
Other Operating Costs		
Grants/Direct Assistance		
Depreciation		
Payments to Affiliates/Dues	-	
Other Expense Items (items that do not fit within any of the line items above)	-	-
Unassigned Expenses (Should equal zero)	-	
Total	-	-
Describe any amounts in "Other Expense Items" & reasons for large fluctuations		

Maximum allowable grant, 20% of 3 times Year #1 Projected Expenses, is calculated below[$]
-

Enter total 3 year grant request below (do not exceed maximum allowable amount)[$]

Functional Expense Info Per Last Audit				
Functional Expense Categories	**Local Expenses (Per last Audit)**		Note: If the audit covers a greater service area, the figures may not match	**Support Services Rate**
				= (a+b) / c
Total Program Expense	-			
Management & General		a		#DIV/0!
Fundraising		b		
Unassigned Expenses (Should equal zero)	-			
TOTAL LOCAL EXPENSES PER AUDIT	-	c		

If support services rate is greater than 25% explain why and any agency plans to address

Operating Reserve Calcuation Ratio				
	Local Expenses + Out of the Area Figures (Per last Audit)		Note: The operating reserve ratio will include local and out of the area figures	**Operating Reserve Rate**
				= (a-b+c) / d
Unrestricted net assets		a		
Net fixed assets (positive number required)		b		#REF!
Mortgage/loan liabilities associated with net fixed assets		c		
Total expenses (local + out area)		d		

If operating reserve rate is greater than 75% or less than 10% or negative explain why and any agency plans to address

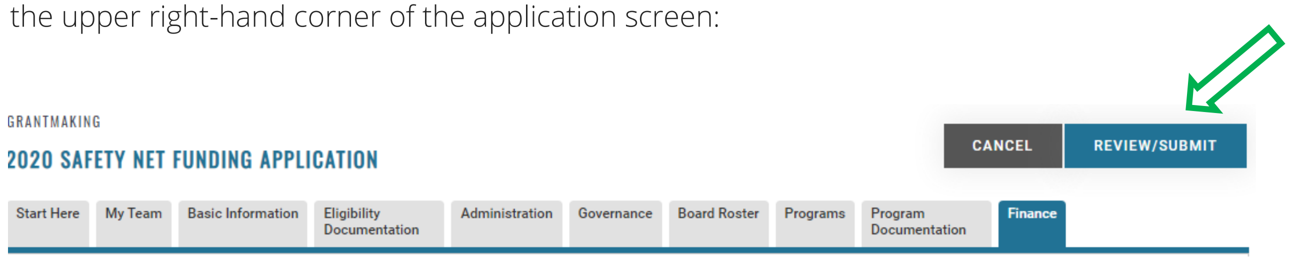
NET INCOME (Local Basis) FROM PRIOR 2 AUDITS AND NEXT YEAR PROJECTED *(see Note 2)*

From 2nd prior Audit as of:		
From Last Audit (above) as of:	01/00/00	-
For Next Yr Projected as of:		

If net income is negative for two or three years above, explain why, whether budgeted, and any agency plans to address

Submitting the Application

Once all parts of the application have been completed, it is strongly suggested that organizational leadership and staff members review all application components. When the application has been reviewed and is ready for submission, click the "Review/Submit" button in the upper right-hand corner of the application screen:



The following screen will allow you to review the application and will provide the following options: "Back to Application", "Print", or "Submit". Click "Submit" to finalize your agency's application and submit it to United Way for funding consideration. Once you have submitted the application, you will no longer be able to make changes, so please be sure it is in a finalized state before doing so.

Please note that any individual with an account on the agency's account (which can be found in the "My Team" Tab) can submit the application. Please coordinate with all staff associated with the account to ensure the application is not prematurely submitted.

After submitting your agency's application, all individuals listed on the "My Team" tab will receive an email confirming submission.

Appendix A: Glossary

Included terms:

Continuous Quality Improvement

Continuous Quality Improvement (CQI) is a concept that originated in the business industry and has been successfully applied in health and human services. It is an approach to quality assurance that emphasizes continually improving an organization's systems and processes to meet the needs of those served and improve the services offered. It involves a system of gathering, analyzing, and responding to collected data to guide efforts to meet an organization's vision, mission, and values. CQI also incorporates an ongoing process of identifying and implementing opportunities for improvement.

Measurement Tool/Method

Measurement Tools/Methods are used to assess effectiveness of programs and services. For the Outcomes Section of United Way reporting, a measurement tool/method should be used to determine if a client has achieved the selected outcome. Providing context about the process that is used to determine if a client has achieved an outcome may be more helpful than only listing tools/assessments.

Outcomes

An outcome is a change or benefit a client experiences during or after a program which the agency believes it has helped contribute to. Outcomes can be:

- Short-term - changes in client knowledge, attitudes, and/or skills
- Intermediate - changes in client behavior
- Long-term - meaningful changes in client condition and/or status

Portfolio Manager

A portfolio manager is a United Way staff member that serves as a liaison between allocations volunteers and member agencies. Portfolio Managers have field of service and nonprofit best practices expertise. During the grant application and review process, your agency will be assigned to a Portfolio Manager based upon Impact Area and availability. If selected for funding, your agency will be notified about your official Portfolio Manager assignment and receive their contact information. The Portfolio Manager would serve as your main point of contact going forward.

Scoring Rubric

The Scoring Rubric is the tool the United Way Allocations Volunteers will use to score applications for funding. It is divided into four sections: administration, governance, program, and finance. A copy of the scoring guides, which include the rubric items and explanations of what constitutes a specific score on an item, can be found in the Appendices here.

United Way Allocations Volunteers

Traditionally, allocations volunteers serve as the eyes and ears of United Way donors by leading and comprising the United Way of Greater St. Louis Allocations Panels, groups of volunteers that provide oversight of funded agencies that work within the same field of service. In our previous investment model, volunteers visited member agencies and reviewed materials to assess demonstration of United Way's Quality Standards, made funding decisions, and recommended areas of improvement. As part of United Way's new funding model, volunteers will be providing in-depth review of grant applications, making funding decisions, and continuing to take part in agency monitoring.

United Way Geographic Service Area

United Way of Greater St. Louis serves 16 counties in Illinois and Missouri with a population of nearly 3 million people.

Illinois Counties	Missouri Counties
Calhoun	Franklin
Clinton	Jefferson
Greene	Lincoln
Jersey	St. Charles
Macoupin	St. Louis City
Madison	St. Louis
Monroe	Warren
Randolph	

St. Clair

Weighted Formula

United Way allocation volunteers will use the Weighted Formula to help make funding determinations. In addition to the rubric score, additional weighting will be given to the areas included in the weighted formula.

Appendix B: Frequently Asked Questions

Technical Questions:

1. How do I set up an agency account?
2. What web browsers are recommended to use while completing the application?
3. Who do we contact for help during the application process?
4. How do I know my username?
5. What are the password requirements and what if I forget my password?
6. Is spellcheck embedded in the application system?
7. How do I upload/attach documents in the application?
8. How can we print and/or save a copy of our application?
9. Is the application compatible with or accessible on mobile devices, like tablets and mobile phones?
10. Is there a timeout period while working in Foundation Connect/on the application?
11. How do I get a login to work on my agency's application?
12. Can multiple users/collaborators work on the same grant application simultaneously?
13. I just got added as a user for my agency's account. How do I work on my agency's existing application?
14. Can I preview my application before submitting?
15. Is there a word limit for my answers?
16. Is there a size limitation for attachments, or required file types?
17. Can I submit additional application material outside of the online application?
18. What is an Account Administrator and what permissions does this person have on the agency account?
19. How long will it take to complete the application?
20. I accidentally submitted my application. How do I regain access to it?
21. Can I still see my application after I submit it?

Application Questions:

22. What if my agency does not have formal audits from previous fiscal years and what should we do regarding the audit Management Letter?
23. What should be uploaded for the Organizational Performance/Operational Dashboard on the Administration Tab?
24. In reference to question 9 in the Administrative section, what is meant by administrative, financial, customer, and programmatic data?
25. Is there a way to add board members to the roster in batches?
26. Why does United Way ask for board demographics?
27. How is the program form information used and how many programs should be included in the application?

Process Questions:

Technical Questions Answered:

1. How do I set up an agency account?

   Every agency applying for funding will need to create an organizational account in Foundation Connect. Once an organizational account is created, individual accounts can be created for staff members on the organizational account. This can include staff who will be working on or reviewing the application. To learn more about setting up an organization account, see the "Creating an Account" section of this guide.

   One agency staff person should be identified as the Account Administrator. This person should do the initial setup of the organizational account and will serve as the primary contact for technical issues related to the account. This person will be responsible for maintaining the agency account and adding or removing other staff contacts.

2. What web browsers are recommended to use while completing the application?

   The following web browsers are recommended to use while completing the funding application:

   - Google Chrome
   - Apple Safari
   - Firefox

3. Who do we contact for help during the application process?
   For assistance, please email grantsupport@stl.unitedway.org. If your questions are related to application content rather than technical support, you may then be directed to a Portfolio Manager.

4. How do I know my username?
   By default, your username is the beginning of your email address that comes before the @. If you elected to enter a different username during registration, you should be able to find it in your registration confirmation email. If you no longer have the email, you can contact grantsupport@stl.unitedway.org for assistance.

5. What are the password requirements and what if I forget my password?
   The password may be between 8 and 20 characters and must contain a capital letter, lower case letter, number, and special character. **Your password cannot contain or be the same as your username.** If you forget your password, you can rest it using the "Can't access your account?" link on the login page. For information about your username, see above.

6. Is spellcheck embedded in the application system?
   Spellcheck functionality is not embedded in the Foundation Connect system. Some web browsers do have this functionality, so completing the application in such a browser would incorporate spellcheck.

7. How do I upload/attach documents in the application?
   To upload or attach documents in the application, use the following instructions. (You can view these instructions with screenshots in the Attach Eligibility Documentation section of the guide):
   a. Click on the "Choose file" button.
   b. Select a file to upload. Once you have chosen a file, the file name should appear in the bottom left of the upload box.
   c. Enter any descriptive information about the upload that you would like to include in the "Attachment Description" box. Then click the "Upload" button to complete the upload.
   d. Once the upload is complete, you will see a link to the file, the upload date, and an option to delete the file.

e. If you wish to upload additional documents for the same question, you can repeat this process for multiple documents.
f. To remove an uploaded document, click on the "Delete" link listed beside the Upload link.

8. How can we print and/or save a copy of our application?
   To print a copy of your application at any time, go to the Applications Tab of the Grantee Dashboard and click on the magnifying glass next to the application listing to "View" the application. Once you are viewing the application, you can click on the "Review/Print" button in the upper right corner. This will switch to a print compatible view and then you can click on the "Print" button in the upper right corner to print the application or save a PDF by selecting your computer's "Print to PDF option".

   Please note that any program forms and the budget form will not be included in the printed or PDF copy of the application. In order to print or save a PDF of a program or budget form, you must navigate to the form in the application and select "View". Then you can use your browser's print function to either print a copy of the form or save it as a PDF. (This is usually be done by selecting File→Print or hitting the "Ctrl" and "p" buttons at the same time.)

9. Is the application compatible with or accessible on mobile devices (like tablets and mobile phones)?
   While it can be accessed on mobile devices, the amount of text in the application makes use on a mobile phone difficult. It is advised to work on a tablet, laptop, or desktop computer to maximize viewing experience.

10. Is there a timeout period while working in Foundation Connect on the application?
    The Foundation Connect system is set to time out after two hours. Any work not saved will be lost when the system times out. Users are advised to save regularly while working on the application to avoid any unexpected loss of work.

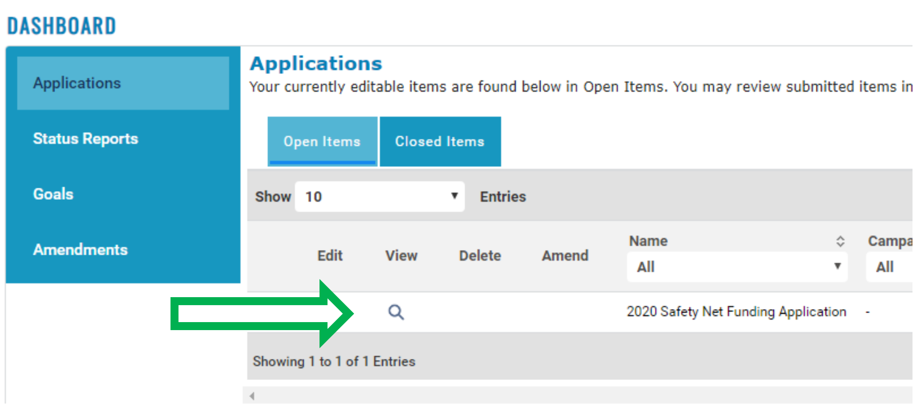
11. How do I get a login to work on my agency's application?
    Each agency account has one person identified as the Account Administrator. (This person did the initial setup of the organizational account). On the "My Team" tab of the application, an Account Administrator can add more people to work on the application. Once the Account Administrator adds someone to the team, that person will receive an email enabling them to set up an account and work on the agency's application.

12. Can multiple users/collaborators work on the same grant application simultaneously?

While you do have the ability to invite team members to collaborate with you on the application using their own login, we do not recommend that you work on the application at the same time. Working simultaneously could affect your ability to save your work and see each other's changes. Furthermore, staff working simultaneously may inadvertently overwrite each other's changes. If multiple agency staff members are collaborating on an application, we recommend ensuring that only one person is working in the application at a time to prevent the loss of any changes or progress. You will not be able to see each other's changes until they are saved by the person making the changes and collaborators refresh their views of the application and/or move between sections.

13. I just got added as a user for my agency's account. How do I work on my agency's existing application?

When your agency's [Account Administrator](#) sets up a login for you to access your agency's Foundation Connect account, you will be sent an email to register. After registering, you will be able to log in, and you should see the current agency 2020 Safety Net Funding Application on your "Grantee Dashboard" (which can be accessed using the navigation bar at the top of the screen). If you select the pencil and paper icon, you will be able to edit the application. If you select the magnifying glass icon, you'll be able to view the application.



Please note that if you begin an application, but someone from your organization has already started one, then you may see a notification indicating that there is already an unsubmitted application on your agency's account. By clicking "Go To Dashboard" you can work on your agency's current application.

14. Can I preview my application before submitting?

You will be given the opportunity to review your application before submitting it. If you submit your application by mistake before the deadline, contact grantsupport@stl.unitedway.org to request that it be unsubmitted.

15. Is there a word limit for my answers?
    Most text boxes do have a word limit for responses. The limit is specified outside the bottom right corner of the text box. If you are copying and pasting into question fields and your pasted response exceeds the character limit for the question, your response will be cut off at the character limit. You should be alerted that you have reached the limit by the character counter and the outline of the question box changing color. Please scroll to the bottom of your responses to check that nothing has been lost.

16. Is there a size limitation for attachments, or required file types?
    When uploading documents, files should be no more than 20MB in size and should be in one of the following formats:
    - PDF
    - DOC
    - DOCX
    - XLS
    - XLSX
    - PPT
    - PPTX
    - CSV

17. Can I submit additional application material outside of the online application?
    Because application review will take place within the online Foundation Connect system, all materials for consideration should be submitted as part of the online application. If you believe you have an extenuating circumstance regarding application materials, please contact grantsupport@stl.unitedway.org.

18. What is an Account Administrator and what permissions does this person have on the agency account?
    For each agency account, one person is identified as the Account Administrator. This person should do initial setup of the organizational account and will serve as the primary contact for technical issues related to the account. This person will be responsible for maintaining the agency account and adding or removing other staff contacts.

19. How long will it take to complete the application?
    The amount of time it may take an agency to complete the application can vary widely based on factors like the number of programs added and the number of outcomes

entered per program. It is estimated that the application will take 10-25 hours to complete, and sufficient time should be allotted for both completion and review.

20. I accidentally submitted my application. How do I regain access to it?
    Once all parts of the application have been completed, it is strongly suggested that organizational leadership and staff members review all application components. Only after a thorough review should the application be submitted. Once submitted, an application can no longer be edited. If you prematurely submit your application and need to regain access, please email grantsupport@stl.unitedway.org. Please note that users will not be able to access the application after the March 10, 2020 deadline.

21. Can I still see my application after I submit it?
    All individuals listed on "My Team" for the agency account will be able to view the submitted application by clicking "Closed Items" on the Grantee Dashboard.

Application Questions Answered:

22. What if my agency does not have formal audits from previous fiscal years and what should we do regarding the audit management letter?
    If your agency does not have a formal audit, you may upload your official year-end financial statements for the previous fiscal year, including an explanation of why your agency does not have an audit. Where you are asked to upload a Management Letter, please upload the explanation of why your agency does not have an audit again. On the budget form, enter the amounts request from your year-end financial statements for the designated year.

23. What should be uploaded for the Organizational Performance/Operational Dashboard on the Administration Tab?
    Please upload the documents that you use to monitor organizational performance. Often this will include documented progress over a given period of time on Key Performance Indicators.

24. In reference to question 9 in the Administrative section, what is meant by administrative, financial, customer, and programmatic data?
    The administrative, financial, customer, and programmatic data refers to key data that an agency collects to measure and analyze the organizations is performance on a comprehensive scale. This data may be used to help an organization make informed strategic decisions. The technology refers to the system deployed to capture, track, and retain the administrative, financial, customer, and programmatic data.

25. Is there a way to add board members to the roster in batch?
    Batch upload of board members is not currently an option, though we hope to develop a tool for doing so in the future. Because the board roster will be saved in your agency account, you will not need to go through the process of entering each member again on future applications.

26. Why does United Way ask for board member demographics?
    United Way asks for board member demographic information in order to understand who comprises the leadership of funded partners and the extent to which their leadership reflects the populations served by the agency, within the agency's area of service, and the 16-county St. Louis region as a whole. Demographic information will never be shared at the individual level. The "Decline to Disclose" and "Unknown" options may be used in cases when a board member chooses not to disclose particular information for any reason or when that information is not collected by the agency.

27. How is the Program Form information used and how many programs should be included in the application?
    While funding resulting from this application would be for general operating support, assessment of your agency's ability to address community needs will be based on the programs you include in your application. These will also be the programs for which you will be expected to provide annual reporting data if funded. You must include at least one program to submit an application, but beyond that, there is no recommended number. A program's ability to respond to a community need should be a key factor to consider, as well as the expectation that your agency will complete annual reporting on any programs included.

28. What if my agency uses more than one measurement tool/method to determine if a client has achieved an outcome?
    When describing the measurement tool/method used to measure outcomes on the Program Form, it is best to be very clear and specific about how the agency understands if a client has actually achieved the selected outcome. If more than one measurement tool or method is used, describe how those various tools are used to determine achievement. It may be helpful to outline what score or level of completion on an assessment dictates achievement of an outcome. If one answer on a survey/assessment is used to determine achievement of a particular outcome, it may be helpful to list that question in the Measurement Tool/Method Section rather than the survey name.

29. How do I determine which outcomes should be measured in a program?
    The Outcomes Alignment Map in the appendices of this guide offers suggestions about outcomes that might be measured for the needs listed in the Program form. The list of outcomes is neither exhaustive nor prescriptive. Outcomes other than those listed could be good indicators of impact for a specified need, and all outcomes listed do not need to be measured to determine success in addresing need. This chart is solely intended to help applicants consider outcomes selection.

30. How many outcomes should my agency include for each program?
    Applying agencies are asked to select 1-5 outcomes they plan to measure in a program and report past perforamnce for 1-3 outcomes. While there is no specific recommendation for how many outcomes should be selected, agencies are encouraged to share all meaningful outcomes they currently measure to understand program success in the "Past Outcomes" Section. If selected for funding, applicants will be required to report on success in achieving the 1-5 outcomes to be measured. Agencies, therefore, should only select outcomes that can feasibly be measured in the program when the funding cycle begins.

31. If I'm applying for funding for a new program, how do I share about performance in past outcomes?
    Both the Program Scoring Rubric and Weighted Formula that will be used to score an agency's application for funding assess demonstration of impact in achieving outcomes. Applicants should contact grantsupport@stl.unitedway.org if applying for funding with a program that has not yet measured any benefit/change to clients or the community. United Way staff will help the agency determine the best way to complete the application and ensure this detail is understood in the selection process.

32. What if none of the outcomes provided reflect what is measured by our program?
    While we encourage you to select one of the 99 standard outcomes if possible, there is an option to write in an outcome previously measured by your program that is not included in the list. For the outcomes you plan to measure if your agency receives funding, you will need to select an outcome from the standard list.

33. How should I report on past outcomes for community- level (rather than individual-level) outcomes?
    Some outcomes refer to community-level (rather than individual-level) change (e.g., "the community has increased access to affordable and quality transportation"). For these outcomes (numbers 67, 69, 79, 81, 85, 88, 91, 93, 95, 96, and 97), applicants may find it

difficult to report client numbers. For applicants reporting community-level outcomes, the following guidance is offered on how to report on the requested outcome information. If more help is needed contact grantsupport@stl.unitedway.org:

Requested Outcome Information	Community-Level Equivalent to Report
• Of the entire client population in this program, which specific clients were assessed for this listed outcome?	• Describe the unit of measure used. (For "the community has increased access to affordable and quality transportation," this could be number of new bus routes, reduction in bus fare costs, additional modes of public transportation introduced, etc.).
• The measurement method(s) used to determine achievement of the listed outcome, including assessments/tools used and specific criteria to determine outcome achievement	• Applicants should report their methods to measure any change in the unit of measure listed above.
• How many clients were measured?	• Applicants can leave blank if reporting on a community-level outcome.
• The target for clients achieving the outcome in this program and how this target was set	• Applicants can list the desired number related to their unit of measure listed earlier. (e.g., if the unit of measure is number of new bus routes, applicants should report the desired number of new bus routes). Additional explanation can be given in the follow-up question regarding how the goal was set.
• The number of clients who achieved the outcome according to the measurement method listed above	• Applicants should list the actual change related to their unit of measure listed above (e.g., if the unit of measure is number of new bus routes, applicants should report the number of new bus routes.)

34. I want to submit a collaborative application with other agencies, what should I do?

Each agency seeking collaborative funding from United Ways' Safety Net RFP should submit a separate application and supporting documentation. This approach ensures United Way Staff and Volunteers have the opportunity to understand each agency's specific role in the collaborative, how funding will be used by the collaborative, and allows us to assess each agency individually. Your agency and your agency's partners are also required to indicate being a part of the collaborative on Question 9. b) of the Program section of the application. Please include information on each agency's role in the collaborative at this time. The other details of the collaborative (e.g. determination of lead agency, reporting requirements, funding distribution, etc.) will be finalized during the contracting phase of Community Investment 2020 if the collaborative is funded.

35. What types of funding should I enter for alternate funding sources in Section B of the Finance Tab?

    Agencies are asked to list the top 5 alternative sources of funding (other than United Way) and the annual amount received from those sources in the last complete fiscal year. These sources may include, but are not limited to:
    - Individual Donors
    - Corporate Foundations
    - Special Events
    - Government Grants and Contracts
    - Private Grants and Contracts
    - Program Service Fee Revenue
    - Memberships Dues and Revenue
    - Investment Income

36. Why can't I see the values on the Budget Form that say, "Automatically calculated after save"?

    In order to see the automatically calculated values, you must:
    - Enter values in the related fields necessary for the calculation (For example, Net Revenue: Local is automatically caluclated after you save responses to the Total Revenue: Local and Total Expense: Local fields.)
    - Save the form
    - Return to the Finance Tab and select to "View" rather than "Edit" the form

Process Questions Answered:

37. Is there a way to monitor the status of our application?

    When you are logged into Foundation Connect, you will be able to view the status of your application on the Applications Tab of the Grantee Dashboard.

38. When can we expect to receive notification about whether our application has been selected for funding?

    Notifications of funding decisions are expected to be released in late May of 2020. Funding is for January 1, 2021 – December 31, 2023.

Appendix C: Application Scoring Guides & Weighted Formula

Administration Scoring Guide

United Way allocations volunteers will use the rubric below to score the Administration portion of funding applications.

	Administration Rubric Text	Score			
		0	2	5	7
1	The agency's mission, vision, and values are clearly articulated and inform practice.	Agency did not provide their mission, vision, or values.	Agency provided one or more, but not all three of their mission, vision, or values.	Agency provided their mission, vision, and values; however, these are not aligned with their day-to-day practice.	Agency provided their mission, vision, and values and they are aligned with their day-to-day practice.
2	The agency has clearly defined core competencies and utilizes its strategic plan to inform operations.	Agency does not provide clearly defined core competencies or evidence of using a strategic plan to inform operations.	Agency provides either clearly defined core competencies or evidence of using a strategic plan to inform operations but not both.	Agency provides both defined core competencies and some evidence of using a strategic plan to inform operations; however, the competencies could require further clarity, or the evidence may be limited in scope.	Agency provides clearly defined core competencies and strong evidence of using a strategic plan to inform operations.
3	Senior leaders intentionally and effectively encourage high performance and a culture of continuous learning.	Agency does not provide evidence of senior leaders encouraging high performance or a culture of continuous learning.	Agency provides evidence of either senior leaders encouraging high performance or a culture of continuous learning, but not both.	Agency provides evidence of senior leaders encouraging both high performance and a culture of continuous learning; however, the evidence is limited in scope.	Agency provides strong evidence of senior leaders encouraging both high performance and a culture of continuous learning.

	Administration Rubric Text	Score			
		0	2	5	7
4	There are systematic processes in place to measure, assess, and continuously improve performance.	Agency does not provide evidence of a process to measure, assess, and continuously improve performance.	Agency provides evidence of a process to measure, assess, and continuously improve performance; however, it is unclear if it is systematic.	Agency provides evidence of a systematic process to measure, assess, and continuously improve performance; however, the evidence provided is limited in scope.	Agency provides evidence of a systematic and effective approach to measure, assess, and continuously improve performance.
5	The agency captures voice of the customer data to determine its performance in meeting their needs and requirements.	Agency does not capture voice of the customer data.	Agency provides evidence of capturing voice of the customer data; however, the data is not used to determine performance in meeting the needs and requirements of their customers.	Agency provides evidence of capturing voice of the customer data to determine its performance in meeting their needs and requirements; however, the evidence provided is limited in scope.	Agency provides evidence of a systematic and effective approach to capture voice of the customer data to determine its performance in meeting their needs and requirements.
6	Processes are in place to evaluate, reward, develop, and engage the workforce, including volunteers.	Agency does not provide evidence of processes to evaluate, reward, develop, and engage the workforce, including volunteers.	Agency provides evidence of a process to evaluate, reward, develop, and engage the workforce, including volunteers.	Agency provides evidence of a systematic process to evaluate, reward, develop, and engage the workforce, including volunteers.	Agency provides evidence of a systematic and effective process to evaluate, reward, develop, and engage the workforce, including volunteers.
7	The agency cultivates and prioritizes diversity, equity, and inclusion (DEI) within the workplace.	The agency does not provide evidence of cultivating and prioritizing DEI in the workplace.	Agency provides evidence of an approach to cultivating and prioritizing DEI in the workplace; however, it is unclear if the process is systematic.	Agency provides evidence of an approach to cultivating and prioritizing DEI in the workplace; however, evidence presented is limited in scope.	Agency provides evidence of a systematic and effective approach to cultivating and prioritizing DEI in the workplace.

	Administration Rubric Text	Score			
		0	2	5	7
8	The agency has processes in place to document, ensure, and meet legal and ethical regulatory requirements.	The agency does not provide evidence of processes to document, ensure, and meet legal, ethical, and regulatory requirements.	Agency provides evidence of processes to document, ensure, and meet legal, ethical, and regulatory requirements; however, it is unclear if it is systematic.	Agency provides evidence of processes to document, ensure, and meet legal, ethical, and regulatory requirements; however, the evidence provided is limited in scope.	Agency provides evidence of systematic and effective approaches to document, ensure, and meet legal, ethical, and regulatory requirements.
9	The agency has electronic systems to collect real-time administrative, financial, and performance data.	The agency does not provide evidence of collecting real-time administrative, financial, and performance data.	Agency provides evidence of collecting either real-time administrative, financial, or performance data using an electronic system, but not all three.	Agency provides evidence of collecting real-time administrative, financial, and performance data; however, agency does not provide evidence of utilizing an electronic system.	Agency provides evidence of collecting real-time administrative, financial, and performance data using an electronic system.

Governance Scoring Guide

United Way allocations volunteers will use the rubric below to score the Governance portion of funding applications.

	Governance Rubric Text	Score 0	Score 2	Score 5	Score 7
1	There is an effective structure in place for agency governance.	Agency does not provide evidence of a governance structure.	Agency provides evidence of a governance structure; however, key information is missing.	Agency provides evidence of a governance structure; however, information presented does not align with United Way Quality Standards (e.g. less than 12 members, no standing committees, meet less than 4 times a year, etc.).	Agency provides evidence of an effective governance structure that aligns with United Way Quality Standards.
2	Effective processes exist for recruiting, developing, engaging, and retaining talent to serve on the Board of Directors.	Agency does not provide evidence of processes to recruit, develop, engage, and retain talent to serve on their Board of Directors.	Agency provides evidence of a process for one or more of the following, but not all four: recruiting, developing, engaging, or retaining talent to serve on their Board of Directors.	Agency provides evidence of processes to recruit, develop, engage, and retain talent to serve on their Board of Directors; however, evidence is limited in scope or it is unclear if the process is systematic.	Agency provides evidence of a systematic and effective approach to recruit, develop, engage, and retain talent to serve on their Board of Directors.
3	The agency cultivates and prioritizes diversity, equity, and inclusion (DEI) at the board level.	The agency does not provide evidence of cultivating and prioritizing DEI at the board level.	Agency provides evidence of an approach to cultivating and prioritizing DEI at the board level; however, it is unclear if the process is systematic.	Agency provides evidence of an approach to cultivating and prioritizing DEI at the board level; however, evidence presented is limited in scope.	Agency provides evidence of a systematic and effective approach to cultivating and prioritizing DEI at the board level.

	Governance Rubric Text	Score			
		0	2	5	7
4	Bylaws, policies, and oversight exist to ensure transparency, stewardship, and accountability to the community.	The agency does not provide information regarding bylaws, policies, and oversight.	The agency provides evidence of bylaws, policies, and oversight that do not address transparency, stewardship, and accountability to the community.	The agency provides limited evidence of by-laws, policies, and oversight that address transparency, stewardship, and accountability to the community.	The agency provides strong evidence of by-laws, policies, and oversight that address transparency, stewardship, and accountability to the community.
5	The agency has an effective process for engaging in succession planning for the Chief Executive, Board Chair, and other key senior leadership roles.	Agency does not provide evidence of a process for engaging in succession planning for key leadership roles.	Agency provides evidence of an approach for engaging in succession planning for some, but not all key leadership roles.	Agency provides evidence of an approach for engaging in succession planning for key leadership roles; however, evidence is limited in scope or it is unclear if the process is systematic.	Agency provides evidence of a systematic and effective approach for engaging in succession planning for key leadership roles.
6	Board members assess themselves individually and collectively at least once a year.	Agency does not provide evidence of board members assessing themselves.	Agency provides evidence of board members assessing themselves either collectively or individually, but not both.	Agency provides evidence of board members assessing themselves both collectively and individually; however, the assessments do not occur at least once a year.	Agency provides evidence of board members assessing themselves both collectively and individually at least once a year.
7	The board reviews the Chief Executive's performance annually and uses this process to determine compensation and goals for the upcoming year.	Agency does not provide evidence of the Board reviewing the Chief Executive's performance.	Agency provides evidence of the Board reviewing the Chief Executive's performance annually but not of using the process to determine compensation and goals.	Agency provides evidence of the Board reviewing the Chief Executive's performance annually to inform either compensation or goals but not both.	Agency provides evidence of the Board reviewing the Chief Executive's performance annually and using the process to determine compensation and goals.

Program Scoring Guide

United Way allocations volunteers will use the rubric below to score the Program portion of funding applications.

	Program Rubric Text	Score			
		0	2	5	7
	The program addresses critical needs identified in the Community Needs Assessment (CNA).	Program does not align with identified needs from the CNA.	Programs align with at least 1 of the identified needs from the CNA, but the alignment described is more peripheral than directly related.	Programs aligns with at least 1 of the identified needs from the CNA, but the agency does not provide an explanation of that alignment.	Programs directly align with at least 1 of the identified needs from the CNA, and the agency provides a robust explanation of alignment.
1	There is a systematic and effective process to deliver program activities and interventions.	Agency does not provide evidence of a process to deliver program activities and interventions.	Agency provides evidence of an approach to deliver program activities and interventions; however, it is unclear if it is systematic.	Agency provides evidence of a systematic approach to deliver program activities and interventions; however, the evidence provided is limited in scope.	Agency provides evidence of a systematic and effective approach to deliver program activities and interventions.
2	The program's target population is well-defined.	Agency does not provide information about the program's target population.	Agency provides information about the program's target population; however, the target population does not match either with needs identified in the CNA nor expected program outcomes/program activities.	Agency provides information about the program's target population; however, target population matches either needs identified in the CNA or expected program outcomes/program activities (but not both).	Agency provides information about the program's target population, and the target population matches both needs identified in the CNA and expected program outcomes/program activities

	Program Rubric Text	Score			
		0	2	5	7
3	The agency's theory of change describes how the program model addresses the community need and helps clients achieve intended outcomes, including any research, evidence, or experience that supports this.	Agency does not provide a theory of change.	Agency provides a theory of change; however, it is not supported by research, evidence, or experience.	Agency provides a theory of change and is supported by limited, unrelated, and/or out of date research, evidence, or experience.	Agency provide a theory of change that is supported by robust research, evidence, or experience.
4	The agency has successful outcome results including trends and/or benchmarks as it pertains to the program(s) and target population(s) for which it is requesting funding.	Agency does not provide outcome results or outcome results provided are unsuccessful.	Agency provides successful outcomes results; however, they are not related to program activities and/or the identified target population.	Agency provides successful outcome results related to the target population and activities; however, they do relate outcomes to internal trends and/or external benchmarks.	Agency provides successful outcome results related to the target population and activities and can demonstrate learning from internal trends and/or external benchmarks.
5	There are processes and protocols in place to ensure program fidelity and modifications as needed.	Agency does not provide evidence of a process to ensure program fidelity and modifications as needed.	Agency provides evidence of either a process to ensure program fidelity or making modifications, but not both.	Agency provides limited evidence of processes to ensure program fidelity and modifications.	Agency provides evidence of processes to ensure program fidelity and make modifications as needed.
6	Processes are in place to listen and learn from program participants and obtain actionable information.	Agency does not provide evidence of a process to listen to program participants and obtain actionable information.	Agency provides evidence of either a process to listen and learn from program participants or obtain actionable information, but not both.	Agency provides limited evidence of processes to listen and learn from program participants and obtain actionable information.	Agency provides evidence of processes to listen and learn from program participants and obtain actionable information.

	Program Rubric Text	Score			
		0	2	5	7
7	The agency demonstrates that their programs, services, and initiatives seek to reduce disparities and advance diversity, equity, and inclusion (DEI).	Agency provides no evidence of an approach to reducing disparities or advancing DEI.	Agency provides evidence of an approach to reducing disparities and/or advancing DEI, but no evidence of outcomes.	Agency provides evidence of an approach to reducing disparities and/or advancing DEI with some evidence of positive outcomes.	Agency provides evidence of an approach to reducing disparities and/or advancing DEI with clear evidence of positive outcomes.
8	Staff and volunteers possess the necessary qualifications, expertise, training, credentials, and cultural competency to effectively deliver the program.	Agency does not provide evidence of a process to ensure staff or volunteers possess the necessary qualifications, expertise, training, credentials, and cultural competency to effectively deliver the program.	Agency provides evidence of a process to ensure that either staff or volunteers (but not both) possess the necessary qualifications, expertise, training, credentials, and cultural competency to effectively deliver the program.	Agency provides some evidence of processes to ensure that both staff and volunteers possess the necessary qualifications, expertise, training, credentials, and cultural competency to effectively deliver the program.	Agency provides strong evidence of processes to ensure that both staff and volunteers possess the necessary qualifications, expertise, training, credentials, and cultural competency to effectively deliver the program.
9	The agency regularly collaborates, integrates, and aligns services with other service providers.	Agency does not provide information about collaborations, integrations, or alignment with other service providers.	Agency provides evidence of collaborations with other service providers, but services are not aligned and/or resources are not being shared.	Agency provides evidence of deep collaboration, integration, and/or alignment with one other service provider. Examples include sharing resources, joint application for funding, coalition work or collective impact work.	Agency provides evidence of deep collaboration, integration, and/or alignment with multiple other service providers. Examples include sharing resources, joint funding applications, coalition work or collective impact work.

Finance Scoring Guide

United Way allocations volunteers will use the rubric below to score the Finance portion of funding applications.

	Finance Rubric Text	Score			
		0	2	5	7
1	The agency describes how the funds will be used to address the community needs and selected outcomes.	Agency does not describe how the funds will be used to address the community needs and selected outcomes.	Agency partially describes how the funds will be used to address the community needs and selected outcomes.	Agency somewhat describes how the funds will be used to address the community needs and selected outcomes.	Agency fully describes how the funds will be used to address the community needs and selected outcomes.
2	The agency has appropriately resourced financial expertise to help assure financial planning, monitoring, and safeguarding.	Agency does not have appropriately resourced financial expertise to help assure financial planning, monitoring, and safeguarding.	Agency appears to have minimal financial expertise to help assure financial planning, monitoring, and safeguarding.	Agency appears to have some financial expertise to help assure financial planning, monitoring, and safeguarding.	Agency appears to have sufficient financial expertise to help assure financial planning, monitoring, and safeguarding.
3	The agency clearly articulates the impact of not receiving United Way funding.	Agency does not clearly articulate the impact of not receiving United Way funding.	Agency articulates a partial reason regarding the impact of not receiving United Way funding.	Agency articulates some reason regarding the impact of not receiving United Way funding.	Agency demonstrates a strong need for United Way funding and provided an explanation regarding the impact of not receiving United Way funding.
4	The agency identifies alternative funding sources.	Agency does not identify alternative funding sources.	Agency references at least one alternative funding source.	Agency references two to three alternative funding sources.	Agency references four or more alternative funding sources.
5	The agency has an operating reserve ratio range of 25% - 75%.	Agency has an operating reserve ratio of less than 10% or negative.	Agency has an operating reserve ratio of 10% - 20% or over 100%.	Agency has an operating reserve ratio of 20% - 25% or 75% - 100%.	Agency has an operating reserve ratio of 25% - 75%.

	Finance Rubric Text	Score			
		0	2	5	7
6	The agency has a support services ratio range of 6% - 25%.	Agency has a support services ratio greater than 35%.	The agency has a support services ratio of 25.1% - 35%.	Agency has a support services ratio less than 6%.	The agency has a support services ratio of 6% - 25%.
7	The agency demonstrates diverse sources of revenue types and amounts.	Agency does not have diverse sources of revenue types.	Agency has at least one to two sources of revenue types that represent 10% to 40% total revenue.	Agency has at least three sources of revenue types that represent 40% to 85% total revenue.	The agency has four or more sources of revenue types that represent greater than 85% total revenue.
8	The agency's financial history does not reflect any deficits in the past three years.	Agency reported three deficits within the past three years.	Agency reported at least two deficits within the past three years.	Agency reported at least one deficit within the past three years.	Agency reported no deficits within the past three years.
9	The agency has provided a management letter and findings with few or no financial weaknesses.	Agency's management letter and findings reflect severe financial weaknesses with no documented course of action to address the concerns.	Agency's management letter and findings reflect five or more financial weaknesses with some documented course of action to address the concerns.	Agency's management letter and findings reflect no more than three financial weaknesses with a documented course of action to address the concerns.	Agency's management letter and findings reflect no financial weaknesses.
10	The agency's budget form figures align with the audited financials' figures, with no inconsistencies in the amounts.	Agency's budget form figures do not align with audited financial figures and no explanations exist.	Agency's budget form figures align with audited financial figures but there are no reasonable explanations.	Agency's budget form figures align with audited financial figures and somewhat reasonable explanations exist, but certain elements remain unclear.	Agency's budget form figures align with audited financial figures and reasonable explanations exist.

Weighted Formula

United Way allocation volunteers will use the weighted formula below to help make funding determinations. In addition to the rubric score, additional weighting will be given to the following areas:

Weighted Formula	Points	Rating
1. Rubric score Administration 20%; Governance 20%; Program 40%; Finance 20%	100	
2. Depth and breadth of services Number of people served, complexity of services provided, alignment with systems-level community initiatives	7	
3. Outcomes and impact Data, trends, and internal and external benchmarks demonstrating effectiveness and meaningful results for the people the organization is in existence to serve	7	
4. Alignment with community needs The programs and services the organization provides addresses priorities identified in the Community Needs Assessment	7	
5. Diversity, equity, and inclusion lens The organization's policies, programs, and practices prioritize and advance diversity, equity, and inclusion	7	
TOTAL POSSIBLE POINTS	128	

Appendix D: Outcomes Alignment Map

The chart belows offers suggestions about outcomes that might be measured for the needs listed in the Program form. The list of outcomes is neither exhaustive nor prescriptive. Outcomes other than those listed could be good indicators of impact for a specified need, and all outcomes listed do not need to be measured to determine success in addresing need. This chart is solely intended to help applicants consider outcomes selection.

Impact Area	Need/Topic	Need Definition	Outcomes
Basic Needs	Crisis Intervention	Availability and quality of services for individuals or families in need and when costs related to housing, childcare, transportation, and basic needs are a significant burden.	◘ Clients feel more hopeful about the future. ◘ Clients maintain/improve their quality of life. ◘ Clients gain knowledge about available community resources. ◘ Clients gain knowledge about pertinent legal rights and obligations. ◘ Clients gain knowledge and skills to prevent and respond to emergencies. ◘ Clients gain strategies for enhancing safety. ◘ Clients have immediate basic needs met (food, clothing, shelter, etc.). ◘ Clients recover to their normal lifestyle after a disaster. ◘ Clients remain in/transition to an improved, stable living situation.
Basic Needs	Food Security	Access by all people at all times to enough food for an active and healthy life.	◘ Clients have immediate basic needs met (food, clothing, shelter, etc.). ◘ Clients have access to enough nutritious food for an active and healthy life.
Basic Needs	Housing Security	Access to quality housing in the absence of threats.	◘ Clients have immediate basic needs met (food, clothing, shelter, etc.). ◘ Clients remain in/transition to an improved, stable living situation. ◘ Clients secure/maintain safe, stable housing. ◘ The community has increased access to affordable housing.
Basic Needs	Legal Assistance	Availability and quality of legal counsel for issues related to basic needs, including immigration.	◘ Clients gain knowledge about available community resources. ◘ Clients gain knowledge about pertinent legal rights and obligations. ◘ Clients make changes based on knowledge gained. ◘ Clients have access to quality legal counsel regarding issues related to basic needs. ◘ Clients resolve legal issues and/or requirements
Basic Needs	Transportation	Access to means of getting around, public or private, that is affordable and flexible.	◘ The community has increased access to affordable and quality transportation. ◘ Clients have been able to secure consistent, reliable transportation.

Impact Area	Need/Topic	Need Definition	Outcomes
Financial Stability	Debt	Amount of money owed that is to be paid back at a later date, usually with interest.	◘ Clients reduce debt.
Financial Stability	Financial Education	Resources that teach individuals how to become self-sufficient so they can achieve financial stability	◘ Clients gain knowledge about personal finance and money management. ◘ Clients make changes based on knowledge gained. ◘ Clients have accessed financial products and/or services. ◘ Clients that were formerly credit invisible have established a credit score.
Financial Stability	Financial Safety Net	Emergency funds and/or insurance to protect individuals from losing their financial security because of unexpected expense on catastrophic illness or personal tragedy.	◘ Clients have accessed financial products and/or services. ◘ Clients gain/maintain sufficient savings to maintain financial stability in the midst of a large unexpected expense. ◘ Clients increase income, savings, and/or assets.
Financial Stability	Income	Access to enough money to maintain a quality standard of living.	◘ Clients increase income, savings, assets. ◘ Clients obtain employment.
Financial Stability	Jobs	Access to steady employment for which individuals are reasonably qualified.	◘ Clients enroll in/complete job training, college, or vocational training. ◘ Clients obtain employment. ◘ Clients obtain job readiness skills. ◘ Clients retain employment for at least three months. ◘ Clients have accessed healthcare and/or other benefits as part of wage package. ◘ Clients obtain improved employment situations.
Foster Learning	Child Welfare	Availability and quality of services designed to ensure that children are safe and supported by their families, including children in foster care and those adopted, and early intervention screening.	◘ Clients achieve/maintain permanency (reunification, guardianship, adoption). ◘ Clients are free from substantiated incidents of child abuse and/or neglect. ◘ Clients are promoted to the next grade level. ◘ Clients develop healthy relationships with family members/caregivers/caring adults. ◘ Clients experience no out-of-home placements. ◘ Clients gain knowledge, skills, and/or support for positive parenting.

Impact Area	Need/Topic	Need Definition	Outcomes
Foster Learning	Early Childhood Education	Availability and quality of affordable programming and childcare that serves children in their infant and preschool years (0-5) designed to aid in cognitive and social development.	◘ Clients are ready to enter kindergarten. ◘ Clients meet or exceed age-appropriate developmental milestones. ◘ The community has increased access to quality, affordable childcare programming.
Foster Learning	K-12 Education and Out-of-School Time	Curricular and extracurricular education access, quality and navigation for school-aged children and youth, designed to help all children reach their full potential.	◘ Clients are proficient in math. ◘ Clients are proficient in reading. ◘ Clients pass their classes. ◘ Clients develop positive self-concept/self-esteem/self-confidence/self-efficacy. ◘ Clients make changes based on knowledge gained. ◘ Clients develop skills to avoid engaging in risky behaviors. ◘ Clients do not become pregnant or father a child during teen years. ◘ Clients gain critical thinking and decision-making skills. ◘ Clients gain knowledge about safe and healthy relationships. ◘ Clients graduate from high school, earn a GED, other high school equivalent. ◘ Clients maintain/improve course grades/academic performance. ◘ Clients maintain/improve school attendance/remain in school. ◘ Clients are proficient in science and/or technology. ◘ The community has increased access to quality curricular and extracurricular education that is designed to help all children reach their full potential.
Foster Learning	Post-secondary Education	Formal and informal opportunities after high school and throughout peoples' lives that foster continuous development and improvement of the knowledge and skills needed for employment and personal fulfillment.	◘ Clients gain critical thinking and decision-making skills. ◘ Clients pass their classes. ◘ Clients maintain/improve course grades/academic performance. ◘ Clients maintain/improve school attendance/remain in school. ◘ Clients enroll in job training, college, or vocational training. ◘ Clients complete job training, college, or vocational training.

Impact Area	Need/Topic	Need Definition	Outcomes
Improve Health	Access to Healthcare	Support to connect individuals and families to the best health care provider or facility to meet their needs.	◘ Clients are successfully linked with community services. ◘ Clients receive routine medical care and age-appropriate immunizations. ◘ Clients are connected with a regular, quality healthcare provider or facility that meets their needs. ◘ Clients are able to secure quality health insurance that is financially manageable.
Improve Health	Aging and Senior Support	Resources and programming to support people in later life.	◘ Clients feel less isolated. ◘ Clients remain in/transition to an improved, stable living situation. ◘ Clients receive routine medical care and age-appropriate immunizations. ◘ Clients maintain/improve their quality of life. ◘ Clients gain critical thinking and decision-making skills. ◘ Clients gain knowledge about available community resources. ◘ Clients are successfully linked with community services. ◘ Clients gain/maintain independent living. ◘ Clients maintain/improve their level of functioning. ◘ Clients are able to safely remain in/transition to a residence of their own choosing.

Impact Area	Need/Topic	Need Definition	Outcomes
Improve Health	Behavioral Health and Substance Abuse	Support to address mental and emotional challenges, including addiction to substances.	◘ Clients avoid bullying behaviors. ◘ Clients avoid/reduce substance use. ◘ Clients develop coping, stress management/resiliency skills. ◘ Clients maintain/improve their quality of life. ◘ Clients develop healthy relationships with family members/caregivers/caring adults. ◘ Clients develop positive friendships/relationships with peers. ◘ Clients develop positive self-concept/self-esteem/self-confidence/self-efficacy. ◘ Clients develop skills to avoid engaging in risky behaviors. ◘ Clients experience a sense of belonging. ◘ Clients experience fewer mental, emotional, and/or behavioral symptoms. ◘ Clients express empathy. ◘ Clients feel less isolated. ◘ Clients feel more hopeful about the future. ◘ Clients gain knowledge about behavioral/mental health issues. ◘ Clients identify, manage, and appropriately express emotions and behaviors. ◘ Clients maintain/improve their level of functioning.

Impact Area	Need/Topic	Need Definition	Outcomes
Improve Health	Physical Health	Support to address physical challenges, with a focus on chronic conditions.	◘ Researchers advance knowledge of health issue with publication of research by a peer-reviewed journal/entity. ◘ Clients are born of a healthy birth weight. ◘ Clients receive routine medical care and age-appropriate immunizations. ◘ Clients are successfully able to manage physical health conditions. ◘ Clients maintain/improve their quality of life. ◘ Clients develop/maintain a physically active lifestyle. ◘ Clients develop/maintain healthy eating habits. ◘ Clients gain knowledge about healthy lifestyle habits. ◘ Clients gain knowledge about physical health conditions. ◘ Clients maintain/improve their level of functioning. ◘ Clients receive support to address physical challenges. ◘ The community has increased resources for those living with chronic health conditions or disease. ◘ Clients experience reduced/no visits to the emergency room. ◘ Clients are connected with a regular, quality healthcare provider or facility that meets their needs. ◘The community has increased access to prevention services.

Impact Area	Need/Topic	Need Definition	Outcomes
Improve Health	Services for Individuals with Disabilities	Availability and quality of resources for individuals with disabilities, including the removal of barriers that restrict their life choices.	◘ Clients feel less isolated. ◘ Clients remain in/transition to an improved, stable living situation. ◘ Clients receive routine medical care and age-appropriate immunizations. ◘ Clients maintain/improve their quality of life. ◘ Clients gain critical thinking and decision-making skills. ◘ Clients gain knowledge about available community resources. ◘ Clients are successfully linked with community services. ◘ Clients gain/maintain independent living/essential life skills. ◘ Clients improve listening and spoken language abilities. ◘ Clients maintain/improve their level of functioning. ◘ Clients develop/use skills for self-advocacy. ◘ Clients gain/improve skills to develop and maintain positive social relationships. ◘ Clients are able to safely remain in/transition to a residence of their own choosing. ◘ The community has increased access to quality resources for individuals with disabilities. ◘ Clients have reduced/overcome barriers that restrict life choices.
Strengthen Communities	Built Environment	The human-made surroundings where individuals work, live, and interact and play on a daily basis. This includes proximity to sources of healthy food, green space, and recreational facilities.	◘ Clients feel less isolated. ◘ The community has increased access to sources of healthy food, green space, and/or recreational facilities.
Strengthen Communities	Community Building	Formal and informal interactions that grow relationships and build social and physical assets for a desired quality of life within a community. Also includes the infrastructure to promote advocacy and education around important community issues and policy changes.	◘ Clients are successfully linked with community services. ◘ Clients experience a sense of belonging. ◘ Clients feel less isolated. ◘ Clients feel more hopeful about the future. ◘ Clients gain knowledge/take action about advocacy/policy issues. ◘ Clients gain knowledge about available community resources. ◘ Clients increase interactions with community members.

Impact Area	Need/Topic	Need Definition	Outcomes
Strengthen Communities	Disaster Preparedness and Response	Available resources and coordination for humanitarian needs resulting from hazards, including natural disasters.	◘ Clients gain knowledge and skills to prevent and respond to emergencies. ◘ Clients gain knowledge/take action to increase disaster preparedness. ◘ Clients gain strategies for enhancing safety. ◘ Clients recover to their normal lifestyle after a disaster. ◘ The community has increased resources for coordination of humanitarian aid resulting from hazards and natural disasters.
Strengthen Communities	Justice System	Consistent, fair, and respectful engagement of all citizens involved in the criminal justice system.	◘ Clients are free from law enforcement/juvenile justice involvement or re-offending. ◘ Clients are successfully able to navigate the justice system. ◘ The community's criminal justice system has increased consistency, fairness, and respect for all citizens.
Strengthen Communities	Safety	Risk of violent crime, and availability of crime prevention efforts.	◘ Clients avoid bullying behaviors. ◘ Clients gain strategies for enhancing safety. ◘ The community experiences reduced risk of violent crime. ◘ Clients increase awareness of/engage with crime prevention efforts.