# 2022 SAFETY NET RENEWAL APPLICATION GUIDE

UNITED WAY OF GREATER ST. LOUIS

**DEADLINE:** Thursday, July 1st @ 5 PM



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## I. Renewal Application Process

All 2020 Safety Net agencies will need to complete a 2022 Renewal Application. The purpose of the Renewal Application is to allow agencies space to provide key updates and document progress in regard to information submitted during the 2020 Safety Net application process. This will ensure that United Way volunteers have necessary and up to date information for site visits and continued funding approval during the Summer and Fall.

United Way of Greater St. Louis regularly collects data and information from its funded partners for the following purposes: accountability to donors and the community, informing community investments, fundraising, evaluation, research, benchmarking, and knowledge sharing.

## <u>PLEASE NOTE: The 2022 Safety Net Renewal Application will be open from June 2, 2021 through July 1, 2021 with responses due by 5pm on July 1.</u>

United Way of Greater St. Louis has transitioned to using FormAssembly to collect agency data this year as it allows us more control over the forms while providing a much better user experience for you. However, FormAssembly does not have users and logins in the traditional sense. That is why we are recommending **one person in the organization be designated to enter the information into the forms and to submit the forms.** 

We also recommend writing all responses to the questions outside FormAssembly in a traditional word processing software like Microsoft Word. You will have the ability to print and review your responses before submitting. The <u>list of questions</u> and instructions for <u>printing</u> before you submit are provided later in this guide.

The link to the Renewal Application is below:

#### 2022 Safety Net Renewal Application

Please direct questions regarding the technical aspects of FormAssembly, saving and resuming, and entering information into forms to <a href="mailto:reporting@stl.unitedway.org">reporting@stl.unitedway.org</a>.

Questions regarding the content of information submitted during reporting should be directed to your Portfolio Manager/ United Way staff contact. Please see the Contact List in the Appendices for a list of agencies and corresponding United Way staff contacts.

Portfolio Manager/Staff Member	Panels	Email Address
Anna Paul	Crisis Intervention Food Security Housing Security	Anna.paul@stl.unitedway.org
Darlene Martin	Aging & Senior Support	Darlene.martin@stl.unitedway.org

	Community Building Jobs Services for Individuals with Disabilities	
Dawna Gilbreath	Child Welfare Early Childhood Education K-12 Education & Out of School Time	Dawna.gilbreath@stl.unitedway.org
Julia Fuller	Access to Healthcare Behavioral Health & Substance Abuse Physical Health Services for Individuals with Disabilities	Julia.fuller@stl.unitedway.org

## II. Important Tips

#### 1. System Requirements

To use the web-based reporting system, you will need the most up-to-date version of either Microsoft Edge, Google Chrome, or Mozilla Firefox.

## 2. Copying and Pasting into FormAssembly Forms

We are recommending writing all responses to the questions outside FormAssembly and copying and pasting your responses into the correct text box. FormAssembly does not save your work as you are working so it is best to have another place where responses are saved outside the forms. You can copy and paste from any word processing software including Microsoft Word, Open Office, and Microsoft Excel without worrying about any special characters (!, @, \$, etc.) or formatting changing.

#### 3. Do not use Back or Reload Buttons on Browser

Each of the forms that need to be filled out and submitted are self-contained so there will be no need to use the Back or Reload button on your browser. If you do use the Back or Reload buttons you may lose all the work you have completed in the form. If you find that you need to leave your computer, you can save and resume later by using the links at the top and bottom of the form. You can view more detailed instructions later in the guide.

#### 4. Spellcheck

The system does not contain an embedded spellcheck/grammar check; however, some web browsers do include this feature. We recommend typing narrative responses in a

word processing system and then copying/pasting into the reporting system to minimize the likelihood of spelling and grammar errors.

## 5. Spell out Acronyms

Spell out acronyms, at least with the first use (e.g., FQHC – Federally Qualified Health Center or COA – Council on Accreditation).

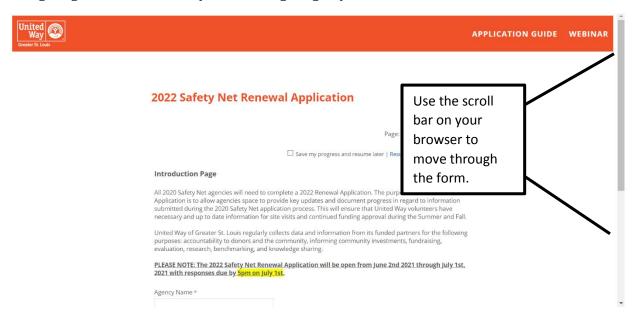
## III. Accessing the Renewal Application

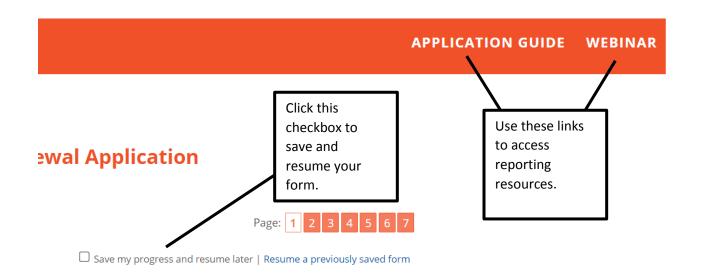
The Renewal Application can be accessed at the link below:

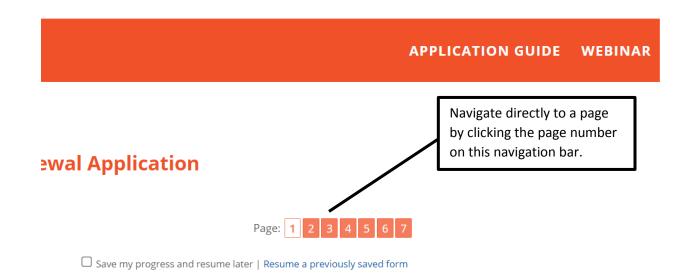
2022 Safety Net Renewal Application

## IV. Navigating and Using Forms

Navigating within the form is just like navigating any other website.

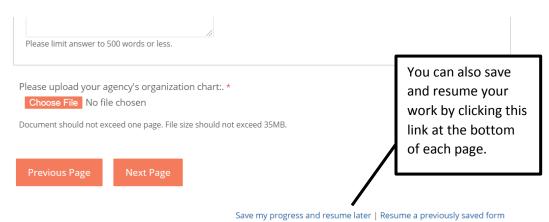






How many episodic volunteers, whagency had in the past year	ho came once or very few times fo	or a particular event or purp	ose, has your
Number can be estimated.			
How many ongoing volunteers do	es your agency have? *		
This can include direct services and/or a	dministrative volunteers.		
How many board and committee	volunteers does your agency have	e?*	
Previous Page Next Pag	ge	Navigate to the clicking the Next at the bottom of	Page button
	Save my progress	and resume later   Resume a p	previously saved form
Return to the previous by clicking the Previous button.			
	Thank you paragraph.		
	Acknowledgement State	ement	
	O Yes		
	O No		
	Signature/Initials for Ac	knowledgement *	The surbrait
	Date *		The submit button is at the bottom of page 7 of the form.
	Previous Page	Submit	

Save my prog



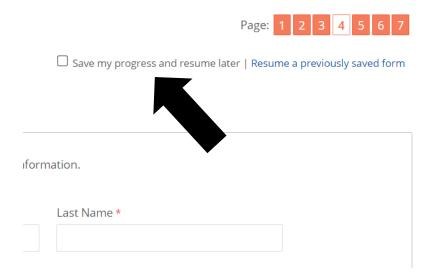
#### save my progress and resume later | Resume a previously sured form

## V. Saving and Resuming Forms

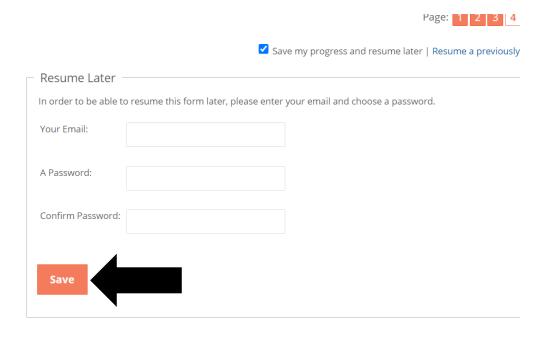
You will be able to save and resume your work if you need to get up from your working area. \*\*Note: Your work will not be saved on an ongoing basis. We recommend completing the responses in a word processing software and copying and pasting them into the form.\*\*
Follow the directions below to save and resume your form.

1.Click the check box next to "Save my progress and resume later" at the top of each page or click the link that says "Save my progress and resume later" at the bottom of each page to start the process of saving and resuming your form.

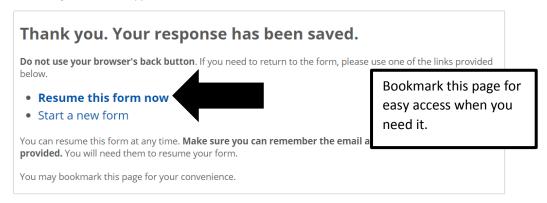
## wal Application



2. You will be prompted to enter your email address and a password. Once you have entered them click the "Save" button.



3. After clicking save, you will be taken to a webpage with a link to resume your form later. You will also receive an email with a link to resume your form later.



Thank you. Your response to "2022 Safety Net Renewal Application" has been saved.

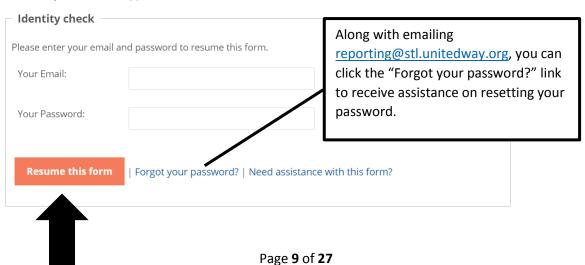
Form Notification <no-reply@formassembly.com>
To Michael Abrams

You can resume this form at any time by going to <a href="https://uwgsl.tfaforms.net/forms/resume/4603035">https://uwgsl.tfaforms.net/forms/resume/4603035</a>.

If you don't receive this email right away, check your Spam folder.

4. When you are ready to continue working on the form, click one of the links above. Enter your email and password and click "Resume this form." \*\*Note: If you forget your password, email <a href="mailto:reporting@stl.unitedway.org">reporting@stl.unitedway.org</a> and a staff member will assist you in recovering it.\*\*

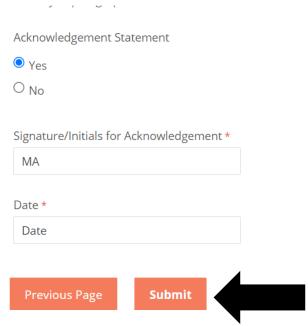
2022 Safety Net Renewal Application



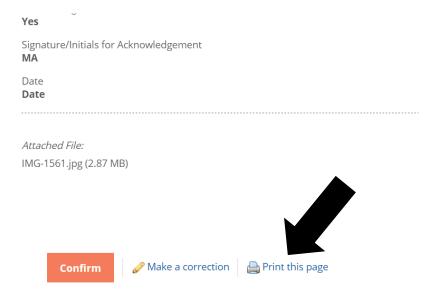
## VI. Printing Forms

Follow the directions below to review and print your forms before submission.

1. Scroll to the bottom of page 7 and click the "Submit" button.



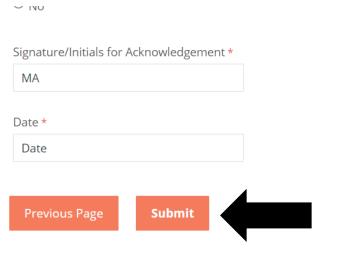
2. You will be taken to a page where you can review the answers you entered into the text boxes. To print your form, scroll to the bottom of the page and click "Print this page" and follow the prompts.



## VII. Submitting Forms

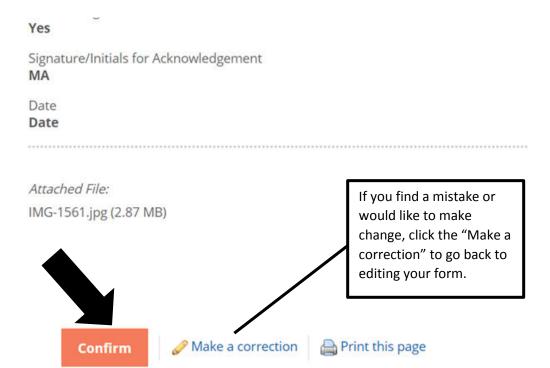
Follow the directions below to submit your form once you have completed all required answers.

1. Scroll to the bottom of page 7 and click the "Submit" button.



Save my progress

2. You will be taken to a page where you can review the answers you entered into the text boxes. Once you are satisfied with your responses, you can press the "Confirm" button to send the form in.



## VIII. List of Questions

The next sections of the guide provide a detailed look at everything United Way will be asking your agency about in the Renewal Application.

\*\*Note: Many questions in the renewal application are conditional based on the responses to the questions above it. As a result, some of the questions listed here may not appear for you while filling out the form.\*\*

## A. Eligibility Documents

Have there been any updates to the following documents or policies since the submission of your 2020 Safety Net application? If yes, please upload the updated document(s).

- Federal 501(c)(3) Tax Determination Letter
- Illinois or Missouri Certificate of Corporate Good Standing
- Agency policy for background checks on staff and/or volunteers (and if applicable, policies on child abuse and neglect screenings)
- Agency policy on non-discrimination in hiring and service delivery
- Agency policy on privacy protection practices

Do you agree to the following anti-terrorism certification in compliance with the USA Patriot Act:

In compliance with the USA Patriot Act and other counterterrorism laws and United Way World Wide's recommendation, the United Way of Greater St. Louis requires that the Organizational Leader (Executive Director, CEO, etc.) of each member agency annually certify on behalf of the member agency that all United Way funds and donations will be used in compliance with all applicable anti- terrorist financing and asset control laws, statutes, and executive orders.

#### B. Administration

Briefly describe the work of your agency in 25 words or less. (25 Word Limit)

Please provide your Organizational Leader's most up to date contact information.

Name and contact Information for the agency staff member who oversees the following (if applicable):

- Policy and/or advocacy work
- Volunteer Management
- United Way Employee Campaign Coordinator

Is your agency accredited or subject to review by your national organization? If yes, please list the accrediting body(ies) and expiration date(s) and/or your dues formula to your national organization. (500-word limit)

Has your agency had any legal, ethical, safety, or regulatory issues from January 1 to May 31, 2021 that we should be aware of? If yes, please explain. (500-word limit)

Has your agency had any official complaints or grievances from January 1 to May 31, 2021? If yes, how many, and please explain. (500-word limit)

Enter the total number of people who were employed at any time from January 1 to May 31, 2021:

What is the approximate number of Full Time Equivalent (FTE) positions normally employed?

**Note**: FTE is defined as the number of total hours worked divided by the maximum number of compensable hours in a work year as defined by law. For example, if the work year is defined as 2,080 hours, then one worker occupying a paid full-time job is equivalent to one FTE. Two employees working for 1,040 hours each are equivalent to one FTE between the two of them.

How many episodic volunteers, who came once or very few times for a particular event or purpose, has your agency had from January 1 to May 31, 2021?

How man ongoing volunteers does your agency have? (direct services and/or admin).

How many Board and committee volunteers does your agency have?

#### C. Governance

Please provide updated Board Leader Information.

Have there been any significant changes in your Board composition or activities since the submission of your 2020 Safety Net application? (This does not include typical cycling on and off of board members.) If yes, please explain. (500-word limit)

Strategic plan start date, end date, and description of goals. (500-word limit)

Upload organizational chart. Document should not exceed one page in length.

Please describe your agency's efforts in Diversity, Equity, and Inclusion across the following areas since submitting your application. Have any new policies been written? What challenges and successes has your agency had in DEI?

- a) Administration (500-word limit)
- b) Governance (500-word limit)
- c) Finance (500-word limit)
- d) Program (500-word limit)

Please upload any documentation to share regarding your agency's DEI efforts.

Please provide the name, start date, end date, and status of up to 3 capacity building initiatives your agency has participated in from January 1 to May 31, 2021.

#### D. Finance

Was the agency in arrears in submitting any payroll taxes (employee or agency share) to any city, state, or federal authorities in its most recently completed fiscal year? If yes, give details about tax delinquency and current status. (100-word limit)

Is the agency required to file an IRS Form 990 or 990EZ tax return? Please upload.

- a) If yes, was the most recent IRS Form 990/990EZ tax return submitted on time or within an extension period approved by the IRS?
- b) If no, provide details regarding late IRS Form 990/990EZ tax return submission. (100-word limit)

Please upload your agency's most recent Federal Form 990.

Please list any significant changes in the agency's financial situation for the current fiscal year. (500-word limit)

What percentage of your agency's 2021 United Way allocation award has been utilized to date? Note explanation if needed. (250-word limit)

What is your agency's projected total program expenses for fiscal year 2022?

Does the agency foresee any projected changes in how it plans to utilize its United Way allocation award? (500-word limit)

## E. Program

Please explain any major changes to your agency's programs and services or general operations made due to factors related to COVID-19. How do these changes affect plans for the future? (1,000-word limit)

Total number of direct clients that reside in UW service area served by your agency January 1 - May 31, 2021.

Total Indirect Clients served by your agency January 1 - May 31, 2021.

Note: Updated guidance about how to define direct and indirect clients can be found in the definitions section in Appendix B.

Describe a service or good provided by your agency that the following monetary amounts would provide: \$10, \$50, \$150, \$500, \$100

(E.g., \$10 will provide flu shots for 7 infants; \$500 will provide a month of counseling sessions to a survivor of domestic violence; \$1000 will provide a three-month job training program for a veteran)

The following questions will be asked for each program included in your agency's Safety Net contract:

- What percentage of your agency's United Way 2021 Allocation is dedicated to this program?
- Total number of direct clients that reside in UW service area served by this program from January 1 May 31, 2021.
- Total number of indirect clients served by this program from January 1- May 31, 2021.

The following questions pertain to your agency's contracted outcomes listed in Exhibit B of your agency's Safety Net Member Agency Agreement. If you are unable to locate your agency's copy of the agreement, please reach out to your Portfolio Manager. In the case of agencies who have submitted notice of outcomes changes due to COVID-19 since the signing of the agreement, this question pertains to the altered outcomes.

 Measurement tools/methods for measuring achievement of contracted outcomes (1000-word limit)

This could include a standardized assessment from an external source or a survey your agency developed or adapted. How did you determine a client had achieved the outcome and what was the criteria? This may include reviewing client records (report cards, case noes, etc.) and counting the number of clients meeting a certain criterion or setting a cutoff score or minimum improvement amount between pre and post measures on a survey or assessment to indicate outcome achievement.

• Describe your agency's continuous quality improvement (CQI) process for this program: How is outcome data used? What adjustments have been made as a result of findings? What successes and challenges have you had with this program and how have you responded? (1000-word limit)

You can add additional programs by clicking the "Add another program" link after the Individual Program Information section of the page.

Individual Program Information ——	
Program Name *	
Total Direct Clients served by this program	in 2020 that reside in United Way Service Area *
What measurement tools and/or methods	does your agency use to determine if clients are achieving the
contracted outcomes for this program? Ple	
//	
	s program. How are outcomes used? What adjustments have been ses and challenges have you had with this program? *
made as a result of minings. This couldess	res and animaliges have year had with ans program
// Please limit responses to less than 1000 words.	
riedse ilitiik responses to less tildir 1000 Words.	
	Add another program

## F. Acknowledgement

By selecting "Yes", the leader of this agency attests that the information provided is correct to the best of their knowledge and reflects the true status of this funding. Please enter your electronic Signature/Initials for Acknowledgement.

Please include the information of the primary person completing this form who should be our main contact for any questions about what is reported (Name, Title, Email).

## IX. Appendices

## A. FAQ

**Note:** These questions are hyperlinked in the electronic version of the reporting guide.

**TECHNICAL QUESTIONS** (How to complete reporting – typically direct these questions to <a href="mailto:reporting@stl.unitedway.org">reporting@stl.unitedway.org</a>)

- 1. Where do I log in to the renewal application?
- 2. I accidentally submitted my form before I was done. What should I do?
- 3. I hit BACK, RELOAD, or closed my browser. Can I recover the information I entered?
- 4. The form I open does not look like the pictures you have in the guide. Did I do something wrong?
- 5. What do I do if the files sizes of my documents are too large for the upload tool?

**CONTENT QUESTIONS** (What to include in reporting information – typically direct these questions to your Portfolio Manager/UWGSL Staff Contact)

- 6. What if I am unsure about what information I should enter?
- 7. What if my agency uses more than one measurement tool/method to determine if a client has achieved an outcome?
- 8. How is the information reported on this application going to be used?

### **GENERAL/OTHER QUESTIONS**

- 9. Who is my agency's Portfolio Manager?
- 10. What happened to data my agency submitted in 2021 Reporting?
- 11. How is the information reported on this application going to be used?
- 12. What if I my agency does not complete the application by the deadline?

#### **TECHNICAL QUESTIONS**

## 1. Where do I log in to the renewal application?

There is no log in page for reporting this year. To access reporting, refer to the section titled "Accessing Reporting" above in this guide.

If you saved your form to resume it later and have lost the link or forgotten your password, please reach out to <a href="mailto:reporting@stl.unitedway.org">reporting@stl.unitedway.org</a>.

## I accidentally submitted my form before I was done. What should I do?

Hitting the "Submit" button on the bottom of the form one time **DOES NOT** submit your form. Instead, it brings you to a page for confirmation. To go back to editing your form, press the "Make a correction" link at the bottom of the confirmation page.

If you hit the "Confirm" button on the bottom of the confirmation page before you meant to, please reach out to <a href="mailto:reporting@stl.unitedway.org">reporting@stl.unitedway.org</a> for assistance.

3. I hit BACK, RELOAD, or closed my browser. Can I recover the information I entered? Form Assembly does not continuously save your work as you enter information. Because of this, we recommend you write all your responses outside Form Assembly and copy/paste into the form itself.

If you need to step away from your computer, refer to the section above titled "Save and Resume Forms."

4. The form I open does not look like the pictures you have in the guide. Did I do something wrong?

If the online form is not functioning correctly, you might be using an outdated version of your browser. Please make sure you are using the most up-to-date version of Microsoft Edge, Google Chrome, or Mozilla Firefox. If you are using the most up-to-date browser and you are still having problems, please reach out to <a href="mailto:reporting@stl.unitedway.org">reporting@stl.unitedway.org</a>.

If you are not seeing certain questions on your forms, those questions may be conditional such that they only show up based on an answer to a previous question. The conditional questions are noted in italics in the List of Questions section of this guide.

5. What do I do if the files sizes of my documents are too large for the upload tool? For documents with file sizes too large for the upload tool, select the "Yes" option in the form for the document that has changed and then email the document to reporting@stl.unitedway.org with the naming convention of Agency Name-Document Name. For example, if I needed to email United Way's Certificate of Corporate Good Standing, I would first select "Yes" when asked if my agency's Corporate Good Standing Certificate had been updated and then I would send it titled as United Way-Certificate of Corporate Good Standing.

#### **CONTENT QUESTIONS**

6. What if I am unsure about what information I should enter?

Agency updates, program descriptions, client types, and any other questions about the *content* of information submitted should be directed to your agency's United Way Portfolio Manager. You can find your agency's Portfolio Manager in the United Way Contact List appendix of this document.

7. What if my agency uses more than one measurement tool/method to determine if a client has achieved an outcome?

When describing/listing the measurement tool/method in the "Outcomes" section, it is best to be 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.

#### GENERAL/OTHER QUESTIONS

### 8. Who is my agency's Portfolio Manager?

Portfolio Managers are listed in the United Way Contact List appendix of this guide.

## 9. What happened to data my agency submitted in 2021 Reporting?

2021 Reporting covered services provided and outcomes achieved by agencies funded in 2020 under the previous funding model. It will be used to demonstrate the impact of investments made in the community in 2020. Data collected during reporting is also used to identify priority areas for supplemental funding, understand regional resources for specific populations, assess community need, identify best practices and effective models for service, pursue grant funding, and more.

If your agency was required to complete 2021 Reporting, some of that information may also be referenced for comparison during the Safety Net site visit process.

## 10. How is the information reported on this application going to be used?

Data collected during in the Renewal Application will be used to help United Way understand any major changes within the agency and services provided, clients served thus far in the year, and current use of funding. It is the first opportunity for updates regarding 2021 Safety Net Funding. This information will be reviewed by United Way allocations volunteers and referenced during the Safety Net site visit process.

Information from funded agencies helps United Way in its efforts to invest in quality agencies that are working to address community needs and help people in the St. Louis region live their best possible lives.

#### 11. What if I my agency does not complete the application by the deadline?

Safety Net agencies are required to submit a renewal application by the stated deadline. Network Member agency's annual award amount are based on the network

member's performance, which is gleaned from a combination of annual reporting, the renewal application, and the agency's site visit. If an agency does not complete the renewal application, UWGSL may in its discretion withhold funding until the agency provides the requested information. In addition, this may impact the agency's future funding from UWGSL.

#### B. Definitions

#### **Direct Clients**

These clients generally receive extensive and/or long-term services in small groups or one-on-one. Intake records or other reliable methods of collecting information on these clients are maintained. Please note that if a client receives a core direct service provided by your agency, even if only once, and you have any demographic information, the client should likely be considered direct, but records should be maintained to the degree that the same client is not counted twice in the direct client total.

#### Indirect Clients

These clients generally receive one-time or infrequent services from the agency and the services may be provided in a group setting. Detailed records for each client are not maintained, although a basic count of the number of participants should be available. Demographic information is typically difficult or impossible to collect for indirect clients.

#### 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.

## Portfolio Manager

Portfolio Managers serve as liaisons between allocations volunteers and funded agencies and have field of service and nonprofit best practices expertise.

## Primary Need Area

There are twenty-four priority needs defined in United Way's Community Needs Assessment. For each program, agencies should select the priority need that aligns most closely to the need the program addresses as the primary need area for that program. Programs may address multiple needs but only one primary need can be selected. This information is particularly helpful in data analysis.

## United Way 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 County	
Monroe	Warren	
Randolph		
St. Clair		

## C. United Way's Contact List

Agency Name	Portfolio Manager	Portfolio Manager Email Address
Affinia Healthcare, Inc.	Julia Fuller	julia.fuller@stl.unitedway.org
Agape Ministry of Warren County, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Alcoholic Rehabilitation Community Home	Julia Fuller	julia.fuller@stl.unitedway.org
Almost Home, Inc.	Anna Paul	anna.paul@stl.unitedway.org
American Cancer Society	Julia Fuller	julia.fuller@stl.unitedway.org
American Heart Association - Greater St. Louis Chapter	Julia Fuller	julia.fuller@stl.unitedway.org
American Lung Association in Missouri	Julia Fuller	julia.fuller@stl.unitedway.org
American Red Cross of Greater St. Louis	Julia Fuller	julia.fuller@stl.unitedway.org
American Red Cross of South Central Illinois	Darlene Martin	darlene.martin@stl.unitedway.org
Amyotrophic Lateral Sclerosis Association St. Louis Regional Chapter	Julia Fuller	julia.fuller@stl.unitedway.org
Annie Malone Children and Family Service Center	Julia Fuller	julia.fuller@stl.unitedway.org
Asthma and Allergy Foundation of America St. Louis Chapter	Julia Fuller	julia.fuller@stl.unitedway.org
Betterment Federation, Inc. Carondelet Community	Anna Paul	anna.paul@stl.unitedway.org
Big Brothers Big Sisters of Eastern Missouri	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Big Brothers Big Sisters of Southwestern Illinois	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Bilingual International Assistant Services of Greater St. Louis	Julia Fuller	julia.fuller@stl.unitedway.org
Boy Scouts of America, Inc., Greater St. Louis Area Council	Darlene Martin	darlene.martin@stl.unitedway.org
Boys and Girls Club of Bethalto, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Boys and Girls Clubs of Greater St. Louis, Inc.	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Boys Hope Girls Hope of St Louis	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Call for Help, Inc.	Anna Paul	anna.paul@stl.unitedway.org
Cardinal Ritter Senior Services	Darlene Martin	darlene.martin@stl.unitedway.org
Caritas Family Solutions	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
CASA of Southwestern Illinois	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
CASA of St. Louis	Dawna Gilbreath	dawna.gilbreath@stl.unitedway.org
Catholic Charities of Madison County	Anna Paul	anna.paul@stl.unitedway.org

Catholic Charities of St. Louis	Darlene Martin	darlene.martin@stl.unitedway.org
Catholic Urban Programs	Anna Paul	anna.paul@stl.unitedway.org
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