

Community Impact Grant Process RFP (Request for Proposals)

Grant Period: January 1, 2017-December 31, 2019

TOP THINGS FOR APPLICANTS TO KNOW:

1. RFP Information Session attendance is required. To make best use of your time, please read this document prior to attending. United Way Staff are available at any time to answer questions during the process.
2. All agencies must meet the eligibility requirements. New agencies to United Way are to submit eligibility documentation for review with the Letter of Intent. All others submit information with the Full Program Proposal.
3. ABSOLUTELY NO LATE applications will be accepted.
 - ALL PROGRAMS SUBMIT LETTER OF INTENT - DEADLINE: Monday, January 11, 2016 by 5:00 p.m.
 - ALL FULL PROGRAM PROPOSALS DEADLINE: Tuesday, March 1, 2016 by 5:00 p.m.
4. If a grant is received, a program representative must attend shared measurement sessions and track measures as jointly defined by funded partners. This reporting is in addition to program-level outcomes and measures. These may evolve during the grant period as we gather baseline data and / or determine more meaningful measures.

This RFP document was approved by the United Way Board of Directors on November 5, 2015.

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PURPOSE & OVERVIEW:

The United Way of Marathon County Board of Directors is pleased to release this Request for Proposals (RFP) for the 2017-19 funding cycle. Funding priorities and strategies were established through many years of community input and continued community conversations, planning, and research at the local, state, and national level.

UNITED WAY MISSION & ROLES:

This RFP represents ONE way United Way adds value to the community and fulfills our mission:

To unite people and agencies in Marathon County to build a stronger community and strategically invest in education, income and health priorities to improve lives now and into the future.

To create greater impact United Way performs 5 major roles to lead the community in:

- **Evaluating** needs by collecting data and monitoring results (LIFE report)
- **Convening** agencies and people to work together toward shared goals (coalitions)
- **Investing** in high-quality local agency programs with proven results (this RFP process)
- **Mobilizing volunteers** and implementing initiatives to support education, income and health priorities. (initiatives and affinity groups)
- **Connecting people** to resources to get and give help (2-1-1, Volunteer Connection and RSVP)

GRANT PROCESS OVERVIEW:

This document provides potential applicants information to apply for United Way program grants.

Successful program proposals will:

1. Deliver desired programmatic outcomes that are aligned with United Way's community priorities listed on page 4.
2. Describe how program / agency representatives engage with community partners to achieve shared goals.
3. Have capacity, efficiency and expertise to implement the program.
4. Articulate a funding plan to deliver and sustain the program.

Grant distribution period is January 1, 2017-December 31, 2019.

Local volunteers who comprise Education, Income, and Health Impact Teams will review proposals and make funding recommendations to United Way's Board of Directors. The Board will approve the final three-year funding plan in August 2016 for the grant period January 1, 2017-December 31, 2019.

If your agency is a recipient of a 3-YEAR GRANT - the grant is a FUNDING PLAN AND NOT A PROMISE OR GUARANTEE. Grants are approved annually based on program performance and United Way's ability to finance the plan with unrestricted campaign revenue. United Way is committed to raising the funds to fulfill these grants, but there is **NO GUARANTEE** that we will be able to fully fund the plan. **In these changing times, annual adjustments may be needed.** Every effort will be made to provide agencies with notification of the grant amount by each November for grants beginning in January, but grants are subject to change at any time.

UNITED WAY GRANT PRIORITIES:

The priorities below were developed during United Way’s Strategic Planning Process in 2008 and endorsed again in our 2014 planning process, engaging community input throughout both of these planning processes. These priorities are focused on the long-term goal of helping children succeed and empowering individuals and families to self-sufficiency.

BUILDING BLOCKS – Focus Areas / Impact Team	GRANT PRIORITIES
Education	Improve school readiness
	Improve academic performance and career readiness
Income	Improve food security and increase safe & affordable housing
	Increase skills to improve financial stability
Health	Decrease relationship violence and sexual assault
	Improve mental health
	Reduce alcohol and drug abuse
	Improve seniors’ ability to live independently

IMPORTANT NOTES:

- These priorities are long-term goals and will take all of us working together to improve lives in Marathon County. To make progress on these goals, pages 11 to 17 describe target populations to be served, and program strategies and measures.
- United Way recognizes that no program alone can impact these priorities and requests funded partners engage with issue-related community Coalitions / partnerships that are working toward common community goals.
- As stated in our mission, our focus is to improve lives now and into the future. This means proposals will be funded that both get to the root cause (primary and secondary prevention) as well as those that help people in tough times get back on a path to success (intervention or tertiary prevention). While there is no pre-determined dollar amount or formula for any one priority area, the long-term goal is to shift focus slightly more to root cause solutions.
- All programs in this funding cycle are asked to describe how they are helping children succeed or empowering individuals and families toward self-sufficiency. Intervention services should be striving, when possible, to move people on a continuum toward self-sufficiency or to decrease the need or behavior from reoccurring. For example, a food program should provide services or connect a client to other programs that support their clients’ capacity to achieve financial stability and reduce their potential need for food assistance in the future.
- Shared measures are a new RFP process requirement. While each program has unique strategies and targeted outcomes, shared measures are intended to:
 - Provide root-cause analysis to develop long-term solutions.
 - Increase understanding of who is working on the issues, the scope of need and community capacity to meet the need.
 - Ensure best practices, strategies, and measures that have the greatest impact on our shared long-term community goals.

APPLYING FOR A GRANT - PROCESS STEPS:

1. Review and read this RFP.
2. Attend an Information Session.
3. Take time to think about and discuss your proposal -- Is it a proven strategy? Should you meet with other agencies or staff members to identify best practices to advance shared community goals? To learn who else in the community might be working on the same or similar priority, feel welcome to contact United Way to inquire about potential partners.
4. Submit a Letter of Intent. This is a required step to help ensure that desired proposals are received within each priority area. Programs that clearly don't align will be advised not to submit a proposal (see page 8 for technical requirements).
5. Look at the list United Way publishes following Letter of Intent submissions and determine if there's a unique approach needed or an effective way to partner with another program working on a similar goal. **NOTE:** Proposals can be altered from the time of the Letter of Intent to the final proposal as long as the agency submitted a Letter of Intent in that priority area. United Way also reserves the right to seek out a proposal if there is no Letter of Intent submitted to fulfill a desired strategy.
6. Submit Full Program Proposal.
7. Provide any requested clarification during the volunteer Impact Team grant evaluation process. This may be via meetings, site visits or email correspondence / submitted documents.
8. Sign a partner agency agreement. (template reference - appendix E) signifying your agreement to any clarifying requirements or terms.
9. Collect and provide program progress reports as required.
10. Participate in shared measurement development sessions and track measures as jointly defined.
11. Commit time to be engaged in Coalition work toward community-level goals.

AGENCY ELIGIBILITY REQUIREMENTS & DOCUMENTATION:

To be a United Way grant recipient, an agency must meet eligibility standards. New agency partners must provide this documentation with their Letter of Intent. Returning agency partners submit these documents with their full proposal.

Submit:

1. The agency's 501(c)3 authorization letter.
2. The agency's most recent IRS 990 or 990EZ
3. An annual audit by an independent certified public accountant that complies with generally accepted auditing and accounting standards, unless the agency has a total budget of less than \$499,999.00, then the agency is required to submit an annual review of its financial affairs by a qualified independent source.
4. Documentation that shows your agency is regularly convening a voluntary local board of directors or an advisory board/committee. Include a meeting schedule and membership

roster showing the members' terms of service, expertise, board position and contact information.

5. Your agency's non-discrimination policy that shows you provide services to the residents of Marathon County without regard to social and economic class, gender, ability, race, religious group, and sexual orientation. Agencies with a religious affiliation must not refuse services to an applicant based on religion or require attendance at religious services as a condition of assistance.
6. After receiving grant funding, you will be expected to sign and return the Partner Agency Agreement and annually submit updated documents for items 2-4.

GRANT PROCESS TIMELINE:

NOTE: All deadlines are final - no late documents are accepted.

MONTH/DATE	ACTION
November 11, 2015	Request for Proposal (RFP) Issued The RFP will be made available on the United Way website by 5 p.m., November 11, 2015.
November 2015	RFP Information Sessions (sessions listed on page 7)
January 11, 2016	1 page Letter of Intent (ALL AGENCIES). NEW AGENCIES must also submit Eligibility Documentation listed on pages 5-6. <ul style="list-style-type: none"> • Required documents emailed to the United Way office by 5:00 p.m., Monday, January 11. • You will receive an e-mail response indicating receipt from United Way by Wednesday, January 13. • United Way staff will post on January 18, a list of the program descriptions outlined in the Letters of Intent.
March 1, 2016	Full Program Proposal Due. Returning agencies must also include eligibility documentation listed on pages 5-6. <ul style="list-style-type: none"> • Submit the full proposal electronically to the United Way office by 5:00 p.m., Tuesday, March 1. • You will receive an e-mail response indicating receipt from United Way by Thursday, March 3.
March- June 2016	Impact Teams Review Program Proposals <ul style="list-style-type: none"> • Preliminary recommendations presented to the United Way Board of Directors
August 2016	Final Grant Decisions made by the United Way Board of Directors and agencies notified of grant decisions
December 2016	United Way Partner Agency Agreement Due (template reference - appendix E)
January 2017	Funding begins

RFP INFORMATION SESSIONS - REQUIRED

Any agency/program interested in applying for a grant is required to attend a session. Please contact Deanna Schuette via e-mail at dschuette@unitedwaymc.org to reserve a seat at one of the three information sessions listed below.

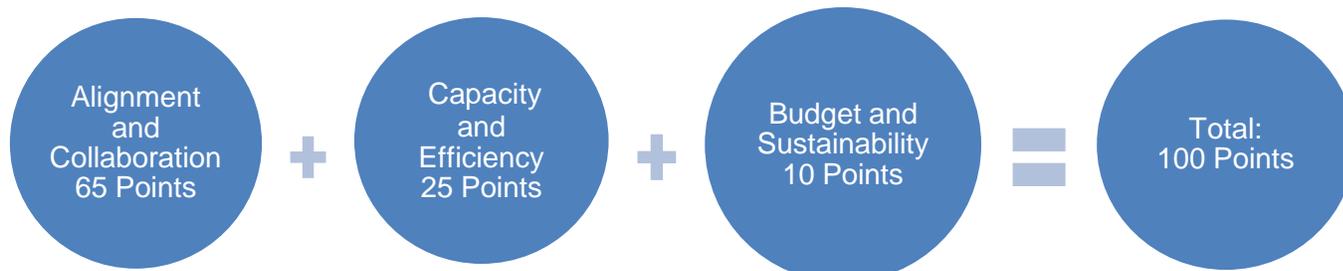
DATE and TIME	LOCATION – United Way office
Monday, November 16 (11:30 a.m. – 12:30 p.m.)	705 S. 24 th Ave., Wausau WI 54401
Tuesday, November 17 (8:00 a.m. – 9:00 a.m.)	
Thursday, November 19 (4:00 p.m. – 5:00 p.m.)	

IMPACT TEAM REVIEW AND SCORING PROCESS OF THE FULL PROPOSAL

United Way staff will review that the proposals submitted are complete. Those proposals that align with United Way priorities go on to the volunteer Impact Team for review.

The Impact Teams use a Program Proposal Evaluation Tool at the beginning of the evaluation process as a guide to help them rank and discuss proposals.

Program Proposal Evaluation Scoring



Alignment and Collaboration:

- Fit with priority focus - child success or empowering clients to self-sufficiency.
- Program summary demonstrates best practice strategies.
- Logic Model.
- Measurement of Impact.
- Collaboration Efforts.

Capacity and Efficiency-Organization's:

- Capacity and Key Program Staff.
- Program Plan.

Budget and Request:

- Revenues and Expenses.
- Funding Plan.

Program Rank

SCORING:

High (point range 90-100):

Proposal is exceptional and demonstrates the agency's capacity meets and exceeds expectations.

Medium (point range 70-89):

Proposal is satisfactory and demonstrates the agency's capacity meets expectations.

Low (point range 60-70):

Proposal contains numerous deficiencies and capacity is uncertain.

Very Low (point range below 60): Agency's proposal is not acceptable or applicable.

During the evaluation, Impact Team volunteers may have questions about the program proposal. Staff will forward Impact Team questions via e-mail to the program contact listed to request a written response. Written responses will become an addendum to a program's proposal. Impact Teams may also request site visits or meetings with a program representative.

SUBMITTING THE LETTER OF INTENT:

Submission Deadline: 5:00 p.m., Monday, January 11, 2016.

All agencies interested in applying for a grant must submit a 1 page Letter of Intent for each program proposal. NEW AGENCIES ONLY (those who have not received United Way funding in the past) must also submit eligibility documentation at this time. If it is a collaborative where two or more agencies would share grant funds, one lead agency is responsible for submitting the Letter of Intent.

THE LETTER OF INTENT WILL:

- Allow for an initial screening by United Way staff of new agencies and program descriptions to ensure they fit United Way priorities and meet eligibility requirements.
- Provide United Way volunteers and staff with time to prepare for the quantity and types of proposals to be reviewed.
- Allow United Way an opportunity to seek out proposals should there be a gap in addressing a desired goal or strategy.
- Provide potential grantees a list of programs and agencies who intend to apply for funding. This list is to encourage agencies to assess their program in the context of others who might be working on a similar goal.
- Proposals may be combined into a collaborative effort or altered from the Letter of Intent as long as the agency submitted a Letter of Intent in that priority area.

Technical Requirements of Letter of Intent

ASPECT	REQUIREMENT
Font Size	Letter of Intent may not exceed one page and must be typed in 12 point font.
Margins	Letter margins must be a minimum of one inch on each side.
Submitting Letter of Intent	Attach an electronic copy of the Letter of Intent in an e-mail to: dschuetter@unitedwaymc.org . In the subject line of the e-mail, please type <u>Letter of Intent, the lead organization's name and the name of the program</u> (example – Letter of Intent, Childcaring, Good Start Grants Program).
Attachments	ONLY NEW Organizations are required at this time to attach the eligibility documentation (pages 5-6)

SECTIONS

Include the following components in your one page Letter of Intent

- A. Name of your agency and program name.
- B. Contact person for this program, including phone, email and mailing address.
- C. \$ ____ **estimated annual grant request** for this program (Three-year Grants are planned to continue at the same annual amount each of the two subsequent years.)
- D. List any partner organizations that will share the funding.
- E. Provide a 25 word description of the program.

NOTE: The agency name, program name, contact name and program description will be posted to share with volunteers and posted to United Way's website for agency reference.

AFTER SUBMISSION OF THE LETTER OF INTENT:

Agencies will receive an e-mail response indicating receipt from United Way by Wednesday, January 13. **A list of the program descriptions from letters of intent will be posted on the United Way website on January 18, 2016**, and agencies will be notified if any program descriptions do not fit our priorities or if new agencies do not meet eligibility requirements.

SUBMITTING THE FULL PROGRAM PROPOSAL

Submission Deadline: 5:00 p.m., Tuesday, March 1, 2016

Technical Requirements of the Full Program Proposal

ASPECT	REQUIREMENT
Full Proposal Length	Complete in 13 pages or less as outlined below. ALL SECTIONS MUST BE COMPLETE FOR PROPOSAL TO BE CONSIDERED.
Font Size	Use 12 point font. For tables you may use as small as a 9 point font.
Margins	Margins must be a minimum of one inch on each side. (tables may be ½ inch)
Header or Footer	Insert a header or footer that identifies the agency name, program name and page number.
Submit via email as a single PDF including all attachments	SUBMIT an ELECTRONIC COPY via e-mail to: dschuette@unitedwaymc.org . In the subject line of the e-mail, please type: <u>Full Program Proposal, the lead organization's name and the name of the program</u> (example – Full Program Proposal, Childcaring, Good Start Grants).
Attachments	Returning organizations submit eligibility documentation listed on pages 5-6.

SECTIONS	Include the following components in your FULL PROGRAM PROPOSAL
Cover Sheet	Complete Appendix A.
Narrative - No more than 6 pages	<p>I. Program Summary -</p> <ul style="list-style-type: none"> • Include any documentation / reference as to if program strategy(ies) is considered evidence based practice. • Include a description of how your program fits with grant priorities and is focused on child success or empowering clients to self-sufficiency. • Provide an updated 25 word program description. (in addition to this same request in the Cover Sheet). <p>II. Collaboration/Collective Impact</p> <ul style="list-style-type: none"> • Are you collaborating with other organizations? If so, provide details regarding the collaboration (names of participating organizations, shared mission, planning, operations, shared resources and responsibilities). • What issue-related community Coalition(s) do you participate in? Describe your involvement. <p>III. Program Plan</p> <ul style="list-style-type: none"> • Primary program elements broken out per quarter over a 12-month timeline (if program elements will change or evolve in years 2 & 3, provide a description of anticipated changes) <p>IV. Personnel</p> <ul style="list-style-type: none"> • What key staff members are involved with this program? How much time per week will they dedicate to the program? Describe their qualifications.
Logic Model - max. 2 pages	Inputs, Activities, Outputs, Outcomes, Shared Measurement (See Appendix B)
Measurement Framework – max 2 pages	Program Outcomes, Indicator(s), Data Collection Method, Targeted number of people to be served, tracked and achieving outcome in 2017 (See Appendix C)
Budget Form	Revenues and Expenses (See Appendix D)
Attachments	Include the documents required for eligibility purposes listed on pages 5-6.

AFTER SUBMISSION OF FULL PROGRAM PROPOSAL:

- Agencies will receive an e-mail response indicating receipt from United Way by Thursday, March 3, 2016.
- Provide any requested clarification during the volunteer Impact Team grant evaluation process. This may be via meetings, site visits or emails / documents submitted as requested.
- Receive notification of grant and clarify any adjustments to requirements or terms in August 2016.
- Sign a partner agency agreement by December 2016. (template reference - appendix E)
- Throughout the grant period collect and provide program results as required and determined. This will include requirement of a program representative to attend shared measurement sessions and track measures as jointly defined by funded partners. These measures may change during the grant period as we gather baseline data or find more meaningful measures.
- Commit time to be engaged in Coalition work toward shared community goals and measures.

REPORTING

Required Reporting

Any changes to a funded program after grant funding has begun must be submitted in writing to the United Way office within 30 days of the agency becoming aware of the change. In the written notification include: what change has been made, why the change was made, and what (financial and functional) effect the change will have on the program. Impact Teams may require the submission of an updated program proposal if the change is significant. If an Impact Team deems the change significant enough to affect the programs ability to achieve outcomes, allocations will be withheld until a decision is reached by the United Way Board of Directors regarding the grant.

All United Way funded programs will be required to track and report outcome results. Progress reports will be designed by United Way staff and Impact Teams with input from currently funded programs. Completed reports must be submitted to United Way of Marathon County on the due dates and for specified timeframes listed below.

Report	Specifications	Due Date
Six-month and year-end Progress Reports	Provide mid-year and year-end progress reports and summary of accomplishments.	August 2017 February 2018 August 2018 February 2019 August 2019 February 2020

United Way reserves the right at any time to request additional information beyond a progress report to ensure dollars are being used as identified in the funded program proposal.

FOCUS AREA: EDUCATION

Long-Term Community Goal: Marathon County young adults are either in school or working at or toward a living wage job by age 25.

UNITED WAY FUNDING PRIORITY: IMPROVE SCHOOL READINESS

Priority Populations – While individuals and families in need may exist beyond what is noted below, United Way will first invest resources in the populations identified below:

- Children birth to six years of age and their families who experience barriers related to:
 - Access to quality child care.
 - Continuity of quality child care.
 - Ethnicity, gender, disability, or socioeconomic status.
- Caregivers/Parents of children birth to six years of age.

Strategies – Preference will be given to programs that within the program design apply one or more of the following strategies and have program measures to show the program's impact:

- **Program Collaboration:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to prepare Marathon County children for school.
- **Parent/Caregiver Education:** Engage and empower parents/caregivers and families to support their child(ren)'s early development. Individuals improve their knowledge of early developmental milestones and skills that support the unique developmental need of their child(ren).
- **Early Detection:** Young children are screened for developmental delays and referred for intervention.
- **Access to Quality Child Care:** Individuals encounter fewer barriers to access quality child care.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Percent of caregivers (parents and providers) who report having increased knowledge and feel supported when caring for children in their early years.

This measure is for the purpose of showing progress toward the Long-Term Community goal of Marathon County young adults either being in school or working at or toward a living wage job by age 25.

UNITED WAY FUNDING PRIORITY: IMPROVE YOUTH ACADEMIC PERFORMANCE AND CAREER READINESS

Priority Populations – United Way will first invest resources in the populations identified below. Youth that demonstrate one or more of the following characteristics:

- Failing or not progressing academically.
- Behavioral problems.
- Inability to maintain or are lacking positive relationships.

- Unable to internalize and demonstrate an understanding of right and wrong and express a basic code of ethics/moral compass that guides their decision making.

Strategies – Preference will be given to programs which apply one or more of the following strategies and have program measures to show the program’s impact:

- **Program Collaboration:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to provide wrap-around support to struggling youth and students, and promote their academic success and social-behavioral development.
- **Connecting:** Ensure Marathon County youth have at least one strong, positive adult relationship.
- **Parent/Caregiver Education:** Engage and empower parents/caregivers and families to support their child(ren)’s development. Individuals improve their knowledge of child development and skills that support the unique developmental need of their child(ren).
- **Access to Quality Support Services:** Individuals encounter fewer barriers to accessing quality support services.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Number and percent of youth served who report having at least one positive adult role model in their life.

This measure is for the purpose of showing progress toward the Long-Term Community goal of Marathon County young adults either being in school or working at or toward a living wage job by age 25.

FOCUS AREA: INCOME

Long-Term Community Goal: Families living at or below 200% of poverty improve their financial stability.

UNITED WAY FUNDING PRIORITY: FINANCIAL STABILITY FOR INDIVIDUALS AND FAMILIES

Priority Populations – United Way will first invest resources in the populations identified below in priority order:

- Families with children in crisis.
- Families with children with income below 200% of the poverty level.
- Individuals with income below 200% of the poverty level.

Strategies – Preference will be given to programs which apply one or more of the following strategies and have program measures to show the program's impact:

- **Program Collaboration:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to remove barriers to long-term employment and increased earnings.
- **Individual and Family Sustaining Employment Supports:** Priority population participates in opportunities to obtain skills and supports to be hired, remain employed and increase earnings.
- **Financial Education:** Priority population participates in financial education opportunities to increase assets and savings, and decrease liabilities.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Number of clients with barriers to financial stability.
- Percent of clients able to exhibit improved resource management as demonstrated by an increase in savings or on-time bill payment documents (rent, utilities, credit card etc.).
- Percent of clients that show gains in education, employment, and/or life skills.

These shared measures are for the purpose of showing progress toward the Long-Term Community goal of having Marathon County families living at or below 200% of poverty improve their financial stability.

UNITED WAY FUNDING PRIORITY: FOOD SECURITY AND SAFE AND AFFORDABLE HOUSING FOR INDIVIDUALS AND FAMILIES

Priority Populations – United Way will first invest resources in the populations identified below in priority order:

- Families with children with income below 200% of federal poverty level.
- Individuals or families without children with income below 200% of federal poverty level.

Strategies – Preference will be given to programs which apply one or more of the following strategies and have program measures to show the program’s impact:

- **Program Collaboration:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to evolve Marathon County’s emergency food, housing and shelter systems.
- **Individual and Family Sustaining Employment Supports:** Priority population participates in opportunities to obtain skills and supports to be hired, remain employed and increase earnings.
- **Financial Education:** Priority population participates in financial education opportunities to increase assets and savings, and decrease liabilities.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Number of clients with barriers to financial stability.
- Percent of clients who have their emergency basic needs (food, shelter, and clothing) met.
- Percent of clients able to secure basic needs (food, clothing, housing and health supplies) within 10 days of an emergency/disaster.

These shared measures are for the purpose of showing progress toward the Long-Term Community goal of having Marathon County families living at or below 200% of poverty improve their financial stability.

FOCUS AREA: HEALTH

Long-Term Community Goal: Increase the number of youth and adults who are healthy and avoiding risky behaviors.

UNITED WAY FUNDING PRIORITY: REDUCE ALCOHOL AND DRUG ABUSE

Priority Populations – United Way will first invest resources in the populations identified below in priority order:

- At risk children grades K-12.
- All children grades K-12.
- Families with children who experience barriers to care related to:
 - Socioeconomic status.
 - Disability.
- Individuals who experience barriers to care related to:
 - Socioeconomic status.
 - Disability.

Strategies – Preference will be given to programs which apply one or more of the following strategies and have program measures to show the program's impact:

- **Program Collaboration:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to prevent and reduce the misuse of drugs and alcohol.
- **Health and Risk-Avoiding Education:** Priority population participates in programming to improve health and develop skills to avoid harmful risks.
- **Early Detection:** Priority population is screened and is referred to effective treatment programs.
- **Access to Quality Care:** Priority population encounters fewer barriers to accessing quality drug and alcohol treatment.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Percent of clients who are no longer abusing alcohol or other drugs at discharge from AODA counseling.
- Percent increase in appropriate bystander AODA intervention/prevention actions.

These shared measures are for the purpose of showing progress toward the Long-Term Community goal of increasing the number of youth and adults who are healthy and avoiding risky behaviors in Marathon County.

UNITED WAY FUNDING PRIORITY: IMPROVE MENTAL HEALTH

Priority Populations – United Way will first invest resources in the populations identified below in priority order:

- School age children.
- Low-income individuals and families.

Strategies – Preference will be given to programs which apply one or more of the following strategies and have program measures to show the program’s impact:

- **Program Collaboration:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to improve behavioral health.
- **Health and Risk-Avoiding Education:** Individuals participate in programming to improve health and develop skills to avoid harmful risks.
- **Early Detection:** Individuals are screened and referred to effective behavioral health programs.
- **Access to Care:** Individuals encounter fewer barriers to quality behavioral health care.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Percent of clients indicating their quality of life has improved as a result of receiving mental health services.
- Percent of clients making progress towards achieving their clinical treatment goals and in daily functioning.

These shared measures are for the purpose of showing progress toward the Long-Term Community goal of increasing the number of youth and adults who are healthy and avoiding risky behaviors in Marathon County.

UNITED WAY FUNDING PRIORITY: DECREASE RELATIONSHIP VIOLENCE AND SEXUAL ASSAULT

Priority Populations – United Way will first invest resources in the populations identified below:

- Abusers/perpetrators.
- School age children 6-12th grade.
- Victims of relationship abuse/violence.

Strategies – Preference will be given to programs which apply one or more of the following strategies and have program measures to show the program’s impact:

- **Safety Partnerships:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to reduce domestic abuse/violence.
- **Healthy Relationship Education:** Individuals participate in programming to recognize unhealthy relationship behaviors (abuse and violence) and to take appropriate actions.
- **Early Detection:** Individuals are screened and referred to effective support and treatment programs.
- **Access to Care:** Individuals encounter fewer barriers to quality support and treatment.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Percent of victims / program participants who feel safer.
- Percent of clients (perpetrators) who do not re-offend.
- Percent of clients able to identify some characteristics of a healthy relationship and consent.

These shared measures are for the purpose of showing progress toward the Long-Term Community goal of increasing the number of youth and adults who are healthy and avoiding risky behaviors in Marathon County.

UNITED WAY FUNDING PRIORITY: IMPROVE SENIORS' ABILITY TO LIVE INDEPENDENTLY

Priority Populations – United Way will invest resources in the populations identified below:

- People who are 60+ years of age and experiencing challenges accessing needed basic in-home care:
 - Living at or below the poverty level.
 - Ineligible to receive government assistance and unable to pay for services due to lack of money or other resources.

Strategies – Preference will be given to programs that mobilize and train volunteers to provide basic in-home care and within the program design, apply one or more of the following strategies and have program measures to show the program's impact:

- **Program Collaboration:** Active participation with an issue-related community Coalition that promotes proven strategies and methods to help older people stay well and remain independent for as long as possible.
- **Caregiver and Program Participant Prevention and Health Education:** Referral to educational opportunities to gain the knowledge needed to reduce the risk of accidents and help identify health conditions and safety concerns.
- **Access to Care:** Individuals encounter fewer barriers to in-home services available to older adults. Basic in-home care activities or services may include:
 - Light housekeeping or gardening or minor home repair
 - Shopping or completion of errands.
 - Helping to secure needed services.
 - Companionship.
 - Transportation.

Shared Measures – In addition to program measures, funded agencies must also commit to measuring, data-sharing, and evolving the current shared measures being collected by the funded group of agencies:

- Percent of elderly or disabled receiving in-home support services such as food, transportation, housekeeping and friendly visiting, report they maintained or improved their health, safety and/or food security.
- Percent of elderly or disabled receiving in-home support services report they improved their ability to safely remain in their home.

These shared measures are for the purpose of showing progress toward the Long-Term Community goal of increasing the number of youth and adults who are healthy and avoiding risky behaviors in Marathon County.

GLOSSARY OF TERMS

Agency Capacity - Ability and capacity of an agency expressed in terms of its (1) Human resources: their number, quality, skills, and experience, (2) Physical and material resources: machines, land, buildings, (3) Financial resources: money and credit, (4) Information resources: pool of knowledge, databases, and (5) Intellectual resources: copyrights, designs, patents, etc.*

Collaboration - A more durable and pervasive relationship marks collaboration. Participants bring separate agencies into a new structure with full commitment to a common mission. Such relationships require comprehensive planning and well-defined communication channels operative on all levels. The collaborative structure determines authority, and risk is much greater because each partner contributes its resources and reputation. Power is an issue and can be unequal. Partners pool or jointly secure the resources, and share the results and rewards.**

Example - A group of agencies serving Hispanic clients comes together to address the need for job development and job training. They are looking at long-term plans to develop businesses that will provide jobs. They will involve government training services (to help secure grants and provide job training) and post-secondary institutions (for academic and vocational education).**

Efficient - Reaching a desired result with a minimum of expense or waste.

Logic Model and Measurement Framework – Overview of program performance that aligns with organizational, United Way, and community-level goals and objectives.

- **Activities** are what a program does with its inputs, the services it provides, to fulfill its mission. Examples are sheltering homeless families, educating the public about signs of child abuse, and providing adult mentors for youth. Program activities result in outputs.*
- **Inputs** are references a program uses to achieve program objectives. Examples are staff, volunteers, facilities, equipment, curricula, and money. A program uses inputs to support activities.*
- **Outputs** are products of a program's activities, such as the number of meals provided, classes taught, brochures distributed, or participants served. Another term for "outputs" is "units of service." A program's outputs should produce desired outcomes for the program's participants.*
- **Outcomes** are benefits for participants during or after their involvement with a program. Outcomes may relate to knowledge, skills, attitudes, values, behavior, condition, or status. Examples of outcomes include greater knowledge of nutritional needs, improved reading skills, more effective responses to conflict, getting a job, and having greater financial stability. For a particular program, there can be various "levels" of outcomes, with initial outcomes leading to longer-term ones. For example, a youth in a mentoring program who receives one-to-one encouragement to improve academic performance may attend school more regularly, which can lead to getting better grades, which can lead to graduating.*
- **Outcome indicators** are the specific items of information that track a program's success on outcomes. They describe observable, measurable characteristics or changes that represent achievement of an outcome. For example, a program whose desired outcome is that participants pursue a healthy lifestyle could define "healthy lifestyle" as not

smoking; maintaining a recommended weight, blood pressure, and cholesterol level; getting at least two hours exercise each week; and wearing seat belts consistently. The number and percent of program participants who demonstrate these behaviors then is an indicator of how well the program is doing with respect to the outcome.*

- **Outcome targets** are numerical objectives for a program's level of achievement on its outcomes. After a program has had experience with measuring outcomes, it can use its findings to set targets for the number and percent of participants expected to achieve desired outcomes in the next reporting period. It also can set targets for the amount of change it expects participants to experience.*

Strategies - Actions designed to achieve a particular goal.*

Sources:

**Measuring Program Outcomes: A Practical Approach*. United Way of America, 1996.

**Ray, Karen and Winer, Michael. *Collaboration Handbook, Creating, Sustaining, and Enjoying the Journey*. Saint Paul, MN: Fieldstone Alliance, 1994. Information in *Collaboration Handbook, Creating, Sustaining, and Enjoying the Journey* was used with permission from Sharon L. Kagan, United We Stand: Collaboration for Child Care and Early Education Services. (New York: Teachers College Press, copyright 1991 by Teachers College, Columbia University. All rights reserved.) pp.1-3

Suggested Reading:

Donald L. Kirkpatrick, *Evaluating Training Programs – the four levels* / Donald L. Kirkpatrick (2nd ed.) San Francisco, CA: Berrette-Koehler Publishers, Inc., 1998.

**Community Impact Grant Period 2017-2019
UNITED WAY OF MARATHON COUNTY
PROPOSAL COVER SHEET**

Organization:		Org. EIN# (Fed. Tax I.D.#):	
Organization Address:			
	City:	State:	Zip: Phone:
Executive Director:	Name:		
	Phone:	Ext:	Email:
Board President:	Name:	Term:	
	Phone:	Ext:	Email:

PROGRAM FOR WHICH YOU ARE REQUESTING FUNDING

Program Name:			
Program Contact:	Name:	Title:	
	Phone:	Ext:	Email:

Dollar Amount of Request (annual amount):	\$ _____
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Is this a new service or an existing program?	<input type="checkbox"/> New <input type="checkbox"/> Existing	If it is an existing program, how long has it been underway?	
Has this program previously received United Way Funding?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, when was it last funded by United Way and how much was the funding?	When: _____ Funding: \$ _____

25 Word Program Description:

Program alignment with Investment Priorities - Type an "X" in front of the Priority. Choose ONE.

EDUCATION		Improve school readiness
		Improve academic performance and career readiness
INCOME		Improve food security and increase safe & affordable housing
		Increase skills to improve financial stability
HEALTH		Decrease relationship violence and sexual assault
		Improve mental health
		Reduce alcohol and drug abuse
		Improve seniors' ability to live independently

Signatures:

Executive Director _____ Date _____

Board President _____ Date _____

Program Name: _____

Inputs	Activities	Outputs	Outcomes	United Way Funded Partner Shared Measure(s)

Program Name: _____

Program Outcomes	Indicator(s)	Data Collection Method	Targeted # to be Served by the Program in 2017 <small>(Define #s. Provide unduplicated #s. If you believe #s will decrease in 2018 or 2019, share why.)</small>	Targeted # Tracked for the Outcome in 2017	Targeted # to Achieve the Outcome in 2017

FUNDED PARTNER AGENCY AGREEMENT

12 month period: January 1 - December 31, 201X

United Way of Marathon County (United Way) values local agencies as critical partners in advancing our mission to improve lives and address priorities in the areas of education income and health.

United Way enters into the agreement with_____, as a funded partner agency that submitted and received a grant through the United Way Request for Proposal process. This document describes the terms of Agreement between United Way and the Partner provide accountability and work together to accomplish the goals. Both organizations contact information is listed below.

This program grant funding is subject to compliance of the terms of this agreement. The agreement is valid for twelve months beginning January 1, 201X and ending December 31, 201X.

This grant amount listed below is a budget plan, and not a promise. The United Way Board of Directors reserves the right to change the grant amount based upon United Way’s financial ability to fund the grants.

The agreement is for the following program as described in the agency’s program proposal:

Program Name	12 Month Grant

Funded Partner Agency contact information is as follows:

Name of Organization _____
 Address: _____ City/State/Zip: _____
 Executive Director: _____ Email of Exec. Director: _____
 Agency Phone Number: _____
 Web Site: _____
 Other Contact Person: _____ Title: _____
 Contact E-Mail Address: _____
 Employer Identification Number: _____

United Way contact information is as follows:

United Way of Marathon County, 705 S 24th Ave, STE 400 B, Wausau, WI 54401
 Executive Director: Joanne Kelly Email of Exec. Director: jkelly@unitedwaymc.org
 Agency Phone Number: 715-848-2927 Web Site: www.unitedwaymc.org
 Other Contact Person: Deanna Schuette Title: Community Impact Director - Education
 Contact E-Mail Address: dshcuette@unitedwaymc.org

Both United Way and Partner Agree to:

1. Have open communications and notify each other of significant changes in contact information on page 2 or significant program changes in agency operations.
2. Be fiscally responsible and uphold high standards of accountability. Meet the certification requirements and Generally Accepted Accounting Practices.
3. Work cooperatively with other community organizations, or collaborations to develop or sustain a coordinated service system that focuses on improved results.
4. Share knowledge and information for the good of the community. Support other organization's activities and collaborate whenever possible.
5. Respect autonomy and the inherent right and responsibility of each other's boards.
6. During the period of this Agreement, if it becomes necessary to change the terms of this Agreement, such changes, after being explained and understood by Partner and United Way, shall be made effective when signed and incorporated in written amendments to the Agreement.

United Way Agrees to:

1. Conduct a community-wide campaign to raise funds annually to support partner program grants and other programs of United Way.
2. Respect and maintain the confidential nature of certain information provided by the Partner agency.
3. Distribute grant payments to the Partner on a monthly basis provided agreement terms are met.
4. List Partners and funded programs on the United Way website and when appropriate share program outcomes or cohort goals and measures with donors and the community via the website, social media, print or other media outlets.
5. Accept campaign contributions that are designated to the Partner. It is the practice of United Way to pay designated dollars to the Partner as first dollars towards the program funding described in this agreement. If designations exceed program funding, United Way will consider distribution of the additional funds to the Partner, once the Partner confirms the funds will be used to further the mission and work of the Partner. United Way has the explicit authority to redirect these gifts if necessary.

Partner Agrees to:

1. Be familiar with the funded program proposal(s) and notify United Way of any significant program or participation changes. Recognize that such changes may jeopardize current or future program funding.
2. Meet agency eligibility standards and submit annually: the agency's most recent IRS 990 or 990EZ; an annual audit by an independent certified public accountant that complies with generally accepted auditing and accounting standards (unless the agency has a total budget of less than \$499,999.00, then the agency is required to submit an annual review of its financial affairs by a qualified independent source); documentation that shows your agency is regularly convening a voluntary local board of directors or an advisory board/committee (a meeting schedule and membership roster showing the members' terms of service, expertise, board position and contact information); your agency's non-discrimination policy that shows you provide services to the residents of Marathon County without regard to social and

economic class, gender, ability, race, religious group, and sexual orientation (agencies with a religious affiliation must not refuse services to an applicant based on religion or require attendance at religious services as a condition of assistance.)

3. Submit the requested 6 month progress reports which describe the program results within the designated time frame of August and February. Allow United Way to audit records to provide verification of program and financial information that has been reported. United Way reserves the right at any time to request additional information beyond a progress report to ensure dollars are being used as identified in the funded program proposal.
4. The following meetings will be coordinated by United Way and require your participation.
 - A minimum of twice a year, meet about shared measures with organizations who are working on similar priorities and then follow up to complete the agreed upon tracking and reporting
 - Attend Agency Forums, to share information and learn about the work of United Way and that of other United Way Partner Agencies.
5. Actively be engaged in community groups or coalitions who are working on similar goals toward creating community change. Some of these groups are coordinated by United Way.
6. As a way of supporting United Way campaign success, limit agency fundraising activities to those that are not competitive with the United Way campaign. Do not actively promote designations to your program or agency. Acknowledge and promote the United Way funding partnership to staff, volunteers and clients. Encourage others to support United Way and conduct an internal employee campaign to support United Way. Participate in United Way's campaign presentations or provide tours of the Agency to the public if requested and possible.
7. Recognize and promote United Way as a funder of your program. Follow United Way brand guidelines in use of the United Way logo. When possible, place the logo on your promotions, program materials, annual report, letterhead, newsletters, presentations, websites, social media and at public functions.
8. Protect, defend, indemnify and hold harmless United Way and its agents, officers and employees from all claims and suits including court costs, attorney fees and other expenses, caused by any act or omission of the Partner and/or its subcontractors, and employees.
9. Certify that all funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statues and executive orders.

Signing below indicates the Board and leadership of United Way and Partner will abide by the terms contained in this agreement. Any misrepresentation or false information in the funded program proposal or reporting to United Way may void this agreement and funds paid by United Way to partner may need to be returned to United Way. In addition, the Partner signature below signifies the partner is in compliance with the USA PATRIOT Act and other counterterrorism laws and that United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes and executive orders.

Partner Board President _____ Date: _____

Partner Executive Director: _____ Date: _____

United Way President _____ Date: _____

United Way Executive Director _____ Date: _____