Strong Individuals and Families Impact Council
Successful Students Impact Council
Independent and Joint Application Comparison

INDEPENDENT APPLICATION *(To be used by single agency)*	JOINT APPLICATION *(To be used by lead agency with one or more partners)*
ELIGIBILITY QUESTIONS: Please answer the following questions to determine the agency's eligibility to apply.	**ELIGIBILITY QUESTIONS**: Please answer the following questions to determine the collaboration's eligibility to apply. 1. Is your agency the lead applicant representing the collaboration?
1. Does the agency have an IRS 501(c)(3) determination letter dated prior to January 1, 2016?	2. Do all agencies participating in the collaboration have an IRS 501(c)(3) determination letter dated prior to January 1, 2016?
2. Does the agency provide health and human services primarily in Bexar County?	3. Do all agencies participating in the collaboration provide health and human services primarily in Bexar County?
3. Does the agency have the capacity to electronically track and upload program performance metrics on a monthly basis and finances on a quarterly basis?	4. Do all agencies participating in the collaboration have the capacity to electronically track and upload program performance metrics on a monthly basis and finances on a quarterly basis?
4. Does the agency have the ability to procure and track the required co-investment for the proposed program(s)?	5. Do all agencies participating in the collaboration have the ability to procure and track the required co-investment for the proposed program(s)?
5. Does the agency agree to participate in a shared data system?	6. Do all partners in the collaboration agree to participate in a shared data system? 7. As the lead applicant, will you ensure accountability and oversee all partners included in this joint application? 8. Does the collaboration have a signed MOU from all partners? *(See required attachments)*
6. If funded, does the agency agree to participate in the Impact Council through which the program(s) is funded?	9. If funded, do all partners in the collaboration agree to participate in the Impact Council through which the program(s) is funded?
7. Have you read the Impact Council Request for Proposal Process Guide and do you understand the requirements and expectations of an agency receiving United Way funding? *(Please note there have been changes since the release of the Ready Children Impact Council RFP.)*	10. Have you read the Impact Council Request for Proposal Process Guide and do you understand the requirements and expectations of any agency receiving United Way funding? *(Please note there have been changes since the Ready Children Impact Council RFP.)*

INDEPENDENT APPLICATION – ORGANIZATION INFORMATION

Note: Similar form exists for Joint Application

Program Solicitation: (Impact Council indicator(s) and solicitation # here)

1) **Proposed Program(s) Name:**	
2) **Legal name of applicant organization:**	
3) **D.B.A. (if any):**	
4) **Mailing address:**	
5) **Phone:**	6) **Fax:**
7) **Agency CEO's name and title:**	
8) **Agency CEO's email address:**	
9) **Name and title of contact person for this application:**	10) **Phone and e-mail address for contact:**
11) **Name of title of second contact person for this application:**	12) **Phone and email for second contact:**

13) Is this application for:

☐ **New program(s)**

☐ **Existing/ongoing program(s)**

☐ **Expansion of existing program(s)**

☐ **Other – Provide details: _____**

12) Total Proposed Program(s) Budget: $_____	**13) Amount Requested from United Way:** $_____
14) Total AGENCY Budget: $ _____	

INDEPENDENT APPLICATION PROGRAM NARRATIVE: *(To be used by single agency)*	**JOINT APPLICATION PROGRAM NARRATIVE**: *(To be used by lead agency with one or more partners)*
In the space below, please describe the agency's proposed program(s). (*Word limit is outlined per question*.) All questions will require a response in order to be submitted.	In the space below, please describe the collaboration's proposed program(s). (*Word limit is outlined per question*.) All questions will require a response in order to be submitted.
Organization's Capacity	**Collaboration's Capacity**
1. Provide the agency's vision/mission statement and discuss how this proposed program(s) aligns with it. *(Max of 400 hundred words)*	1. Provide an overview of this collaboration and describe how the partners of this joint application have a shared vision for change, including a common understanding of the problem and a joint approach to solving it through agreed upon actions. *(Max of 400 hundred words)*
2. How does this program(s) align with the selected indicator(s) and strategy(ies)? *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*	2. How does the collaboration align with the selected indicator(s) and strategy(ies)? *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*
3. Describe the buy-in/support from key agency leadership for this program(s). What role would leadership have in ensuring the success of this program(s)? *(Max of 400 hundred words)*	
4. Describe the agency's experience collecting data and measuring impact. *(Max of 400 hundred words)*	3. Describe how the collaboration collects or plans to collect data and measures impact. *(Max of 400 hundred words)*
	4. Outline how the lead agency will coordinate operational functions within the collaboration. Include any previous history serving as the lead agency for a collaborative grant or initiative. (If there is not a history as a lead agency, describe the lead agency's qualifications for serving in this role.) *(Max of 400 hundred words)*
	5. Provide a brief narrative that outlines the partners' roles and responsibilities specific to the proposed collaboration, including the resources and capacity each partner brings to the collaboration. (This is a summary of details of the required MOU.) *(Max of 400 hundred words)*
	6. What does the collaboration allow the partners to accomplish that cannot be accomplished by a single organization? *(Max of 400 words)*

INDEPENDENT	JOINT
Organization's Capacity (Continued)	**Collaboration's Capacity (Continued)**
5. How will the agency be enhanced by participating in the Impact Council, which will utilize a collective impact model, and how will the Impact Council be enhanced by the agency? *(Max of 400 hundred words)*	7. How will the collaboration be enhanced by participating in the Impact Council, which will utilize a collective impact model, and how will the Impact Council be enhanced by the collaboration? *(Max of 400 hundred words)*
Program Design	**Program Design**
6. Describe the problem or need your program(s) will address. (Note: The problem statement is *not* the same as the description of the population to be served; nor is this the place to describe the program(s).) *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*	8. Describe the problem or need your program(s) will address. (Note: The problem statement is *not* the same as the description of the population to be served; nor is this the place to describe the program(s).) *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*
7. Describe the population to be served by this program(s). (Detailed and specific information such as age, gender, ethnicity, geographic area(s), income and/or poverty level is key here; reviewers should be able to understand the need of clients). If applicable, please include program(s) site locations where services will be provided. Please be sure to mention any demographic data or other conditions that are important to this proposal. *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*	9. Describe the population to be served by this program(s). (Detailed and specific information such as age, gender, ethnicity, geographic area(s), income and/or poverty level is key here; reviewers should be able to understand the need of clients). If applicable, please include program(s) site locations where services will be provided. Please be sure to mention any demographic data or other conditions that are important to this proposal. *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*
8. Describe the program(s) for which funding is being requested and its primary purpose. *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*	10. Describe the program(s) for which funding is being requested and its primary purpose. *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*
9. How will the program(s) intentionally include community members, clients, or those most likely to benefit from services, in the planning implementation and results of the program(s)? *(Max of 400 hundred words)*	11. How will the program(s) intentionally include community members, clients, or those most likely to benefit from services in the planning, implementation and results of the program(s)? *(Max of 400 hundred words)*
	12. Outline some of the initial actions (programmatic changes, new programs, policy changes, etc.) the partners are planning to take together and the rationale for these actions. How is this work different from the work you currently do as individual organizations? *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*

INDEPENDENT	JOINT
Program Design (Continued)	**Program Design (Continued)**

10. Answer one of the following two bullet points, depending on whether the program(s) is ongoing or new to the agency:
 	
   ▪ If this is an *ongoing* program(s): Data for the ongoing program(s) demonstrating past success or challenges is required. What have been challenges to achieving success? Any recent enhancements? Will this program be different in any way from its original model in order to meet the requirements of this RFP? If an existing model is being adapted, please explain how it is holding fidelity to the previous or evidence-based model. If it no longer holds fidelity to the model, please clarify what those changes are.
 	
   ▪ If this is a *new* program(s) (new to the agency): What is the basis for expecting the program(s) will succeed? (Anecdotal information? Evidence-based practices? Literature review? Other?) *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators)*
 	
11. Does the program(s) partner with other programs/agencies to achieve its results? If so, please list each partner. (*Note: A letter of support from each partner is required and needs to describe each partner's contribution(s) to the program(s).)*
 	
12. Provide a brief narrative that details the rationale for the Implementation Plan. *Note: Implementation Plan template may be found at www.unitedwaysatx.org/rfp. (Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators.)*
	13. Answer one of the following two bullet points, depending on whether your collaboration is ongoing or new:
	
	   ▪ If this is an *ongoing* collaboration: Data for the ongoing collaboration demonstrating past success or challenges is required. What have been challenges to achieving success? Any recent enhancements? Will this collaboration be different in any way from how it operated previously in order to meet the requirements of this RFP? If an existing model is being adapted, please explain how it is holding fidelity to the previous or evidence-based model. If it no longer holds fidelity to the model, please clarify what those changes are.
	
	   ▪ If this is a *new* collaboration: What is the basis for expecting the collaboration will succeed? (Anecdotal information? Evidence-based practices? Literature review? Other?) *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators.)*
	
	14. Provide a brief narrative that details the rationale for the Implementation Plan. *Note: Implementation Plan template may be found at www.unitedwaysatx.org/rfp. (Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators.*

INDEPENDENT	JOINT

Performance Measures & Evaluation
Performance Measure form is embedded in e-CImpact.
 	
13. Provide a detailed description of the following:
    • **Proposed short and long-term impact of the proposed program(s) from all funding sources;**
    • **Evidence that supports that this is achievable;**
    • **Any additional data you will collect besides the required Performance Measures (this includes any additional Performance Measures you proposed in the Performance Measure form);**
    • ==**An explanation for each measure provided by United Way that you determine is not applicable to your proposal (so long as it is part of a strategy you are pursuing);**==
    • **The measurement tools to be used; and**
    • **How these data will contribute to both the result and moving the needle on the indicator selected.**
    *(Note: The aforementioned components are **required. Performance measures should reflect the total number you expect to serve in the program, not just portion supported by United Way.)** (Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators.)*
	Performance Measures & Evaluation
	Performance Measure form is embedded in e-CImpact
	
	15. Provide a detailed description of the following:
	    • **Proposed short and long-term impact of the proposed program(s) from all funding sources;**
	    • **Evidence that supports that this is achievable;**
	    • **Any additional data you will collect besides the required Performance Measures (this includes any additional Performance Measures you proposed in the Performance Measure form);**
	    • ==**An explanation for each measure provided by United Way that you determine is not applicable to your proposal (so long as it is part of a strategy you are pursuing);**==
	    • **The measurement tools to be used; and**
	    • **How these data will contribute to both the result and moving the needle on the indicator selected.**
	*(Note: The aforementioned components are **required. Performance measures should reflect the total number you expect to serve in the program, not just portion supported by United Way.)***
	
	Refer to your list of partners and be specific as to what deliverables you expect the lead agency and each partner to contribute. *(Max of 400 hundred words for single indicator applicants; max of 800 words for multiple indicators.)*

Budget *Note: United Way will provide up to 50% of funds needed to operate the program(s). Exceptions will be considered for innovative or start-up programs.* *Program Budget form is embedded in e-CImpact.* 14. Provide a line item budget narrative for total program(s) expenses *broken out by indicator*, inclusive of the requested United Way funds and the co-investment funds. <u>Budget narrative **must** include a description of revenue as well as expenses. Regarding co-investment funds, denote whether they are confirmed or pending.</u> *(Note: All co-investment funding will need to be confirmed by April 2019.)*	**Budget** *Note: United Way will provide up to 50% of funds needed to operate the program(s). Exceptions will be considered for innovative or start-up programs.* *Program Budget form and link to Joint Application Spreadsheet are embedded in e-CImpact.* 16. Provide a line item budget narrative for total program(s) expenses *broken out by indicator*, inclusive of the requested United Way funds and the co-investment funds. <u>Budget narrative **must** include a description of revenue as well as expenses. Regarding co-investment funds, denote whether they are confirmed or pending.</u> *(Note: All co-investment funding will need to be confirmed by April 2019.)*

INDEPENDENT	JOINT
Budget (Continued)	**Budget (Continued)**
	17. Describe how United Way funding will support the collaboration and how specific funding will be distributed and used among partners. *(Note: Lead applicants are not responsible for partners' portion of the match. United Way will retain the responsibility to allocate the funds to each partner.)*
15. Do you intend to include an indirect rate in your budget? If so, what is the proposed rate? (*Note: This question is NOT weighted and is for clarification purposes only. United Way will fund a **maximum** indirect rate of 10% of United Way-requested funds.)*	18. Do you intend to include an indirect rate in your budget? If so, what is the proposed rate? (*Note: This question is NOT weighted and is for clarification purposes only. United Way will fund a **maximum** indirect rate of 10% of United Way-requested funds.)*
Sustainability	**Sustainability**
16. Understanding that this is a two-year *(Successful Students Impact Council)* or five-year (*Strong Individuals and Families Impact Council)* funding cycle based on performance, outcomes and United Way's annual campaign results, please describe how you will plan for possible financial fluctuations. *(Max of 400 words)*	19. Understanding that this is a two-year *(Successful Students Impact Council)* or five-year (*Strong Individuals and Families Impact Council)* funding cycle based on performance, outcomes and United Way's annual campaign results, please describe how you will plan for possible financial fluctuations. *(Max of 400 words)*
17. What internal and/or external systemic changes do you expect to result from this partnership with United Way? *(Max of 400 words)*	20. What internal and/or external systemic changes do you expect to result from this partnership with United Way and other members of the collaboration? *(Max of 400 words)*